

Adding and Maintaining Customers

A [Customer](#) is an owner of [Volumes](#). This page details how to Add or Delete [Customers](#).

Add Customer

To add a [Customer](#), right-click on the [Server Node](#) of the [Customer Tree](#) and select Add Customer.

The screenshot displays the TapeTrack TapeMaster™ (GazillaByte) application window. The interface includes a menu bar (File, Administration, Favorites, Tools, View, Help) and a Customer Filter input field. On the left, a tree view shows the hierarchy: GazillaByte - Production > US00 - United States > US01 - New York > US02 - Los Angeles > CONT - Contamination > LTO - LTO Cartridge > US03 - North Carolina. The main area shows a 'Volumes' table for the 'Los Angeles Data Center' using 'LTO Cartridge' media. The table has columns for ID, Current Location, Target Location, Next Move, and Description. Below the table, summary statistics show 'Total Items: 1,585', 'Total Selected: 1', and 'First Selection: 16'. At the bottom, the 'Repositories' section displays icons for Gemtrac, Library, Transport, and Offsite Vault. A status bar at the bottom right indicates 'Connection 127.0.0.1 uses AES 256 bit encryption'.

ID	Current Location	Target Location	Next Move	Description
000000L6	Offsite Vault	Library	Permanent	
000001L6	Library	Offsite Vault	Permanent	
000002L6	Library	Offsite Vault	Permanent	
000003L6	Library		Wednesday, May ...	Monthly
000004L6	Library		Permanent	
000005L6	Library	Offsite Vault	Friday, June 18, 20...	Weekly 1
000006L6	Library	Offsite Vault	Friday, June 18, 20...	Weekly 1
000007L6	Library	Offsite Vault	Friday, August 20,...	Monthly
000008L6	Library		Permanent	
000009L6	Library		Permanent	
000010L6	Library		Permanent	
000011L6	Offsite Vault		Monday, May 17, ...	DB Backup
000012L6	Library	Transport	Permanent	
000013L6	Offsite Vault		Permanent	
000014L6	Offsite Vault		Permanent	
000015L6	Offsite Vault		Permanent	
000016L6	Offsite Vault	Library	Permanent	

This will launch the Edit New Customer window.

Identity

The first tab on the Add Customer window is the Identity tab.

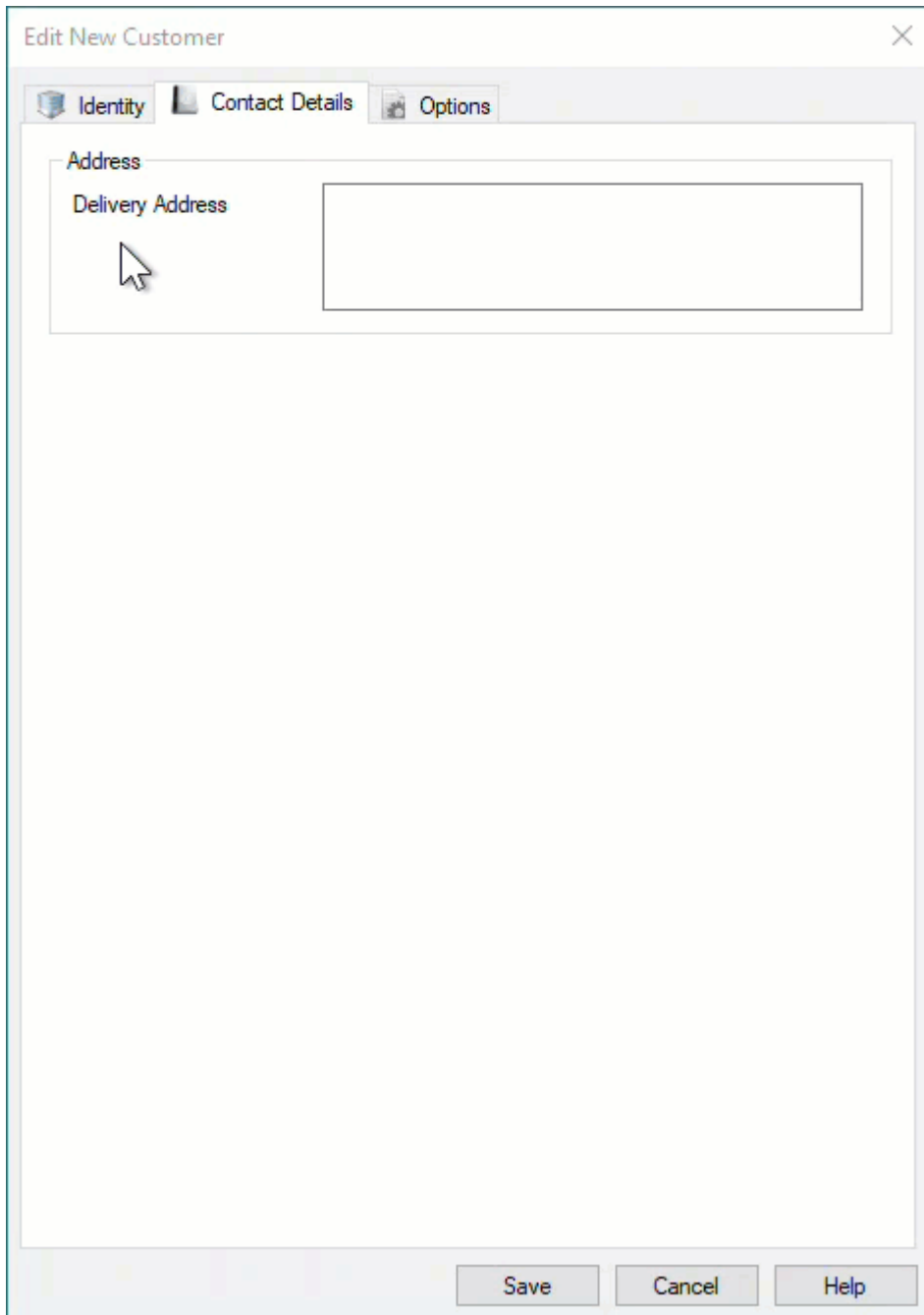
Enter the [Customer-ID](#) and a [Customer Description](#).

You can add up to four alphanumeric characters as the [Customer-ID](#) and up to forty alphanumeric characters for the [Customer Description](#).

The screenshot shows a software dialog box titled "Edit New Customer". It has three tabs: "Identity", "Contact Details", and "Options". The "Identity" tab is selected and contains a section titled "Customer Attributes". Within this section, there are two input fields: "Customer-ID" and "Customer Description". A mouse cursor is pointing at the "Customer Description" field. At the bottom of the dialog box, there are three buttons: "Save", "Cancel", and "Help".

Contact Details

Enter the contact details for the [Customer](#) in the Contact Details tab.



Options

The Options tab can be utilized to set specific details about a [Customer](#). These details are accessible at any point by right-clicking the [Customer](#), on the [Customer Tree](#) and selecting Properties.

Edit New Customer


Identity | Contact Details | Options

Hide Customer	False
Disallow Customer Duplicates	False
Disallow Global Duplicates	False
Volume Lock	False
Hide No Children	False
Allowable Media-ID Filter	
Maximum number of Media-IDs	0
Holiday Group	
Customer Category	0
Parent Customer	<No Selection>
Account Number	0
Long Barcode Attribute	<Not Selected>

Save Cancel Help

- **Hide Customer** when set to true removes the [Customer](#) from view in the [Customer Tree](#).
- **Disallow Customer Duplicates** stops the duplication of [Volume-ID's](#) across the [Customer Media Types](#).
- **Disallow Global Duplicates** stops the duplication of [Volume-ID's](#) across all [Customers](#).
- **Volume Lock** stops any [Volumes](#) moving within this [Customer](#).
- **Hide No Children** stops the display of this [Customer](#) unless showing children or has [Media](#) defined.
- **Allowable Media-ID Filter**, if set, restricts the allowable [Volume-ID](#) formats for this [Customer](#).
- **Maximum number of Media-ID's** that can be created for this [Customer-ID](#). 0=No limit.
- **Holiday Group** assigns a group for [Simple Management](#) calculations of holidays to avoid.
- **Customer Category** is an arbitrary number that can be set to group [Customers](#) for batch processing.
- **Parent Customer** displays the current [Customer](#) as a child under the selected [Customer](#).
- **Account Number** Iron Mountain (or other third-party) account number.
- **Long Barcode Attribute** adds un-hashed long Barcode to selected Attribute.

Once you click Save, TapeMaster will open a window asking if you'd like to add some **Media** to this **Customer**. If selected yes, then TapeMaster will display the Add **Media Types** for new Customer window. Create relevant **Media Type** by changing the Create option from False to True. Other fields, **Media-ID** and **Description** may be edited or customized to your required values.

 If no **Media Description** is added, TapeMaster will display the **Media-ID**.

Add Media Types for new Customer

You can now add one or more Media Types (by enabling the "Create" property).

A Media Type is a collection of media, usually group by technology type.

While it is possible to add a media type for each media type generation (i.e. LTO1, LTO2 etc), it is recommended that you group all technology generations together (i.e. LTO).

US04

Media Type[1]	
ID	LTO
Description	LTO Cartridge
Create	True
Media Type[2]	
ID	DLT
Description	DLT Cartridge
Create	True
Media Type[3]	
ID	359X
Description	IBM 359x Cartridge

Click OK to continue.

The next prompt will be to add any required **Repositories**. Create relevant **Repositories** by changing the Create option from False to True. Other fields, **Repository-ID** and **Description**, may be edited or customized your required values.

Add Repositories for new Media Type

You can now add one or more Repositories (by enabling the "Create" property).

A Repository is a general location a tape volume might reside in (i.e. Offsite, Legal Hold).

It is completely up to you how granular you define your Repositories. Some users have one to represent all of their onsite tape libraries, others have one for each tape library.

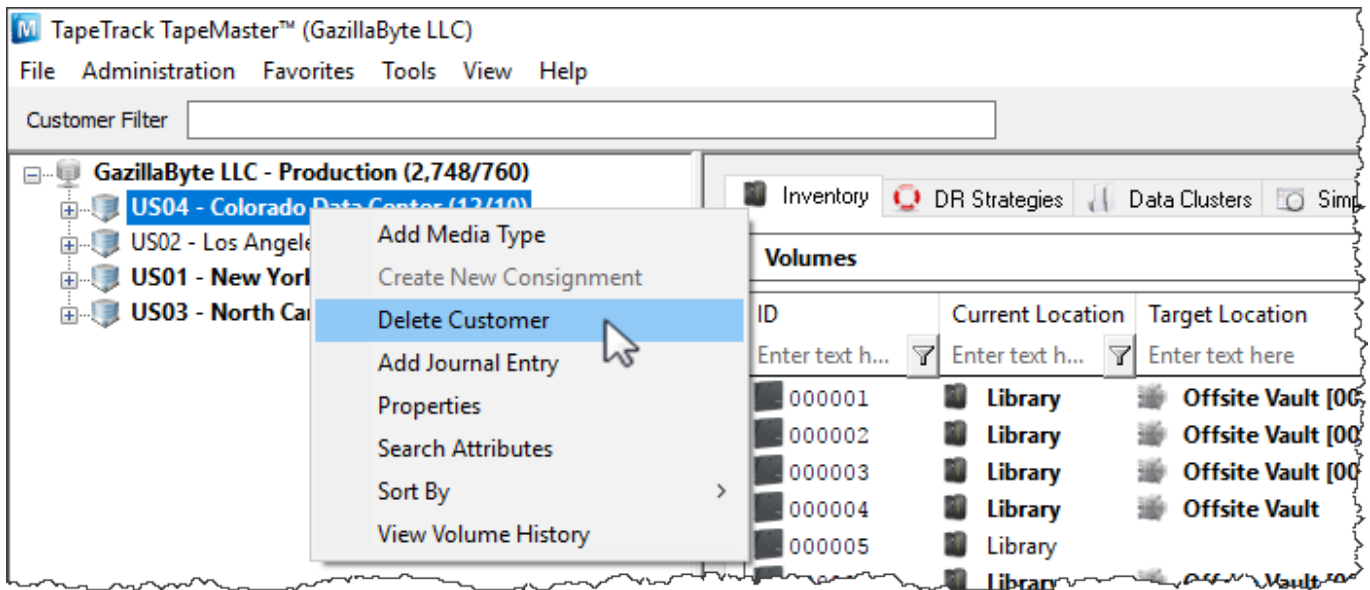
US04

DLT DLT Cartridge

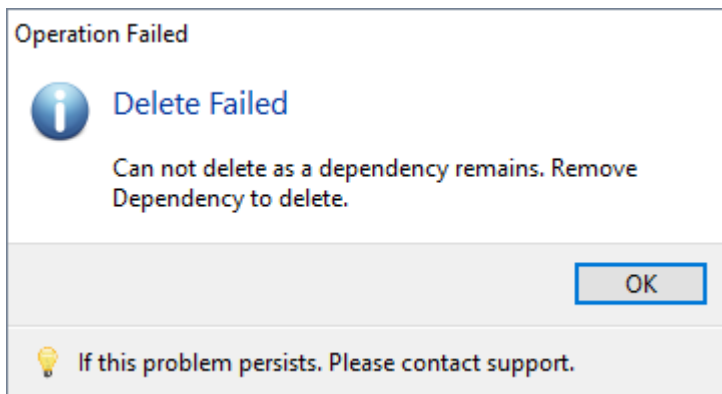
Repository [1]	
ID	OFFS
Description	Offsite Vault
Type	Vault
Next Repository	LIBR
Offsite	True
Initial	False
Create	True

Delete Customer

To delete a [Customer](#), right-click on the [Customer](#) in the [Customer Tree](#) and select Delete Customer.

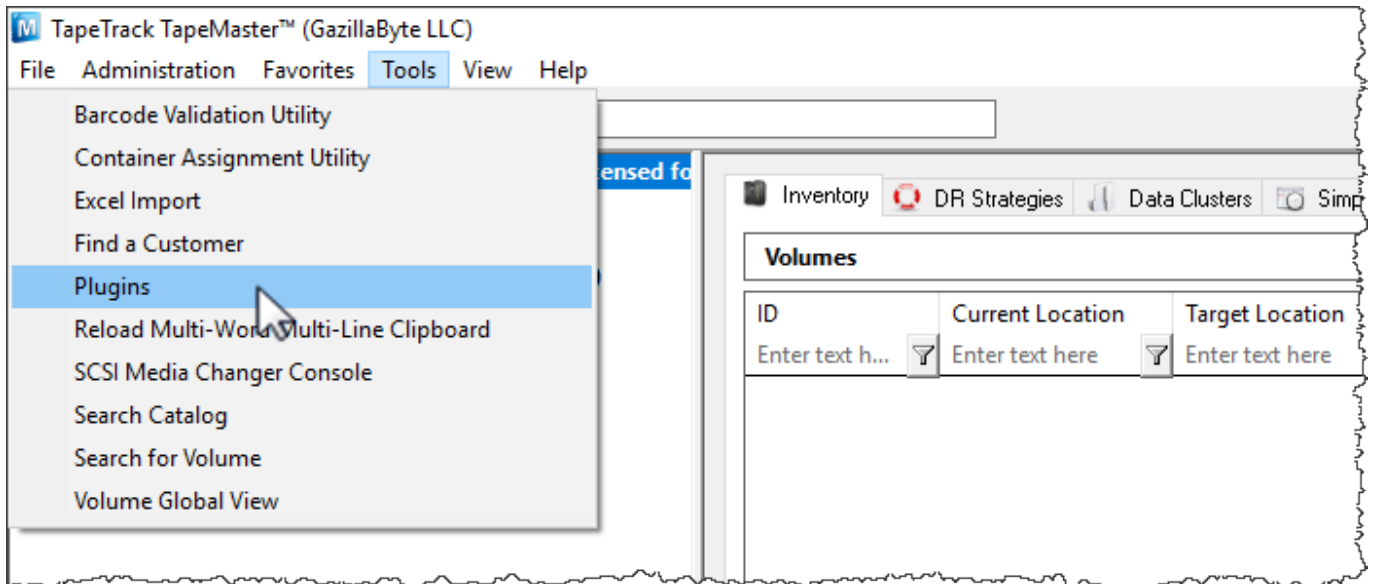


A [Customer](#) may only be deleted when it does not contain [Media Types](#), [Repositories](#), or [Volumes](#).

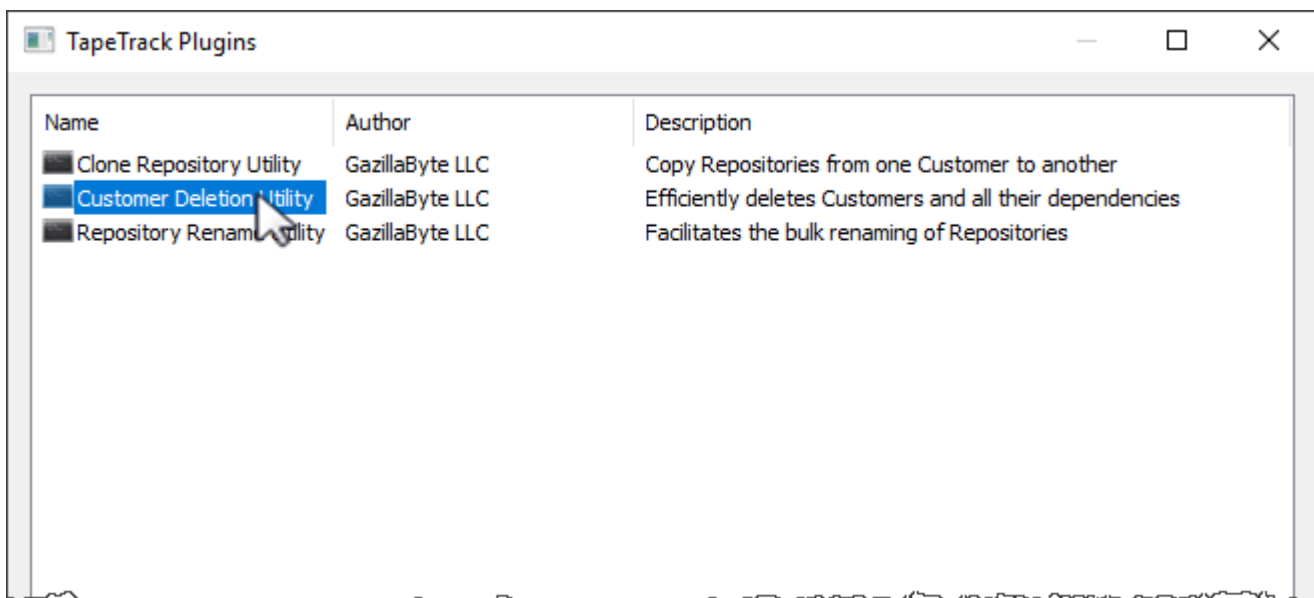


If you receive this error, delete all [Volumes](#), then all [Repositories](#) and all [Media types](#) before deleting [Customer](#).

You can also delete [Customer](#) (without the need to remove [Volumes](#), [Repositories](#) and media types first) by using the [Customer Delete](#) plugin. From the menu select Tools → Plugins



Select the Customer Deletion Utility by double-clicking.



Check each **Customer** (1) you wish to remove and click **Delete Selected** (2) and **Yes** (3) to the warning popup.

Plugin: Delete Customers

Please select the Customers that you wish to delete.
Once selected then click the 'Delete Selected' button.
This Plugin will then delete the Customer and all of its child records.

Customer	Volumes	Moves
<input checked="" type="checkbox"/> Colorado Data Center	0	0
<input type="checkbox"/> Los Angeles Data Center	326	0
<input type="checkbox"/> New York Data Center	2,287	729
<input type="checkbox"/> North Carolina Data Center	123	22

Deletion Warning

? You have selected 1 Customers to be deleted. Are you sure you want to delete the selected Customers?

Yes No

Delete Selected Cancel

Exit out of the plugins windows using the X at the top right and press F5 in the [Customer Tree](#) to refresh information.

TapeTrack TapeMaster™ (GazillaByte LLC)

File Administration Favorites Tools View Help

Customer Filter

- GazillaByte LLC - Production (2,736/751)
 - US02 - Los Angeles Data Center (326/0)
 - US01 - New York Data Center (2,287/729)
 - US03 - North Carolina Data Center (123/22)

F5

Inventory DR Strategies Data Clusters Simple

Volumes

Scope		ID
Customer	None Selected	Enter text
Media	None Selected	

List Options	
Hide un-selected	False
Date Format	%A, %B %d, %Y
Attribute Field	Description

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