

OUTGOING LOANS

Most museums, no matter how good their collections, will need materials from other institutions to complete an exhibit. The handling of loans both to and from the museum is an integral part of good registration. As the loaning institution, you will be in the driver's seat. It is the prerogative of the lender to set the conditions of the loan and control how the borrower uses the items.

When you are the lending institution, your forms and conditions apply. The loan form should state exactly what is being borrowed and give a detailed description of the physical condition of the item. Because you have been careful to fully catalog and document each item in your collection, your catalog records should be enough to identify the item in court, should a dispute arise. It is important to state the exact purpose of the loan and to be specific about any restrictions that may apply to the items.

You should do a detailed condition report for each item in the loan. See Chapter 6 for detailed instructions on condition reporting. You must carefully assess each object's ability to travel and withstand the conditions under which the materials will be stored or exhibited during the period of the loan.

It is usually the responsibility of the borrower to provide crating and shipping for the loan. However, as the curator or collections manager responsible for the materials, it is important to review the proposed packing and/or transportation to make sure they meet your standards.

Make it a policy to periodically review your active outgoing loans. Loan expiration dates should be monitored so that loans are returned on time. Often times, loans expire and are not returned or processed promptly. A loan agreement may be

extended. However, to extend a loan agreement, the contract must be updated and the insurance coverage extended by the borrowing institution.

When a loan is returned, you should unpack it as soon as possible and compare objects against their outgoing condition reports for any significant changes. If there is any damage to the items, notify the borrower immediately. Take pictures of the damage to compare with "before" pictures in your records. It will be up to you, the lending institution, to file an insurance claim. If you feel that the damage occurred during shipping, save all the crating and packing material and take photographs of it. If a damage claim is necessary, you will need to provide documentation of the damage.

TRACKING OUTGOING LOANS

To begin the process of creating an outgoing loan agreement, open the Outgoing Loans screen by clicking on the **Outgoing Loans** command on the main menu.

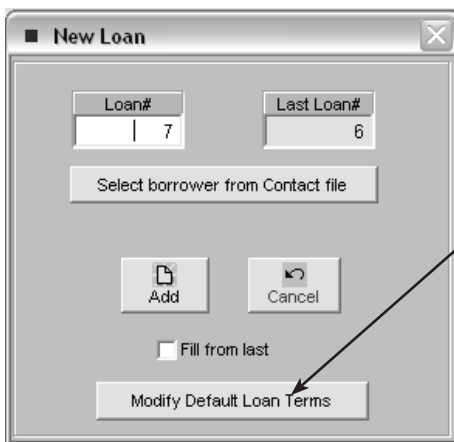
If you have no Outgoing Loan records, the screen will be blank. If you do have records, the last record viewed will appear on the screen. To create a new outgoing loan, click on the **Add** command button at the top of the screen.

Figure 12-1
Command
buttons



Click Add to open the
New Loan screen

Figure 12-2
Add New
Loan screen



To modify the
default terms of the
loan, click here.

Enter a number for the new loan. Duplicate loan numbers are not permitted. PastPerfect will display the last loan number used and suggest the next number. However, you may enter any number you wish.

On the same New Loan screen, you can enter or change the default loan terms click on the **Modify Default Loan Terms** command button at the bottom of the New Loans screen.

The default loan terms will appear on all loans. You may change these terms by clicking on **Edit**. When you have completed your changes, click on the **Save & Exit** command button.

Figure 12-3
Default Loan
Terms

Default Outgoing Loan Terms

Loan Agreement line 2
PastPerfect Museum, 312 Main Street, Pastville, PA 10234 425/555-1256

Default Terms of Loan

1. It is understood that the objects in this loan will remain in the condition received and will not be repaired, restored, cleaned, or altered in any way without the permission of the museum. The condition is understood to be as stated on the form.
2. All damage to objects at any point in this loan from the out date until returned will be reported to the museum immediately.
3. The objects may not be lent to a third party without the advance approval of the museum.
4. The objects may be photographed only with the permission of the museum. The borrower agrees that the photographs taken of this loan will be used only for the purpose stated on this form and only for the number of times stated. The museum will receive a copy of all photographs for record purposes. All publications of photographs of items in this loan will bear a credit line acknowledging that the objects are the property of the PastPerfect Museum.
5. The borrower is responsible for packing, transportation, insurance, and all other factors of transporting the loan, unless otherwise stated. The borrower is responsible for returning the loan at the time stated.
6. The museum may require proof of insurance, may wish to have its name on the policy, and may wish to receive a copy of the insurance policy.
7. The borrower agrees to use the loan only for the purposes stated on the form.

Edit Save & Exit

Once you have added the new loan, enter information in each field, as shown in Figure 12-4. Fill in the name and address of the borrowing institution, and a contact name and phone number.

Figure 12-4
Outgoing Loan
screen

Outgoing Loans

Outgoing Loan# 6 Tracking# Loan 6

Viewing All Records View All Active Returned

Total Records: 6 records **Active** Return this Loan

Phone numbers

Work: 611/555-5854 Out date: 03/18/2004

Home: / - Due date: 03/18/2005

Fax: 611/555-5855 Return date: //

Cell/Pager: / - Renewal date: //

Renewal until: //

Total minimum value: 0.00 Renewed by:

Total maximum value: 0.00

View loan terms

View Shipping & Insurance Information

Loan includes 3 catalog records Add Item Edit, Delete, Return, or View details for item Notes

Object ID	Objname	Title	Description / Summary
1997.6.3	Pyrite		Pyrite forms as cubic or octahedral crystals. The pale yellow color and metallic luster give it its name. Pyrite is one of the most common minerals.
1997.6.5	Quartz		Quartz crystal also called rock crystal in its colorless form. Quartz is one of the commonest minerals.
1998.2.3	Quartz		Amethyst quartz crystal from broken geode. Amethyst color is caused by the inclusion of iron impurities.

Record 6 of 6 Updated 03/18/2004 12:19 PM Updated by Unknown Update History

LOAN TERMS, SHIPPING & INSURANCE

On the right of the screen are two command buttons, **View Loan Terms**, and **View Shipping & Insurance Information**. Click on the first button to compose the legal language defining this loan. There are two radio buttons at the top of this screen, **Default** and **Custom**. If the Default button is clicked, the loan terms may not be edited from this screen. The default terms can only be edited from the Add New Loan screen as described earlier. Enabling the Custom radio button gives you a blank screen where you may type loan terms that apply only to this loan.

You can print or preview the loan terms with the **Print** command button at the top of the main loan screen.

To enter information about shipping and the insurance carrier for the loan, click on **View Shipping and Insurance Information** located on the right of the main loan screen.

ADD CATALOG RECORDS TO THE OUTGOING LOAN

At the bottom of the Loan screen is a grid that lists the catalog records included in the loan. At the top of the grid are command buttons labeled **Add Item** and

Edit, Delete, Return, or View details for items. If some of the items loaned have been returned, there is another button **View details for returned items** which, if pressed, allows you to view a list of those items.

When you click on the **Add Items** command button, this screen appears:

Figure 12-5
Add Items to
Loan

This screen allows you to add the items from the Objects, Photos, Archive, or Library catalogs to the loan. Choose the catalog to search by clicking on the appropriate radio button. Using the Prior, Next, and Browse buttons, locate the item you wish to add. When you have found it, click on **Add This Item**.

When you are finished adding items, click **Close** to return to the loan screen. The new item will now be on the list at the bottom of the loan screen.

To change items on the list, click **Edit, Delete, Return, or View details for items** to display the screen shown in figure 12-6.

The command buttons at the top of this screen present you with several options. Browse the items on loan by clicking the **Prior** and **Next** command buttons.

Return this item - If an individual item has been returned while the loan is still active, you may return the individual item without affecting the whole loan. Type in a return date in the Return Date field and click **Process Return**.

Detailed Condition Report - You can create a detailed condition report for the item that is going out on loan. Click on the **Detailed Condition Report** command

Figure 12-6
Edit Items on Loan

button at the top of the screen and a blank condition report appears. *See Chapter 6, The Objects Catalog*, for detailed instructions on creating a condition report.

Delete - Removes the item on the screen from the loan.

Edit - This command button allows you to make changes in the record.

History - This command button reveals a list of past loans for that item.

Once an item is placed on loan, a flag is placed on the item in its respective catalog. The flag appears at the middle of the screen, in a yellow box.

Figure 12-7
Catalog
screen

Click here to go to the Outgoing Loans screen

RETURNING THE ENTIRE LOAN

When all the loaned items are returned, you will want to record that on the loan screen. Click on the **Return this Loan** command button at the upper right of the loan screen. You will need to enter a Return date and press **Process Return** to complete the operation. The loan will now be moved to the Returned Loans file.

VIEWING RETURNED LOANS

The Outgoing Loan screen has separate modes for viewing Active and Returned loans. There is also a View All mode. To change the screen view mode, press the desired command button at the top right of the loans screen.

Figure 12-8
Loan Screen
Views



