11

INCOMING LOANS

Loans may come into your institution from other museums or from private individuals. The most common type of loan is for exhibit purposes. These short-term loans are common in today's museum community.

Donors may sometimes lend an object to the museum with the promise that it will someday be given to the museum. Such objects should retain loan status until the ownership has officially transferred, by deed of gift, to the museum. Long-term or permanent loans from individuals or institutions were standard operating procedure in the early and mid 20th century. Such loans are less common today, however, you may still be administering long-term loans that came into your museum before your arrival.

Loans of any kind should be accepted with great care. You must maintain meticulous records of all such transactions. The lending institution is in charge of the loan procedures and forms. When you are the borrower, the lending institution or individual may set the conditions of the loan. You are under obligation to use the loaned materials for the purpose expressed in the loan agreement and return the loaned materials in the same condition as they came to you. Typically your institution assumes all liability for the borrowed objects, including insurance, care, handling, and transportation. Because your institution is responsible for the care of borrowed materials for as long as they are in your possession, it is best to borrow items only for a particular purpose and for a specified period of time.

TRACKING INCOMING LOANS

PastPerfect includes an **Incoming Loans** section. Incoming loans are treated much like new accessions. To begin the process, click on the **Incoming Loans** button under Activities on the Main Menu.

ADD A NEW INCOMING LOAN

If you have no records in Incoming Loans, the screen will be blank. If you do have records, the last record viewed will appear on the screen. To create a new loan, click the **Add** button in the Navigation Bar at the top of the screen.
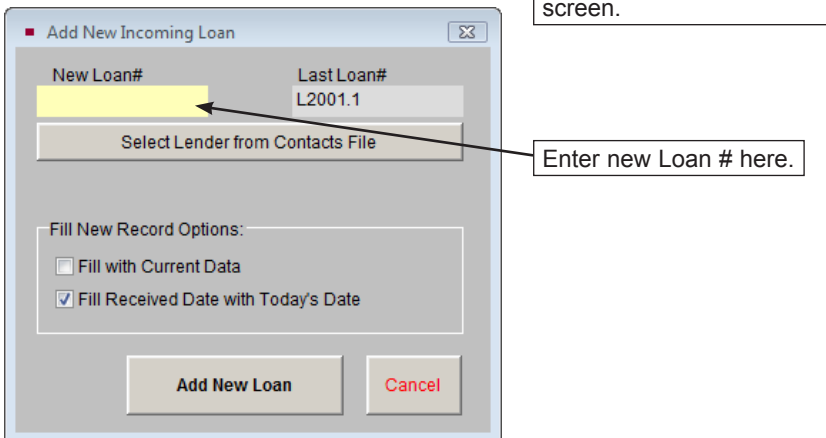
Figure 11-1
Navigation Bar

Click here to open the Add New Incoming Loan screen.
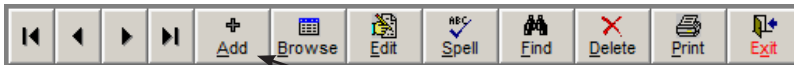
Figure 11-2
Add New
Incoming Loan
screen

Enter new Loan # here.

Each incoming loan must have a unique loan number to distinguish it from other loans. The loan number may be any combination of numbers and letters up to 15 characters in length. We recommend that you use a basic two-part numbering system with the prefix "L" for creating your loan numbers, for example: L2004.1. This will give you information about the year of the loan (2004), and it tells you that this is the first loan of the year 2004. However, PastPerfect is entirely flexible and allows any loan numbering system you choose.

If you have entered a duplicate loan number, PastPerfect will give you an alert and ask you to choose another number. PastPerfect displays the last loan number used on the **Add New Incoming Loan** screen for your reference. Enter your loan number in the **New Loan#** field.

If the lender is in your Contacts file, you may click the **Select Lender from Contacts File** button to locate the contact and fill in fields with the contact's information automatically. By selecting the lender's name from the list, you create a link between your Contact and Incoming Loan records. Later, you can view a list of all loans borrowed from a particular contact.

The check boxes in the **Fill New Record Options** section provide you with some shortcuts.

If **Fill with Current Data** is checked, PastPerfect will copy all information, including the source's name and address, from the last viewed record. Check this box *only* if you have not selected a new source name from the Contacts file and *only* if the source for the new loan is the same as the source on the Incoming Loan screen showing behind the Add screen.

If **Fill Received Date with Today's Date** is checked, the program will automatically insert the current date in the **Received Date** field. Check this box if you would like to add the current date by default.

After you have assigned the loan number and clicked the **Add New Loan** button, the screen in Figure 11-3 appears.

If the lender provides a loan number, record it in the **Tracking Number** field. If you did not use the option to select your lender from the Contacts file, fill in the name and address of the lending institution, along with a contact name and phone number. You may enter a **Credit Line** for the entire loan. In the **Purpose** field, you may enter a short description of the purpose of the loan. Fill in the **Received by** and **Received Date** fields, as well as the **Due Date**, **Agreement Signed** and **Value** fields, if they are known. The Returned and Renewal fields will be filled in later.

If you chose your lender from the Contacts file, the **Contact ID#** field will be filled in with the Contact ID# for that contact. You may view the Contact record by clicking the file folder icon to the right of the ID#.

NOTE

If you created your loan record before adding the lender into the Contacts file, you can link a new Contact record to an existing loan record. Go into the Contacts file and find the Contact ID# for the lender, then enter the number in the Contact ID# field on the loan record.

Figure 11-3 Incoming Loan screen

If your loan record was created by transferring a Temporary Custody receipt into the Incoming Loans catalog, the Temporary Custody receipt number will display in the **TC Receipt#** field. You may view the Temporary Custody record by clicking the file folder icon to the right of the **TC Receipt#** field.

Click the **Description** button in the Screen View section of the Sidebar to view more fields. If there are any specific instructions for the management of this loan, enter them in the **Instructions** field. Use the **Brief Description of Loan** field to enter a short description of the items in the loan. If there are any restrictions on the loan, note them in the **Restrictions** field. Please be aware that each catalog record

related to this loan will then be marked with a red flag showing that there are restrictions. If you do not want every item in the loan marked as restricted, leave the **Restrictions** field blank and note restrictions on individual catalog records. The **Special Considerations** field can be used to record any additional information. Once fields are filled in with as much information as required, click the **Save** button in the Navigation Bar. A green data light will appear on the Description button if data is entered in any of these fields.

LOAN AGREEMENT, SHIPPING & INSURANCE

In the More Screens section of the Sidebar are two buttons, **Loan Agreement** and **Shipping & Insurance Information**.

Loan Agreement

Click on the **Loan Agreement** button to view or compose the legal language defining this loan. Most lending institutions will have their own forms. However, you may need your own loan agreement when loans are coming in from private parties. The **Loan Agreement Signed** date will be filled automatically from the Agreement Signed field on the main loan screen.

Figure 11-4
Loan Agreement
screen

On the screen shown in Figure 11-4, the loan agreement terms are displayed. There are two radio buttons at the top of this screen, **Default Legal** and **Custom Legal**. If the Default button is selected, you will see the default loan agreement terms. Clicking the **Custom** radio button gives you a blank screen where you may type loan agreement terms that apply only to this loan.

Modifying the Default Loan Agreement

If the Default button is selected, the loan agreement terms may not be edited from this screen. The default terms can be edited by going to the Main Menu | Setup | Collections | Incoming Loans. On this screen, click in the **Default Terms of Incoming Loan** field and enter your text. Your institution's name and address that appear on the Loan Agreement may also be changed on this screen. Changes made to the default terms will affect all loans using the default loan agreement terms. To save the changes, click the **Exit** button. Click the **Incoming Loans** button on the Main Menu to return to the Incoming Loans screen.

Printing the Loan Agreement

When you return to the Incoming Loans screen, you can print or preview the loan agreement by clicking the **Print** button in the Navigation Bar on the main loan screen and selecting **Loan Conditions**.

Shipping & Insurance Information

To enter information about shipping and the insurance carrier for the loan, click on **Shipping & Insurance Information** in the More Screens section of the Sidebar. You may add or edit information by clicking the **Edit** button at the bottom of the screen. A green data light will appear the button if you have entered shipping or insurance information. You will have the option to update the insurance fields on the related catalog records with this information by clicking the **Transfer Insurance Information to Catalog Records** button, which appears after entering and saving information on this screen.

ADD CATALOG RECORDS TO THE INCOMING LOAN

By clicking the **Catalog Records** button on the Sidebar, you can view a list of the catalog records included in the loan, seen in Figure 11-5. This list displays as a grid on the bottom portion of the loan screen. At the top right of the grid are the **plus sign** button to add new items, and the **file folder icon** to view, delete or edit information on the catalog records.

Figure 11-5 Incoming Loan Catalog Records List

Click on the **plus sign** button to open the **Add Item to Catalog** screen, seen in Figure 11-6. To add an item, you must be out of Add Mode or Edit Mode. Much like entering a new accession, when you add items to a loan they will be placed in one of the four catalogs. Please be sure to select the radio button at the top of the screen for the appropriate catalog before you begin entering data. For more information about the fields on this screen, please see the section for "Add Catalog Records" in *Chapter 5 - The Accession Process*.

Figure 11-6 Add Item to Catalog screen

When you press the **Add Condition Report** button, a blank condition report screen will appear. For more information about creating a detailed condition report, see *Chapter 6 - The Objects Catalog*. If you add information to the condition report, you will have the option to update the condition fields on the catalog record with the general condition information when you click Save.

Printing the Loan Form

After catalog records have been added to the loan, you may print the Loan Form to acknowledge the receipt of the loan. The Loan Form lists all the items on the loan, as well as the insurance information and the lender's contact information. The Loan Form may be printed by clicking the **Print** button in the Navigation Bar and choosing the **Loan Form** option. You also have the option to print a blank Loan Form if you would like to fill in the form by hand.

TIP   Customize the layout of the Loan Form by going to the Main Menu | Reports | Loans Incoming | Incoming Loan Form | Custom Layout 1 or 2 | Modify Selected Layout.

ASSIGNING ACTIVITIES

The Incoming Loan screen allows you to track activities related to your loan. You may view these activities by clicking the **Activities** button on the Sidebar. Common activities include getting the signed Loan Agreement form, arranging insurance, creating condition reports, and renewing or returning the items. You can assign each task to a staff member, give it a due date, then track when the task was completed. This allows you to keep a record of the loan activities on the Incoming Loan screen.
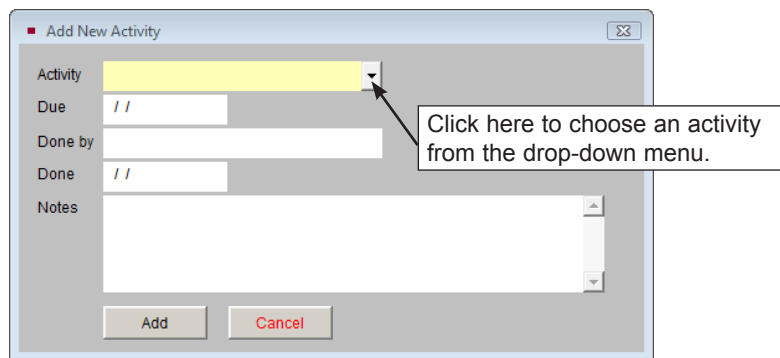
Adding a New Activity – To add a new activity, click the **Activities** button and then click the **plus sign** button above the list of activities. The screen in Figure 11-7 will appear.

The **Activity** field allows you to choose an activity. This field is controlled by an authority file drop-down menu. Click on the down arrow to the right of the field to see the choices. To select an activity, click on the term. New terms can be added

to the authority file by going to the Main Menu | Setup | Authority Files | Incoming Loans | Incoming Loan Activities.
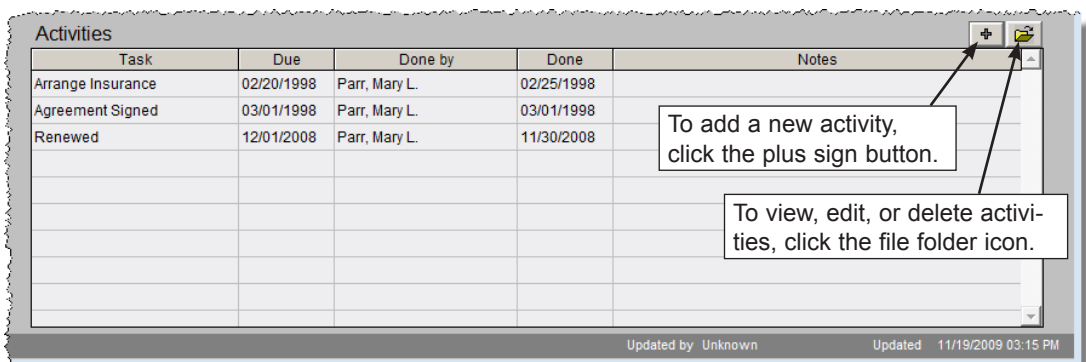
Figure 11-7
Add New
Activity

Click here to choose an activity from the drop-down menu.

The fields for **Due**, **Done by**, **Done**, and **Notes** can be filled in if desired. The **Done by** field is controlled by the Users authority file. To access the authority file, right click or press the **F7** key. Click **Add** to add this activity to the list of activities.

Editing an Activity – As activities are completed, you can enter the date of completion so you have a record of activities and dates. To edit an existing activity, click on the **Activities** button on the Incoming Loan screen. Then click on the activity and click the **file folder icon** above the list of activities. This will bring up the **Edit / Delete Task** screen.

To edit the activity, click the **Edit** button, or to delete an activity, click the **Delete** button. Once an activity is complete, enter the date in the **Done** field rather than deleting the entire activity.

To add a new activity, click the plus sign button.

To view, edit, or delete activities, click the file folder icon.

Figure 11-8 Activities screen

Once activities have been added to a loan, a green data light will appear on the **Activities** button to indicate activities have been added for the loan.

RETURNING BORROWED ITEMS

You may wish to return some items on the loan while retaining others. To do this, click the **Catalog Records** button in the Sidebar to view the listing of records. Then click on the **file folder icon** located at the top right of the grid listing the loan's catalog records. This will open the **Edit Catalog Record** screen shown in Figure 11-9. In addition to returning items, you may also set up multimedia links from this screen, attach images, change the catalog, view the full record screen, and accession the item.

Figure 11-9 Edit Catalog Record screen

Browse through the items using the **Prior** and **Next** buttons until you find the item you wish to return. Click on the **Return this Item** button on the left. The screen in Figure 11-10 will appear.

Figure 11-10
Return Loan Item
screen

Enter the date of the return. By
default, today's date is entered.
Then click here.
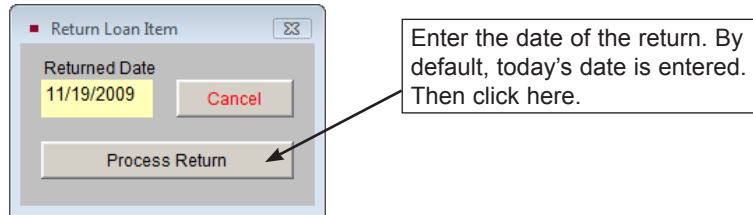
You will need to enter the date the item is being returned, then click **Process
Return**. Returned items are deleted from their respective catalogs and abbreviated
records are saved in the Returned Items list. To view the Returned Items list, from
the main loan screen click the **Returned Records** button in the Sidebar. Click the
file folder icon on the right to view more details about the records, or to transfer
the record back to the loan.

Printing the Returned Items Form

After selected items have been returned to the lender, you may need to print the
Returned Items Form to acknowledge the return of the items. The Loan Form
lists the returned items and the date they were returned, as well as the lender's
contact information and an area for the lender to sign off on the return. The
Returned Items Form can be printed by clicking the **Print** button in the Naviga-
tion Bar and choosing the **Returned Items Form** option.

TIP
Customize the layout of the Returned Items Form by going to the Main Menu | Reports |
Loans Incoming | Returned Items Form | Custom Layout 1 or 2 | Modify Selected Layout.

RETURNING THE ENTIRE LOAN

When the term of the loan is completed, you will want to return the loan. Click
on the **Return Entire Loan** button under Actions on the Sidebar. A message will
appear telling you how many records are on the loan that will be deleted from
their catalogs. Returned items are deleted from their respective catalogs and an
abbreviated record is saved in the Returned Items list. If you want to return
all the items, click **Yes**. You will need to enter a return date and click **Process
Return** to complete the operation. The loan will now be moved to the Returned
Loans section. A Returned Loan record will have a brown flag at the top of the

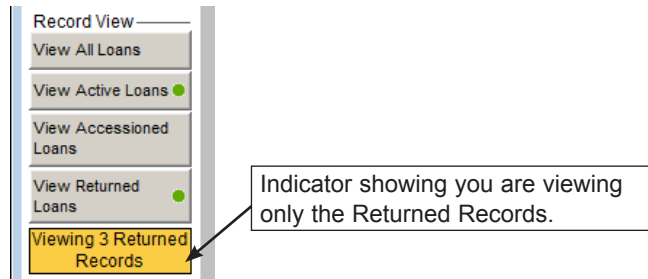screen indicating that this loan has been returned.   Returned

If a loan was mistakenly returned, you can transfer the loan back to an Active loan. Under Actions, click the **Return to Active** button. The catalog records that were part of this loan will be returned to their catalog: Objects, Photos, Archives, or Library, and they may be viewed by clicking the Catalog Records button.

VIEWING RETURNED LOANS

The Incoming Loan screen has separate views for seeing Active, Accessioned, and Returned loans. There is also a View All Loans view. To see only loan records that have been returned, click the **View Returned Loans** button in the Record View section of the Sidebar. An indicator will appear below the button telling you the number of Returned Records you are viewing.
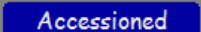
Figure 11-11
Record View Modes

Record View
View All Loans
View Active Loans ●
View Accessioned Loans
View Returned Loans ●
Viewing 3 Returned Records

Indicator showing you are viewing only the Returned Records.

To view all Incoming Loan records, click the **View All Loans** button in the Sidebar.

NOTE Incoming Loan records that have not been Returned or Accessioned are considered Active Loans. An Active Loan record will have a green flag at the top of the screen indicating that this loan is active. To view just the Active Loans, click the View Active Loans button in the Record View section of the Sidebar. An indicator will appear below the button telling you the number of Active Records you are viewing.

TRANSFERRING A LOAN TO AN ACCESSION

If the lender decides to donate the loan to your organization's permanent collection, you can click the **Convert to Accession** button under Actions on the

Sidebar. This will move all of the information, including all catalog records, to the Accession file. After clicking the Convert to Accession button, you will be asked to enter an Accession# and then verify the donor's name for the Deed of Gift and Thank You Letter. The Accession screen will appear, where you may edit data if needed. When you exit the Accession screen, you will return to the Incoming Loan screen. The loan record will retain the loan's data and be marked with a blue Accessioned flag at the top of the screen. Accessioned

To see only loan records that have been accessioned, click the **View Accessioned Loans** button in the Record View section of the Sidebar. An indicator will appear below the button telling you the number of Accessioned Records you are viewing. To view all Incoming Loan records, click the **View All Loans** button in the Sidebar.

NOTE   Please note that you cannot do a partial transfer to accession of selected catalog records from the loan. To accession selected catalog records, first return those records individually on the loan screen. Then create a new Accession record in the Accession catalog and enter the catalog records on the Accession screen.

VIEWING LOAN ITEMS THROUGH THE CATALOGS

When you enter new items through an Incoming Loan, PastPerfect places these items in the catalogs you specify on the Add Item to Catalog screen. You may view these items by going to the Objects, Photos, Archives or Library catalog. See Figure 11-12 for a view of a catalog record for a loaned item.
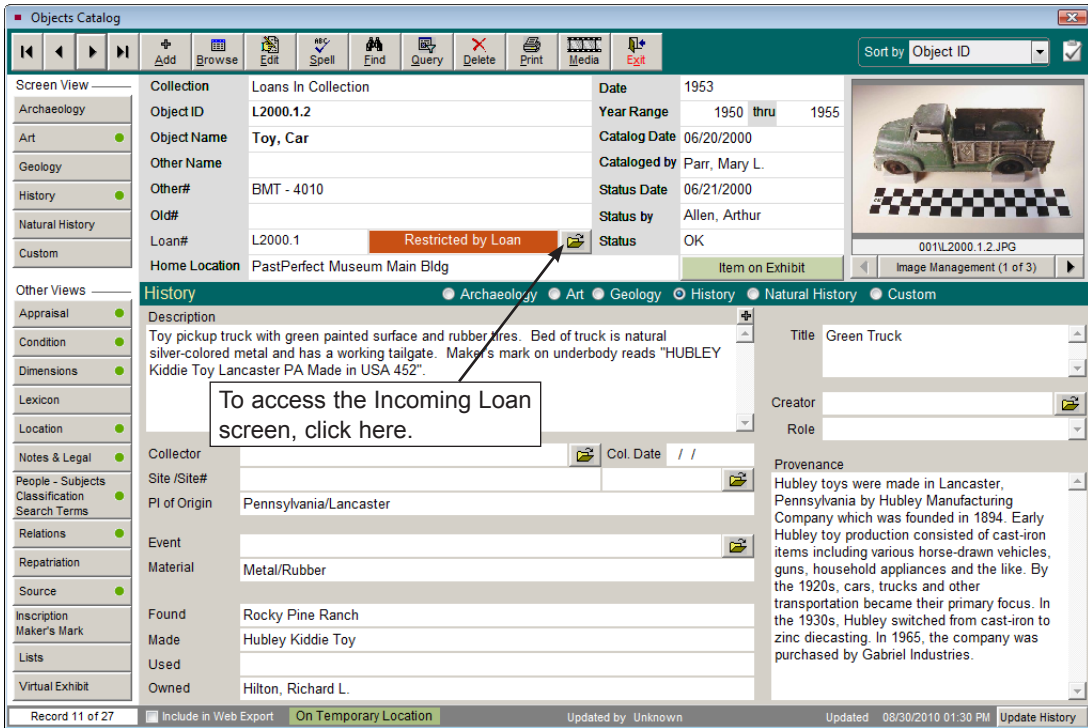
Because adding items through the Incoming Loan screen creates a limited record, you may wish to complete the cataloging process as you would for other items.

TIP   If you need to edit the Incoming Loan number, you can do so by using the Change Loan# button under Activities on the Sidebar on the Incoming Loan screen. You will have the option to change the Loan# on all the related catalog records, or just on the Incoming Loan record. If you do not change it on the related catalog records, the link between them and the Incoming Loan record will be broken.

Figure 11-12 Catalog Record for a Loaned Item

The Incoming Loan screen allows you to track every aspect of the borrowing process, from temporary custody through the eventual disposition of the materials. Whether the item is part of an exhibit or is on long-term loan to your institution, meticulous record keeping is critical to the process. In the past, long-term loans were very common. However, it is not uncommon for the heirs of the original donor to approach an institution for the return of borrowed items long after the original transaction. Often, the museum staff has changed as well. This makes good record keeping extremely important.

It is good policy to review your active loans periodically. Loan expiration dates should be monitored so that loans are returned on time. Often times, loans expire and are not returned or processed promptly. If a loan is to be extended, the contract must be updated and the insurance coverage extended.