12

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 lending 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 - The Objects Catalog* 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 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.
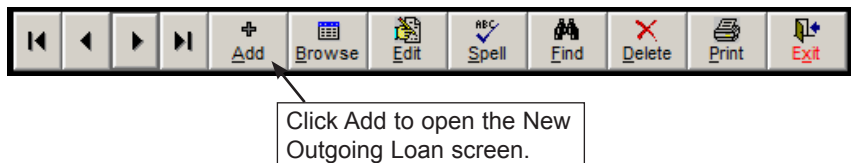
TRACKING OUTGOING LOANS

To begin the process of creating an outgoing loan agreement, open the Outgoing Loans screen by clicking on the **Outgoing Loans** button in the Activities section of 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** button in the Navigation Bar at the top of the screen.

Figure 12-1
Navigation Bar

Click Add to open the New Outgoing Loan screen.

ADD A NEW OUTGOING LOAN

Clicking **Add** will open the **Add New Outgoing Loan** screen, seen in Figure 12-2. Enter a number for the new loan in the **New Loan#** field. Duplicate loan numbers are not permitted. PastPerfect will display the last loan number used and suggest the next number. We advise that you allow PastPerfect to assign these numbers. The new outgoing loan record has a field for recording your organization's tracking number.

Figure 12-2
Add New
Outgoing
Loan screen

If the borrowing institution is in your Contacts file, you may click the **Select Institution from Contacts File** button to locate the contact and fill in fields with the contact's information automatically.

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

Once you have clicked the **Add New Loan** button to create the new loan, enter information in each field, as shown in Figure 12-3. If you did not use the option to select your borrower from the Contacts file, fill in the name and address of the borrowing institution, along with a contact name and phone number. The **Tracking#** can be used to record the loan number from the borrowing institution or an in-house loan number. Fill in the **Out Date** and **Due Date** fields. The Returned and Renewal fields may be filled in later. The Total Value fields will be filled in automatically once you begin to add catalog records. They are totalled from each item's minimum and maximum value fields in the catalog records.

Click the **Loan Information** button in the Screen View section of the Sidebar to view more fields. Use the **Purpose** field to give a short description of the purpose of the loan. In the **Location** field, enter the location where the borrowed materials will be housed. The **Transport** field may be used to describe the method of transportation for the borrowed materials, including any special transportation requirements for the items in this loan. The **Notes** field can be used to record any

Figure 12-3 Outgoing Loan screen

additional information. Once the fields are filled in with as much information as needed, click the **Save** button in the Navigation Bar. A green data light will appear on the Loan Information button if data is entered in any of these fields.

LOAN AGREEMENT TERMS, SHIPPING & INSURANCE

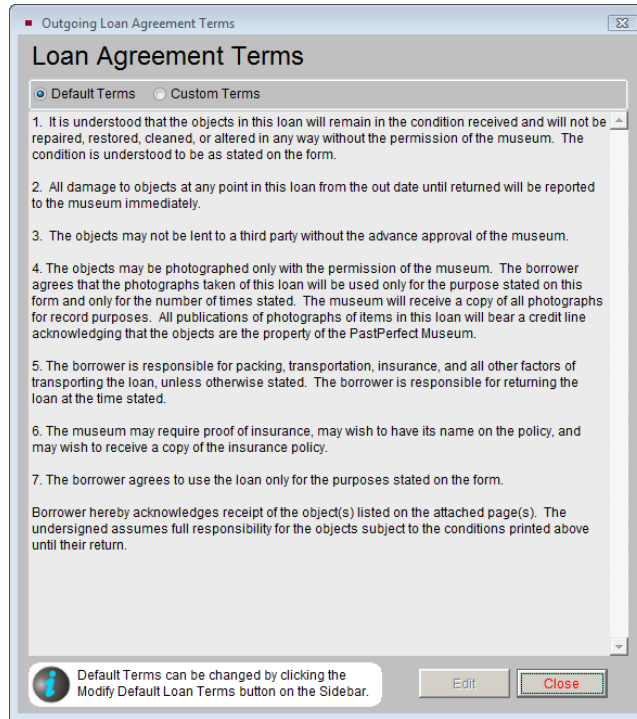In the More Screens section of the Sidebar are two buttons, **Loan Terms** and **Shipping & Insurance Information**.

Loan Agreement Terms

Click on the **Loan Terms** button to view or compose the legal language defining this loan.

On the screen shown in Figure 12-4, the loan agreement terms are displayed. There are two radio buttons at the top of this screen, **Default Terms** and **Custom**

Figure 12-4
Loan Agreement
screen

Loan Agreement Terms

○ Default Terms   ○ Custom Terms

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.

Borrower hereby acknowledges receipt of the object(s) listed on the attached page(s). The undersigned assumes full responsibility for the objects subject to the conditions printed above until their return.

Default Terms can be changed by clicking the Modify Default Loan Terms button on the Sidebar.

[Edit]   [Close]

Terms. 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 Terms

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 | Outgoing Loans. On this screen, click in the **Default Terms of Outgoing 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 **Outgoing Loans** button on the Main Menu to return to the Outgoing Loans screen.

Printing the Loan Agreement Terms

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

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. If you add or edit information here, the insurance fields on the related catalog records will not be updated with this information. A green data light will appear on the button if you have entered shipping or insurance information.

ADD CATALOG RECORDS TO THE OUTGOING LOAN

By clicking the **Catalog Records** button on the Sidebar, you can view a list of the catalog records included in the loan. This list displays as a grid on the bottom portion of the loan screen. At the top right of the grid is the **plus sign** button to add new items. Please note that you cannot be in Add Mode or Edit Mode to add items. When you click on the **plus sign** 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 **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.

Once an item is placed on loan, a flag appears on the record in its respective catalog. The **Item on Loan** flag is located below the Status field on the right half of the screen. You may click this button to view the Outgoing Loan screen.
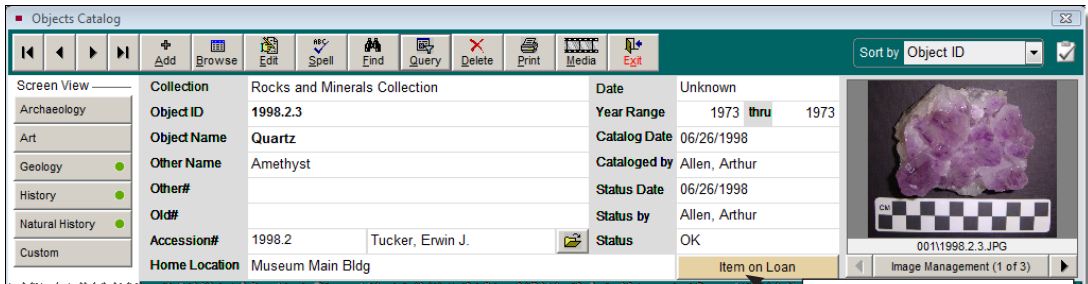

Figure 12-6 Item on Loan Flag in Catalog screen

To change items on the list, click the **file folder icon** to display the screen shown in Figure 12-7.

Figure 12-7 Edit Items on Loan

You may browse the items on loan by clicking the **Prior** and **Next** buttons at the top of the screen. If you need to change information on the screen, click the **Edit** button. To remove the catalog record from the loan without processing it as a returned item, click the **Delete** button.

TIP   Fill in the Loan Condition Information field with condition information specifically for the loan. This information will print out on the Loan Agreement Form.

The buttons on the left side of this screen present you with several options.

Detailed Condition Report - You can view existing condition reports and create a new detailed condition report for the item that is going out on loan. To create a new report, click on the **Detailed Condition Repor**t button and click the **Add** button to add a new report. See *Chapter 6 - The Objects Catalog*, for detailed instructions on creating a condition report.

Setup Multimedia Link - With the MultiMedia Upgrade installed, you may add multimedia links to the catalog record by using this function.

Item Loan History - This button reveals a list of past loans for the item.

View Full Record - Click this button to see the full catalog record in Objects, Photos, Archives or Library.

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 a return date in the **Returned Date** field and click **Process Return.** 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 view the item's loan history.

Printing the Loan Forms

After catalog records have been added to the loan, you may print the **Loan Agreement Form** to be signed by representatives from your institution and the borrower. The Loan Agreement Form lists all the items on the loan, as well as the purpose, location, values, transport and insurance information and the
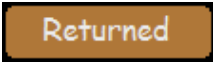
borrower's contact information. To print the Loan Agreement Form, click the **Print** button in the Navigation Bar and choose the **Loan Form** option. You also have the option to print a blank Loan Form if you would like to fill in the form by hand. If you need to change the format of your loan form, an additional Loan Agreement Form may be set up under the **Custom Loan Form**. To include detailed information about each item, you may print the full catalog record report for each item on the loan, which is done by choosing the **Detail Object List** from the Print screen.

TIP   Customize the layout of the Loan Agreement Form by going to the Main Menu | Reports | Loans Outgoing | Outgoing Loan Form | Custom Layout 1 or 2 | Modify Selected Layout. You may also modify the Custom Loan Agreement Form by going to the Main Menu | Reports | Loans Outgoing | Custom Loan Form | Custom Layout 1 or 2 | Modify Selected Layout.
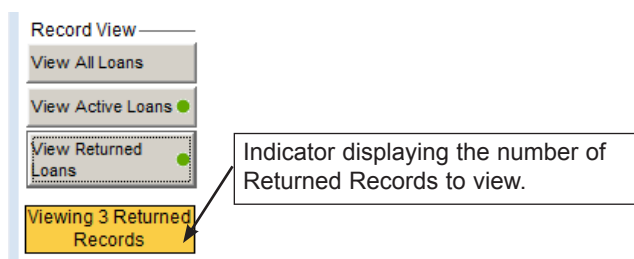
RETURNING THE ENTIRE LOAN

When all of the loaned items are returned, you will want to record that on the loan screen. Click on the **Return this Loan** button on the Sidebar. 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 file. The catalog records on the loan will appear under the Returned Records Screen View. Returned loans will display a brown flag at the top of the screen.   Returned

VIEWING RETURNED LOANS

The Outgoing Loan screen has separate views for seeing All, Active and Returned loans. 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

Figure 12-8
Record View Modes

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

Indicator displaying the number of Returned Records to view.

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

NOTE   Outgoing Loan records that have not been Returned 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.