## Incoming Loan Field Descriptions

### Accession#
Use this field to record the accession number for the item. The accession number refers to the collection of items received from the same source at the same time. If the accession record has been created, the adjoining field will fill automatically with the name of the source. Typically, accession numbers are composed of the year the accession was received and a sequential number denoting the order in which the accessions were received in that year. For example, 2009.1 indicates the first object or group of objects received in 2009. [ACCESSNO : Character (15)]

### Additional Carriers
Enter the names of other companies or entities that will be involved in the transportation of the shipment. [CARRIER2 : Memo]

### Address1
Individual's, membership's, or institution's mailing address. [ADDRESS1 : Character (50)]

### Address2
An additional line for recording an individual's, membership's, or institution's mailing address. [ADDRESS2 : Character (50)]

### Agreement Signed
Enter the date that a loan agreement was signed by the participating parties. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats:
- American - MM/DD/YYYY
- British - DD/MM/YYYY
- German - DD.MM.YYYY
- Italian - DD-MM-YYYY
- Japan - YYYY/MM/DD
- US - MM/DD/YYYY [AGMTSIGNED : Date]

### Arrival Date
The Arrival Date field, located on the Shipping & Insurance Information subscreen, is used to record the date upon which the items on loan reached their destination. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats:
- ANSI - YYYY.MM.DD
- American - MM/DD/YYYY
- British - DD/MM/YYYY
- German - DD.MM.YYYY
- Italian - DD-MM-YYYY
- Japan - YYYY/MM/DD
- US - MM/DD/YYYY [ARRIVEDATE : Date]

To set the type of date you wish to use, go to the Setup screen and choose System Parameters. Make your selection from the Date Style drop-down menu.

### Brief Description of Loan
Enter a general description of the items in this unlimited notes field. For example, you may describe the incoming loan as:
- 20 black and white photographs
- 2 books
- 1 rhinestone bracelet
Since each item will later be cataloged individually, a detailed description is not necessary. [DESCRIP : Memo]
# Incoming Loan Field Descriptions

**Cell Phone**
Use this field to record the loan contact's cellular phone number. [PHONECELL : Character (25)]

**City**
City portion of the address. [CITY : Character (30)]

**Contact**
Use this field to record the name of your contact at the loaning institution. This is usually a curator or other official of the loaning institution who authorized the loan. [CONTACT : Character (100)]

**Country**
Country portion of the address. [COUNTRY : Character (30)]

**County**
U.K. Setup Option. Enter the county. [COUNTY : Character (30)]

**Crate List**
Press the "View Shipping & Insurance Information" button to access the Shipping subscreen. The Crate List is used to list the number and description of crates in the shipment. [CRATELIST : Memo]

**Crate Types**
Press the "View Shipping & Insurance Information" button to access the Shipping subscreen. The Crate Types field is used to enter the type of crate used. For example: Wood, Plastic, Metal, or Cardboard. [CRATETYPES : Character (30)]

**Credit Line**
A Credit Line may be entered in the Incoming Loans screen and appears on every item in the loan. The credit line may express a memorial to a donor or relative of a donor, e.g., "Given in memory of Esther Crutch." The credit line often appears on exhibit labels, for example, "Gift of Mr. and Mrs. Edwin Hopewell." [CREDIT : Memo]

**Dataset**
This field is controlled by a drop-down menu. Click on the downward pointing arrow to the right of the field to view entries in the authority file. Click on your choice to select an entry for the field. You can add, edit, or delete items on this list from Main Menu | Setup | Authority Files. [DATASET : Character (15)]

**Date Received**
The date on which the incoming loan was received. Sometimes the exact date is unknown. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats:
- ANSI - YYYY.MM.DD
- American - MM/DD/YYYY
- British - DD/MM/YYYY
- German - DD.MM.YYYY
- Italian - DD-MM-YYYY
- Japan - YYYY/MM/DD
- US - MM/DD/YYYY

To set the type of date you wish to use, go to the Setup screen and choose System Parameters. Make your selection from the Date Style drop-down menu. [RECDATE : Date]

**Due Date**
Enter the date on which the loan is due to be returned. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats:
- American - MM/DD/YYYY
- British - DD/MM/YYYY
- German - DD.MM.YYYY
- Italian - DD-MM-YYYY
- Japan - YYYY/MM/DD
### Incoming Loan Field Descriptions

**10/05/2017**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>US</strong> - MM/DD/YYYY</td>
<td>To set the type of date you wish to use, go to the Setup Menu, select Gen. Information, and make your selection from the Date Style pull-down menu. [DUEDATE : Date]</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td>Use this field to record the loan contact's email address. [EMAIL : Character (50)]</td>
</tr>
<tr>
<td><strong>Fax#</strong></td>
<td>Use this field to record the loan contact's fax number. [FAXNO : Character (25)]</td>
</tr>
<tr>
<td><strong>Form of Transportation</strong></td>
<td>Use this field to describe the form of transportation for the items to and from the exhibit location. For example; &quot;truck&quot;. [FORMTRANS : Character (50)]</td>
</tr>
<tr>
<td><strong>Handlers</strong></td>
<td>Press the &quot;View Shipping &amp; Insurance Information&quot; button to access the Shipping subscreen. List the person or people responsible for handling the incoming loan materials during shipping. [HANDLERS : Memo]</td>
</tr>
<tr>
<td><strong>Home Phone</strong></td>
<td>Use this field to record the loan contact's home phone number. [PHONEH : Character (25)]</td>
</tr>
<tr>
<td><strong>ID#</strong></td>
<td>Use the Contact ID# to link a contact to the incoming loan by entering the ID# on the Incoming Loans screen. Click the open folder icon to view the associated contact record. [IDNO : Numeric (6)]</td>
</tr>
<tr>
<td><strong>Incoming Loan#</strong></td>
<td>Incoming loan # is the unique number assigned to an incoming loan. [LOANINNO : Character (15)]</td>
</tr>
<tr>
<td><strong>Instructions</strong></td>
<td>[INSTRUCT : Memo]</td>
</tr>
<tr>
<td><strong>Insurance Company</strong></td>
<td>Click on the View Shipping &amp; Insurance Information button. Use the Insurance company field to record the name of the insurance company responsible for insuring the incoming loan items. [INSCOMP : Character (50)]</td>
</tr>
<tr>
<td><strong>Insurance Company Phone#</strong></td>
<td>Insurance Company Phone is used to record the phone number of the insurance company that insures the item. [INSPHONE : Character (25)]</td>
</tr>
</tbody>
</table>
| **Insurance Policy Expiration Date** | Use this field to record the date upon which the policy will expire. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats:  
  ANSI - YYYY.MM.DD  
  American - MM/DD/YYYY  
  British - DD/MM/YYYY  
  German - DD.MM.YYYY  
  Italian - DD-MM-YYYY  
  Japan - YYYY/MM/DD  
  US - MM/DD/YYYY  
  To set the type of date you wish to use, go to the Setup screen and choose System Parameters. Make your selection from the Date Style drop-down menu. [INSDATE : Date] |
| **Insurance Policy#**  | Insurance Policy# is used to record the insurance policy number covering the item. [POLICYNO : Character (20)] |
| **Insurance Premium**  | Insurance Premium is used to record the dollar amount of the insurance policy.                  |
### Incoming Loan Field Descriptions

**10/05/2017**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Insurance Representative</strong></td>
<td>Insurance Representative is used to record the name of the insurance agent responsible for the policy insuring the item. [INSREP : Character (30)]</td>
</tr>
<tr>
<td><strong>Insured Value</strong></td>
<td>Insured Value is used to record the amount of insurance coverage on the item(s) in a loan. [INSVALUE : Character (30)]</td>
</tr>
<tr>
<td><strong>Insured by</strong></td>
<td>Click on the View Shipping &amp; Insurance Information button. Indicate whether the exhibit is insured by the borrower or the lender by clicking on the appropriate radio button. [INSUREDBY : Numeric (1)]</td>
</tr>
<tr>
<td><strong>Legal Terms</strong></td>
<td>Use the Legal Terms field to record the legal agreement between the borrower and the loaning institution. You may use either default loan agreement terms or create a custom legal agreement for each loan. [LEGAL : Memo]</td>
</tr>
<tr>
<td><strong>Loan fees</strong></td>
<td>Record the dollar amount of any cost charged by the loaning institution for the use of the items on loan. [LOANFEES : Character (15)]</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>The Notes field may be used to record any additional information. There is no limit to the number of lines or the type of information recorded in this field. [NOTES : Memo]</td>
</tr>
<tr>
<td><strong>Number of Crates</strong></td>
<td>Enter the number of crates in the shipment comprising the Incoming Loan. [NOCRATES : Character (6)]</td>
</tr>
<tr>
<td><strong>Primary Carrier</strong></td>
<td>Enter the name of the company or entity that is primarily responsible for the transportation of the shipment. [CARRIER : Memo]</td>
</tr>
<tr>
<td><strong>Purpose</strong></td>
<td>Give a short description of the purpose of the loan. Example: &quot;Museum Exhibit, Treasures of the West.&quot; [PURPOSE : Character (80)]</td>
</tr>
<tr>
<td><strong>Receipt#</strong></td>
<td>This is a unique number assigned to any object or group of objects when they are held in temporary custody before being assigned a loan number. [RECPTNO : Numeric (10;1)]</td>
</tr>
<tr>
<td><strong>Received by</strong></td>
<td>Enter the name of the officer of the museum who approved the receipt of the incoming loan. This is usually the director, a curator, or head of the collections committee. Protocol for entering the name is last name, first name, and middle initial. This field is controlled by the Users Authority File. With the cursor in the field, press F7 or right click to view entries in the Authority File. Double click on your choice to enter the person's name in the field. You can add, edit or delete entries on this list from the Authority File screen or by going to Main Menu</td>
</tr>
<tr>
<td><strong>Renewed Date</strong></td>
<td>Enter the date upon which the loan was renewed for an additional term. [RENEWEDATE : Date]</td>
</tr>
<tr>
<td><strong>Renewed Until</strong></td>
<td>Enter the new due date for the loan. [RENEWUNTIL : Date]</td>
</tr>
<tr>
<td><strong>Renewed by</strong></td>
<td>Enter the name of the person who renewed the loan. This field is controlled by the &quot;Users&quot; authority file. To access the file press F7 or the right mouse key. To add, edit, or delete entries in the authority file use the buttons at the top of the screen.</td>
</tr>
</tbody>
</table>
You may also go to Setup, Authority Files. Highlight "Users" on the left hand list and press Next> at the top of the screen. You may then use the ADD, EDIT, and DELETE buttons to populate the authority file.

[RENEWEDBY : Character (30)]

**Restrictions**

Record information about any restrictions imposed on access to the materials in this loan. Make a note specifying the details of the restriction, including the date when such restrictions will be lifted. Additional information should be recorded regarding jurisdiction, i.e. the person, institution, or entity through which the terms governing access are imposed, enforced, or appealed.

Restrictions entered in this field will apply to all items in the accession and cause a Restricted tag to appear on all catalog records linked to this accession. If only some of the items in the accession are restricted, do not enter anything in this field. You may deal with individual item restrictions in the copyright field of the catalog record.

[RESTRICT : Memo]

**Returned Date**

Use this field to indicate the actual date that the loan was returned. Press F8 to fill in today's date automatically.

Your system may be set to enter dates in the following formats:
- American - MM/DD/YYYY
- British - DD/MM/YYYY
- German - DD.MM.YYYY
- Italian - DD-MM-YYYY
- Japan - YYYY/MM/DD
- US - MM/DD/YYYY  [RETURNED : Date]

**Ship Date**

The Ship Date field, located on the Shipping & Insurance Information subscreen, is used to record the date upon which the loan materials were shipped. Press F8 to fill in today's date automatically. Your system may be set to enter dates in the following formats:
- ANSI - YYYY.MM.DD
- American - MM/DD/YYYY
- British - DD/MM/YYYY
- German - DD.MM.YYYY
- Italian - DD-MM-YYYY
- Japan - YYYY/MM/DD
- US - MM/DD/YYYY  [SHIPDATE : Date]

**Shipped from**

Press the "View Shipping & Insurance Information" button. Enter the name of the institution from which the loan items were shipped. [SHIPFROM : Character (40)]

**Shipped to**

Press the "View Shipping & Insurance Information" button. Enter the name of the institution to which the loan items were shipped. [SHIPTO : Character (40)]

**Shipping & Insurance Notes**

Use the Shipping & Insurance Notes field to record additional information about the shipping and insurance that may be relevant to this incoming loan that has not been covered in the other fields. [INSNOTES : Memo]
# Incoming Loan Field Descriptions

**Source**
The name of the original donor or source of the item(s). This can be the name of the individual donor, organization or other entity from which the incoming loan was received. Protocol for entering names is last name, first name, and middle initial. [RECFROM : Character (120)]

**Special Considerations**
List any special circumstances regarding this loan. There is no limit to the number of lines or the type of information recorded in this field. [SPECIALCON : Memo]

**State**
Enter the two character state code. [STATE : Character (2)]

**Status**
The Status field records the status of the incoming loan:

- R = Past
- <empty> = Active
- A = Accessioned

[STATUS : Character (1)]

**Tracking#**
Tracking # can be used to record the loan number from the lending institution or an in-house loan number. [TRACKINGNO : Character (30)]

**Transportation Paid by**
Enter the name of the organization or entity paying for the transportation of the loan. [TRANPAIDBY : Numeric (1)]

**Value**
The current value determined for the item or group of items on loan. [VALUE : Numeric (12;2)]

**Website**
Use this field to record the loan contact's website address. [WEBSITE : Character (60)]

**Work Phone**
Use this field to record the loan contact's work phone number. [PHONEW : Character (25)]

**Zip**
Enter the ZIP Code or Postal Code. [ZIP : Character (13)]