

Incoming Loan Field Descriptions

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Accession#	Use this field to record the accession number for the object, for example, "2004.1". The accession number refers to the collection of objects 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, 2004.1 indicates the first object or group of objects received in 2004.[accessno:c(15)]
Additional carriers	Enter the name 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:c(50)]
Address2	An additional line for recording an individual's, membership's, or institution's mailing address.[address2:c(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	Press the "View Shipping & Insurance Information" button to access the Shipping subscreen. The Arrival Date 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: 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]
Brief Description of Loan	Enter a general description of the items in this unlimited notes field. Since each item will later be cataloged individually, a detailed description is not necessary. For example you may describe the incoming loans as: 20 black and white photographs 2 books 1 rhinestone bracelet [descrip:memo]
Cell Phone	Use this field to record the cellular phone number for the organization or contact for the loan.[phonecell:c(25)]

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City	City portion of the address.[city:c(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:c(100)]
Country	Country portion of the contact's address.[country:c(30)]
County	U.K. Setup Option. Enter the county.[county:c(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:c(30)]
Credit line	A Credit Line may be entered in the Loans In Screen and appears on every item in the loan. The credit line may express a memorial to a donor or relative of a donor as in: "Given in memory of Esther Blagg Crutch". The credit line often appears on exhibit labels, for example, "Gift of Mr. and Mrs. Edwin Hopewell".[credit:memo]
Dataset	This field is used with the Scatter/Gather function to identify the computer that controls each record. This field is controlled by a pull-down authority file. With the cursor in the field, click on the down arrow to the right of the field to view entries in the Authority file. Double click on your choice to enter the name in the field. To add, edit, or delete entries on this list choose Setup on the main menu. Choose Authority Files. Highlight "Dataset" and press the Next> Button at the top of the screen. You will then have the option to ADD, EDIT, or DELETE entries on the list.[dataset:c(15)]
Date received	The date on which the incoming loan was received. 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 [reccdate:c(10)]
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 US - MM/DD/YYYY To set the type of date you wish to use, go to the Setup Menu, select Gen. Information,

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and make your selection from the Date Style pull-down menu.[duedate:date]

Email

Record the E-mail address of the loaning party.[email:c(50)]

Fax#

Telephone number of the loaning institution's fax machine.[faxno:c(25)]

Form of Transportation

Use this field to describe the form of transportation for the items to and from the exhibit location. For example; "truck".[formtrans:c(50)]

Handlers

Press the "View Shipping & Insurance Information" button to access the Shipping subscreen. List the person or people responsible for handling the incoming loan materials during shipping.[handlers:memo]

Home Phone

Loan contact's home telephone number.[phoneh:c(25)]

Id#

Use the Contact id# to link a contact to the incoming loan by entering the id# on the Incoming loans screen. Clicking on the View Contact button next to the field will allow you to display the associated contact screen.[idno:n(6)]

Incoming Loan#

Incoming loan # is the unique number assigned to an incoming loan.[loaninno:c(15)]

Ins company phone

Insurance company phone is used to record the phone number of the insurance company that insures the object.[insphone:c(25)]

Ins policy exp date

Use this field to record the date upon which the policy will expire.[insdate:date]

Insurance Representative

Insurance representative is used to record the name of the insurance agent responsible for the policy insuring the object.[insrep:c(30)]

Insurance company

Click on the View Shipping & Insurance Information button. Use the Insurance company field to record the name of the insurance company responsible for insuring the incoming loan items.[inscomp:c(50)]

Insurance policy#

Insurance Policy # is used to record the insurance policy number covering the object.[policyno:c(20)]

Insurance premium

Insurance premium is used to record the dollar amount of the insurance policy.[inspremium:c(20)]

Insured by

Click on the View Shipping & Insurance Information button. Indicate whether the exhibit is insured by the borrower or the lender by clicking on the appropriate radio button.[insuredby:n(1)]

Insured value

Insurance Value is used to record the amount of insurance coverage on the objects in a Loan.[insvalue:c(30)]

Legal terms

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]

Loan fees

Record the dollar amount of any cost charged by the loaning institution for the use of the items on loan.[loanfees:c(15)]

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No of crates	Enter the number of crates in the shipment comprising the Incoming Loan.[nocrates:c(6)]
Primary Carrier	Enter the name of the company or entity that is primarily responsible for the transportation of the shipment.[carrier:memo]
Purpose	Give a short description of the purpose of the loan. Example: "Museum Exhibit, Treasures of the West."[purpose:c(80)]
Receipt#	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:n(10,1)]
Received by	Enter the name of the officer of the museum who approved the receipt of the accession. 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.[recby:c(50)]
Received from	The name of the source of the items. This can be the name of the individual donor, organization or other entity from which the accession was received. Protocol for entering names is Last Name, First Name, and Middle Initial.[recfrom:c(120)]
Renewed by	<p>Enter the name of the person who renewed the loan. This field is controlled by the "Users" 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.</p> <p>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.</p> [renewedby:c(30)]
Renewed date	Enter the date upon which the loan was renewed for an additional term.[renewdate:date]
Renewed until	Enter the new due date for the loan.[renewuntil:date]
Restrictions	<p>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.</p> <p>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]</p>
Returned Date	<p>Use this field to indicate the actual date that the loan was returned. Press F8 to fill in today's date automatically.</p> <p>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</p>

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Japan - YYYY/MM/DD
US - MM/DD/YYYY[returned:date]

Ship date Enter the date that 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:
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:c(40)]

Shipped to Press the "View Shipping & Insurance Information" button. Enter the name of the institution to which the loan items were shipped.[shipto:c(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]

Special Considerations 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]

State Enter the two character state code.[state:c(2)]

Status The Status field is designed to provide flags to alert the user to special information about the item. This field is controlled by a pull down authority file. To access the authority file, click on the down arrow to the right of the field. Click on your highlighted choice.

To add, edit, or delete entries in this authority file, choose Setup on the main menu. Choose Authority Files. Highlight "Status - Catalog Name" and press the Next> Button at the top of the screen. You will then have the option to ADD, EDIT, or DELETE entries on the list.
[status:c(1)]

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

Transportation paid by Enter the name of the organization or entity paying for the transportation of the loan.[tranpaidby:n(1)]

Value The current value determined for the item or group of items on loan.[value:n(12,2)]

Website Type in the website name for this organization, institution, or individual.[website:c(60)]

Work Phone Loan contact's work telephone number.[phonew:c(25)]

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Zip Enter the zip or postal code for the incoming loan contact's address.[zip:c(13)]