

Outgoing Loan Field Descriptions

10/05/2017

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)]
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]
Cell Phone	Use this field to record the cellular phone number for the organization or contact for the loan.[phonecell:c(25)]
City	City portion of the address.[city:c(30)]
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)]
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)]
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

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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]

Email Record the E-mail address of the borrowing institution's contact.[email:c(50)]

Fax# Telephone number of the borrowing 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 outgoing loan materials during shipping.[handlers:memo]

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

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]

Institution Fill in the name of the borrowing institution.[institute:c(50)]

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 outgoing loan items.[inscomp:c(30)]

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)]

Loan Terms Use the Loan Agreement 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.[conditions:memo]

Loan# Each new Outgoing Loan must have a unique identifying number. When you click on the Add button, PastPerfect will alert you of the last number used and invite you to assign the next number in the sequence. You may use the suggested number or assign any other unique number to the Loan.[loanno:n(7)]

Location Enter the location where the borrowed materials will be housed. Example: "Chrysler

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Building Lobby."[location:c(80)]

Name & Title Enter the name of your contact at the borrowing institution or the representative of the borrowing institution.[lastname:c(40)]

No of crates Enter the number of crates in the shipment comprising the Outgoing Loan.[nocrates:c(6)]

Notes 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]

Out Date Record the starting date of the loan.[outdate:date]

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)]

Renewed by 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.

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: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]

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 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

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[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 outgoing loan that has not been covered in the other fields.[insnotes: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)]

Title Enter the title of the representative of the borrowing institution. Title is a formal appellation attached to the name of a person by virtue of office, rank, hereditary privilege, noble birth, education, or attainment or used as a mark of respect. Common titles include, Mr., Mrs., Ms., Dr., Curator, President, Director, Reverend, etc.[title:c(40)]

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

Transport Describe the method of transportation for the borrowed materials. Example: "Acme Air Freight" or "UPS." The Transport field may be used to record any special transportation requirements for the items in this loan.[transport:c(80)]

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

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)]

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