

# TEMPORARY CUSTODY

## WHAT IS TEMPORARY CUSTODY?

---

An accession is defined as one or more objects acquired at one time from one source constituting a single transaction between a museum and a source (Burcaw 1997).

When items come into your museum, you may not wish to accession them right away. Many institutions have a Collections Committee that meets regularly to consider new acquisitions. Other organizations must hold potential donations until a curator or other expert can examine them. For many reasons, possible donations may be held for consideration in a state of temporary custody. This allows your institution to analyze the proposed collection items to determine if they conform to your mission statement and can be cared for properly by your institution.

The Temporary Custody module of PastPerfect is designed to help you record and retrieve source information and to create temporary custody documents. PastPerfect's Temporary Custody screen records important information about incoming items and their source, prints a receipt for the potential donor, and tracks the items prior to your museum's decision to accession the items. Temporary Custody also tracks the eventual disposition of the items. If you decide to accept the donation, you may convert the Temporary Custody receipt into an accession record. If you prefer to return the items, add the date and method of return to the receipt and remove it from the active file.

For occasions when you wish to accession items immediately, bypass the Temporary Custody procedure and enter source information directly in the Accession screen. This chapter will explain how to complete and use the Temporary Custody form.

## THE BASIC STEPS TO ACCEPT ITEMS INTO TEMPORARY CUSTODY

---

1. Launch the PastPerfect Program.
2. Click on the Temporary Custody command button.
3. Add a new Temporary Custody receipt.
4. Complete the form by entering data in each field.
5. Press the Save command to save the entry.
6. Print the Temporary Custody Receipt.
7. Accession, Loan, or return the items.

Double-click on the PastPerfect icon on the Windows Desktop to start the program.

If this is the very first Temporary Custody receipt entered, the screen will display blank data fields. If you have already entered some receipts, the last-viewed receipt will be displayed. Use the **Browse** button or the **Find** button to retrieve a particular receipt. To enter a new receipt, click the **Add** button.

### ADD A NEW TEMPORARY CUSTODY RECEIPT

Click on the Add button at the top of the screen. The New Temporary Custody screen, shown in Figure 4-1 will appear. Assign a unique receipt number to the new Temporary Custody receipt. Receipt numbers may be up to ten digits long, but cannot include characters or punctuation. PastPerfect recommends assigning sequential numbers. Should you choose to accession the items later, you will be asked to assign an accession number in accordance with your museum's numbering policy.

PastPerfect will verify that the receipt number you assign has not already been used. If it has, you will receive a message asking you to assign a different number.

Figure 4-1  
New Temporary Custody Screen

Once a receipt number is approved, a new record will appear for completion. To complete the entry of the new receipt enter data in each field and press Save at the top of the screen. If you do not want to save your entries, press Cancel.

Figure 4-2  
Completed Temporary Custody Screen

Temporary Custody		Receipt No. 1	Date Received	01/04/2004
Source	Packwood, Neil Jr.			
Contact				
Address	12343 Elmwood Drive			
City, State, Zip	Perfectown	PA	19822	
Email / Country	paker@yahoo.com			
Web site				
Credit Line				
Where Acquired	Inherited from Neil Packwood Sr.			
Who Acquired	Family heirloom collection	When Acquired	1900-1915	
Received by	Lufkin, Joseph	Received as	Gift	
Return by	12/15/2005	Returned		
Interim Location	Temporary Custody / Shelf 6			
Notes	The Packwood family has been prominent in the Perfectown area since the Revolutionary War Period. The family patriarch, Horace W. Packwood, was a pioneer in the area, receiving a land grant in 1770. Neil Packwood Sr. was a Chester County Justice of the peace from 1875 to 1915.			

Phone numbers		Thank you Letter	
Work	610/555-6789 Ext 2103	Individual Id#	<input type="checkbox"/> View
Home	610/555-2356	Individual Id#2	<input type="checkbox"/> View
Fax	610/555-6788	Individual Id#3	<input type="checkbox"/> View
CellPager	610/555-8473	Individual Id#4	<input type="checkbox"/> View

**Description**

- 1 Engagement Ring, 19th century diamond
- 1 Book, Bread from God 1901
- 1 Letter Ethel Gregory to Neil Packwood Sr. 1888
- 1 Photo Ethel & Neil Packwood Sr. wedding 1902

At any time, you can click on Edit to change or add to the entered information.

## NOTE

New Temporary Custody receipts will always be entered and displayed in the Active file. Using the command buttons at the top right of the screen, Active receipts may be Accessioned, Loaned, or Returned. There are also buttons that will allow you to view receipts in just one of the files, Active, Accessioned, Loaned, or Returned, or to view all receipts.

## PRINT THE TEMPORARY CUSTODY RECEIPT

If you are satisfied with the receipt, you can print it directly from the preview screen by clicking the Printer icon on the toolbar; or, if you need to make changes to the information, click on the Exit icon and return to the active file. Click Edit to make changes.

Figure 4-3  
Temporary  
Custody  
Receipt

Receipt No. 1

**Temporary Custody Receipt**

**PastPerfect Museum, 312 Main Street, Pastville, PA 10234 425/555-1256**

**This is to acknowledge receipt of the items listed below by the PastPerfect Museum from:**

Name: <u>Packwood, Neil Jr.</u>	Date: <u>01/04/2004</u>
Address: <u>12343 Elmwood Drive</u>	
City: <u>Perfectown</u>	State: <u>PA</u> Zip: <u>19822</u>
Work#: <u>610/555-6789 Ext</u>	Home#: <u>610/555-2356</u> Fax#: <u>610/555-6788</u> Cell#: <u>610/555-8473</u>
Website: _____	Email: <u>paker@yahoo.com</u>

**The items listed below are left in the custody of the PastPerfect Museum to be considered as:**

An unconditional donation. The Museum reserves the right to keep, lend, or otherwise dispose of the donated material.

To be considered for acquisition.

For identification. Does not constitute an authentication, will not include appraisals. Museum reserves the right to photograph.

For other. Please specify \_\_\_\_\_

**Disposition if not accepted for accession:**

The Temporary Custody Receipt may be customized by going to Reports | Temporary Custody | Temporary Custody Receipt | Modify Report Layout.

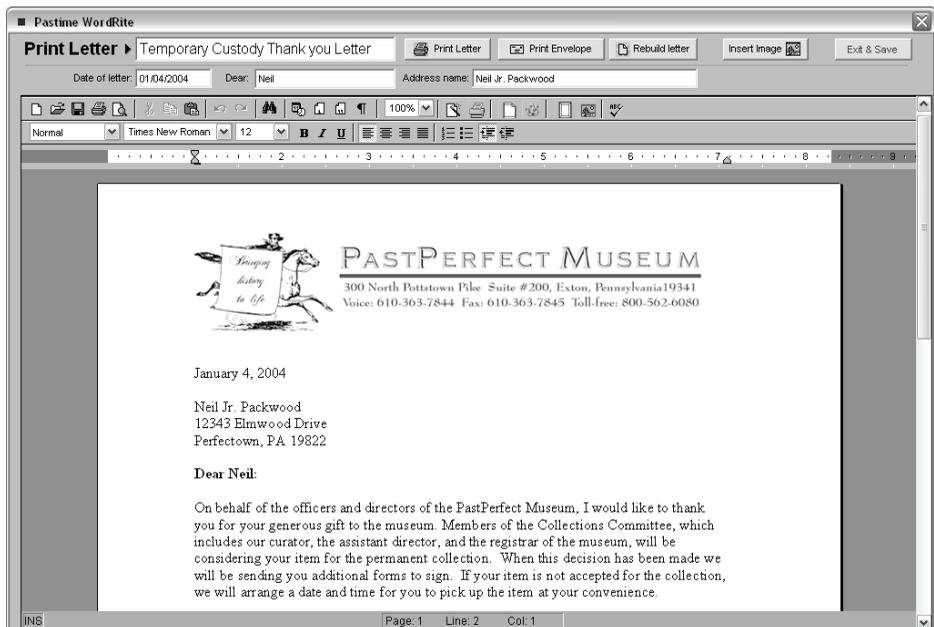
On the printed receipt, check the appropriate box to record the museum's reasons for holding the items in temporary custody, as well as the method of disposi-

tion, should the museum decide against accessioning the items. You may want to record the same information in the Temporary Custody screen's Notes field. Be sure both the donor and the receiving agent sign the receipt. Finally, make a copy for the donor to keep.

## PRINT THE TEMPORARY CUSTODY THANK YOU LETTER

You may also want to print a thank you letter or cover letter for the receipt to send to the donor. To edit or print the letter, click on the Thank you Letter command button on the right side of the Temporary Custody screen, which will reveal this screen:

Figure 4-4  
Temporary  
Custody  
Thank you  
Letter



The Thank you Letter is generated based on the data you entered on the Temporary Custody screen and the default letter text that was entered under Add/Modify Default Thank You Letter. Four default letters can be composed, one for each donor. You may personalize the letter further. To rebuild the letter based on the default letter and information on the Temporary Custody screen, press Rebuild Letter. Finally, you can print the letter as well as an envelope to put it in. When finished, click on Exit to return to the Temporary Custody screen.

## TIP

Not all printers are capable of printing envelopes, and for those that are capable you may need to adjust the settings from the Reports menu by selecting Temporary Custody | Thank You Letter Envelope | Modify Report Layout.

---

At this point, exit the Temporary Custody screen by clicking the Exit button on the toolbar. The receipt will remain in the active file until you initiate the next step—returning or accessioning the items.

## ACCESSION, LOAN, OR RETURN THE ITEMS

The next step depends on whether the museum decides to accession the items held in Temporary Custody, keep them as a long term loan, or return or dispose of them. First, bring up the receipt. Use the Find command to locate the correct receipt. You can search for a particular receipt by receipt number, donor (source), or type.

Another way to find receipts is to click Browse at the top of the screen. A list of Temporary Custody receipts will appear. Click on the receipt you wish to view using the right-mouse button, or position the cursor over the appropriate record and press the Enter key on your keyboard.

To exit Browse mode without choosing a record, just click the “X” in the upper right corner of the screen.

### Return Items

If items are to be returned or disposed of without becoming a loan or entering the permanent collection, click the **Transfer to Return File** command button at the top of the screen.

A box labeled **Return Date & Information** will appear, asking you to enter the return date and information. You will be asked “Transfer All Items?” or “Transfer Some Items?” If you click Transfer All Items, the record will be stored and displayed in the Returned file.

Figure 4-5  
Returned  
Date and  
Information

## Transferring Some Items to the Return File

Clicking Transfer Some Items will bring up the following screen.

Figure 4-6  
Temporary  
Custody  
Partial  
Return

This screen allows you to choose which items you wish to accession and which items you wish to return to the donor. Using this screen will create an additional record to track the returned item. The returned item will be given the temporary receipt number plus point one (.1). The original temporary custody receipt retains the original receipt number but no longer shows the returned item on the receipt.

## NEW ACCESSION OF INCOMING LOAN SCREEN

Should your museum agree to accept the items into the collections, you will click on the **Accession or Loan** command button near the top of the screen. A box labeled **New Accession or Incoming Loan** will appear, beginning the accession process. The Temporary Custody information will be moved from the active file to the accessioned or loaned file, and a copy will be converted to an accession record or incoming loan record.

Enter the new **Accession Number** or the **New Incoming Loan Number** and select whether you want to transfer all or selected items, then click OK. This will take you to the Accession screen or Incoming Loan screen. PastPerfect will transfer the donor information and the descriptions of the items.

If you wish to cancel the transfer and return to the Temporary Custody screen, click on the **Cancel** command button.

## MULTIPLE DONORS

The Temporary Custody record will allow you to record information about three additional donors. A separate receipt and thank you letter may be printed for each donor.

To add another donor, click on the **Add/View Additional Donors** command button to open this screen.

Figure 4-7  
Other Temporary Custody Donor

The screenshot shows a window titled "Other Temporary Custody Donors" with a tab labeled "Other donors information". The window contains a form for entering donor details. The form is divided into two sections: "Donor #2" and "Donor #3".

**Donor #2** information:

- Source: Caliber Software, Inc.
- Contact: Henry Hanover
- Address: 1254 Pomeroy Ave.
- City, State, Zip: Pastville PA 19345
- Email / Country: Hanover@camb.net
- Web site: calibersoftware.com
- Work#: 212/555-6767
- Home#: 212/555-7887
- Fax#: 212/555-8900
- Cell/Pager: 212/555-9000
- Contact Id#2: 27

**Donor #3** information:

- Source: (empty)
- Contact: (empty)
- Address: (empty)
- Work#: / -
- Home#: / -
- Fax#: (empty)

Buttons at the bottom of the form include "Print Receipt" and "Thank you Letter". The window also has "Edit" and "Close" buttons at the top right.

You can type in the donor information or press **Add from Contact File** to select a donor from your Contacts database.