

Outgoing Loan Field Descriptions

04/21/2014

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)]

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

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.

[ARRIVEDATE : Date]

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)]

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)]

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)]

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

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

Email Use this field to record the loan contact's email address. [EMAIL : Character (50)]

Fax# Use this field to record the loan contact's fax number. [FAXNO : Character (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 : Character (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 Use this field to record the loan contact's home phone number. [PHONEH : Character (25)]

Institution Fill in the name of the borrowing institution. [INSTITUTE : Character (50)]

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 : Character (30)]

Insurance Company Phone# Insurance Company Phone is used to record the phone number of the insurance company that insures the item. [INSPHONE : Character (25)]

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. [INSPREMIUM : Character (20)]

Insurance Representative Insurance Representative is used to record the name of the insurance agent responsible for the policy insuring the item. [INSREP : Character (30)]

Insured Value Insured Value is used to record the amount of insurance coverage on the item(s) in a

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loan. [INSVALUE : Character (30)]

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 : Numeric (1)]

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 : Numeric (7)]

Loanid# A unique id number that is assigned to each outgoing loan and used to link catalog records to loans. [PPID : Character (36)]

Location Enter the location where the borrowed materials will be housed. Example: "Chrysler Building Lobby." [LOCATION : Character (80)]

Name Enter the name of your contact at the borrowing institution or the representative of the borrowing institution. [LASTNAME : Character (40)]

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]

Number of Crates Enter the number of crates in the shipment comprising the Outgoing Loan. [NOCRATES : Character (6)]

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 : Character (80)]

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]

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 : Character (30)]

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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

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. [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 outgoing loan that has not been covered in the other fields. [INSNOTES : Memo]

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

Status The Status field records the status of the outgoing loan:

R = Past

<empty> = Active [STATUS : Character (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, Director, President, Reverend, etc. [TITLE : Character (40)]

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

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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 : Character (80)]
Transportation Paid by	Enter the name of the organization or entity paying for the transportation of the loan. [TRANPAIDBY : Numeric (1)]
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)]