

INCOMING LOANS

Loans may come into your institution from other museums or from private individuals. The most common type of loan is for exhibit purposes. These short-term loans, often for traveling exhibits, are common in today's museum community.

Donors may sometimes loan an object to the museum with the promise that it will someday be given to the museum. Such objects should retain loan status until the ownership has officially passed, by deed of gift, to the museum. Long-term or permanent loans from individuals or institutions were standard operating procedure in the early and mid 20th century. Such loans are less common today, however, you may still be administering long-term loans that came into your museum before your arrival.

Loans of any kind should be accepted with great care. You must maintain meticulous records of all such transactions. The loaning institution is in charge of the loan procedures and forms. When you are the borrower, the loaning institution or individual may set the conditions of the loan. You are under obligation to use the loaned materials for the purpose expressed in the loan agreement and return the loaned materials in the same condition as they came to you. Your institution assumes all liability for the borrowed objects, including insurance, care, handling, and transportation. Because your institution is responsible for the care of borrowed materials for as long as they are in your possession, it is best to borrow items only for a particular purpose and for a specified period of time.

TRACKING INCOMING LOANS

PastPerfect includes an **Incoming Loans** screen. Incoming loans are treated much like new accessions. To begin the process, click on the **Incoming Loans** command on the main menu.

If you have no records in Loans In, the screen will be blank. If you do have records, the last record viewed will appear on the screen. To create a new loan, click the **Add** command button at the top of the screen.

ADD A NEW INCOMING LOAN

Figure 11-1
Command
Buttons

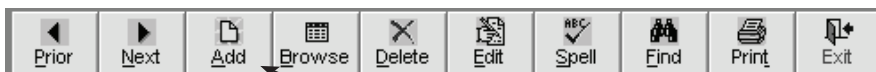


Figure 11-2
New Incoming
Loan screen

Click here to open
the New Incoming
Loan screen

Click here to modify
the Default Loan
Agreement terms.

Each incoming loan must have a unique loan number to distinguish it from other loans. The loan number may be any combination of numbers and letters up to 15 characters in length. We recommend that you use the basic two-part numbering system with the prefix "L" for creating your loan numbers. For example: L2004.1. This will give you information about the year of the loan (2004), and it tells you that this is the first loan of the year 2004. However, PastPerfect is entirely flexible and allows any loan numbering system you choose.

If you have assigned a duplicate loan number, PastPerfect will give you an alert and ask you to choose another number. PastPerfect displays the last loan number used. After you have assigned the loan number and clicked the **Add** command button, the following screen appears:

Figure 11-3
Incoming Loan
Screen

The screenshot shows the 'Incoming Loans' window with the following data:

- Incoming Loan#**: L1998.1
- Tracking#**: PMH-94.001
- Total Records**: 4 records (Active)
- Source**: Perfectown Museum of History
- Contact**: Pamela Myers, Phd., Curator of American Decorative Arts
- Address**: 3459 Main Street
- City, State, Zip**: Perfectown PA 19324
- Email / Country**: pam@pmh.org
- Web site**: pmh.org
- Credit line**: (empty)
- Purpose**: (empty)
- Phone Numbers**: Work: 610/555-6762; Home: / -; Fax: / -; Cell/Pager: / -
- Received by**: Parr, Mary L.
- Received date**: 03/01/1998
- Due date**: 12/01/2001
- Returned date**: / /
- Brief Description of Loan**: 1 - Plate Hopalong Cassidy
- Special Considerations**: Pamela Myers is the curator of American Decorative Arts at the Perfectown Museum of History.
- Restrictions**: This item may not be photographed without permission of the Perfectown Museum of History.
- Renewed by**: 11/30/2001
- Renewal date**: 11/30/2001
- Renewed until**: 12/01/2004
- Agreement signed**: 03/01/1998
- Loan Fees**: Value: 50.00
- Value**: 50.00
- Loan includes 1 catalog record**
- Table**:

Object ID	Objname	Title	Description / Summary
O L1998.1.1	Plate, Commemorative	The Hoppy Plate	Commemorative plate depicting Hopalong Cassidy on his white h
- Buttons**: View Loan Agreement, View Shipping & Insurance Information, Add Items, Edit, Delete, Return, or View Items, View Contact, View Temp Custody, View Accession, Update History.
- Status**: Record 2 of 4, Updated: 02/26/2004 10:32 PM

Fill in the name and address of the loaning institution, along with a contact name and phone number. Use the Description field to enter a short description of the items in the loan. If the loaning party provides a loan number, record it in the Tracking Number field. Then press Save.

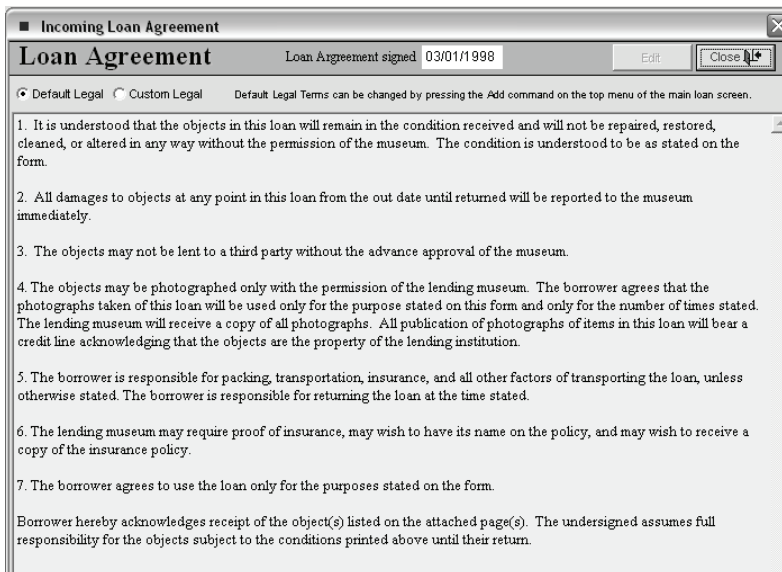
LOAN AGREEMENT, SHIPPING & INSURANCE

Now at the top of the screen are two command buttons, **View Loan Agreement**, and **View Shipping & Insurance Information**. Click on the first button to compose the legal language defining this loan. Most lending institutions will have their own forms. However, you may need your own loan agreement forms when loans are coming in from private parties.

On the screen shown in Figure 11-4, the loan agreement terms are displayed. There are two radio buttons at the top of this screen, **Default** and **Custom**. If the Default button is enabled, the loan agreement terms may not be edited from this

screen. The default terms can only be edited from the New Incoming Loan screen by clicking on **Add** at the top of the main loan screen and then **Modify Default Loan Agreement** button. Changes made to the default terms will affect all loans using the default loan agreement terms. Clicking the **Custom** radio button gives you a blank screen where you may type loan agreement terms that apply only to this loan.

Figure 11-4
Loan Agree-
ment Screen



■ Incoming Loan Agreement

Loan Agreement Loan Agreement signed 03/01/1998 Edit Close

Default Legal Custom Legal Default Legal Terms can be changed by pressing the Add command on the top menu of the main loan screen.

1. It is understood that the objects in this loan will remain in the condition received and will not be repaired, restored, cleaned, or altered in any way without the permission of the museum. The condition is understood to be as stated on the form.
2. All damages to objects at any point in this loan from the out date until returned will be reported to the museum immediately.
3. The objects may not be lent to a third party without the advance approval of the museum.
4. The objects may be photographed only with the permission of the lending museum. The borrower agrees that the photographs taken of this loan will be used only for the purpose stated on this form and only for the number of times stated. The lending museum will receive a copy of all photographs. All publication of photographs of items in this loan will bear a credit line acknowledging that the objects are the property of the lending institution.
5. The borrower is responsible for packing, transportation, insurance, and all other factors of transporting the loan, unless otherwise stated. The borrower is responsible for returning the loan at the time stated.
6. The lending museum may require proof of insurance, may wish to have its name on the policy, and may wish to receive a copy of the insurance policy.
7. The borrower agrees to use the loan only for the purposes stated on the form.

Borrower hereby acknowledges receipt of the object(s) listed on the attached page(s). The undersigned assumes full responsibility for the objects subject to the conditions printed above until their return.

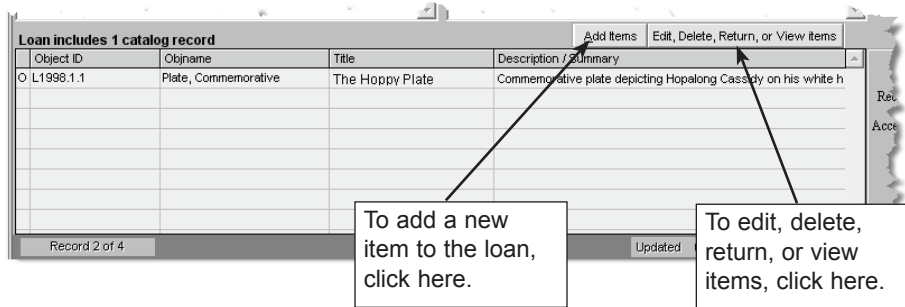
You can print or preview the loan agreement with the **Print** command button at the top of the main loan screen.

To enter information about shipping and the insurance carrier for the loan, click on **View Shipping and Insurance Information** located near the top of the main loan screen.

ADD ITEMS TO THE INCOMING LOAN LIST

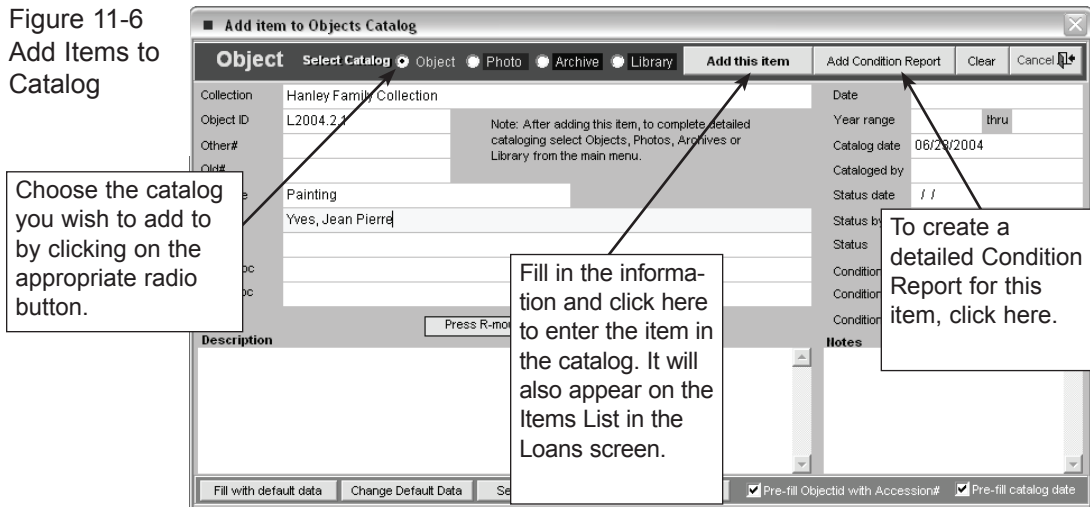
At the bottom of the Loan screen is a grid that lists the catalog records included in the loan. At the top of the grid are command buttons labeled **Add Items** and **Edit, Delete, Return, or View Items**. If some of the items loaned have been returned to the lender, there is another button **View Returned Items**, which if pressed allows you to view a list of those items.

Figure 11-5
Incoming Loan
Items List



Click on the **Add Items** command button to open the Add Items to Catalog screen. Much like entering a new accession, when you add items to a loan they will be placed in one of the four catalogs.

Figure 11-6
Add Items to
Catalog




When you press the **Add Condition Report** command button, a blank condition report screen will appear. For more information about creating a detailed condition report, see *Chapter 6, The Objects Catalog*.

RETURNING BORROWED ITEMS

You may wish to return some items while retaining others. To do this, click on the command button **Edit, Delete, Return, or View Items** located at the top of the grid listing the loan's catalog records. This will open the **Edit Catalog Record** screen shown in Figure 11-7.

Figure 11-7
Edit Catalog
Record

Object Return ◀ Prior Next ▶ Detailed Condition Report Change Catalog Delete Edit Close

Collection	Loans In Collection		Date	1953	
Object ID	L2000.1.2	Obname	Toy, Truck	Year range	1950 thru 1955
Other#	BMT - 4010	Category	9: Recreational Artifacts	Catalog date	06/20/2000
Old#		Sub-category	Toy	Cataloged by	Parr, Mary L.
Artist				Status date	06/21/2000
Title				Status by	Allen, Arthur
Home loc/Bldg	PastPerfect Museum Main Bldg		Status	OK	
Temp loc/Bldg	Main gallery exhibit		Condition	Fair	
Description			Condition date	06/22/2000	
Toy pickup truck with green painted surface and rubber tires. Bed of truck is natural silver-colored metal and has a working tailgate. Maker's mark on underbody reads "HUBLEY Kiddie Toy Lancaster PA Made in USA 452".			Condition by	Withers,Blanche	
The Hubley Manufacturing Company was incorporated in 1894 in Lancaster, Pennsylvania, and produced wonderful toys throughout its history. Early Hubley production consisted of numerous cast iron toys including various horse drawn vehicles, guns, household appliances, and more.			Loan date	06/20/2000	
Notes			Setup Multimedia links		
Hubley Toy Vehicles: 1946-1965					
The Hubley Manufacturing Company was incorporated in 1894 in Lancaster, Pennsylvania, and produced wonderful toys throughout its history. Early Hubley production consisted of numerous cast iron toys including various horse drawn vehicles, guns, household appliances, and more. With the automotive age, cars, trucks, and other transportation became their focus. This book			Image Management (1 of 3)		

Record 2 of 4

Browse through the items using the **Prior** and **Next** command buttons until you find the item you wish to return. Click on the **Return** command button at the top left of the screen. The following screen will appear:

Figure 11-8
Return Loan
Item

Return Loan item X

Returned Date
06/23/2004

Cancel

Process Return

Enter the date of the return. By default, today's date is entered. Then click here.

Returned items are deleted from their respective catalog: Objects, Photos, Archives, or Library and an abbreviated record is saved in the returned items file. To view the Returned Items list, from the main Loan screen click on **View Returned Items**.

RETURNING THE ENTIRE LOAN

When the term of the loan is completed, you will want to return the loan. Click on the **Transfer to Returned file** command button at the upper right of the loan screen. You will need to enter a Return date and press **Process Return** to complete the operation. The loan will now be moved to the Returned Loans file.

VIEWING RETURNED LOANS

The Incoming loan screen has separate modes for viewing Active, Accessioned, and Returned loans. There is also a View All mode. To change the screen view mode press the desired command button at the top right of the loans screen.

Figure 11-9
Screen View
Modes



Click on Returned to view loans that have been returned to the lender.

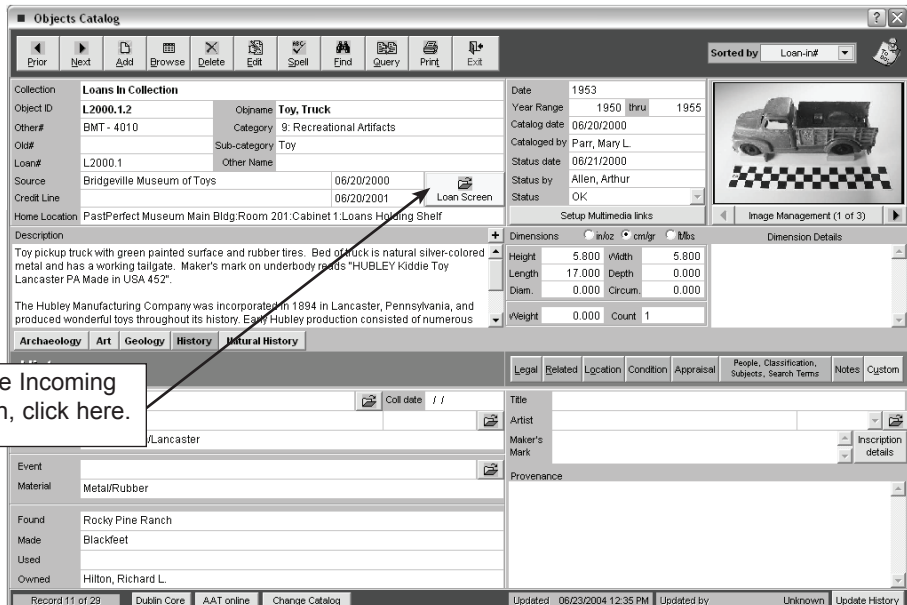
TRANSFERRING A LOAN TO AN ACCESSION

If you decide to make the loan a part of your permanent collection, you can press the **Transfer to Accession** command button. This will move all of the information to the Accession file and cancel the loan.

VIEWING LOAN ITEMS THROUGH THE CATALOGS

When you enter new items into the Loan Item list, PastPerfect places these items in the appropriate catalogs. You may view these items by going to the catalog.

Figure 11-10
Catalog
Record for a
Loaned Item



Because adding items through the Incoming Loans screen creates a limited record, you may wish to complete the cataloging process as you would for other items.

The Incoming Loans screen allows you to track every aspect of the borrowing process, from temporary custody through the eventual disposition of the materials. Whether the item is part of a traveling exhibit or is on long-term loan to your institution, meticulous record keeping is critical to the process. In the past, long-term loans were very common. However, it is not uncommon for the heirs of the original donor to approach an institution for the return of borrowed items long after the original transaction. Often, the museum staff has changed as well. This makes good record keeping extremely important.

It is good policy to review your active incoming loans periodically. Loan expiration dates should be monitored so that loans are returned on time. Often times, loans expire and are not returned or processed promptly. If a loan is to be extended, the contract must be updated and the insurance coverage extended.