Specify Interactions Tab- Creating a Loan

Tracking loans is important not only so that we know where our specimens are, but also so that we can have a record of how much use our collection gets. These numbers are vital to supporting grant requests, as well as internal tracking.

The steps to creating a loan are as follows:

- create the loan record in Specify
- print the loan labels
- pull the specimens, leaving the in-house loan label in the drawer
- pack the specimens for shipment, include 2 copies of the outgoing loan report
- file one loan report in the loans out filing cabinet
- print out the shipping summary and add that to the file.

The steps for a return loan are as follows:

- Unpack the returned loan and lay out specimens near a computer
- mark the specimens 'returned' in the database
- print out the return loan invoice, file it with the loan paperwork
- put specimens back where they belong, and retrieve the in-house loan labels as you go.

The process is fairly simple. Please read this whole document before attempting to preform the tasks listed herein.

Here are the basic steps:

- Run a simple query to determine the last loan number used.
- Select the Interactions Tab from the top of the Specify interface
- Most often, you will have a list of numbers or a record set to base the loan on, so you will use the regular loan form (red arrow).
  - Rarely, uncatalogued material will be sent out. In these cases, use the 'Loan w/o Preps' (blue arrow), and Specify will take you straight to the this form.
- For standard loans, you will be asked to choose how you want to enter the catalog numbers of the items being loaned out. Record sets are the easiest to work with, but if you don't have one made, or if you already have a list of properly formatted numbers, the 'Enter Catalog Numbers' option is best.
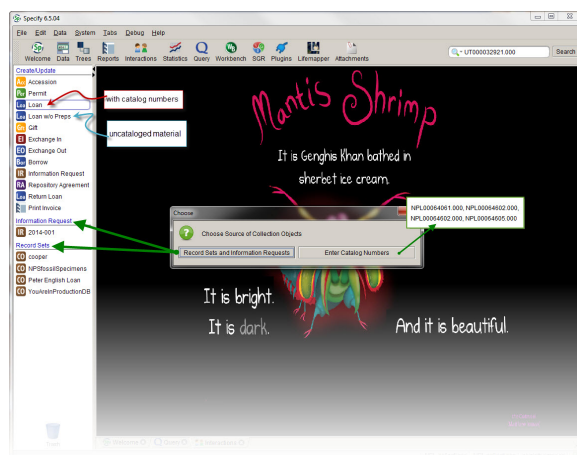 - Be aware that these numbers must have a comma separating them

Loan Paperwork:

If you are creating this loan from a record set, you will be prompted to pick which set you are using. You must click on the set and hit OK even if there is only one record set available.

For entering a list of catalog numbers, a window for pasting/typing the catalog numbers will appear. All parts of the catalog number must be included (Catalog Acronym, number, separator (decimal) and suffix. Catalog numbers must be separated by a comma.
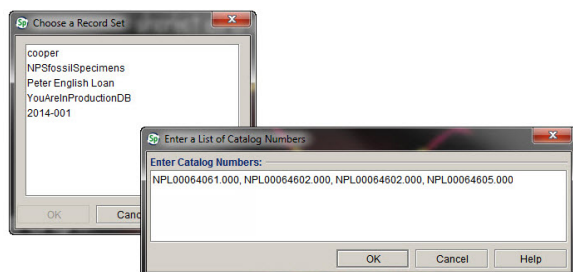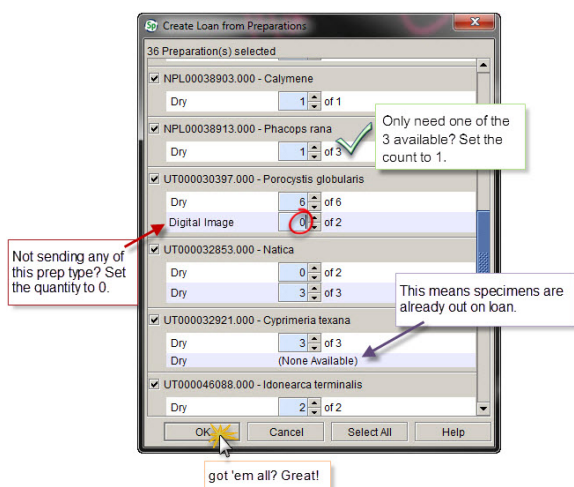
3 copies of the NPL Loan Invoice. Two on white paper, one on pink.

- One pink and one white go to borrower.
- Remaining report goes into loan folder.

On Loan Labels printed on white acid free paper. There are 2 columns.

- In-house label stays in the drawer.
- Specimen label replaces the original labels when the specimen is sent off.

Choose a Record Set
cooper
NPSfossilSpecimens
Peter English Loan
YouAreInProductionDB
2014-001

OK   Cancel

Enter a List of Catalog Numbers
Enter Catalog Numbers:
NPL00064061.000, NPL00064602.000, NPL00064602.000, NPL00064605.000

OK   Cancel   Help

This next window requires careful attention to detail. Because we often have multiple specimens with one catalog number, as well as multiple preparations of a cataloged specimen; we need to keep careful track of what is going out, how many, and what kind of specimen it is.

Create Loan from Preparations
36 Preparation(s) selected

☑ NPL00038903.000 - Calymene
Dry   1 of 1

☑ NPL00038913.000 - Phacops rana
Dry   1 of 3
Only need one of the 3 available? Set the count to 1.

☑ UT000030397.000 - Porocystis globularis
Dry   6 of 6
Digital Image   0 of 2

Not sending any of this prep type? Set the quantity to 0.

☑ UT000032853.000 - Natica
Dry   0 of 2
Dry   3 of 3

This means specimens are already out on loan.

☑ UT000032921.000 - Cyprimeria texana
Dry   3 of 3
Dry   (None Available)

☑ UT000046088.000 - Idonearca terminalis
Dry   2 of 2

OK   Cancel   Select All   Help

got 'em all? Great!

From here, Specify launches you into the Loan form. Fields with **bold** titles are required fields. Loan date and due date autocomplete with today's date, and 6 months from today. Shipment date also autocompletes.

Finishing the Loan

Once all the information has been added, just it save. Do not use the option to generate invoice on save, as this does not allow you to filter by agent role, resulting in specimen information being repeated for each of the agent roles.

Once the document is saved, close out the loan tab. You are now ready to create the reports and labels.

Some important points to note

Research (both off and on campus) loans and Destructive have an additional requirement. Specimens out on this type of loan will have an IGSN number assigned to them.

Filling this field out properly allows us to easily find out how many times we loaned specimens for outreach events, exhibits and so on. The option are as follows:

<u>Destructive testing</u>

- making thin sections, drilling out small cores, dissolution in an acid bath are all destructive testing, even though the level of destruction is different. These specimens will need their Collection Object records updated when they come back, or we receive the data set.

<u>Educational</u>

- some of the courses at UT use fossils from the teaching collection. When these loans go out, one of the agents is set to 'other', and the abbreviation of the course gets put into the name. This is also the loan type used for outreach talks.

<u>Exhibit</u>

- The Texas Memorial Museum is just one of the many organizations that have our specimens on display. The default 6 month loan is edited to reflect more long-term dates.

Other

- material that is sent out for appraisal, commercial interests or any other reason other than the ones listed in the drop down menu should be put into this category. In the remarks field, put a short note describing the circumstances.

Research

- most of the material NPL loans out falls under this category. When a researcher borrows material for study, and does not need to do any destructive sampling, this is categorized as a general research loan.

Research on Campus

- in cases where borrowers don't need to remove material from the JJ Pickle campus, this is the loan type used. NPL hosts visiting researchers as well as adjunct researchers who use the collections for research, but do all the photographing, measuring and describing while at PRC 122.

Describe any additional permissions or caveats. If a specimen is allowed mechanical prep (with air scribe, air abrasion etc.,) this should be clearly stated. Also note conditions- like 'SEM specimens should be returned with mounting adhesive (carbon tape ONLY) still intact. NPL will be responsible for removal of glues and residues'. Use clear, concise and complete sentences. Any text saved to this field is automatically inserted into the printed loan invoice, and becomes part of the record for that loan.

This is where you would describe any additional information about this loan- "Will let us know by X date if an extension is needed", "Loan duration is for 5 years, OK'd by the Collection Manager". Details like this are important to know, but don't really belong in the Special Conditions box.

This is also where you'd make comments about partially returned loans, or other circumstances that happen in the return of the loan.

For each person associated with the loan, they have to be assigned a role. NPL requires that the Borrower be named, as well as the NPL staff or volunteers who processed the loan. If a single person handled multiple roles, list that person as 'preparer' and make a note in the remarks.

When a loan is for a class, one of the loan agents will be the name of the class (its abbreviation and number). If you are not sure of which class is associated with the loan, ask the collection manager. Also, the professor running the class will be listed as the borrower.

NPL allows students to borrow material under the sponsorship of their adviser or mentor. In these cases, the borrower is the adviser. The name of the student is recorded also, and given the appropriate role. Reports and labels will have to have the sponsors name on them, not the borrower.

▼ Loan Agents ✚ ━

Agent: Kauffman, E ▼ ✏ ✚ 🔍   Role: Sponsor ▼

Remarks: [   ] 🖼

▼ Shipments ✚ ━

▼ Loan Agents ✚ ━

Agent: Kennedy, J ▼ ✏ ✚ 🔍   Role: Borrower ▼

Remarks: [   ] 🖼

|◀ ◀   2 of 2   ▶ ▶| ✏ Grid ▼

▼ Shipments ✚ ━   Go to Next Loan Agent

▼ Loan Agents ✚ ━

Agent: Kauffman, E ▼ ✏ ✚ 🔍   Role: Sponsor ▼

Remarks: [   ] 🖼