

Extending a loan

When a loan comes due, alert the Collection Manager or Curator. They will decide if a Recall or Extension letter is to be sent.

If an extension is to be offered to the borrower, you must first edit the loan record. We edit the record first for two reasons- first, the decision to extend the loan is made as an internal NPL decision. The borrower can reject the extension offer and send the material back. Second, the paperwork will not display correctly if things are done out of order.

Things to know:

[editing a record](#)

[running a simple query](#)

Open the loan record.

Move the Current due date (A) into the Original due date (B) field. In the Current Due Date field, enter the extended loan date (the Collection Manager or Curator will specify this for you).

The screenshot shows a loan record form with the following fields and annotations:

- Loan number: 00511
- Purpose of loan: Research on Campus
- Loan date: 07/13/2015
- Current due date: 07/13/2015 (labeled with a red 'A')
- Extension granted:
- Original due date: 07/13/2015 (labeled with a red 'B')
- Special conditions: Specimens are to be whitened with Ammonia (labeled with a red 'A')
- Remarks: (empty)
- Loan Return: 07/13/2015 (labeled with a red 'C')

Save your edits and close the record.

Open the Reports tab and select the Loan Extension report. In the window that pops up, enter the loan number and set the agent role to borrower. Click OK and Specify will compile the report.

The screenshot shows the Reports tab with the Loan Extension report selected. A dialog box titled "Report Settings" is open, showing the following fields and values:

Field	Not Operator	Criteria	Sort
Role	<input type="checkbox"/>	= Borrower	
Loan number	<input type="checkbox"/>	Contains 00511	
Loan date	<input type="checkbox"/>	=	
Current due date	<input type="checkbox"/>	=	
Purpose of loan	<input type="checkbox"/>	=	
Species	<input type="checkbox"/>	Contains	
Genus	<input type="checkbox"/>	Contains	

A callout box with a blue border contains the text: "Remember, setting the Agent Role to **Borrower** is very important! The report takes this information and uses it to fill in the correct name in the opening salutation."



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Shelburne, Chase, regarding NPL Loan 00511.
 The following specimens are available for loan renewal. If you would like to renew, the new due date will be 10/10/2019.

NPL00503288.000
 Trepostoma
 43 specimen(s)

NPL00505163.000
 Colaptes auratus

Loan conditions of the original agreement still apply. If you do not intend to renew this loan, please pack and ship specimens for return to NPL. By accepting this extension, you are agreeing that all specimens are still in your possession and these specimens are in good condition. If there are any changes to the specimens, please note this in the "condition" field. If an extension is required, please print out and sign this document and return to us post, fax or email. If responding via email, please scan and attach the filed out document.

Thank you,

Ann Molinuev
 (512) 232-5384

Save the file as a PDF into the DocLib /Loans/(loan you are extending). If the Collection Manager has asked you to contact the borrower, attach a copy of this letter to an email addressed to the borrower. Emails regarding official lab business must be sent from your UT email. Lastly, print out one copy and give it to the Collection Manager.