

# 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.

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' form with the following fields and annotations:

- Loan number:** 00511
- Purpose of loan:** Research on Campus
- Loan date:** 01/13/2015
- Current due date:** 07/13/2015 (Annotated with a red circle and letter 'A')
- Original due date:** (Empty field, annotated with a red circle and letter 'B')
- Extension granted:** (Empty checkbox)
- Special conditions:** Specimens are to be whitened with Ammonia (Annotated with a red circle and letter 'A')
- Remarks:** (Empty text area)
- Loan Return:** (Empty checkbox)
- Current due date:** 10/10/2015 (Annotated with a red circle and letter 'C')
- Original due date:** 07/13/2015

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 in the software interface. The 'Loan Extension' report is selected. A red arrow points from the 'Loan Extension' report to the 'Report Settings' dialog box.

**Report Settings**

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


OK Cancel Help

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.

Things to know:

[editing a record](#)

[running a simple query](#)



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Steuburn, 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 10/10/2015.

NPL00501028.000  
Preparator  
43 specimen(s)  
Condition:

NPL00501028.000  
cshattuck@jpick

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 filled out document.

Thank you,

Ann Moloney  
(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.