



– HOW TO CREATE LOAN RECORD IN TMS – INSTRUCTIONS & STYLE GUIDE

The Walters Art Museum maintains records for incoming and outgoing loans in TMS in the Loans Module.

Before you begin:

Loan Prefix Definitions:

OL = Outgoing Loan: Outgoing loans to other institutions for exhibition, conservation, etc.

TL = Temporary Loan: Temporary deposit of objects which are on loan for a Gift/Bequest Consideration, Purchase Consideration, Examination Study, or General Property Transfer

IL = Incoming Loan: Objects entering WAM for a Special Exhibition, Focus Show or Long Term Loans

When creating a new loan record, you must select the appropriate prefix.

How to find the next available loan number:

- 1) From the first Query screen in the Loan Module, type in loan *prefix.year.** [example: IL.2012.*] in the Loan Number box. This will search for all loans in that year.
- 2) Go to the last loan and note the next open loan number.

Navigating the Loans Module:

A Loan is broken down into **nodes** on the left side of the screen. To add information to any of the nodes, right click on the node and an “add” item will appear to allow you to add information.

To create a new loan:

- 1) Navigate to Loan Module.
- 2a) Select New Entry from the Loan Query screen.
Or,
- 2b) If you are already in the module, click on File > New > Loan.
- 3) Complete this Basic Loan Info in the pop-up window and click next. **Note: all of these fields are required.**

< COMPLETE THE DATA ENTRY ASSOCIATED WITH THE LOAN RECORD. >

Fields marked with an asterisk (*) are required.

LOAN NODE

Loan

- Exhibition
- Loan Objects
- Shipments

When you select the main Loan Node on the left, you are presented with data entry tabs and fields on the right.

The static area on the top of the loan record gives you basic information about the loan and connected exhibitions

GENERAL TAB

* Loan Number

Enter “IL.year.#” or “TL.year.#” or “OL.year.#”

Loan Mnemonic

Auto generated

***Overall Loan Status**

This status will change as the loan proceeds. Select the appropriate status:

- Active: Board Approved OL and other loans in building including TLs
- Approved: For loans approved by lender
- Board: Loans ready to go to Board for approval
- Canceled: Canceled Loans
- Canceled (Moratorium)
- Closed: Complete Loans
- Denied: Denied Loans
- Development: For loans connected to exhibition checklists under development
- Proposed: New Outgoing Loan or Proposed Incoming loan
- Returned to Owner: (No longer in use)

***Loan Purpose**

Select Loan Purpose that describes the reason for the loan.

- Bequest Consideration (TL)
- Conservation (OL)
- Exam/Study (TL)
- Exhibition (OL or IL)
- Gift Consideration (TL)
- Long Term (OL or IL)
- Promised Gift (IL)
- Purchase Consideration (TL)
- Sale Through Auction (OL)
- Temporary Deposit (TL)
- Transfer of Property (TL)

Loan Type

Not in use

***Requested By**

OL: Enter Institution name requesting loan

***Date Requested**

OL: Enter date from formal loan request

Request Addressee

OL: Last name of person to whom the formal request letter was addressed.

Date Approved

Not in use

***Loan Begin Date**

TL: Enter date object enters the building

IL: Enter first day of installation or exhibition opening date

OL: Enter date 3 weeks before start of 1st venue (always a Monday)

***Loan End Date**

TL: Enter date when loan is closed (accessioned or returned to lender)

IL: Enter end date of exhibition or last date of deinstallation

OL: Enter date 3 weeks after close of last venue (always a Friday)

***Loan Date Qualifier**

OL: if dates of loan are not formalized, enter "dates approx." Remove when final loan dates are confirmed.

Original Loan End Date

Not in use

***Exhibition Begin Date:**

IL & OL: Enter starting date for first venue

*** Exhibition End Date:**

IL& OL: Enter end date for last venue

Display Qualifier:

Not in use

Loan Renewal Date:

IL, TL, OL: Enter renewal date (use for long term loans only)

Remove date when loan is closed

***Remarks:**

This field is used to track the progress of the loan until approval by board or loan is turned down

New loan: Enter "New Loan Request"

Loan which has gone to Loan Committee: Enter "Ongoing" and actions notes

Loan which is ready for the Board: Enter "To (month of boarding meeting and year) Board MTG"

Loan Canceled or Denied: Enter "Canceled" or "Denied"

All other actions are recorded with date and action step.

Lender/ Borrowers Tab

*** Primary Lender (Constituent):**

Enter in the primary lender/borrower of the loan

Loan Agreement Sent:

Not in use

***Lender Address:**

Select the primary lender address

Loan Agreement Received:

Not in use

Contact:

Enter the name of the contact for the loan

Constituent Module:

See [constituent data entry style guide](#)

Constituent Data Entry for Loans:

▪ Name: Enter in native language if provided. English translation and other names should be added to Alternate names.

▪ Address: Must be entered for reports to run

***Loan-Related Constituents:**

Enter constituents related to the loan. This could be multiple organizers, lenders, borrowers or Registrars.

Only enter a constituent once, marking it with its highest role.

Loan Conditions:

Not in use

Insurance/ Indemnity Tab

Not in use

Notes Tab

Description:

Not in use

***Text Entries:**

OL: Curators Recommendation:

Use for loan summary report to be completed after written recommendation has been supplied by the curator. Send "Loan Date Approval-CUR" to the curator to confirm the object information and to receive the recommendation. After recommendation has been submitted at Text Entry

OL: 2.05 Display Replacement(s)

Use for loan summary report to indicate replacement plans for objects being removed from the galleries.

OL: Other text entries can be used to track loan tasks.

Media Tab

OL: Request letters to be attached.

File naming: RG_loan#_Requestletter_YYYYMMDD.pdf

Statuses Tab

Not in use



***EXHIBITION NODE**

All Exhibition related loans (OL or IL) must be connected to an exhibition in TMS.

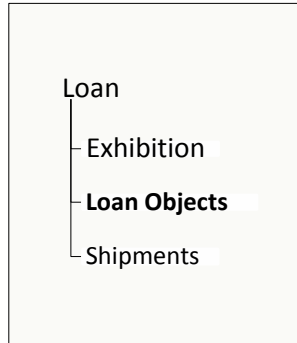
Every outgoing collection loan (except for conservation or disposal loans) needs to be linked to an exhibition.

See [exhibition style guide](#) for Exhibition related data entry.

Connecting a loan to a previously created exhibition:

- Select "Exhibition" from the menu
- Search for exhibition by keyword
- Select the correct exhibition from list
- Loan Tab: Click on "Add"
- Select "look up exiting loan"
- Click "Next"
- Loan Number: enter loan number (example: IL.year.#)

- Click "Get Suggestions"
- Highlight the correct loan from the list
- Click on "Select"
- Venue tab: to confirm that objects are included/excluded from appropriate venues



Not in use

*LOAN OBJECTS NODE

General

Not in use

Valuation and Insurance

Not in use

Conditions

Not in use

Fees and Billings

Not in use

Notes

*SHIPMENTS OBJECT NODE



See [Shipment Style guide](#)

*LOAN-RELATED DATA ENTRY TO BE COMPLETED IN THE OBJECT MODULE

Object Module:

*Text Entries (on Notes tab):

Each entry needs to be entered separately [Loans, Conditions, Crating Requirements, Handling Requirements, and Mount and Crate Information]

See Exhibition style guide for how to enter this data.

Additional Data entry for TL objects

Registration > Incoming menu for TLs:

Object/Depositor tab:

Object Incoming Purpose [Bequest Consideration; Examination Study; Exhibition: Long Term; Exhibition: Short Term; Gift Consideration; Purchase Consideration; Sale; Year-End Gift Consideration]

Receiving/Custody tab:

Actual Arrival and Despatch [date of arrival]

Shipping tab:

Shipping Method [Air Freight; Hand Carry; Hired Truck; WAM truck]

Courier in [name (free text) of courier]

The insurance information is entered in the Shipment record on the Documentation tab, Insurance Remarks.

See [Shipment Style guide](#) for more information.

Valuation information is entered in the Registration> Valuation & Insurance menu.

How to:

Remove an object(s) from a loan:

- Enter the Loan module
- Type in the Loan Number
- In the Loan Tree expand Loan Objects
- Right click on object to be removed
- Select “remove object”
- Prompt will ask “Would you also like to remove selected Objects from the Exhibitions that include this Loan?”
- Click “yes”
- Go to the Notes on the General Tab and explain that the object has been removed from the loan and the reason.

Cancel or turn down an outgoing loan:

- Enter the Loan module
- Type in the Loan Number
- On the Loan “General” tab: change Overall Loan Status to “Canceled” or “Denied”
- Notes Tab, Remarks field: change ONGOING or NEW LOAN REQUEST to DENIED or CANCELED.
- Go to linked Exhibition
- General Tab: Change Department to “Canceled”
- Exclude the object(s) from each venue
- Expand venues node
- Highlight the included objects
- Drag to Exclude

(This needs to be done for each object in each venue)