

4

TEMPORARY CUSTODY

WHAT IS TEMPORARY CUSTODY?

An accession is defined as one or more objects acquired at one time from one source constituting a single transaction between a museum and a source (Burcaw 1997).

When items come into your museum, you may not wish to accession them right away. Many institutions have a collections committee that meets regularly to consider new acquisitions. Other organizations must hold potential donations until a curator or other expert can examine them. For many reasons, possible donations may be held for consideration in a state of temporary custody. This allows your institution to analyze the proposed collection items to determine if they conform to your mission statement and can be cared for properly by your institution.

The Temporary Custody catalog in PastPerfect is designed to help you record and retrieve source information and to create temporary custody documents. PastPerfect's Temporary Custody screen records important information about incoming items and their source, prints a receipt for the potential donor, and tracks the items prior to your museum's decision to accession the items. Temporary Custody also tracks the eventual disposition of the items. If you decide to accept the donation, you may convert the Temporary Custody receipt into an Accession record. If you choose to return the items, add the date and method of return to the receipt, and remove it from the Active file.

For occasions when you wish to accession items immediately, bypass the Temporary Custody procedure and enter source information directly in the Accession screen.

This chapter explains how to complete and use the Temporary Custody catalog.

THE BASIC STEPS TO ACCEPT ITEMS INTO TEMPORARY CUSTODY

1. Launch the PastPerfect program.
2. Click on the **Temporary Custody** button in the **Activities** menu.
3. Add a new Temporary Custody receipt.
4. Complete the form by entering data in each field.
5. Click the **Save** button to save the entry.
6. Print a **Temporary Custody Receipt** report, **Thank You Letter** and envelope.
7. Accession, Loan, or Transfer items to the Returned File.

To launch the program, please double click on the PastPerfect icon on the Windows desktop, then click once on **Temporary Custody** in the **Activities** menu to open the Temporary Custody screen.

If this is the first Temporary Custody receipt entered, the screen will display blank data fields. If you have already entered some receipts, the last viewed receipt will be displayed. Use the **Browse** button or the **Find** button to retrieve a particular receipt. To enter a new receipt, click the **Add** button.

ADD A NEW TEMPORARY CUSTODY RECEIPT

Click the **Add** button at the top of the screen. The **Add New Temporary Custody Receipt** screen, shown in Figure 4-1, will appear. Assign a unique receipt number to this new Temporary Custody receipt. Receipt numbers may be up to eight digits long, but cannot include characters or punctuation. PastPerfect recommends assigning sequential numbers. Should you choose to accession the items later, you will be asked to assign an accession number in accordance with your museum's numbering policy.

After assigning the receipt number, we recommend using the **Select Donor from Contacts File** button to choose your source from the Contacts file. If the donor is not listed, exit from Temporary Custody and go to Contacts to add the donor. When you use the **Select Donor from Contacts File** feature, the source's information will be automatically entered into the Temporary Custody receipt. This saves you from entering data twice and links the Contact record with the Temporary Custody receipt.

Figure 4-1
Add New Temporary Custody Receipt screen

PastPerfect enables you to save time by pre-filling data when adding new records. Under **Fill New Record Options**, if **Fill with Current Data** is checked, PastPerfect will copy all information, including the source's name and address, from the last viewed Temporary Custody record into the new receipt. Check this box *only* if you have not selected a donor name from the Contacts file and *only* if the donor for the new receipt is the same as the donor on the screen showing behind the Add screen.

If the **Fill Received Date with Today's Date** is checked, the program will fill the new record's **Date Received** field with today's date.

When you click the **Add New Receipt** button, PastPerfect will verify that the assigned receipt number has not already been used. If it has, you will receive a message asking you to assign a different number. When the receipt number is accepted, a new, blank record will appear. You will be in **Add Mode** and able to complete the record's fields.

To save your data, please click **Save** at the top of the screen. If you do not want to save your entry, click **Cancel**. Once you have saved the initial record, you can click **Edit** to change or add to the entered information.

Temporary Custody

Record View —

- View All Receipts
- View Active
- View Accessioned
- View Loaned
- View Returned

More Screens —

- Thank You Letter
- Add/View Additional Donors
- Update History

Actions —

- Accession or Loan
- Transfer to Returned File

Temporary Custody Receipt No. 1 Date Received 01/04/2008

Source Packwood, Neil Jr.

Contact

Address 12343 Elmwood Drive

City, State, Zip Perfectown PA 19822

Email, Country paker@yahoo.com

Home Phone 610/555-2356 Fax 610/555-6788

Work Phone 610/555-6789 Ext 210 Cell/Pager 610/555-8473

Website

Credit Line

Where Acquired Inherited from Neil Packwood Sr.

Who Acquired Family heirloom collection When Acquired 1900-1915

Received by Lufkin, Joseph Received as Gift

Return by 01/09/2009 Returned 06/21/2004

Interim Location

Accession#

Incoming Loan#

ID#	Name
Donor 1	Packwood, Neil Jr.
Donor 2	
Donor 3	
Donor 4	

Dataset

Field 01

Field 02

Field 03 / /

Field 04

Field 05

Field 06

Description

1 Engagement Ring, 19th century diamond
 1 Book, Bread from God 1901
 1 Letter Ethel Gregory to Neil Packwood Sr. 1888
 1 Photo Ethel & Neil Packwood Sr. wedding 1902

Notes

The Packwood family has been prominent in the Perfectown area since the Revolutionary War Period. The family patriarch, Horace W. Packwood, was a pioneer in the area, receiving a land grant in 1770. Neil Packwood Sr. was a Chester County Justice of the peace from 1875 to 1915.

Record 14 of 22 Updated by Unknown Updated 11/17/2009 11:50 AM

Figure 4-2 Completed Temporary Custody screen

NOTE New Temporary Custody receipts will always be entered and displayed in the Active file. Using the Actions buttons in the Sidebar on the left, Active receipts may be Accessioned, Loaned, or Transferred to the Returned File. Buttons in Record View allow you to view receipts in just one of the files, Active, Accessioned, Loaned, or Returned, or to view all receipts. A green data light will appear on the button when there are records to view.

If you chose your donor from the Contacts file when adding your receipt, the **Donor ID#** and **Name** fields will be filled in with the Contact ID# for that contact. You may view the Contact record by clicking the file folder icon button to the right of the name.

NOTE

If you created your Temporary Custody record before adding the donor in the Contacts file, you can still link the Contact record to the existing Temporary Custody record. Go into the Contacts file and note the Contact ID# for the donor, then edit the Temporary Custody record. You will create the link by entering the Contact ID# in the Donor ID# field.

The Temporary Custody screen includes 6 custom fields, which you may use if you have information that does not fit in the standard fields. By default, these fields will be called Field 1, Field 2, Field 3, Field 4, Field 5 and Field 6. Fields 1 and 2 are character fields, Field 3 is a date field, Fields 4 and 5 are numeric, and Field 6 is an unlimited memo field. You may rename the fields by going to the Main Menu | Setup | Custom Fields | Temporary Custody.

PRINT THE TEMPORARY CUSTODY RECEIPT

Once you are satisfied with the receipt, you can preview or print the **Temporary Custody Receipt** report using the **Print** button at the top of the screen. The **Print Temporary Custody** screen also has options for printing this receipt's thank you letter and envelope, as well as a blank receipt. The blank receipt may be printed and filled out by hand.

Figure 4-3
Temporary
Custody
Receipt

Receipt No. 1

Temporary Custody Receipt

PastPerfect Museum, 312 Main Street, Pastville, PA 10234 425/555-1256

This is to acknowledge receipt of the items listed below by the PastPerfect Museum from:

Name: <u>Packwood, Neil Jr.</u>		Date: <u>01/04/2008</u>
Address: <u>12343 Elmwood Drive</u>		
City: <u>Perfectown</u>	State: <u>PA</u>	Zip: <u>19822</u>
Work#: <u>610/555-6789 Ext</u>	Home#: <u>610/555-2356</u>	Fax#: <u>610/555-6788</u> Cell#: <u>610/555-8473</u>
Website: _____		Email: <u>paker@yahoo.com</u>

The items listed below are left in the custody of the PastPerfect Museum to be considered as:

An unconditional donation. The Museum reserves the right to keep, lend, or otherwise dispose of the donated material.

To be considered for acquisition.

For identification. Does not constitute an authentication; will not include appraisals. Museum reserves the right to photograph.

For other. Please specify _____

Disposition if not accepted for accession:

The **Temporary Custody Receipt** may be customized by going to the Main Menu | Reports | Temporary Custody | Temporary Custody Receipt | Custom Layout 1 or 2 | Modify Selected Layout. Please see *Chapter 19 - Advanced Report Modifications* for more information about editing layouts. The name and address of your institution that prints on the receipt may be changed by going to the Main Menu | Setup | Collections | Temporary Custody.

On the printed receipt, check the appropriate box to record the museum's reasons for holding the items in temporary custody, as well as the method of disposal, should the museum decide against accessioning the items. You may want to record the same information in the Temporary Custody screen's **Notes** field or in its user defined fields. Please be sure both the donor and the receiving agent sign the receipt. Finally, make a copy for the donor to keep.

PRINT THE TEMPORARY CUSTODY THANK YOU LETTER

You may also want to print a thank you letter or cover letter for the receipt. To edit or print the letter, click on the **Thank You Letter** button in the **More Screens** section in the Sidebar on the left. This will launch your computer's MS-Word program and enable you to personalize the letter for this receipt as well as print the letter and accompanying envelope. See Figure 4-4. You may print a Thank You Letter for up to four different donors. When finished, use the **Close** button at the upper right to return to the Temporary Custody screen.

The Thank You Letter is generated based on the data you entered on the Temporary Custody screen and the default letter text. To modify the default letter text, go to the Main Menu | Setup | Collection | Temporary Custody. If you have made modifications to the default letter or the Temporary Custody record, click the **Rebuild Letter** button on the Temporary Custody Thank You Letter screen to update the letter with those changes. Please see *Chapter 22 - Letters, Labels & Emails*, for more information about working with letters.

TIP

Not all printers are capable of printing envelopes. For those that are, different paper feeds may require you to adjust the envelope settings. To adjust the settings, please go to the Main Menu | Reports menu and select Temporary Custody | Thank You Letter Envelope | Custom Layout 1 or 2 | Modify Selected Layout.

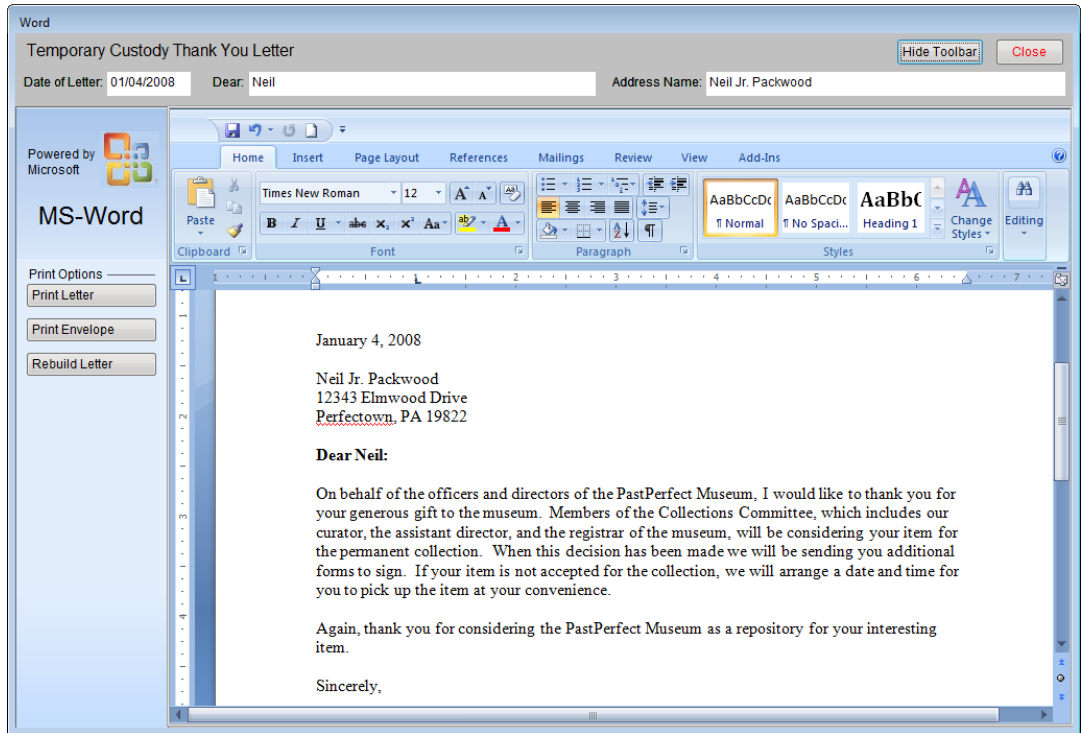


Figure 4-4 Temporary Custody Thank You Letter

When you are finished with the receipt, exit the Temporary Custody screen by clicking the **Exit** button at the top of the screen. It will remain in the Active file until you initiate the next step - returning or accessioning the items.

ACCESSION, LOAN, OR RETURN THE ITEMS

The next step depends on whether the museum decides to accession the items held in Temporary Custody, keep them temporarily as an incoming loan, or return or dispose of them. Please find the receipt by using the **Find** button or **Browse** button. You can find a particular receipt by the receipt number, donor (Source), or type of acquisition (Received as, i.e., donation, purchase, exchange, etc.).

Another way to find receipts is to click **Browse** at the top of the screen. A list of Temporary Custody receipts will appear. Right click on the receipt you wish to

view, or left click on the receipt to select it then press the **Enter** key on your keyboard.

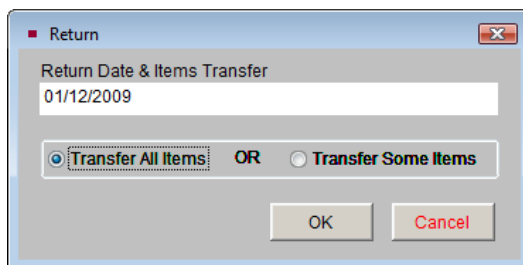
To exit the Browse screen without choosing a record, just click the "X" in the upper right corner of the screen or press the **Esc** key on your keyboard.

Return Items

If items are to be returned or disposed of without becoming a loan or entering the permanent collection, click the **Transfer to Returned File** button in the **Actions** section on the Sidebar.

The **Return** screen will appear. In the field below **Return Date & Items Transfer**, please enter the return date. You will then be asked if you plan to **Transfer All Items** or **Transfer Some Items**. If you select Transfer All Items, the record will be stored and displayed in the Returned file.

Figure 4-5
Temporary
Custody Return
screen



Transferring Some Items to the Return File

Selecting **Transfer Some Items** and clicking **OK** will bring up the **Partial Return** screen. This screen, seen in Figure 4-6, allows you to choose which items you wish to keep and which items you wish to return to the donor. A list of all items in the description of your Temporary Custody receipt will appear in both columns. If you plan to keep a specific item or items, remove those items from the "Description of Items Returned" column. For items you plan to return to the donor, remove those items from the "Description of Items NOT Returned" column. In the end, both columns should no longer contain the same items.

Using this screen will create an additional record to track the returned item(s). The returned item(s) will be given the temporary receipt number plus point one (.1). The original temporary custody receipt retains the original receipt number but no

longer shows the returned items on the receipt. The items you plan to keep will need to be accessioned or accepted as an incoming loan.

Figure 4-6
Temporary
Custody
Partial Return
screen

NEW ACCESSION OR INCOMING LOAN SCREEN

Should your museum agree to accept the items into the collections, you will click on the **Accession or Loan** button in the **Actions** section on the Sidebar. A screen labeled **New Accession or Incoming Loan** will appear, beginning the accession (or loan) process. Enter the accession or loan number and choose **Transfer All Items** or **Transfer Some Items**, then click **OK**.

If you selected **Transfer All Items**, the program will automatically create the new Accession or Incoming Loan record. For Accessioned records, the next screen will be the **Update Donor's Name** screen. This enables you to specify the source's name in the Deed of Gift form, Thank You Letter address, and Thank You Letter Dear field. Then you will see the new Accession or Incoming Loan screen where you can click **Edit** to enter additional information. The associated Temporary Custody record will be moved from the Active file to the Accessioned or Loaned file.

If you select **Transfer Some Items** and click **OK**, the **Partial Accession or Incoming Loan** screen appears. All items will appear in both the **Description of Items Accessioned/Loaned** and **Description of Items NOT Accessioned/Loaned** col-

umns. For the items you plan to keep, please delete them from the “NOT Accessioned/Loaned” column. For the items you plan to return, please delete them from the “Accessioned/Loaned” column. Once you click **OK**, you will begin the Accession or Loan process. The items you plan to return will still be in the active Temporary Custody record, and you will need to transfer them to the returned file to complete the temporary custody process.

If you wish to cancel the transfer and return to the Temporary Custody screen, click on the **Cancel** button.

MULTIPLE DONORS

You can record information for up to three additional donors for a Temporary Custody receipt. A separate receipt and thank you letter may be printed for each donor.

To add another donor, click on the **Add/View Additional Donors** button in the **More Screens** section at left. Click **Add from Contact File** to select a donor from your Contacts database or type the donor information. If you add an additional donor, a green data light will appear on the **Add/View Additional Donors** button to indicate there are additional donors for this receipt.

The screenshot shows a software window titled "Other Temporary Custody Donors" with a close button in the top right corner. Below the title bar are "Edit" and "Close" buttons. The main area is divided into sections for "Donor #2" and "Donor #3".

Donor #2 section:

- Buttons:** "Add from Contact File", "View Contact File", "Print Receipt & Thank You Letter".
- Contact ID#2:** 27
- Source:** Caliber Software, Inc.
- Contact:** Henry Hanover
- Address:** 1254 Pomeroy Ave.
- City, State, Zip:** Pastville PA 19345
- Email, Country:** hanover@caliberssoftware.com
- Website:**
- Phone Numbers:**
 - Home#: 000/555-7687
 - Work#: 000/555-6767
 - Fax#: 000/555-8900
 - Cell/Pager: 000/555-9000

Donor #3 section:

- Buttons:** "Add from Contact File".
- Contact ID#3:**
- Phone Numbers:**

Figure 4-7 Other Temporary Custody Donor screen