Manual DaRWIN - Loans

Data Research Warehouse Information Network – Collection management system
developed by and for the Royal Belgian Institute of natural sciences

English
Version

Table of content

1. INTRODUCTION

This manual hopes to be an aide in the insertion of data regarding the management of loaning collection pieces within the DaRWIN application. The term loan is applicable for both scientific loans as loans for exhibitions.

The manual was written as a help for both the DaRWIN encoder as DaRWIN collection management profiles.

Over the first chapters you will see how to insert a new loan by means of screenshots. Next, you will learn how to find an existing loan and how to print it.

For information on how to access and insert specimen information, we would like to refer you to the general DaRWIN manual
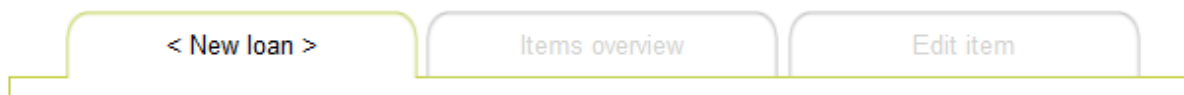http://darwin.naturalsciences.be/help/DaRWIN_FR_2014.pdf

At present this general manual is, unfortunately, only available in French.

2. Inserting loans

2.1 Inserting a loan – tab <New loan>

When you enter a loan, you will get the option to fill in the three tabs below:

< New loan >	Items overview	Edit item

There is no obligation to fill in all three tabs in order to register a complete a loan file. However, the first two tabs need to contain information, should you wish to print a coherent loan's document.

The first tab contains the general information of the loan: Date , persons or institutes concerned, insurances, etc.

Over the course of the following pages, we will show you how to fill in the widgets.

2.1.1 Widget Loan

 The name that you link to your loan, can be either a code or a full text. An example of a code is *R.I./85.54* and an example of a text is *Permanente tentoonstelling Horta Museum*.

 You can establish a start- and end date for your loan. Should you wish to extend an existing loan, then you will have to fill in the *extend to date*. You can either fill in each date field separately or you can use the calendar icon.

 The description allows you to elaborate on the exact content of the loan.

2.1.2 Widget People involved

 The sender side mentions all people and/or institutes that own the objects and that will borrow the to the receiver side. In order to add a sender, you will need to click on *Add sender*.

 The receiver side mentions all people and/or institutes that want to loan from the sender side. In order to add a receiver, you will need to click on *Add receiver.*

In order to attribute a role to a person and/or institution, you must tick the box with the corresponding role that you would like to attribute. When a person/institute involved has more roles within the same loan, then you can simply tick multiple boxes for that person/institute.

> **Warning!** In order to print a valid loan document, you must have at least selected One **Contact**.

2.1.3 Widget Loan status

This widget can only be added once the new loan has been saved at least once. This widget allows you to follow the evolution of the loan.

1 To add a line, you will first need to click on *Add Status.* You can now choose a status from the list and you can add comments if needed. The system will automatically add the date, the time and the name of the user that added the line to the history of the widget.

2.1.4 Widget Properties

This widget is used in multiple places within the application, but its specific purpose within the loans module is to keep track of the *Tracking ID's* for the transport from an to the sender/receiver side.

> **Warning!** For the Tracking ID's to appear on the printed loan form, you must always follow the same insertion method. As *Type* property ▣1 , you must choose **_Tracking ID_** and as *Applies to* ▣2 , you can either choose **_Sender_** when the transport is done on the sender side or **_Receiver_** when entering transport information from the receiver side.

You can obviously also use this widget in the same way it is used elsewhere, for adding properties. However, these other properties will not be printed on the loans documents.

2.1.5 Widget Comments

As with the previous widget, this comments widget is widely used within the application.

▣1   To add a comment, you will need to click on *Add comment* and will then have toi select the appropriate category for your comment.

> **Warning!** Only the Note **state of the observation** ▣2 will be printed on your loan documents.

2.1.6 Widget Insurances

▣1   By clicking the button *Add insurances*, You can insert the insurance issues that will apply to the entire loan file.

2.1.7 Widget Related files

1 By clicking on the *Add file* button, You can either add pictures, documents or other related files. In the case that the file is an image, a miniature picture will appear in the widget once saved as illustrated above.

2.1.8 Widget Darwin Users
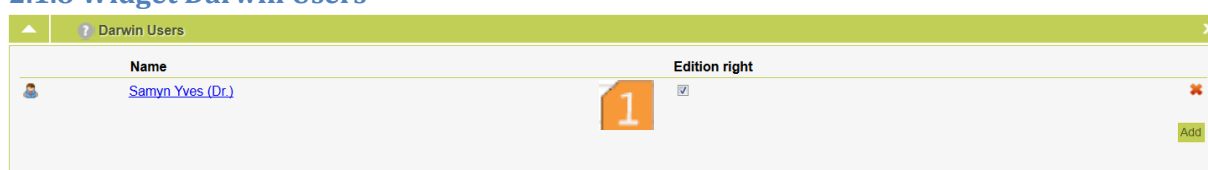
1 By not ticking the column *Edition rights*, you will in fact only give the user the right to view the loan data without the possibility of changing it. The user that is added here can have any type of role within the application DaRWIN itself. It is in other words unrelated to the rights given here.

2.1.9 Widget Maintenances

Target	Type	Title	Details	Person	Date	Has files	
Loans	Action	checked_back_by		Chambert Yann (M.)	10/09/2015 00:00:00	-	👁 ✎ ✖
Loans	Action	received_back_by		Maron Brice	10/09/2015 00:00:00	-	👁 ✎ ✖
Loans	Action	Organized by		Semal Patrick (Dr.)	16/08/2015 00:00:00	-	👁 ✎ ✖
Loans	Action	Approval		Duchesne Paul-André (M.)	13/08/2015 00:00:00	-	👁 ✎ ✖
Loans	Action	Approval		Emery Cathy	13/08/2015 00:00:00	📎	👁 ✎ ✖
Item #18	Action	Return Type Material	Retour et mise en collection	Lievrouw A.	04/08/1986 00:00:00	-	👁 ✎ ✖
Loans	Action	Preparation	Packing	Lievrouw A.	27/11/1985 00:00:00	-	👁 ✎ ✖
Loans	Action	Preparation	Test	Duchesne Paul-André (M.)	01/01/0001 00:00:00	-	👁 ✎ ✖

Add

2.2 Inserting a loan – tab <Overview items>

< Edit loan > Items overview Edit item

The second tab will offer you a listing of all objects that constitute the entire loan. It is also possible to add maintenance tasks related to the loan to an object via this tab.

		Edit loan	< Items overview >	Edit item		
	Darwin Part	**Darwin Part Main Code(s)**	**I.g. Num**	**Details**	**Expedition / Return**	

1 ☐ Choose ! | 10591 | Mathilda canariensis Dautzenberg | ☑ Use Loan dates | 👁 ✖ 📝

2 − Maintenances

Type	**Title**	**Details**	**Person**	**Date**		
Action	Return Type Material	Retour et mise en collection	Lievrouw A.	04/08/1986 00:00:00	👁📝✖	

Add maintenance for this item

☐ ❶ 290832 ✖ Change ! | MT837 | 10591 | | ☑ Use Loan dates | 👁 ✖ 📝

➕ Maintenances

1 You can either add a standalone object or an object that has already been registered within DaRWIN. For a non-DaRWIN related object, You will simply need to fill in an IG number and a description with the objects full name.

2 You can also add a maintenance task, should you wish. The insertion on this level will also become automatically visible on the first general tab and the detail tab 'Edit item' of the object itself.

☐ ❶ 290402 ✖ Change ! | MT95 | 10591 | | ☐ Use Loan dates | 👁📝✖
Expedition date
▾ / ▾ / ▾ 🗓 **1**
Return date
▾ / ▾ / ▾ 🗓

1 In case the loan dates of the object vary from the general loan dates, then you can adapt them here. U will need to clear the box 'use loan dates' and then you will be able to add your own specific dates.

2.3 Inserting a loan – tab <Edit item>

Edit loan	Items overview	< Edit item >

The third tab contains all the information that is specific to one particular object of the loan. Utton

To change or to enter the third tab, you will have to click on the tab '*Items overview*' and then you have access to the edit icon next to the object concerned.

2.3.1 Widget Loan item

Loan Item		
Part Id	Details	Mathilda canariensis Dautzenberg
I.G. number	10591	
Return date	04/02/2016	

This widget is automatically filled in with the existing data.

2.3.2 Widget People involved

People involved

Sender side	Roles Responsible	Contact	Checker	Preparator	Attendant	Transporter	Other	
Maron Brice	☑	☐	☐	☐	☐	☐	☐	✖
								Add Sender

Receiver side	Roles Responsible	Contact	Checker	Preparator	Attendant	Transporter	Other	
ABG Diffusion Soignies	☐	☐	☐	☐	☐	☐	☑	✖
								Add Receiver

This widget allows you to enter other concerned parties then those mentioned on the first and general information tab.

2.3.3 Widget Properties

Properties

Type	Applies to	Values	Date From	Date To
➕ Add Properties				

Properties that are typical to only this object can be mentioned here.

2.3.4 Widget Codes

Category	Prefix	sep.	Code	sep.	Suffix	
		▼		▼		
Main ▼		▼ ✚	Trac	▼ ✚		✖
Main ▼		▼ ✚	Truc	▼ ✚		✖
						Add Code

This widget is used to enter the codes of the non -DaRWIN objects. This allows you then to mention them on the printed loan's documents

Warning! This widget is not to be used when handling DaRWIN objects. Unless you attribute a different code for loaning purposes.

2.3.5 Widget Comments

? commentaren	X
	commentaar toevoegen

Only comments in direct relation to the object are mentioned here.

2.3.6 Widget Insurances

? Insurances	X
	Add Insurance

In case the object is insured in another way then the rest of the loaned objects, you can enter the accurate information here.

2.3.7 Widget Related files

? Related Files	X
	Add File

Only documents and/or images in direct relation to the object are mentioned here.

2.3.8 Widget Maintenances

This widget offers a second way of entering certain actions with relation to the object concerned. Every entry you make here, will have as *Target* 'Loan Item'. The other way was by filling in the action via the second tab `<items overview>`.

Actions that related to the loan as a whole, can only be filled in via the first tab <New loan> or <Edit loan> once the new loan had been saved.

3. Printing the loan documents

Whenever you see the following icon 🖨 , a loan document can be printed.

[1]   In the first column, you choose the loan concerned. In the second column you choose the document or documents that you wish to print.

[2]   You then select the catalogue from which the associated object names will be printed.

[3]   Finally, you select the language in which you would like to print the documents.

You can add your own comment line in order to quickly recognise the document that you have generated. By clicking on 'Add', the report is launched.
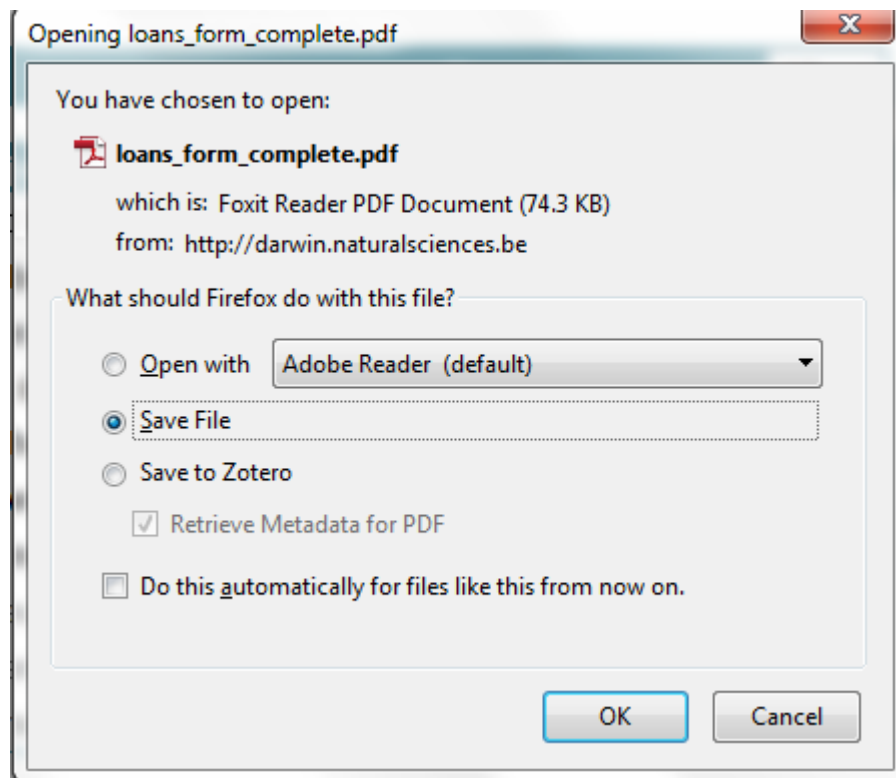
You will get the option of either visualising or saving your report.

4. Exemples of loan documents

On the following pages you will find examples of 4 different types of loan documents with each their specific details.

4.1 Heading

1 For the field *Name* to be filled in on the documents *RBINS Copy*, *Your Copy* and *Specimens copy* at least one contact needs to be entered on the receiver side on the first tab of the loan.
For the *Responsible copy* , at least one *responsible* needs to be filled in on the receiver side on the first tab of the loan.

2 When an Institution is assigned as a contact on the receiver side, then the field *Institution* will be filled in automatically. In case no institution was filled in, the system will try to link the institution of the first contact person to this field. When in this latter case, no institution is found, then the field will not appear on the report.

3 The address field will first attempt to enter the address linked to the institute's name on the receiver side. In case this address is not known, then the system will attempt to enter the work address of the contact person on the receiver side. When in the latter case, no address is found, then the field will not appear on the report.

4.2 Organised by

Organized by

Name(s):	Semal Patrick (Dr.)

This material has been sent as a loan at your request

The name that appears here, comes from the maintenance widget. It is the name of the person that has performed the action 'Organized by' (e.g. see screenshot below):

Loans	Action	Organized by		Semal Patrick (Dr.)	16/08/2015 00:00:00	-	

4.3 Material description

Material description:

Sample ID [1]	Unit(s) [2]	Description [3]	Value (€) [4]
Temporary codes: Truc, Trac	Mathilda canariensis Dautzenberg		
RBINS ID: 290832 Codes: MT837	Helicina euchromia Wagner, 1905	dit is een algemene test beschrijving	
RBINS ID: 290402 Codes: MT95	Cochliolepis dautzenbergi Adam & Knudsen, 1967		
RBINS ID: 290921 Codes: MT1125	Pomatias henricae var. huttneri Wagner, 1897		
RBINS ID: 291324 Codes: MT1141	Paludina madagascariensis Crosse & Fischer, 1872		

[1] When it concerns a DaRWIN object, the column can contain up to 3 '*main'* codes for the same object. When it concerns a non -DaRWIN object, a max. of 3 '*main* ' codes that come from the Widget *Codes on the third tab <Edit item>* will be shown on the report .

[2] The names that appear in the Unit(s) column, come straight from the catalogue that you selected before generating the report. So if you chose T*axonomy* for a loan that only contains elements from Lithology, then this column will be empty when rendering the report.
If however, you have made the correct choice, then the report will render the correct lithological names for your DaRWIN objects . For the non-DaRWIN objects, the report will solely rely on the names that you yourself have entered in the 'Details' field on the second tab <*items overview >*.

[3] This column will either show the comment of type '*description'* as entered in the widget comments on the third tab <*Edit item*. In case this comment does not exist, the system will attempt to enter the comment as it was originally entered on the original specimen record in DaRWIN.

[4] This column shows the value as entered in the widget *Insurances* on the third tab <*Edit item*>.
 In case no insurance info has been entered , the system will try to fill in the value as entered in the same widget on the original specimen record in DaRWIN.

4.4 Comments

 The comment that will be printed as the **Purpose** of the loan, comes from the widget *Comments* with the notion '*Usage'.*

Purpose (e.g. project, PhD)

Test Purpose text

 The comment that will be printed as the **Condition** of the loan, comes from the widget *Comments* with the notion '*State observation.*

Condition   in good condition except as noted

Miss a leg on the first specimen

The comment that will be printed as the return **Condition** of the loan, comes from the widget *Comments* with the notion '*Return State observation.*

Condition

The return condition is the same as the initial state

4.5 Approved by

Approved by

Date:	13/08/2015
Name(s):	Duchesne Paul-André (M.), Emery Cathy
Function(s):	Database architect, *
Signature(s):	

For the names to be filled in automatically, there has to be at least one line in the widget *Maintenances* with **Target** Loan and **Title** '*Approval'.*

Target	Type	Title	Details	Person	Date	Has files	
Loan	Action	received_back_by		Maron Brice	10/09/2015 00:00:00	-	👁 📝 ✖
Loan	Action	checked_back_by		Chambert Yann (M.)	10/09/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Organized by		Semal Patrick (Dr.)	16/08/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Approval		Duchesne Paul-André (M.)	13/08/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Approval		Emery Cathy	13/08/2015 00:00:00	📎	👁 📝 ✖
Loan	Action	Preparation	Packing	Lievrouw A.	27/11/1985 00:00:00	-	👁 📝 ✖
Loan	Action	Preparation	Test	Duchesne Paul-André (M.)	01/01/0001 00:00:00	-	👁 📝 ✖
							Add

4.6 Prepared by

Prepared by

Name(s):	Duchesne Paul-André (M.)
Function(s):	Database architect
Signature(s):	

Date:	27/11/1985
Name(s):	Lievrouw A.
Signature(s):	

For the names to be filled in automatically, there has to be at least one line in the widget *Maintenances* with **Target** Loan and **Title** '*Preparation'.*

*Warning! The names of the people involved will be printed in the same box whenever the **dates** are the same.*

Depending on the data available in the person's record, more or less information will be visible on the report. In the above example the *Function* is filled in in the first box, but it is not present for the person where the date has been filled in.

Target	Type	Title	Details	Person	Date	Has files	
Loan	Action	received_back_by		Maron Brice	10/09/2015 00:00:00	-	👁 📝 ✖
Loan	Action	checked_back_by		Chambert Yann (M.)	10/09/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Organized by		Semal Patrick (Dr.)	16/08/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Approval		Duchesne Paul-André (M.)	13/08/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Approval		Emery Cathy	13/08/2015 00:00:00	📎	👁 📝 ✖
Loan	Action	Preparation	Packing	Lievrouw A.	27/11/1985 00:00:00	-	👁 📝 ✖
Loan	Action	Preparation	Test	Duchesne Paul-André (M.)	01/01/0001 00:00:00	-	👁 📝 ✖

Add

4.7 Transport

Transport

Dispatched by registered	loaner
Name(s):	Samyn Yves
Tracking id(s):	HZ-+

Transport

Dispatched by registered	borrower
Name(s):	Royal Belgian Institute of natural Sciences, Groupe spéléologique de Charleroi
Tracking id(s):	IBZ-4515558-QR

For the information with regards to transport to appear correctly, you will have to have filled in the transport data on both the sender and the receiver side.

People involved

Sender side — Roles

	Responsible	Contact	Checker	Preparator	Attendant	Transporter	Other	
Van Goethem Jackie (Dr.)	☑	☑	☐	☐	☐	☐	☐	✖
Lievrouw A.	☐	☐	☐	☑	☐	☐	☐	✖
Samyn Yves	☑	☐	☑	☐	☐	☑	☐	✖

Add Sender

Receiver side — Roles

	Responsible	Contact	Checker	Preparator	Attendant	Transporter	Other	
Bieler Rüdiger (Dr.)	☑	☐	☐	☐	☐	☐	☑	✖
Duchesne Paul-André (M.)	☐	☑	☐	☐	☐	☐	☑	✖
Royal Belgian Institute of natural Sciences	☐	☐	☐	☐	☐	☑	☑	✖
Groupe spéléologique de Charleroi	☐	☑	☐	☐	☐	☑	☐	✖

Add Receiver

Properties

Type	Applies to	Values	Date From	Date To	
Tracking ID	Receiver	IBZ-4515558-QR	01/01/0001 00:00:00	31/12/2038 00:00:00	✖
Tracking ID	Sender	HZ-+	01/01/0001 00:00:00	31/12/2038 00:00:00	✖

➕ Add Properties

For the **tracking ID** to be printed, the widget *Properties* needs to be filled in.

4.8 Return – Received and checked

Return

Received at RBINS by

Date:	10/09/2015
Name(s):	Maron Brice
Signature(s):	

Checked at RBINS by

Date:	10/09/2015
Name(s):	Chambert Yann (M.)
Signature(s):	

For the names to correctly appear , the widget *Maintenances* needs to be filled in, under the **Titles** '*Received_back_by*' and '*Checked_back_by*'.

	Maintenances						
Target	**Type**	**Title**	**Details**	**Person**	**Date**	**Has files**	
Loan	Action	received_back_by		Maron Brice	10/09/2015 00:00:00	-	👁 📝 ✖
Loan	Action	checked_back_by		Chambert Yann (M.)	10/09/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Organized by		Semal Patrick (Dr.)	16/08/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Approval		Duchesne Paul-André (M.)	13/08/2015 00:00:00	-	👁 📝 ✖
Loan	Action	Approval		Emery Cathy	13/08/2015 00:00:00	📎	👁 📝 ✖
Loan	Action	Preparation	Packing	Lievrouw A.	27/11/1985 00:00:00	-	👁 📝 ✖
Loan	Action	Preparation	Test	Duchesne Paul-André (M.)	01/01/0001 00:00:00	-	👁 📝 ✖

Add

4.9 Ontvangst kopie terugsturen naar

**Return a copy of this form by FAX at +32(0)2.627.41.13.
or by email at Paul-Andre.Duchesne@sciencesnaturelles.be**

This sentence is added automatically if the widget *Maintenances with* **Target** Loan and **Title**
'*Approval'* is filled in :

Apart from this, the *email address* and the correct tag '*work'* needs to be filled in on the widget
Communications of the person's record.

5. Generating loan documents from the reports module

Another way of printing loan documents is Via the menu *My preferences > Reports* .

You choose the report type 'Scientific loan form' and complete the criteria.

> **Warning!** Do not forget to fill in the name attributed to your loan before filling in the other criteria.

As before, you will be able to either visualise or save the report.

On top of this, your report will also become available for *download* in the list above. You can re-open the report at any given time via this interface.

The above example also illustrates why adding a comment when generating a report can be very important. It offers you the flexibility to quickly find the intended report when you have generated a large number of similar reports within the same period of time.

Of course, the i-icon will also give you some more info on the criteria that you had initially chosen.