



Module 9

Interactions



Interactions in Specify

Interactions in Specify allow users to create and manage documentation associated with the movement of specimens or data into or outside of the collection.

- Acc** Accession
- Dsp** Disposal
- Per** Permit
- Loa** Loan
- LrP** Return Loan records
- Gft** Gift
- EI** Exchange In
- EO** Exchange Out
- Bor** Borrow
- IR** Information Request
- RA** Repository Agreement

Loa New Loan: 001

Loan Number

Original Due Date

Total Preps:

Resolved Preps:

Remarks

▼ Loan Agents + —

No Data.

▼ Shipments + —

No Data.

▼ Loan Preparations + —

Catalog #

Quantity

Description



Interaction Table	Specimen Record Linked to	Objects Incoming/Outgoing
Accession	Collection Object	Incoming
Disposal	Preparation	Outgoing
Loan	Preparation	Outgoing
Gift	Preparation	Outgoing
Exchange In	Preparation	Incoming
Exchange Out	Preparation	Outgoing
Borrow	Preparation	Incoming
Deaccession	Disposal/Exchange Out/Gift	Outgoing



More information: [Interactions in Specify](#)

Accession

The legal entrance of an object or objects into your collection.

Accessions contain:

- Accession Number*
- Accession Date
- Accession Agents (who accessioned it, who sent it, etc.)
- Accession Items (catalog number, count)
- Authorizations/Permits

Acc New Accession: 001

Accession #	001	Status	
Accessioned	11/27/2025	Received	11/2
Lot Count:		Preparation Count:	
Specimen Count:		Actual Specimen Count:	
Description of Material			
▼ Accession Agents + —			
No Data.			
▼ Accession Authorizations (0) +			
No Data.			
▼ Collection Objects 🔍 + —			
No Data.			
Attachments			
0			
Modified By Agent			
		Timestamp Modified mm/	

Disposal

Objects permanently leaving your collection that have been or will be destroyed, and leaving your legal authority.

Disposals contain:

- Disposal Number*
- Disposal Date
- Disposal Agents (who approved it, who is prepared it, etc.)
- Disposal Items (catalog number, count)

Dsp New Disposal: 001

Disposal Number

Disposal Date

Total Preps:

Total Items:

Deaccession

▼ Disposal Agents + -

No Data.

▼ Disposal Preparations (129) +

	Cat #	Quantity	Accession #	R
>	000002980	1	0	
>	000003044	1	0	
>	000003051	1	960	
>	000003061	1	0	
>	000003636	1	1200	
>	000003744	1	1489	
>	000003744	1	1489	
>	000004396	1	0	
>	000004439	1	0	
>	000004439	1	0	

Loan



Objects leaving your collection temporarily, but remaining under your legal authority.

Loans contain:

- Loan Number*
- Loan Date
- Loan Agents (who loaned it, who requested it, etc.)
- Loan Items (catalog number, count)

Loa New Loan: 001

Loan Number	001	Loan Date	11
Original Due Date	mm/dd/yyyy	Date Closed	mm
Total Preps:		Total Items:	
Resolved Preps:		Resolved Items:	
Remarks			

▼ Loan Agents + -

No Data.

▼ Shipments + -

No Data.

▼ Loan Preparations + -

Catalog #	000111147	Prep Ty	
Quantity	1	Quantity Return	
Description			

Gift

Objects permanently leaving your collection to another institution, and leaving your legal authority.

Gifts contain:

- Gift Number*
- Gift Date
- Gift Agents (who approved it, who is receiving it, etc.)
- Gift Items (catalog number, count)

New Gift: 001

Gift Number 001

Gift Date 11/27/2

Remarks

▼ Gift Agents + -

No Data.

▼ Shipments + -

No Data.

▼ Gift Preparations (1) +

	Cat #	Quantity	Preparation Typ
>	000023985	1	EtOH

Total Lots:

Total Items:

Attachments



☒ Generate Invoice on S

Borrow

Objects entering your collection temporarily, but remaining under the legal authority of the loaner.

Borrows contain:

- Borrow Number*
- Received Date
- Borrow Agents (who requested it, who loaned it, etc.)
- Borrow Items (original institution's catalog number, count)

New Borrow

Invoice Number

Original Due Date mm/d

Received Date 11/27/2025

Current Due Date mm/d

Remarks

▼ Borrow Agents + —

No Data.

▼ Shipments + —

No Data.

▼ Borrow Materials (0) +

No Data.

Attachments

 0

Deaccession

The legal removal of an object or objects from your collection.

Decessions contain:

- Deaccession Number*
- Deaccession Date
- Deaccession Agents (who deaccessioned it, who approved it, etc.)
- Deaccession Items (catalog number, count)
- Permits

More information: [Deaccessions in Specify](#)

New Deaccession: 001

Deacc # 001

Deaccession Date 11/27/

Total Preps:

Total Items:

Remarks

▼ Deaccession Agents + —

No Data.

▼ Disposals 🔍 + —

No Data.

▼ Gifts 🔍 + —

No Data.

▼ Exchange Outs 🔍 + —

No Data.

Attachments



Modified By Agent

Date Modified mm/dd

Exchange In/Out

Objects entering or exiting your collection to another institution with an understanding of a quid pro quo arrangement.

Exchanges contain:

- Exchange Number*
- Exchange Date
- Quantity Exchanged
- Exchange Agents
- Exchange Out Items (Catalog Number, Count)

EO New Exchange Out: 001

Exchange Out #	001	Quantity
Cataloged By	Bentley, Andrew C	
Total Preps:		Total It
Deaccession		
Description		
Remarks		

▼ Address Of Record + —

No Data.

▼ Shipments 🔍 + —

No Data.

▼ Exchange Out Preps (1) +

	Cat #	Preparation Type	Quantity
>	000023985	EtOH	1

Repository Agreement

The entrance of an object or objects into your collection, but the legal ownership does not transfer.

Repository Agreements contain:

- RA Number*
- Status
- Start and End Dates
- RA Agents (who approved it, who sent it, etc.)
- Authorizations/Permits

RA New Repository Agreement: 001

RA Number

Status

Start Date

End Date

Remarks

▼ Repository Agreement Agents + —

No Data.

▼ Repository Agreement Authorizations + —

No Data.

Attachments



Modified By Agent

Shipment & Permits



Shipments allow you to track the movement of objects.

Shipments link to:

- Loan
- Gift
- Exchange Out
- Borrow

▼ Accession Authorizations (1) +

	Permit	Remarks
▼	Permit	 + 
	Remarks	 

Permits allow you to document the movement of objects.

Permits link to:

- Accession
- Collecting Event
- Collecting Trip



▼ Shipments + -

 << < 1 / 1 > >>

Shipment Date 

of Packages

Packaged By  + 

Method

Shipment Number

Shipped To  + 

Remarks

Item Counts

(Virtual fields)

Loan

Total Preps
Total Items
Unresolved Preps
Resolved Preps
Unresolved Items
Resolved Items

Collection Object

Total Items
Total Current Items

Preparation

Actual Count

Accession

Total Items
Total Current Items
Total Preps
Total Collection Objects

Deaccession

Total Preps
Total Items

Disposal

Total Preps
Total Items

Gift

Total Preps
Total Items

Exchange Out

Total Preps
Total Items

Item Counts

Total Preps:		Total Items:	
Resolved Preps:		Resolved Items:	
Unresolved Preps:		Unresolved Items:	



Total Preps – Count of Preparation Types included in the record.

Total Items – Count of individual items included in the record.

Total Current Items – Count of individual items still in the catalog and associated with the record.

Total Collection Objects – Count of Collection Objects associated with the record.

Resolved Preps – Count of Preparations returned.

Resolved Items – Count of individual items returned.

Unresolved Preps – Count of Preparations, for all Catalog Numbers, not resolved.

Unresolved Items – Count of individual items not resolved.



Creating an Outgoing Interaction

- All Outgoing Interactions link to a preparation
- Can be created using
 - Record Set
 - Entering Catalog Numbers
 - Without Preparations

New Disposal: 001

Disposal Number Disposal Date

Total Preps: Total Items:

Deaccession

▼ **Disposal Agents** + —

No Data.

▼ **Disposal Preparations (129)** +

	Cat #	Quantity	Accession #	Remarks
>	000002980	1	0	
>	000003044	1	0	
		1	960	
		1	0	
		1	1200	
		1	1489	
		1	1489	
		1	0	
		1	0	
		1	0	

Create Loan

- ▶ By choosing a recordset (4 available)
- ▶ By entering Cat #s

Without Preparations

Close



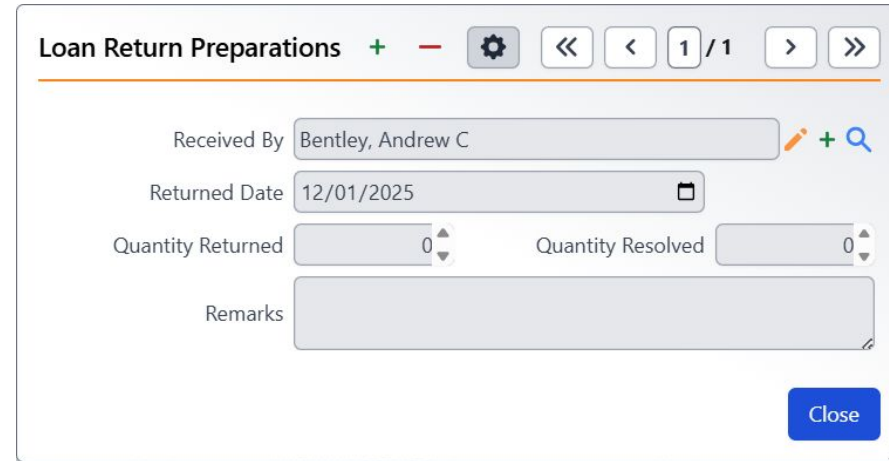
Closing Loans



Closing Loans Through Loan Preparation

Returns all or part of the individual Loan Preparation.

- Multiple Loan Return Records may be created.
- Quantity Resolved and Quantity Returned counts can be entered for each Loan Preparation.
- Received by can be different for each Loan Preparation.
- Returned Date can be different for each Loan Preparation.



The screenshot shows a web application interface for 'Loan Return Preparations'. At the top, there is a title bar with the text 'Loan Return Preparations' followed by a green plus icon, a red minus icon, a gear icon for settings, and navigation buttons: double left arrow, single left arrow, '1 / 1', single right arrow, and double right arrow. Below the title bar, the form contains several input fields: 'Received By' with the value 'Bentley, Andrew C' and a search icon; 'Returned Date' with the value '12/01/2025' and a calendar icon; 'Quantity Returned' and 'Quantity Resolved', both with numeric input fields showing '0' and up/down arrows; and a 'Remarks' text area. A blue 'Close' button is located in the bottom right corner of the form.

Closing Loans Through the Loan Form

Returns all or part of Loan Preparations in the selected Loan record.

- Multiple Loan Return Records may be created.
- Quantity Resolved and Quantity Returned amounts can be entered for each Loan Preparation.
- Received by must be the same for all items being returned in the record.
- Returned Date can be different for each Loan Preparation.

✓ Loan Preparation

Returned Date
12/08/2025

Received By
Admin, Specify

Bulk Return 0 Bulk Resolve 0

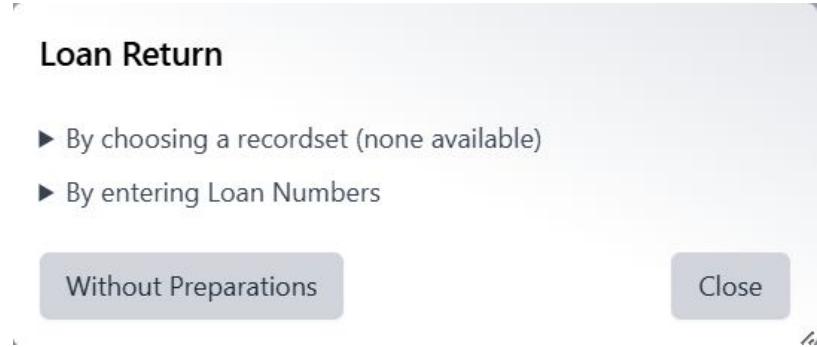
Cat #	Taxon	Object Type	Unresolved	Return	Resolve
☐ 000019198	Cheirodon sp.	EtOH	5	0	0
☐ 000019196	Cheirodon sp.	EtOH	5	0	0

Cancel Select All Deselect All Apply

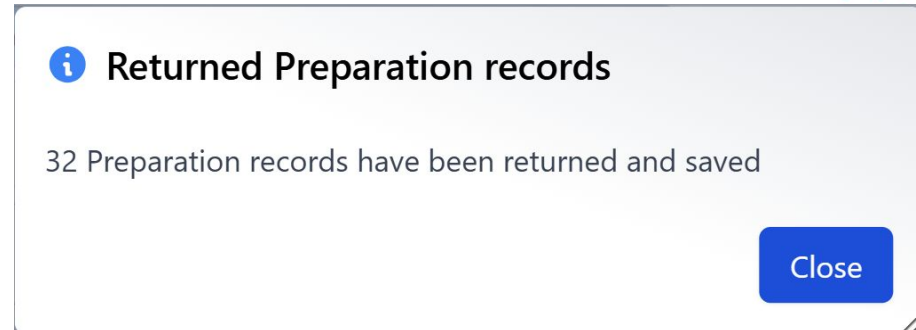
Closing Loans Through the Loan Return Tool

Returns all of the Loan Preparations for the Loan records entered.

- Only one return can be created for each Loan.
- Quantity Resolved and Quantity Returned counts all returned.
- Received by is the agent associated with the user saving the record.
- Returned Date is the date the record is saved.



The screenshot shows a light gray dialog box titled "Loan Return". It contains two bullet points: "► By choosing a recordset (none available)" and "► By entering Loan Numbers". At the bottom, there is a button labeled "Without Preparations" and a "Close" button in the top right corner.



The screenshot shows a light gray dialog box titled "Returned Preparation records" with an information icon (i) to the left of the title. The text inside says "32 Preparation records have been returned and saved". There is a "Close" button in the bottom right corner.

Creating a Deaccession

- Deaccessions do NOT link directly to Preparations or Collection Objects.
- Deaccessions do NOT affect Object Counts
- Deaccessions may link to a Disposal, Exchange Out, or Gift in a single Deaccession record.

New Disposal: 001

Disposal Number: Disposal Date:

Total Preps: Total Items:

Deaccession:

▼ **Disposal Agents** + —

No Data.

▼ **Disposal Preparations (129)** +

	Cat #	Quantity	Accession #	Remarks
>	000002980	1	0	
>	000003044	1	0	
>	000003051	1	960	
>	000003061	1	0	
>	000003636	1	1200	
>	000003744	1	1489	
>	000003744	1	1489	
>	000004396	1	0	
>	000004439	1	0	
>	000004439	1	0	