

Managing Acquisition Details in E-matrix

Overview

"Acquisitions Details" covers five attributes of a holding, some of which can also be applied to all the members of a collection:

Detail	Definition	Holding	Collection
Acquisitions Type	Characteristics of the purchase including type of material (journal or aggregator/database content), the way the purchase is grouped or associated across titles (dependencies).	?	?
Payment Type	Characteristics of the purchase in respect to how the title was paid or not paid. This includes whether or not the title was paid from NCSU Collections budget, the title was paid from an outside source, or if no money was required for the acquisition of that title (free or open access)	?	?
Subscription Status	Describes the current receipt status of the subscription or the reason why it's not current.	?	?
Archive Type	Describes NCSU perpetual access rights to content as well as purposeful selection of the title. Include a coverage statement with each archive type	?	?
Vendor Title Number	Linking field that is used to match the PO to the holding that describes the paid access	?	?

See the [Data Dictionary for Acquisitions Details in E-Matrix](#) for further information on each acquisitions detail category including a detailed description of available options for field.

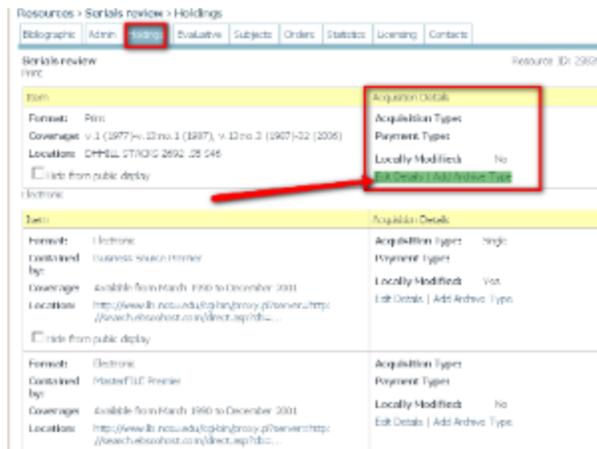
Setting Acquisitions Details at the Holding Level

All the above details can be set for an individual holding from the "Holdings" tab for a title.

Note that vendor title numbers are shown (and edited) from the "acquisitions details" portion of the holdings display, but don't count as an attribute of this type.

Default Acquisitions Type and Payment type can be set at the collection level (go to the page for the collection's resource, then in the "Resource Actions" box on the left hand side of the page, look for the "Details" subheading and select "Edit".)

When setting Acq. Details at the collection level, unless you specifically set "override", values you select for the collection will only be written to holdings that have not been modified from the holdings tab (as outlined above).

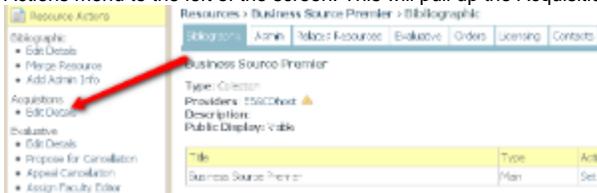


Setting or Editing Acquisition Details at the Collection Level

1. Search for Collection name as a resource in E-matrix. Note that many database/collections will have two entries in E-Matrix. One will be labeled 'Article database,' the other will be labeled 'Collection'. Select the Collection entry.



- Resource records for collections will not have a Holdings Tab. To edit the acquisition details, Click on Acquisition - Edit Details in the Resource Actions menu to the left of the screen. This will pull up the Acquisition Details editing options.



- Using the [Data Dictionary for Acquisitions Details in E-Matrix](#) determine the **Acquisitions Type** and **Payment Type** and populate accordingly.

Example of Completed Record for Business Source Premier



- After selecting options as appropriate for the acquisition details, click 'Overwrite.' (The only Acquisitions Details that now trigger the locally-modified flag are Acquisitions Type and Payment Type.)
Note: Changes to the acquisitions details may take a while to process. Once these changes have been saved, you will see the following message at the top of the screen: "Acquisition details saved."
- When changes are saved, click on the related resources tab and select a title. Click on the holdings tab and verify that the options you selected are represented under the appropriate holding.

Example of completed Acquisition Details at the title level

