Payment Activity by Material Format is available to all WMS users. This report can be used to gather collection count data for the ACRL and IPEDS annual surveys.

- One-time purchases of books, serial back-files, and other materials (Line 20)
- Ongoing commitments to subscriptions (Line 21)

Use of WMS reports for expenditures assumes that you do all materials ordering within WMS Acquisitions. If you do not have acquisitions module data or have incomplete data, you will need to use or supplement with another source, such as your business office reports.

If you consistently purchase specific material types within certain funds or shelving locations, you may choose to use those as alternative reports. The process is similar.

Go to WMS Analytics > Reports > Reports > Acquisitions Reports. Open the Payment Activity by Material Format report.
In the Prompts box, enter the beginning and ending dates of your fiscal year in the “from” and “to” payment date. ADD Budget status=CLOSED so that you can include last year’s data (CLICK REFRESH VALUES to see and add/remove available options).

On the left hand side in the Input Controls, choose Acquisitions Type=FIRM_ORDER for one-time purchases, or SUBSCRIPTION for subscriptions, and press OK. You can switch or run this function/report separately for each type.

On each report, find the Grand Total in the Amount Expended column. If the Acquisitions module data has been entered correctly, this is the amount you need to report.
Select FIRM ORDER and then OK to generate fund amount;
Select SUBSCRIPTION and then OK to generate that fund amount.