AFO 117 - Performance data

117.1 Introduction

This AFO gives you information about the performance of items and their related titles and authors. This gives you an insight in the "achievements" of these items: how often is a certain title, author or item lent, reserved, etc.

The overall goal is to help library staff with the selection process that leads to the actual ordering of records. In situations where files containing (new) bibliographic records that are available for selection are imported into the system, the selection process will go faster and smoother.

The parameters for this AFO are set in AFO 651 – Server Parameters – Performance data setup. See the Help for this AFO for more information.

117.1.1 Overall workflow

The order process, up to the point of the actual ordering of records, looks as follows:

- Import bibliographic records.

- The bibliographic records are imported.

- Selection, supporting *feature 1*: automatic record matching.

- The system applies automatic matching of bibliographic records. The idea behind this record matching is that the system will refer the user to similar records.

- Selection, supporting *feature 2*: provide "performance" data.

- The system provides statistical circulation data for

- similar bibliographic records as retrieved with feature 1

- all records related to the authorities that are present in the current bibliographic record (grouped per authority)

-     giving insight into the "performance" of the title. The idea behind this feature is that the selector will have quick and easy access to circulation performance statistics. For each "related" (i.e. "matched") bibliographic record and for each authority, this information can be accessed.

-     Also a numeric value will be attributed to every authority or bibliographic record as to reflect its "performance" – the higher the value, the higher its performance.

- Actual ordering

117.2 Look at performance data

When you start this AFO, the standard search screen is offered. You must first perform a search in the normal way, and then retrieve the record that interests you.

For each database, 0-N databases can be defined that must be scanned for similar records. For every database to be scanned, 1-N matching profiles can be defined.

If a bibliographic record is retrieved in AFO 117 the system will match it according to certain parameters, and after matching has been applied the system will show an additional information group "performance data" on the record overview screen. This additional group contains the bibliographic records that were found with the matching as well as all authority records related to the current record (except the ones that were excluded).

Each record is preceded by a row number and can be selected (see below).

Note

The performance group can also be displayed in other AFO's at any time from the record overview screen through the option "**Performance data**".

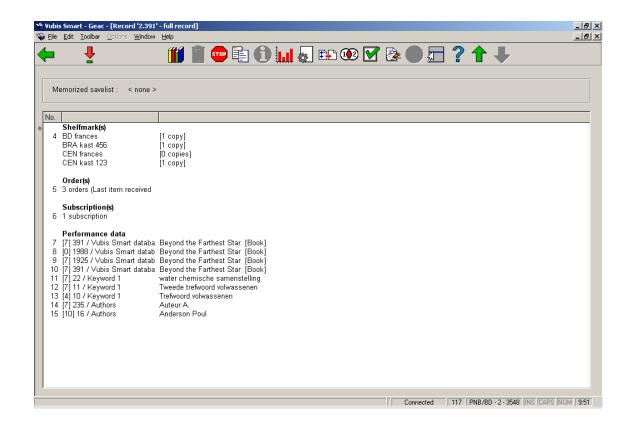| No.		
	Technical information	
	Record identification	no. 391 from database 'Vubis Smart database release 2.1.1 B6'
	Record status	-
	Record type	monograph [type 1]
	Check status	Incorrect record on 30 November 2004 (15:23)
	Miscellaneous	format of record 'Smart', last used template 'Default-Smart'
	Created on	25 April 2000 (18:38) by 'Phil' on location PNB/BD
	Last modified on	30 November 2004 (15:23) by 'Super User' on location PNB/BD
	Description	
1	ISBD	Beyond the Farthest Star [Book]. - A. - p. 7-76. - revised edition. - Dit is een aanvulling in de bibliografische annotatie. - 123456789X. - Eindhoven, 2002
	Author	A.
	Relationship(s)	
2	Series	2 relationships
	Absorbed by	1 relationship
	Reproduction of	1 relationship
	Previous version(s)	
3	4 copies of the record	
	Shelfmark(s)	
4	BD	[0 copies]
	BD F BEY	[3 copies]
	BD QA12345	[2 copies]
	BD QA543	[1 copy]
	BD TEST2	[0 copies]
	BD [JF1] F BEY	[1 copy]
	BD [MAG] QA 123	[1 copy]

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Click on the icon for **Performance data**, after that you must probably use the **Down arrow** icon to scroll to the next screen:

No.		
	Shelfmark(s)	
4	BD frances	[1 copy]
	BRA kast 456	[1 copy]
	CEN frances	[0 copies]
	CEN kast 123	[1 copy]
	Order(s)	
5	3 orders (Last item received	
	Subscription(s)	
6	1 subscription	
	Performance data	
7	[7] 391 / Vubis Smart databa	Beyond the Farthest Star [Book]
8	[0] 1988 / Vubis Smart datab	Beyond the Farthest Star [Book]
9	[7] 1925 / Vubis Smart datab	Beyond the Farthest Star [Book]
10	[7] 391 / Vubis Smart databa	Beyond the Farthest Star [Book]
11	[7] 22 / Keyword 1	water chemische samenstelling
12	[7] 11 / Keyword 1	Tweede trefwoord volwassenen
13	[4] 10 / Keyword 1	Trefwoord volwassenen
14	[7] 235 / Authors	Auteur A.
15	[10] 16 / Authors	Anderson Poul

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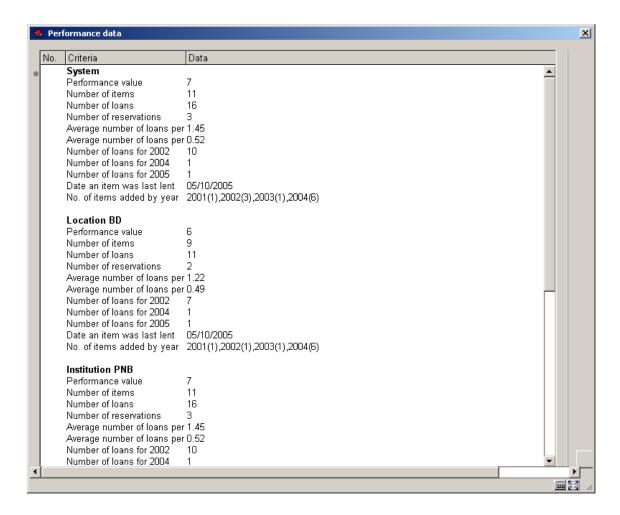**Information in group Performance data**

- First column:

- between square brackets the performance value

- the record number

- the name of the database

- Second column:

- either title of the book or authority heading (for keywords and author names)

- The display order in the group is:

- 1. Current record

- 2. Bibliographic records found through automatic matching

- 3. Authority records related to the current record

If an entry of the performance group is selected, the system displays an overview screen.

The following performance data will be shown:

- performance value

- number of items

- total number of loans

- total number of reservations

- average number of loans per item

- average number of loans per item per year

- number of loans for each individual year

- last loan of any item

- years of data entry of the items

The following groups can be displayed, in a user-defined order:

- all institutions / locations (system)

- current location

- other locations of current institution (per location)

- total of current institution

A screen example:

```
Performance data                                                    [x]

No. | Criteria                      | Data
    | System
    | Performance value             7
    | Number of items               11
    | Number of loans               16
    | Number of reservations        3
    | Average number of loans per   1.45
    | Average number of loans per   0.52
    | Number of loans for 2002      10
    | Number of loans for 2004      1
    | Number of loans for 2005      1
    | Date an item was last lent    05/10/2005
    | No. of items added by year    2001(1),2002(3),2003(1),2004(6)
    |
    | Location BD
    | Performance value             6
    | Number of items               9
    | Number of loans               11
    | Number of reservations        2
    | Average number of loans per   1.22
    | Average number of loans per   0.49
    | Number of loans for 2002      7
    | Number of loans for 2004      1
    | Number of loans for 2005      1
    | Date an item was last lent    05/10/2005
    | No. of items added by year    2001(1),2002(1),2003(1),2004(6)
    |
    | Institution PNB
    | Performance value             7
    | Number of items               11
    | Number of loans               16
    | Number of reservations        3
    | Average number of loans per   1.45
    | Average number of loans per   0.52
    | Number of loans for 2002      10
    | Number of loans for 2004      1
```

117.3 Performance value calculation

Every group of the performance data display and every entry in the list on the record overview screen has a "performance value". This value is a number that is calculated as follows:

- (Average number of loans per year) * 10

- +

- (Average number of reservations per item) * 10

- +

- Loans current year + (12 – current month number) / 12 * loans last year

Note

This value has no meaning as such - for instance a value of 132 can have a very different meaning depending on the system: in one system it may be a high value, in another a medium value; the meaning must be derived from the comparison with other performance values within the same system.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	unknown	creation	
2.0	November 2006	changed incorrect terminology (delivered as part of release 2.4.2 build 1 updates)	