



Smart Libraries Newsletter  
American Library Association  
50 East Huron Street  
Chicago, IL 60611-2795 USA

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## **August 2008** **Ex Libris sets strategic course on Open Systems**

### *Smart Libraries Newsletter*

*Smart Libraries Newsletter* delivers hard data and innovative insights about the world of library technology, every month.

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# Smart Libraries™

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## Ex Libris Sets Strategic Course on Open Systems

In the current phase of the library automation industry, open source software has a large following. Some companies that offer products with a closed source licensing model have developed their own ways to respond to the popularity of more open systems. Releasing source code to software is only one of many approaches to give libraries more control of their data and more flexibility to extend the functionality of the software.

Ex Libris specializes in automation products, primarily aimed at academic and research libraries, and has a large base of customer libraries throughout the world. In June 2008, Ex Libris announced that it had launched what it calls an "open-platform program" formalizing and expanding its commitment to deliver its products and services in a more transparent approach.

The route that Ex Libris has chosen involves creating application programming interfaces (APIs) that provide access to the data and functionality for each of its products. This isn't an entirely new effort. The company has a longstanding practice of developing APIs for its major products. This strategic initiative extends and formalizes these efforts and provides an environment for the users of its products to share and collaborate in their use of these APIs.

The company currently offers APIs for many of its products. Ex Libris designed its ALEPH 500 integrated library system to support APIs from its initial design, culminating in an X-Services layer as internet protocols and Web services emerged as the preferred approach for implementing APIs. The company's MetaLib federated search platform and SFX OpenURL link resolver both include XML APIs. DigiTool, Primo, and Verde use SOAP (Simple Object Oriented Protocol), an industry-standard approach for Web services. One of the major features of the recently released Voyager Version 7 involves the creation of a suite of Web services.

Ex Libris isn't the only company offering APIs for its library automation products. Unicorn, from SirsiDynix, for example, has offered a comprehensive API since 1995. (See Library Systems Newsletter November 1995)

The Open Platform Program will expand the company's commitment to open APIs, going beyond the APIs for its separate products and working toward a more consistent and comprehensive set of APIs that spans its product family. The program includes a commitment to provide documentation for the APIs. Ex Libris will facilitate their use through establishing the "E L Commons" a site that hosts where developers at customer sites can access the documentation for the interfaces, upload components that they have built using the APIs, or download those created by others.

Tamar Sadah, Ex Libris' director of marketing, will lead this program and coordinate resources from the company and customer sites. Revital Marck, currently Aleph development manager, will guide the company's efforts to offer APIs that expose services across all of its products following a more consistent and comprehensive set of standards. The company states that it aims to instill a culture of openness in the way that it develops and supports its products.

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### Receive *Smart Libraries* via e-mail

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## Open APIs versus Open Source

For a company like Ex Libris which has products implemented in thousands of libraries around the world, developing APIs stands as a more practical alternative than opening their systems and moving to open source licensing. Allowing its source code to be changed by anyone might not work effectively as a sustainable strategy for ongoing development. Ex Libris develops products for complex libraries and may not necessarily be well suited for open source development. The coordination involved in version control and the possibilities for forks in the code base could yield more difficulties than they would solve. A robust set of APIs offers customer sites the ability to access data and extend functionality without providing access to the source code of the core business applications or altering the business terms involved in licensing the products.

The key difference in the open platform strategy as described by Ex Libris and the open source model involves allowing programmers outside of the company's own development staff to work. In the open source model, customer sites gain access to the program code from which the core applications are created. Open source licensing allows libraries with their own programming staff to inspect the code and make changes that alter its functionality. It also allows other companies or organizations to develop and support the software and possibly create competing versions.

It's possible to follow a development model where the core products remain proprietary, while creating APIs that give user software the ability to access the underlying data and functionality. If a software developer creates an API, others can write their own reports, scripts, or other components to extend or replace the functionality of the original application.

Open APIs allow customer sites to write scripts that interact with the product without gaining access to the original source code. Depending on the completeness of the APIs offered, programmers can often achieve the same kinds of results with open APIs more effectively than would be possible by reprogramming the source code, thus altering the core product.

Today, claims of openness abound. It's a challenge for libraries to look beyond marketing claims to the approach that best meets their needs for flexibility. This arms race of openness benefits libraries to the extent that it results in more options and flexibility in their own automation strategies. The open source movement and programs such as Ex Libris' open platform strategy provide competing alternatives with similar goals.

### APIs Explained (Sidebar)

Application Programming Interfaces involve a layer of software that allows external systems to gain access to the data and functionality of an application. APIs can be implemented in a number of ways. They can use their own proprietary interface, or they can follow standard protocols such as Web services. Common flavors of Web services include SOAP (Simple Object Access Protocol) and REST (Representational State Transfer). APIs provide hooks into proprietary systems allowing external systems to access data and functionality.

While the availability of APIs provides an additional option for libraries that want to do more with their automation systems, it does not get in the way for those libraries that want to run the software as delivered.

To be useful, the developers of the product must produce documentation for the APIs, which give detailed instructions for programmers regarding what inputs each procedure within the API requires and what results should be expected.

A number of APIs have been defined for library automation products that most automation systems have implemented. These include some of the familiar standard protocols:

- Z39.50, which provides a standard interface for search and retrieval
- SRU/SRW, a Web services approach to a subset of Z39.50 search and retrieval functions
- SIP2 and NCIP which provide access to selected ILS functions related to patrons and items. These protocols were designed to allow third party self-check systems, interlibrary loan and resource sharing systems to interact with library automation systems through a standard interface
- OAI-PMH (Open Archives Initiative Protocol for Metadata Harvesting) provides a standard approach for the wholesale transfer of bibliographic records out of a given

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**“In a highly competitive market fueled primarily by non-profit organizations, such as libraries, companies need flexibility and efficiencies that are difficult to achieve by publicly traded companies.”**

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environment. Originally developed for other types of repositories, this protocol has recently been proposed for the transfer of data from library automation systems to discovery-layer interfaces.

Although protocols like these provide some degree of access into the functionality and data subsumed within library automation systems, they represent a fairly small portion of the overall data sets and functionality. Support for these proto-

cols provides some openness for a library automation system, but not at a comprehensive level. APIs can fill in the gaps not addressed by the standard protocols.

Ideally, other standard protocols may eventually emerge that address a more comprehensive view of the data and functionality of library automation systems. In the meantime, system developers can create their own APIs that expose data and services.

## SirsiDynix launches its Faceted Search Product

For the last two years, next-generation library interfaces have represented one of the major trends in library automation products. SirsiDynix has entered the fray with the announcement of SirsiDynix Enterprise, a search product that features faceted navigation, built using the GlobalBrain data retrieval technology from BrainWare, Inc.. Both SirsiDynix and BrainWare are portfolio companies of Vista Equity Partners.

In addition to the faceted navigation and relevancy ranking of results that is now a standard characteristic in this new generation of library interfaces, SirsiDynix Enterprise will include features such as fuzzy search logic, support of enriched content, saved searches, and the ability to execute searches through a URL. SirsiDynix Enterprise supports multiple languages, including the ability to return appropriate results regardless of the way the user enters diacritics. This product works with either an individual library or can be configured to support

libraries involved in a consortia.

SirsiDynix Enterprise can be implemented as an add-on to all of the Web OPACs offered by the company including Symphony e-Library, iLink / iBistro, Web2, and Horizon Information Portal. The company will focus initially on providing the products to libraries running Symphony, Unicorn, Horizon, or Dynix.

The initial version of SirsiDynix Enterprise will be offered only as a Software-as-a-Service solution, hosted on SirsiDynix servers. Locally installed options will be possible in later versions. Data from the library's automation system is harvested and indexed in SirsiDynix Enterprise. Up-to-date holdings and availability information is available to users through links back into the library's automation system.

SirsiDynix expects the product to be available during the third quarter of 2008; multiple customer libraries are currently participating in a beta test program. A preview of SirsiDynix Enter-

prise was demonstrated at the 2008 ALA Annual Conference in Anaheim, CA.

SirsiDynix Enterprise enters the competition for next-generation library interfaces fairly late. AquaBrowser has been available in the library market since 2004; Innovative Interfaces announced Encore in May 2006; Ex Libris announced Primo in June 2006. SirsiDynix is hardly the only late entry in this category. VTLS announced its Visualizer interface in January 2008. The Library Corporation, although it was one of the first automation companies to get involved with next-generation interfaces through its integration and marketing of both Endeca and AquaBrowser, has only recently begun showing Indigo, the company's own next-generation interface. In the K-12 school library automation arena, Follett Software Company released its Destiny Quest search interface for Destiny Library Manager in June 2008.

## ISACSOFT Completes Business Transition

The April 2008 issue of Smart Libraries Newsletter reported that ISACSOFT, which includes the BiblioMondo library automation business unit, was in the process of making the transition from a publicly traded company on the Toronto Venture exchange to private ownership by its current Chairman, Presi-

dent, and CEO Ronald Brisebois. The shareholders approved the sale of the company for CDN\$ 0.33 per share on June 27, 2008, with a valuation of the company set at about \$4.2 million. The transaction closed on July 10, 2008. Brisebois, now the full owner of the company will continue in his executive roles.

## ChiliFresh Adds Reader Reviews to Your Online Catalog

One exhibitor at the Annual Conference of the American Library Association in Anaheim last June that created quite a bit of buzz was ChiliFresh out of Olathe, Kansas. They have created a way to integrate reader reviews of books directly into your online catalog.

According to the ChiliFresh website, the brand of integrated library system (ILS) you use at your library should not be a major stumbling block to implementing the ChiliFresh Review Engine. “We have developed ChiliFresh at such a basic level so it can integrate into virtually any ILS system. We have created implementations for most of the major ILSs and we are committed to making this available for every library’s catalog.”

Patrons can submit starred ratings and written reviews that can be seen and moderated by library staff members before they are added to the ChiliFresh database. The ChiliFresh administrative panel allows library staff to decide whether the reviews will be moderated or unmoderated. The look and feel of

the reviews can be customized when they are blended into search results from your online catalog. The reviews go into a centralized, hosted database containing reader reviews from all over the world. ChiliFresh allows reviews from readers in or near your zip or postal code to float to the top of the pile of reviews of that book. This way, library staff can control from how far afield ChiliFresh displays reader reviews: just from your library patrons, from readers in your state, from readers worldwide, as well as other options.

ChiliFresh considers the reviews to be intellectual property that is jointly owned by the library and ChiliFresh. According to the FAQ webpage, “Every review entered from your catalog is the property of both your library system and ChiliFresh Enterprises, Inc. What this means is that if you ever want to discontinue the use of the ChiliFresh Review Engine, we will provide you with a copy of all the reviews that were entered from your catalog.” Note that when you discontinue use, ChiliFresh will not remove

your library’s reviews from their centralized database.

Pricing for the ChiliFresh Review Engine includes a one-time \$150 start-up charge, followed by a monthly maintenance fee as low as \$100. There is no contract to sign. Libraries may join and leave at any time. Each additional library location costs \$10 per month though it isn’t necessary to make ChiliFresh available at all branch libraries. Libraries may pay their subscription fees monthly or annually. One-month free trials are available.

ChiliFresh offers a good service for a reasonable price. Although some integrated library systems offer the ability to enter reader reviews, with the ChiliFresh centralized database you get access to a critical mass of reviews, which eventually may put the participating libraries on par—at least in terms of reader reviews—with what Amazon.com.

—Tom Peters

**More Info. @:**

<http://www.chilifresh.com>

## Look Lively

On July 8th Google released the public beta version of Lively, its three-dimensional virtual world. Many prognosticators had predicted that Google would build its much-anticipated virtual world service on top of its existing Google Earth platform, but Lively seems to be a standalone, un-mashedup product coming out of Google Labs.

Some virtual worlds try to achieve a very high graphic, glossy look that may or may not resemble the real world. A

major problem with this style is that it often raises the tech bar too high, diminishing the number of people worldwide who have the computing power and bandwidth to get into the virtual world. Google chose a low-graphic approach that is still three-dimensional. The avatars look almost cartoonish, and the text chat hovers over each avatar like the dialogue in a comic book or strip.

There is no currency yet in Lively, so all goods and services either are free

or bartered. It also currently is impossible for the average avatar to create anything (other than rooms). All of the items currently available for deployment in Lively were created by a select group of Google’s development partners. Regular avatars are able to select these pre-built goods from a catalog.

Will some form of librarianship take root and survive in Lively? Six days after Lively launched its public beta version, a search for the keyword “library” pulled



up over 50 rooms. Some of the libraries seemed to be meant in the original sense of the room in a house where books were kept and read (as opposed to the nursery, the laboratory, the orangery, and the scullery). Other library rooms (with at least one inevitable “library” room) seemed to be associated with real-world libraries, such as Ohio State University, Rutgers University Law Library Newark, and Kean University. In this virtual world there even exists a library for the fictional Miskatonic University. Because Arizona State University served as the private beta testing location for Lively, the Noble Library at ASU has the distinction of being the oldest library in Lively, created back on March 18, 2008.

It is not yet known what types of library services and collections will be available through these Lively libraries, but likely possibilities include reference services and book discussions. The avatars in Lively can communicate via text chat and pre-programmed animations (dancing, hugging, laughing, etc.), but currently there are no voice-over-IP capabilities in Lively. Because it is relatively easy to display videos in Lively rooms, we may see video library collections get the jump on other types of collections.

While some virtual worlds, such as Second Life, build up the terrain into a patchwork of mainland and islands, Google has decided to use the room as the basic building block. The rooms do not seem to be stitchable into buildings, neighborhoods, communities, and vast geographic regions that an avatar could fly over like Peter Pan, then dive and explore at will. No cultural districts, such as the Alliance Information Archipelago in Second Life, seem possible yet in Lively. True to its roots, Google chose the search route to discovering rooms of interest, with a simple search box interface.

The team at Google that developed Lively really wants this virtual world to integrate well with the existing “worlds” of websites, blogs, and web-based social networks such as Facebook. Each Lively room prominently displays the HTML code that will embed the room into a website or blog.

According to Lively’s community standards ([http://www.lively.com/html/community\\_standards.html](http://www.lively.com/html/community_standards.html)), a real-world person must be at least 13 years old to use Lively. If that person is less than 18 years old, parental permission is required, but evidently no forms must be filled out. Just go ask Mom or Dad, or at least pretend that you did. The community standards also forbid certain types of behavior, including nudity, graphic sex acts, sexually explicit material, pedophilia, incest, bestiality, child pornography, bullying, and hate speech. Not surprisingly, two of the most popular rooms during a random check included “porn place” and “sexy babes.” So much for community standards. Note that gambling, which caused such a ruckus in Second Life, is not on the list of forbidden practices. Lively also prohibits impersonation (“We don’t allow impersonation of others or other behavior that is misleading or intended to be misleading.”), which, if interpreted literally, could prohibit gender switching in Lively as well as looking younger and more buff than you do in real life.

Vivaty Scenes, another three-dimensional virtual world that is trying to draw on and build on the strengths of existing online social networks, also relaunched its public beta version in July. They also have opted for a low-graphics cartoonish look, and they also are trying to tap into the power of online social networks such as Facebook and AOL Instant Messenger. Vivaty Scenes currently runs only on computers running the Microsoft Windows operating system and the Internet

Explorer browser, but work is underway to make it available in the Firefox browser as well as on Mac computers.

Both Lively and Vivaty Scenes currently are free, in the sense that there is no direct expense to both individuals and organizations. Fees for services and/or increased advertising may be in their futures.

It is too soon to tell what impact Lively and Vivaty Scenes will have on the overall virtual worlds movement, or on the virtual worlds librarianship sub-movement. Skeptics of the value and value-add of virtual world experiences abound. Ian Bogost, an assistant professor at the Georgia Institute of Technology, was quoted in a Wired article as having said, “The best way to access the internet’s content as a user is to use the ordinary web. Why do I need to sit in a simulated world as a simulated character to watch a simulated PowerPoint? Why not just view the slides or video directly?”

—Tom Peters

**More Info. @:**

<http://www.lively.com>  
<http://www.vivaty.com>

**Wired Article:**

<http://blog.wired.com/games/2008/07/vivaty-scenes-t.html>

## NCES Report on Academic Libraries

In July the National Center for Education Statistics (NCES), part of the U.S. Department of Education, released its report and findings from its fall 2006 survey of academic libraries. The report, "Academic Libraries: 2006: First Look" (NCES 2008:337) is available only online as a PDF file.

The summary to the report provides the big picture, "The nation's 3,600 academic libraries held 1.0 billion books; serial backfiles; and other paper materials, including government documents at the end of FY 2006, and there were 144.1 million circulation transactions from their general collections. During the same time period, academic libraries' expenditures totaled \$6.2 billion." In FY 2006 academic libraries also were involved in approximately 22.3 million interlibrary loans, borrows, and document delivery transactions from commercial vendors, which represent over 15 percent of the volume of direct circulation transactions.

The report defines an academic library as "an entity in a postsecondary institution that provides all of the following: An organized collection of printed or other materials, or a combination thereof; a staff trained to provide and interpret such materials as required to meet the informational, cultural, recreational, or educational needs of the clientele; an established schedule in which services of the staff are available to the clientele; and the physical facilities necessary to support such a collection, staff, and schedule."

Approximately 50 cents of every dollar spent by an academic library goes toward wages and salaries. Collectively, these libraries spent \$692 million in FY06 on current electronic serial subscriptions. They spent \$153 million on computer hardware and software.

Over 2500 of the 3600 academic libraries in the U.S. reported offering between 60 and 99 hours of public services each week. Only 31 of the 3,617 institutions (0.9 percent) were open 24 hours a day.

It was heartening to note that 41.8 percent of the institutions with doctoral programs reported that they now are producing electronic theses and dissertations. Approximately one-third (31.6 percent) of all U.S. academic libraries had had documents digitized by library staff, and 72.1 percent offered reference service via email or the web.

During a "typical week" in the autumn of 2006 when the data were collected, nearly 18 million gate count visits to physical libraries were recorded. No attempt was made to de-dupe multiple visits during the survey week made by individuals, nor evidently was any attempt made to count online visits to the web sites and resources offered by these academic libraries.

—Tom Peters

### More Info. @:

<http://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2008337>

## UMich MBooks Enables Personalized Collections

Massive book digitization projects continue to generate news and interest. When Microsoft, Google, and others announced these initiatives, it seemed initially that most of the use would gravitate to the largest online collections offered by the companies that were providing most of the funding, even though most of the agreements allowed the partner libraries to make the books scanned from their collections available to the general public.

Now that Microsoft has bowed out of the mass book digitization scene, the value of localized digitized book collections is getting more attention. The University of Michigan appears to be one of the leaders in exploring and testing what can be done with their share of the mass digitization universe.

In July the University of Michigan announced an enhancement to their MBooks interface that enables users to create personal collections. These collections may be kept private or made pub-

lic, which then can be viewed and used by others. These personalized collections also can be searched as a group.

The early list of public collections of MBooks covers a wide range of topics: Abe Lincoln, Adventure Novels, Ann Arbor History, Antipodes, and on and on. French literature seems to be well-represented already, with public collections on Moliere, Dumas, and Hugo. There's even a small public collection about Grinnell College, my alma mater.

MBooks also offers the MTagger feature that allows users to add their own tags to books of interest. Because of scanning quality and user interface issues, many collections of mass digitized books remain diamonds in the rough. The University of Michigan Libraries is beginning to explore and reveal the facets of this exciting new area.

—Tom Peters

#### More Info. @:

Announcement:

[http://mblog.lib.umich.edu/blt/archives/2008/07/new\\_mbooks.html](http://mblog.lib.umich.edu/blt/archives/2008/07/new_mbooks.html)

List of MBooks Public Collections:

<http://sdr.lib.umich.edu/cgi/mb>

## Association 2.0

Perhaps the origins of the practice are lost in the mists of history, or perhaps the origin is well-known to everyone but me, but in recent years it has been customary for each elected President of the American Library Association to have a touchstone or overall theme for their presidential year. Jim Rettig, our current President, has chosen the short phrase “Creating Connections” as his touchstone. It has a nice alliterative ring to it, and implies connections to be created and maintained—between libraries and the diverse populations they serve; between the association and its members; between the proud past and the inherently uncertain future.

While “Creating Connections” may be Rettig’s official slogan, it seems like a major current focus for the association is clearly to continue exploring, expanding and maintaining Library 2.0. “Association 2.0” would have been a much riskier and contentious touchstone for a presidential year, but it also would have been more accurate.

Associations can and do use information technology and cool tools to better serve their members and to pursue their goals. For example, the weekly email recap called AL Direct, is a great way to keep up with recent issues and opportunities directly and tangentially affecting the association and the profession. And the wonderful collection of quirky yet informative videos that Daniel Kraus and his merry minions have been cooking up at AL Focus is a breath of fresh air in a format underappreciated by our profession.

Jim Rettig has been working with a diverse group of librarians and ALA staffers on a variety of Library 2.0—or perhaps we should say Association 2.0—initiatives during his presidency. There were many lively discussions both in-person and online about ideas, needs, and opportunities:

1. An ALA Craigslist—an online clearing house for ALA-related groups and communities of interest and a rich resource for online “ads” and announcements to help ALA members get involved in the work of ALA

2. Salon Conversations—salons of 18th century Paris offered opportunities for stimulating, free-form conversations. ALA will be offering salon conversations online using web conferencing software, in-world on ALA Island in Second Life, and even in-person during the Midwinter Meeting and Annual
3. Unconference Sessions at Annual Conference—The BIGWIGS (LITA Blog Interest Group, Wiki Interest Group) blazed the trail on this one. The concept will be expanded to allow more members to select topics of interest to them, help establish the agenda for the unconference sessions, and generally avoid the look and feel of sages on stages.
4. Virtual Poster Sessions—Where is it written that a poster session must involve 4 x 8 feet sheets of synthetic cork and last only a few precious minutes? If you share your poster session content online, you transcend many of the constraints of space and time, thus reaching a larger audience.
5. YouTube Q&A Session with the ALA Presidential Candidates—The Presidential Candidates’ Forum at the Midwinter Meeting in Denver in January 2009 will include questions and answers delivered via short YouTube videos. Even if your travel budget won’t get you to Denver and back, you can participate in the forum.
6. Advocacy for All Libraries—This initiative will explore the use of new tools to help coordinate and improve the efficacy of the many advocacy efforts already underway.
7. Juried Grassroots Programs at Annual Conference—If you have a great idea for a program but don’t know beans about how to enlist committees to co-sponsor a program or all the forms and timelines that must be completed and met, the Juried Grassroots Programs will cut through some Gordian knots.
8. Day at Annual Conference for Promising Undergrads—The goal here is to provide promising undergraduate students from underrepresented groups a positive one-day experience at Annual Conference that will fuel their interest in becoming members of our profession.

—Tom Peters