INFORMATION IN THE HOME OFFICE:
AN ETHNOGRAPHIC STUDY OF SPACE, CONTENT, MANAGEMENT,
AND USE

by

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A thesis submitted in conformity with the requirements for the degree of
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Abstract

Many Library and Information Science (LIS) scholars have long articulated the importance of physical and social settings—the environment—when examining how individuals acquire, store, organize, maintain, dispose of, and use information in one of their home or work lives. Yet, few have raised the question of how these information practices are altered and affected in home office spaces, fused living and working environments that lie at the intersection of the personal and the professional. This thesis resulted from an exploratory, ethnographic research study centred upon describing and analyzing the habits of information management and information use that characterize home office settings—specifically, professional home offices that each serve as their user’s only workplace. It argues that the professional home office differs from both traditional professional offices in corporate or institutional settings and from personal home offices used for non-professional tasks and pursuits. The professional home offices of four printing company account managers provided the field from which data was gathered, collected by way of guided tours, diagramming, photography, interviews, and observation. Findings suggest that information practices in professional home offices are a continual negotiation between the two spheres of household and organization, but that this will not necessarily imply a compromise of one for the other.
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I
INTRODUCTION

1.1 Chapter Overview

This chapter introduces the thesis at hand, which resulted from an exploratory, ethnographic research study centred upon describing and analyzing the habits of information management and information use that characterize home office environments—specifically, professional home offices that serve as a user’s only workplace. It provides background to the study, explains the study’s overall objectives, states its guiding research questions, defines certain specific terms that are used throughout this thesis, and briefly outlines upcoming chapters before the body of the work begins.

1.2 Background

In January 2009, Gawker, a website devoted to reporting “gossip from Manhattan and the Beltway to Hollywood and the Valley” (Gawker, 2009), reported that Martha Stewart Living Omnimedia, undergoing an office move, had received orders from none other than the company figurehead herself. Stewart purportedly reminded her employees that the new building’s carefully chosen design scheme would be marred by any of the following: ink colours other than red or black, desks that are not completely clear at the end of the day, except for one metal basket of approved office supplies, and anything that could be construed as being personal, such as photos or coffee mugs. (Nolan, 2009).

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1 As will be explained further in chapter 3, this thesis developed out of and was informed by a smaller-scale pilot research study that was carried out in spring 2009 and published in winter 2009. Some of this thesis’ preliminary findings were also presented as part of a panel at the American Society for Information Science and Technology (ASIS&T) Annual Meeting in fall 2009. Both of these earlier papers are listed in the References at the end of this thesis (under Thomson, L.), though they are not cited throughout the thesis itself.
Wasting no time, Stewart took to her own blog to address the claim, which she called a “misrepresentation” (The Martha Blog, 2009). She was also quick to add—for the reader’s sake—that her offices “use a great assortment of writing implements from the Martha Stewart crafts line available at Michael’s Crafts and Walmart” (The Martha Blog).

Whether true or not, the above account underscores the point that traditional professional offices, the shared workplaces of many, leave an individual’s workspace and work routine subject to a host of outside forces and influences that may range from their organization’s outright policies and regulations through to its unspoken culture (Shepherd & Yeo, 2003), perhaps only perceptible in the quick judgmental glance of a coworker.

Among the aspects of employees’ work routines that may be influenced in a traditional professional office setting are their information practices; in other words, the ways in which they “acquire or create, store, organize, maintain, retrieve, use, and distribute” (Jones, 2007, p. 453) documents of all types and formats. Taylor (1991) writes that, “within a corporation management establishes, inadvertently or otherwise, an attitude toward information and consequently affects the information behaviour of its employees” (p. 227). Similarly, Lansdale (1988) notes that, “users’ behaviour in offices… is largely adapted to overcoming the problems being created by the mismatch between the facilities provided, the users’ need, and their cognitive capacities” (p. 63). Though referring more to physical and technical facilities, Lansdale’s statement is equally as applicable to the socio-professional facilities of office settings as well; individuals will necessarily and voluntarily adapt their information practices based on all of the subtleties of their environment.
In turn, professional home offices are described as spaces “that contain work in the antithesis of a corporate setting, redefining the rhythm of working life in the context of family and friends” (Myerson & Ross, 2006, p. 156). Professional home office users perform all of their work from a site that is far removed from rigid company controls and colleagues’ prying eyes, yet fused living and working environments pose new considerations and challenges for individuals’ information practices, which this thesis will explore. Working from a professional home office means users must adapt work routines around the entirely different mental model that accompanies the setting. As Crabtree and Rodden (2004) note:

the home is not characterized by a common orientation to a shared work objective—the production of commodity X or the delivery of service Y. Such an orientation is absent from the home, which is instead characterized by a diverse range of disparate concerns, which vary according to household. (p. 193).

The “heterogeneous system” of the home, both a physical and a socio-familial setting, is set in direct opposition to traditional workplaces, “which are homogenous in their concern for task performance” (Paisley, 1980, p. 136). Myerson and Ross model the personal and professional ties that bind employees as “tensions” that ultimately, somehow, reach a natural “balance” (pp. 11-12). Where such competing allegiances are inherent in a setting, in what ways, if any, are information practices specifically affected?

According to Statistics Canada, approximately 2.8 million (or seventeen percent) of employed Canadians routinely completed at least a portion of their professional work from home in 2000, an increase over the 2.1 million who did so in 1995 (Akyeampong & Nadwodny, 2001). More recent estimates of Canadians working either partially or entirely from home remain consistent with those figures from 2000 (Akyeampong, 2007), and reports
from the U.S. Bureau of Labour Statistics similarly state that twenty percent of employed Americans completed some or all of their work from home in 2007 (Business Trends, 2008, p. 21). Such findings indicate that a significant portion of the contemporary North American workforce does—to some extent—accommodate a professional work routine within the non-standard work environment of the home.

Conducting professional activities in the personal sphere of the home hearkens back to pre-industrial, agrarian society, a time before a majority of workers were aggregated in factories and offices, the “necessary by-products of the bureaucratization of industry” (Myerson & Ross, 2006, p. 8). Despite this long history, however, and recent surges in the number of people who choose to telework or to work from home entirely, professional home offices are relatively understudied spaces from all but architecture and design perspectives. The Library and Information Science (LIS) field particularly, which has produced an abundance of valuable research into information practices in traditional professional offices, has focused little attention on these same phenomena within the professional home office and, in fact, little attention on the home office altogether. While some LIS scholars have articulated the importance of workplace settings (e.g., Taylor, 1991; Kwasnik, 1991; Rieh, 2004; among others), pointing out that information practices are not uncompromised across places and spaces, simply taking on the same shape regardless, only one (Fulton, 2000a; 2000b; 2002) has examined the arrangements of employees who occasionally work from their homes, or telework. By documenting how the physical context of the home office and the social context that inevitably accompanies it influence information management and use, this thesis addresses this shortcoming in LIS research.
At the same time, this thesis is also directed toward a less surprising oversight in LIS scholarship: while a substantial number of studies have focused on the information management, seeking, and use habits of professionals, particularly researchers and academics, none have focused on these same dimensions within the printing business, though the rapid accumulation and sheer volume of documents necessary for job success make it a comparably ripe subject area. This study takes as its participants four printing company account managers (hereafter referred to as printing professionals in this thesis). Printing professionals oversee the manufacture of various printed materials, including textbooks, trade books, catalogues, magazines, newspapers, agendas, brochures, and more. They are true knowledge workers, able to translate and communicate so to bridge the divide between the disparate groups of clients and printing plant facilities. They serve as crucial links within the printing industry, ones without whom the needs of information producers and consumers could not be met.

Motivation for this thesis arose from personal proximity to my father, a long-time printing professional, and physical proximity to his home office, which he has used as his sole workplace for almost a decade. Containing a miscellany of information on every subject and in every form and seemingly organized, arranged, and tailored to his every whim, his work setting has long held fascination for me. By carrying out field outings into the professional home offices of four printing professionals, gathering data by way of guided tours, diagramming, photography, interviews, and observation, this study addresses gaps in the current LIS canon, where both the home office terrain and the realm of printing professionals have gone largely, if not wholly, unexplored. This study’s findings regarding information
management and use in professional home offices appear in the following chapters as an ethnography that is grounded in original data and balanced in description and analysis.

1.3 Statement of the Problem

Despite an awareness among many LIS scholars that setting does affect information practices, little research has looked beyond the traditional professional office, the communal workplace, to begin theorizing about the meaning of a different space, the home office, for individuals’ work-related information practices. By taking as its main object of study the professional home office, which serves as a user’s only workplace, as well as examining information management and use therein, this thesis broaches the question of what role setting might play in shaping information practices.

1.4 Objectives

The main objective of this study is to address the unique dynamics that surround home offices as intersectional or hybrid living and working spaces, and to probe in depth the effects of setting on users’ management and use of information content. To achieve this aim, it draws from a rich record of data that was gathered via discussions and observations during ethnographic field outings in the offices of four printing professionals whose work is entirely home-based. It keeps as a touchstone the large body of existing LIS literature that has examined information practices in traditional workplaces, leaving a broad basis from which to draw inferences about the effects of setting on information management and use. Furthermore, because this study focuses on a sample of home office users who share the same job title and largely the same job responsibilities, there is a solid common ground from
which to discern patterns and differences across the home offices explored. The resulting thesis thus contributes to LIS scholarship a detailed and informative portrait of information management and use in the understudied—though increasingly significant—domain of the home office.

1.5 Research Questions

The approach that this study employed is exploratory and ethnographic. Because home offices are largely unexamined settings, an open foray into these spaces as a first attempt to recognize and articulate what features distinguish and make them unique was in order. Stebbins (2001) writes that, “Researchers explore when they have little or no scientific knowledge about the group, process, activity, or situation they want to examine but nevertheless have reason to believe it contains elements worth discovering” (p. 6).

Ethnography is a specific research style complementary to exploration; it emphasizes a need to view phenomena holistically and champions meticulous attention to and immersion in the minutiae of specific settings, as well as inductive flexibility, as the ways to achieve this. Fetterman (1998) states that, “Ethnographers are noted for their ability to keep an open mind about the group or culture they are studying. This quality, however, does not imply any lack of rigour. The ethnographer enters the field with an open mind, not an empty head” (p. 1).

Influenced by an LIS perspective and a desire to view matters of setting in tandem with those of information practices, this study was guided by three general research questions:

01. What is the nature of information management and use in the home office setting?
02. What approaches to information management and use, conventional or unconventional, arise in the home office setting?

03. What are the effects of the home office setting as manifested through what Jones (2007; 2008) terms users’ “meta-level” information activities, the ways in which they “establish, use, and maintain a mapping between information and need” (2007, p. 464; 2008, p. 60)?

1.6 Definition of Terms

Throughout this thesis, certain terms are intended to convey particular meanings as set out below. Many of these cursory terms are further expanded in a later chapter as noted.

*Information practices* refers to doings and dealings with information that are “intentional,… directed by one’s goals and interests,” and also, to some extent, “socially and culturally shaped” (Savolainen, 2008, p. 48). This term is used throughout this thesis in favour of *information behaviour*, which might be thought of more as being “triggered by an individual’s needs and motives” (Savolainen, p. 48). *Information activities* is also used throughout this thesis to refer to the smaller components of an overall information practice; “practices may be seen as interwoven activities in a given domain” (Savolainen, p. 21).

*Printing professional* refers to an individual employed as a printing company account manager, or sales representative. It is the job of the printing professional to oversee the manufacture of various printed materials, and to act as a liaison between clients and the printing plant facility that will actually produce the client’s printing order. These individuals are further explored in chapter 4, and are the participants whose professional home offices and information practices are the focuses of this thesis.
*Traditional professional office* refers to a space located apart from its users’ homes, and that which is most commonly associated with definitions of an “office” as a centralized workplace used by an organization, however large or small, for the singular task of conducting its professional business. It is further explored in chapter 2.

*Personal home office* refers to a space located within a home, within which the information-centred, non-professional tasks and pursuits of one or more of the home’s inhabitants are carried out. It is further explored in chapter 2.

*Professional home office* refers to a space located within a home, within which the information-centred, professional work tasks of one or more of the home’s inhabitants without a supplementary workplace are carried out. It is further explored in chapter 2.

*Information content* refers to work-related documentary artefacts, both paper and electronic, that comprise the professional home offices under study. It is further explored in chapter 5.

*Information management* refers to the ways in which users gatekeep information content in the professional home offices under study. More specifically, it refers to how users acquire (or not), store, organize, maintain, and dispose of (or not) information content in professional home offices, with emphasis on their storage, organization, and maintenance activities. It is further explored in chapter 6.

*Information use* refers to the ways in which users employ information content to work-related or task-related ends in the professional home offices under study. It is further explored in chapter 7.
1.7 Outline of Thesis

Following the introductory chapter (chapter 1), this thesis reviews relevant pre-existing literature in chapter 2, sets forth the overarching theoretical framework and research design for the study in chapter 3, and then moves on to present the most interesting and illuminating findings in chapters 4 through 7. Chapter 4 introduces the field within which this study took place and this thesis is set, which includes the realm of the printing professional participants as well as their professional home office spaces. Chapter 5 surveys the landscape of information content that comprises the home offices of the four printing professional participants. Chapter 6 divulges the techniques and methods of information management employed by the four printing professional participants in their home offices. Chapter 7 examines the intricacies of information use in the home offices of the four printing professional participants. The concluding chapter, chapter 8, recounts the main findings of the study and outlines the outstanding issues raised by this research into information practices in the home office.

1.8 Chapter Summary

This chapter introduced the thesis at hand as an exploratory, ethnographic research study centred upon describing and analyzing information management and information use in the professional home office environment. It provided background to the study, explained the study’s overall objectives and guiding research questions, stated preliminary definitions for terms, and outlined the upcoming chapters in this thesis.
II
LITERATURE REVIEW

2.1 Chapter Overview

This chapter expounds the argument that a majority of previous LIS scholarship focusing on information practices is divided between two main camps in terms of its setting: the workplace and, to a lesser degree, the home. Both of these bodies of literature are relevant to the study at hand and so reviewed in turn; however, even considered side by side, they are not adequate to the task of revealing how the personal-professional hybridity that makes professional home office spaces unique might affect users’ information practices. After existing research centred on the workplace and the home is described and synthesized, the chapter closes with an original conception: the “office continuum.” The “office continuum” contributes a more finely grained distinction of settings for professional and non-professional work-related information practices, and situates the present study as focusing on the unique, largely unexamined setting of the professional home office, which lies at the intersection of the professional and the personal.

2.2 Pre-Existing Literature

An abundance of pre-existing LIS research has examined the information practices of academics, managers, and other professionals as manifested across their workplace offices and in their descriptions of their work routines and habits. Likewise, a substantial amount of attention has been paid to domestic information practices as these arise throughout the everyday, seemingly mundane running of households and ordering of life. The major
contributions of both of these bodies of literature are reviewed below, and then synthesized in terms of their meaning for intersectional professional home office spaces.

The set of sources with which this literature review was conducted were retrieved through a variety of means: a small number were found by conducting keyword searches for “home office,” “office,” and “home” in the LISA: Library and Information Science Abstracts electronic database and the Google Scholar electronic database; many were already in my personal collection or introduced to me by my thesis committee; however, the majority were found through citation chaining. This literature review is selective, due in part to this study’s exploratory nature, and is limited to sustained accounts of information practices that are most relevant to the study at hand and found in scholarly monographs, book chapters, journals, or conference papers.

2.2.1 Information in the Workplace

Whether looked at through the broader lens of information-seeking and use (ISU) or the oftentimes narrower focus of personal information management (PIM), studies of scholar’s and professionals’ information behaviours and practices in the workplace are a predominant mode of LIS research. Harris and Dewdney (1994) note that of the more than 3000 ISU studies published since 1966, ninety-five percent take scholars and professionals as their subjects (p. 9). These works provide valuable portraits of localized, in-office habits and are typically underscored by droves of carefully detailed and even quantified observations and data, yet most reconfirm the same sorts of findings without truly moving outside the box.
In 1991, Kwasnik entered the offices of eight university faculty members, asking them to describe and demonstrate their methods of organizing previously received and newly received paper documents. Her findings indicate that workers base their decisions about the arrangement and disposition of material not only on physical attributes, “document factors,” but also on the context in which material is received and will or will not be used, “situational factors” (Kwasnik, p. 389). Her argument that the broad work context in which paper is received and required professionally will play a key role in determining its arrangement found widespread support in other works (Malone, 1983; Whittaker and Hirschberg, 2001; Sellen & Harper, 2002; Bondarenko & Janssen, 2005; among others). It has also held true for electronic documents (Barreau, 1995; Barreau & Nardi, 1995; Barreau, 2008; among others), despite the fact that digital systems present users with entirely new sets of possibilities and constraints and represent entirely new working environments that “[spill] over to sources far beyond the desktop” (Barreau, 1995, p. 337).

Utilitarian professional concerns are not the only determinants of information practices, however. Information practices, even in the professional domain, are highly personal (Jones, 2008), and their efficacy will rest “fundamentally with the individual and with his or her ability to create, manage, and use a personal information collection” (Bruce, Jones, & Dumais, 2004, Conclusion section). Of any workplace information system, Barreau (1995) writes that it “must be flexible and adaptable to… task needs and personal idiosyncrasies” (p. 327). Moreover, socio-professional factors will intertwine with personal preferences to also influence information practices in complex and subtle ways.
In 1983, Malone interviewed a group of ten professionals concerning the organization of paper information in their offices. He distinguished between two main categories of office organization: “neat” offices, which are characterized by a predominance of archived files, and “messy” offices, which are characterized by a predominance of loosely stacked, unarchived papers and files (Malone, pp. 101-105). Though office neatness and messiness held no bearing on workers’ job performance, Malone notes, “it is clear that there is perceived social value placed on having a neat office” (p. 105). In 2001, Whittaker and Hirschberg picked up on this same research, analyzing how paper information was managed by fifty professionals facing an imminent office move. The authors found no evidence to support the theory that job type and position (whether one was a non-clerical manager or researcher or a clerical secretary) determined “neat” or “messy” office organizations, leading to a speculation particularly important for the study at hand: that “personal style,” however it is manifested in the socio-professional workplace of which Malone speaks, “may therefore be a more likely determinant of strategy choice than job type” (Whittaker and Hirschberg, p. 163). What role might a changed physical setting, such as that of an intersectional personal and professional home office, have in nourishing or otherwise constraining users’ abilities to act as “informal librarians” (Whittaker and Hirschberg, p. 166), keeping desired information at their fingertips, or “sentimental hoarders” (Finneran, 2007, p. 6), attached to the information they acquire?

In her conclusion, Kwasnik (1991) alludes to but does not elaborate on a subject’s own “situation” as a factor influencing their methods of organizing different materials, writing that, “a person makes classification decisions within a context and for a purpose, but also
within the constraints of physical objects and a physical environment” (p. 397). In this study, the professional home office as a physical and socio-familial space is not visualized strictly as the “constraining” force to which Kwasnik (1991) refers—or even the problematic one which Fulton (2000a), who has compared traditional office workers and casual teleworkers, suggests—but as one that is equally conducive to and capable of “de-constraining” or freeing users in ways the traditional office perhaps is not. Of course, however, as Fulton suggests, the home does present entirely new constraints, both physical and social, with which individuals working from a home office must contend.

2.2.2 Information in the Home

Studies of householders’ information practices within the domestic sphere of the home make up a substantial subset of LIS research, though one that is smaller than that of workplace studies by far. These studies are often, but not always, marked by a long-term, naturalistic involvement with a limited number of cases, and often have very open-ended research focuses, sometimes so open-ended as to be established entirely inductively (for example, Swan & Taylor, 2005; Taylor & Swan, 2005; Taylor, Swan, Izadi, & Harper, 2007; Swan, Taylor, & Harper, 2008). More so than that centred on the workplace, LIS literature focusing on the home has explicitly pointed to the ways in which information practices “are contingent upon the material arrangements of domestic space” (Crabtree & Rodden, 2004, p. 193; see also Crabtree, Hemmings, & Rodden, 2002), both relying on and exploiting specific physical features in order to coordinate and enable task completion.
Studying how and why information practices emerge as they do in certain households, Kalms (2008) found that all information activities therein are intensely personal and individualistic. Hartel (2007) confirmed this finding when examining non-professional gourmet cooks’ information practices, noting that the way their resources spread through their homes mirrored the way the hobby spread through their lives, whether as an understated enjoyment or overtaking passion.

However, information practices contained within the home are not free of social influences, but rather “emerge from the interactions of a householder with information, information-related devices and services, [and] other householders” (Kalms, Conclusions section). Rieh (2004) notes in her study of personal Internet searching that the home is equally “a socially defined setting rather than merely a physical setting” (p. 2). Furthermore, the home is too a “public exhibition of the tastes and values of the householders living there” (O’Brien & Rodden, 1997, p. 257), showcased through everything from the display of information on refrigerators (Swan & Taylor, 2005) and pin-up boards and calendars (Taylor & Swan, 2005), via arrangements of photographs (Swan & Taylor, 2008; Taylor, Swan, & Durrant, 2007), and in assortments of clutter (Swan, Taylor, Izadi, & Harper, 2007; Swan, Taylor, & Harper, 2008).

Like information practices in traditional workplaces, domestic information practices are a mix of inward-serving reflections and outward-serving projections, affected by personal preferences, social influences, and surrounding physical space. However, the home setting is still one that stands “in marked contrast to the more openly public affair of doing one’s
work” (O’Brien & Rodden, 1997, p. 252) in a traditional office, and one that individuals also view as distinct from and in contrast to a traditional office; Taylor, Swan, and Harper (2008) note that information practices therein will “say something not just of our practical intentions but also of how we want places like home (and work) to be” (p. 3). If individuals both consciously and unconsciously order the home differently than they do the workplace, how might their work-related information practices be affected in the home office setting?

2.2.3 Situating this Study

Even while pointing out that information practices are affected by setting, there has yet to be an in-depth study of how work-related information practices translate to, and transmute within, the home office in LIS research. Scholars studying the management and use of information content in the traditional office have let these same practices in the home office go largely unexplored, while those looking into information management and use in the home have failed to complicate their findings by also considering information content that is foremost professional, not personal, in its nature.

One exception to this has been the research produced by Fulton, studying the degree of control over their work (2000a; 2002) and work processes (2000b) that occasional home office users, teleworkers, have in comparison to their colleagues who work solely from a traditional office. Her findings indicate that individuals based out of two workplaces face challenges when trying to effectively divide their work between the types of tasks that each space will support and afford. When working from home, teleworkers often run into problems with “missing information,” “reduced collegial contact” (2000b), constraints on
storage (2002), and extra demands on space, time, and attention (2000a), and have to make do by employing “innovating” and improvised “coping strategies” (2000b; 2002). Likewise, they place an additional burden on coworkers stationed at their traditional office, who must also deal with reduced collegial contact and leave themselves open to be drawn upon more heavily for missing information by those teleworking (2000b). Fulton finds that casual home office users “frequently [attempt] to recreate the organizational office” (2002, p. 211) and the “office experience” (2000b) in their homes, but notes that when an individual’s workplace and workspace changes so too, inevitably, does their “means of working” (2002, p. 209).

To understand fully how different types of office spaces affect information practices, including those of individuals who are entirely home-based and do not move between distinct work settings requires an extension of Fulton’s work and probing at a more in-depth level. Lee (2003) has deemed “a missing link” (p. 421) in LIS research, as most studies fail to point out and tease out the interdependent nature of “users, documents, structures, interactions among the first three, and the environment” (p. 421) by adopting too narrow a purview, considering just one or two of these components while ignoring others. All of these elements must necessarily be considered together, in concert and in relation to each other, in order to fully capture and convey the nuances of particular information phenomena. Oftentimes, it is the environment, a physical setting along with its accompanying social aspects, that is rendered invisible in work-related LIS studies—a weakness to which this thesis is particularly directed, studying home offices that lie squarely at the intersection of the personal and the professional.
Similarly, to date, no LIS studies have focused on the information dimensions of the printing profession, or of the commercial information production industry more broadly. However, the rapid accumulation and sheer volume of print documents and print resources necessary for job success in this realm situates it on a plane comparable to that of academics, a group that does have a large body of information management and use literature behind it, in its information richness. At the same time as this thesis addresses the gap in LIS scholarship relating to home office settings, it makes an original contribution to LIS scholarship relating to the printing profession, taking as its participants four printing company account managers.

2.3 The “Office Continuum”

Having described and synthesized pre-existing LIS research centred on the workplace and the home, an original conception, the “office continuum,” is introduced. Firstly, the “office continuum” standardizes often-muddied vocabulary surrounding offices and home offices by concretizing three main types of information-task settings used by individuals. Secondly, when modeled, it visually depicts how previous studies of professional and non-professional information-centred practices have tended to congregate around one of two specific spaces—the traditional office or the home—and situates the present study as focusing on the professional home office, a unique, hitherto unexplored setting at the intersection of the professional and the personal.

Definitions for office and home office in current circulation cannot be said to truly capture and convey the varied spectrum of people’s experiences with either setting. When asked to envision an office, the majority of people may first think of a high-rise tower in a busy
downtown core or of a low-rise complex on a non-residential, suburban street. When asked to picture a home office, the thoughts of that same majority may jump to their own family’s bustling rec. room with a shared computer used for homework completion, email checking, and Internet surfing nestled in one corner, or to their kitchen table piled high with papers and serving as a makeshift desk for paying bills, dealing with received mail, or organizing daily activities. Generally, *office* is the umbrella term used to refer to any “room, set of rooms, or building where the business of a commercial or industrial organization or of a professional person is conducted” (Dictionary.com, 2010) or “used as a place of business for non-manual work” (Oxford English Dictionary, 2009). *Home office* falls under that broad heading as “a work or office space set up in a person’s home and used exclusively for business on a regular basis” (Dictionary.com, 2010). Professional activities are thus seemingly favoured as a de facto standard for all offices, even though, as noted above, a range of personal and professional information-centred tasks can be imagined to involve so-called office spaces. Likewise, a range of settings within which both personal and professional information-centred tasks may be completed is imaginable.

*Teleworking* (also called *telecommuting* and *e-working*) has garnered recent attention as a business arrangement whereby individuals “work from home or outside the traditional office or workplace, using a computer and telephone connection” (Dictionary.com, 2010). Fulton (2000b; 2002) considers teleworkers to be either “part-time” or “full-time” home-based workers, depending on whether they spend less or more than four days per week working from their homes. However, the fact that even “full-time” teleworkers are often not based solely from their homes will affect their establishment and use of their home office spaces,
and also the degree of challenges they face in their daily work (as described in section 2.2.3). The study at hand sets a more nuanced portrait of information practices in different settings by distinguishing professional home office users who are entirely home-based in their work from those in other types of working arrangements and office settings.

In response to the need to more accurately and vividly reflect the types of office spaces and the ways in which they are used, an original conception, an “office continuum,” is proposed and modeled below in Figure 1.

![Figure 1. The “office continuum”. Model depicting a continuum of office types that exist, determined by the purposes for which the user(s) of the so-called office space employ it at a given time.](image)

At the leftmost end of the continuum is the “traditional professional office” that is detached from the home and most commonly associated with basic definitions of an office; at the rightmost end is the “personal home office” within the home where the non-professional information-centred tasks and pursuits of an individual or individuals are carried out. In the middle of these two divergent office types sits the “professional home office,” a space within the home where the professional work of an individual or individuals with no supplementary workplace is carried out. Each of these office types is described in more detail below.
The multi-directional arrows flowing between the office types in the “office continuum” model serve three objectives. First, they indicate that gradations between each of the three main office types selected along the continuum indeed exist, every one with its own varied characteristics and nuances that set it apart. Second, they indicate that an individual may—and usually does—possess more than one of these spaces simultaneously, moving back and forth between them based on need. Third, they indicate that to users of the same office, the space may concurrently inhabit a different position on the continuum based on their differing rationales for using it. The boundaries between office types—particularly between the professional and the personal home office—are fluid, and at any time one space may be reconfigured as the other depending on its user’s purposes. It is therefore not something inherent in a physical space itself that determines its office type, but rather depends upon the needs, perspectives, and purposes of the users of that space.

2.3.1 The Traditional Professional Office

The traditional professional office is a space located apart from its users’ homes, and that which is most commonly associated with definitions of an “office” as a centralized workplace used by an organization, however large or small, for the singular task of conducting its professional business. Within one traditional professional office building, several distinct and even totally unrelated companies may cohabitate (for example, in different areas, rooms, or floors), and often, but not always, each company therein will encompass several different departments (such as human resources, finance, IT services, and so on) and staff positions (such as managerial, general, administrative/support, and so on) that are fulfilled by different individuals.
2.3.2 The Personal Home Office

The personal home office is a space located within a home, within which the information-centred, non-professional tasks and pursuits of one or more of the home’s inhabitants are carried out. Non-professional tasks (such as personal Internet and email use, personal recordkeeping, and so on) may be the sole type of task completed within the space, or they may be completed therein in addition to professional work-related tasks. The most important point is that the personal home office does not serve as the professional workspace of all of its users at all times, whether or not they possess a supplementary traditional office (for example, they may be unemployed or retired and so have no professional office, or they may be fully employed in a traditional office but telework).

Given the popularity of personal computing, personal home offices are a staple in many contemporary homes, but these spaces may also be ad hoc creations (such as the kitchen table acting as a makeshift desk). The personal home office should be distinguished from the *workshop*—“a room, group of rooms, or building in which work, especially mechanical work, is carried on” (Dictionary.com, 2010)—as centred upon the use of information, such as paper or electronic documents and files, rather than the building or creating of various items.

2.3.3 The Professional Home Office

Somewhere in between the traditional professional office and the personal home office rests the professional home office. The professional home office is a space located within a home, within which the information-centred, professional work tasks of one or more of the home’s inhabitants are carried out. Professional work-related tasks may be the sole type of task
completed within the space, or they may be completed therein in addition to non-professional tasks. The most important point is that the professional home office serves as the sole professional workspace of at least one of its users at all times; in other words, at least one of its users must be entirely home-based in their professional work and possess no supplementary workplace. Their professional job must never be based out of a traditional professional office and seldom out of any other setting (with impermanent moves, such as those that arise through business travel or trips to a local coffee shop for a change in scenery, for example, as exceptions). Even individuals who have a traditional office workplace but still only ever carry out professional, work-related tasks within their home offices cannot rightly term these spaces professional home offices since they still depend, however infrequently, upon another type of office space for professional task-completion.

Often, though not always, the professional home office has only one user who employs the space in a professional manner, while to other users, or to the same user at a different time (for example, on the weekend), the space is a personal home office, convenient perhaps for its desk space, computer, or its Internet connection.

2.4 Chapter Summary

This chapter has reviewed pre-existing LIS literature that focuses on information practices in both the workplace and the home, and pointed out a dearth of research into the home office—most especially the professional home office. Despite the fact that many scholars recognize the importance of considering setting in order to gain a comprehensive portrait of information phenomena, none have carefully distinguished between types of work settings
and their potential effects on the information practices of individuals. In response, the “office continuum” was proposed in this chapter, an original conception that separates three main types of information-task settings and situates the study at hand within the professional home office, distinct from both the well-researched traditional workplace and from the home. The next chapter sets out a theoretical framework for this study that explicitly foregrounds setting when investigating information practices, and also explains the study’s research design.
III
FRAMEWORK AND DESIGN

3.1 Chapter Overview

This chapter sets forth the overarching theoretical framework for the study, defining its central focuses as those of i) setting, or “information use environments” as per Taylor (1991), in combination with ii) information practices, or, more specifically, the management and use of information content as informed by Jones (2007; 2008). The chapter then explains the research design of the study, including its exploratory, ethnographic approach, its sampling technique, its underlying ethical considerations, its data collection periods, its data collection methods, and its analysis of data.

3.2 Theoretical Framework

Though this study is exploratory and garnered insights inductively, in order to fully conceptualize the forces at play around information practices in professional home offices, Taylor’s (1991) theory of “information use environments” and Jones’ (2007; 2008) work on personal information management lent it a basic structure and oriented thinking in certain directions. Both are briefly reviewed below and then integrated as a framework that holds direct applicability to this study.

3.2.1 Information Use Environments

In 1991, Taylor encouraged LIS scholars to look beyond the mere processes and products of information practices and also take into account the broader contexts in which such practices occur. Similarly to Kwasnik (1991), he argues that the “information use environment,” or
IUE, within which an individual acts will affect the flow of information to and from them, as well as their management, use, and perception of it. Whether consciously or not, individuals are always operating within an IUE influential enough to trump their personal idiosyncrasies (Taylor, 1991, p. 219) and dictate or alter the ways in which they recognize, keep, and use information—in other words, their information practices.

According to Taylor (1991), most everyone possesses an awareness of their information needs; a knowledge, however vague, of how to go about finding information to meet these needs; and an idea of what information will resolve their needs (p. 219)—all elements that are inevitably contingent upon their IUE. In turn, IUEs are determined by their constituents’ identity as members of a given group, profession, demographic, or population, and by setting—which is social as well as physical—and includes the “structure and style,” domain, information accessibility, and history and experience of the group in question (Taylor, pp. 227-8). Figure 2 below is a visual representation of Taylor’s theory of IUEs.

![Figure 2. Information use environments. Model depicting Taylor’s (1991) theory of “information use environments” and how they influence individuals’ information practices.](image)

The professional home office users in this study are exceptional cases because their information use environment (hereafter referred to as environment) at once encompasses social aspects of both the workplace and the home. Though they are independent and
detached from the physical setting of the traditional office, operating out of their homes, they nonetheless remain corporate employees under professional and organizational influence, as well as individuals with loyalties to a household that may influence them in entirely different ways.

3.2.2 Personal Information Management

The personal information management (PIM) field of study set forth by Jones (2007; 2008) also lays out several key concepts related to information practices that are relevant to this study. PIM itself is defined as the “activities a person performs in order to acquire or create, store, organize, maintain, retrieve, use, and distribute the information needed to complete tasks… and fulfill various roles and responsibilities” (Jones, 2007, p. 453).

Just as every individual, consciously or not, sits within an “information use environment” (Taylor, 1991), every individual also has a “personal space of information,” or PSI, which includes “all of the information items that are, at least nominally if not exclusively, under [their] control” (Jones, 2007, p. 462). In order for information to be potentially useable, individuals mentally slot it into one of many subsets of their PSI called a “personal information collection,” or PIC, which they have made “some conscious effort to control” (Jones, p. 462). This conscious effort is exerted through three information activities:

• “keeping activities,” which “affect the input of information” (Jones, p. 464);
• “finding and re-finding activities,” which “affect the output of information” (Jones, p. 464); and
• “meta-level activities,” which centre on “the management and organization of PICs” (Jones, p. 464).

Figure 3 below is a visual representation of Jones’ work on PIM.

![Figure 3. Personal information management. Model depicting Jones' (2007; 2008) work on individuals' personal information management practices.](image)

This study is concerned with professional home office users’ information activities when managing and using their work-related PICs, or with their “keeping,” “meta-level,” and “finding and refinding” activities. However, it is especially interested in how these activities are coloured by the professional home office environment within which they take place.

### 3.2.3 Integrated Theoretical Framework

Inspired by Taylor’s (1991) theory of “information use environments” and Jones’ (2007; 2008) work on personal information management, an integrated framework holding direct applicability to this study is proposed. It emphasizes the personal and professional duality of the broader environment within which the physical professional home offices of each individual printing professional participant in this study, and, by extension, their information management and information use practices, are situated. Figure 4 below is a visual representation of this integrated framework.
As Taylor’s (1991) theory of “information use environments” posits, each of the printing professional participants in this study operate within a broader social setting that is both personal and professional, deriving force from their industry, their company, and the household within which their professional home office is located. The physical setting of each participant’s professional home office is also both personal and professional, encompassing this hybrid nature in its very name: the professional home office is at once a part of the home in which it is located and a workspace apart and distinct from it. Each participant’s information practices will then be affected by the physical and social settings—the environment—within which they take place. The subdivided activities to which Jones (2007; 2008) points, such as acquiring or “keeping” information content, managing it with storage, organization, and maintenance, and using it through “finding and refinding,” are seen to be shaped by the personal and professional ties that bind the printing professional participants in this study in their immediate physical settings and their larger social settings.
3.3 Research Design

This study drew inspiration from the “grounded theory” methodology first propounded by Glaser and Strauss (1967), whereby “theories, concepts, hypotheses, and propositions arise directly from data, rather than from a priori assumptions” (Powell & Connaway, 2004, p. 201). Yet, despite the open-endedness of its guiding research questions, this study was undertaken with a systematic research design in place. Its approach, sampling technique, ethical considerations, data collection, methods, and data analysis are described below.

3.3.1 Approach

Exploratory approaches are taken when those carrying out research “intentionally put themselves in a position to make discoveries” (Stebbins, 2001, p. 4) in unknown settings. With minimal or no prior knowledge of the field they are entering, researchers follow “a set of broad guidelines suggesting what to look for and where to look for it” (Stebbins, p. 18). Similarly, they view “exploration as a process that unfolds not only within individual studies but also across several studies” (Stebbins, p. 5). Given that professional home offices (in the strict sense as defined in section 2.3.3) are previously unstudied spaces within LIS scholarship, and, at best, understudied spaces from all but architecture and design perspectives, this study adopted an exploratory approach. It therefore has limitations, using general research questions and a small sample of participants to produce only tentative findings. However, it is but the first step in this direction for the LIS world, and provides insight and ideas for future research that nonetheless hold value.
A more specific research approach, ethnography is credited as “the earliest distinct tradition of qualitative inquiry” (Patton, 2002, p. 81), with roots in nineteenth- and early twentieth-century anthropological studies that aimed at “the scientific description of nations or races of men, with their customs, habits, and points of difference” (Oxford English Dictionary, 2009). Today, ethnography centres upon describing “groups and people as they go about their everyday lives” (Emerson, Fretz, & Shaw, 1995, p. 1). Because it demands an intensive involvement in and sensitivity to the field under study, and is “intended to enable the researcher to become immersed in a culture, identify its many elements, and begin to shape an understanding of the experience and world views of the people studied” (Bates, 2005, p. 12), ethnography was selected as a research approach complementary to the exploratory spirit of this study.

Ethnographies produce thickly described, richly detailed pieces of writing that are well-suited to providing a first glimpse into a previously understudied domain like that of the home office. Ethnographic approaches are taken in much contemporary anthropological and social science research, and have been used by prior LIS scholars to successfully investigate information practices in both the workplace and the home, including Swan and Taylor (2004; 2005; 2008), Taylor and Swan (2005), Swan, Taylor, Izadi, and Harper (2007), Taylor, Swan, and Durrant (2007), Taylor, Swan, and Harper (2008), Crabtree, Hemmings, and Rodden (2002), Crabtree and Rodden (2004), and Hartel (2007). For these researchers, the goal of their studies is to obtain qualitative insights and compelling examples, not statistical proof of [prior] conjectures. Where traditional experiments and surveys rely on the skill of the study designer to reduce the effect of biases of the observers, this methodology relies more
on the skill and insight of the observer to discover unexpected phenomena and illuminating examples in the human systems being observed. (Malone, 1983, p. 101).

3.3.2 Sampling

Due to the constraints of this decidedly small-scale study, participants were recruited via purposeful, non-probabilistic snowball sampling (Patton, 2002; Powell & Connaway, 2004; Babbie, 2007), whereby data was collected from locatable individuals, who were then relied upon “to provide the information needed to locate other members of the population whom they happen to know” (Babbie, p. 185).

Inclusion criteria for this study required that all participants be long-time (5 years or more) account managers (or sales representatives) for printing companies, and that all work solely from home offices located in the Greater Toronto Area. Because this study is exploratory in nature, and because it aimed for depth over breadth (Patton, 2002, p. 244), no attempt was made to study the entire population that meets these criteria.

3.3.3 Ethical Considerations

This study fully complied with the ethical requirements of the University of Toronto and was fully approved by the University of Toronto Office of Research Ethics. All participants were treated fairly and respectfully. They were informed of the study’s specifics through an initial Information Letter/ Confirmation of Interest Letter; their interest in participating was affirmed with a Reaffirmation of Participation Letter; and they granted their voluntary consent to participate via a signed Consent Letter prior to any research beginning.

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2 The inclusion criteria for this study originally included “managers of publishing firms” who work entirely from home offices as well, but the only participant meeting this criterion was not actually available to participate within the necessary data collection period.
Participants were also offered a copy of the final written thesis, and reminded of this opportunity through the Thank You Letter sent as a follow-up to each meeting (or field outing). These four letters appear as Appendices A through D of this thesis, respectively.

Confidentiality was the paramount ethical consideration in this study of professional home offices. It is achieved by the use of alias names throughout this thesis for all participants, their companies, and any individuals or companies with whom they conduct business. It is also achieved by the computerized blurring of participants’ facial and body features and the computerized blurring or blacking out of identifiable objects (for example, family pictures or company logos) in photographs throughout this thesis, for which Clark and Werner’s (1997) article was a helpful and practical guide.

3.3.4 Data Collection Period

This study builds upon a previous pilot study that involved only one home-based printing professional participant. The major data collection period for that participant occurred in February and March 2009. After deciding to extend that pilot study into this thesis study, the major data collection period for the additional three printing professional participants recruited occurred over a period of two months, from November until December 2009. During this time, the original participant was also briefly revisited in order to obtain additional details about digital information content and technological storage structures that had been excluded from the purview of the pilot study. With the exception of the original participant, who was visited twice, all participants were visited only once, not on an ongoing basis.
3.3.5 Methods

A variety of research methods were used in order to gather data during the scheduled field outings into participants’ professional home offices. This allowed for a triangulation of methods that, to some extent, mollifies the relatively short lengths of the field outings (which lasted between one and three hours each, and were singular events) and the fact that data was analyzed by just one individual, the researcher. Each method is expanded upon below in the order in which it was employed.

3.3.5.1 Guided Tours

Guided tours of each printing professional participant’s home office space, led by them, were used during all four field outings as a means to ease both the participant and the researcher into the study and acquaint them with its purposes. This technique has been used in several previous LIS studies (Malone, 1983; Case, 1991; Kwasnik, 1991; Lee, 2003; Hartel, 2006; Hartel, 2007).

For this study, a standard introductory statement, along with “object probes” (De Leon & Cohen, 2005) to use throughout the guided tours in order to elicit more information, were written up as a script prior to the field outings. The introductory statement read: “I would like you to show me around your home office, especially the different locations and resources that you would go to in order to obtain needed information throughout the workday. Let’s start here at the office entranceway.” The possible object probes also included were in the form of inviting statements and questions, such as “Tell me more about this…” and “How do
you find needed resources using this...?” The entire guided tour script along with a list of possible object probes appears as Appendix E of this thesis.

The guided tours seemed to be the most captivating and enjoyable aspect of the field outing experience for participants, who readily offered so much elaborative detail on their home office spaces, the work-related information content therein, and their organization and use of it that they unknowingly answered several questions intended for the interviews later. The tours were not voice-recorded, but recorded with shorthand jottings in a notebook. On top of eliciting incredibly detailed notes, the tours allowed for:

- hand-mapping and -diagramming of each space and its information-related features, be these organizational structures, systems, or schemas, or information content (a technique used by Hartel, 2007, and explicated by Kuzner & Werner, 2001); and
- preparation of a “photographic inventory” chronicling each space and its information-related features at different resolutions using a digital camera (Collier & Collier, 1986, p. 45; a technique drawn upon heavily by Hartel, 2006, and Hartel, 2007).

3.3.5.2 Semi-Structured Interviews

Following the guided tour of their home office space, a semi-structured interview with each printing professional participant took place. An interview schedule was created prior to the

Collier and Collier (1986) explain that: “the photographic inventory can record not only the range of artefacts in a home but also their relationship to each other, the style of their placement in the space, all the aspects that define and express the way in which people use and order their space and possessions” (p. 45). Hartel (2006; 2007) used a “shooting guide” (2006, Research Method section; 2007, pp. 69-70), aiming for photos at a room level, resource level, and item level. This study loosely followed the same parameters, seeking to capture the overall home office space, the organizing structures, systems, and schemas in the space, and individual or grouped information artefacts. It was not always possible to capture artefact-level photographs, however, given the lack of visible (paper) information content in some of the professional home offices studied, and no deliberate attempt was made to photograph, log, or screen-capture digital information content residing on computers, laptops, or handheld devices.
field outings that encouraged comprehensive discussion of the topics under study. It began with opening questions related to participants’ history in the printing industry and in their home offices, moved into more narrowly focused questions about work routines, information organization, and information flow, and closed with example scenarios in which participants were asked how they seek certain pieces of information and how they manage (for example, acquire, store, organize, and dispose of) certain pieces of information. The interview schedule was prepared with Spradley’s (1979) advice to “think of ethnographic interviews as a series of friendly conversations into which the researcher slowly introduces new elements to assist informants to respond as informants” (p. 58) foremost in mind.

While the entire semi-structured interview schedule appears as Appendix F of this thesis, questions were oftentimes rearranged, added, or deleted during field outings based on participants’ answers. Also, as previously noted, many questions were rendered redundant by the in-depth way participants responded to the guided tour. Two of the four interviews were voice-recorded (due to equipment unavailability and equipment failure in the other two cases), and all four were recorded with shorthand jottings in a notebook.

3.3.5.3 Unobtrusive Observation

Unobtrusive observation was planned as the final stage of the field outings, during which time each printing professional participant’s day-to-day work routines and natural information management and use habits were to be chronicled and used to verify, illuminate, or elaborate on data collected during the guided tour and semi-structured interview stages.
In actuality, a specified unobtrusive observation period took place in only one field outing, while for the other three cases it was just as meaningfully interspersed throughout the course of the field outings as participants went about their daily work, answering emails, responding to telephone calls, and retrieving needed pieces of information within their home offices. Observations were not voice-recorded, but recorded with shorthanded jottings in a notebook.

### 3.3.6 Data Analysis

Under the constraints of this small-scale study, the type of long-term immersion in the field typical of traditional ethnographies, whereby months if not years are spent living alongside participants, was simply not possible. Nonetheless, an “ethnographic accommodation” (Wolcott, 2008, p. 178) was struck between the available timeframe and the agenda for research. The albeit brief field outings therefore produced a vast “ethnographic record” (Spradley, 1979, p. 69) of data already tailored to this study’s purposes; it totaled approximately fifteen pages of handwritten fieldnotes and hand-drawn maps and diagrams, two voice-recorded interviews, and about ninety photographs, on top of all necessary ethics-related paperwork. As soon as possible following each field outing, handwritten fieldnotes were elaborated as typed fieldnotes on a computer, hand-drawn maps and diagrams were converted to computer-drawn maps and diagrams, voice-recorded interviews were transcribed and typed on a computer, photographs were uploaded to a computer, appropriately titled, and manipulated (with blurring or blacking out) as necessary, and data was separated into a folder labeled with the alias of the participant to whom it pertained.
Having thus primped and prepared all of the raw data collected, analysis began as soon as all four field outings were complete. Analysis was informed by the study’s theoretical framework, and thus alert to the potential ways in which social and physical settings (as per Taylor, 1991) might influence information practices and activities (as per Jones, 2007; 2008). It followed the dialectic pattern of coding and memoing proposed by Emerson, Fretz, and Shaw (1995), who explain that, first,

the ethnographer reads through all fieldnotes as a complete corpus, taking in the entire record of the field experience as it has evolved over time. He begins to elaborate and refine earlier insights and hunches by subjecting this broader collection of fieldnotes to close, intensive reflection. (p. 142).

Open coding, the generation of “words and phrases that identify and name specific analytic dimensions and categories” (Emerson, Fretz, & Shaw, p. 150) within the data, and initial memoing, which “[entertains] a wide variety of ideas and insights about what is going on in the data” (p. 155), are the next steps. These proceed naturally from an initial close reading.

The selection of core themes within the data (Emerson, Fretz, & Shaw, pp. 157-60) follows. Themes of home office spaces, information content, management, and use had already been largely defined by this study’s parameters. Next, a return to coding in a focused, line-by-line manner in order to generate specific names and concepts (for specific information processes, features, and objects, in this study), along with the creation of integrative memos that link discrete pieces of coded data under common themes (Emerson, Fretz, & Shaw, pp. 160-66) occurs. The first six steps (close reading, open coding, initial memoing, theme selection, focused coding, and integrative memoing) led to the beginnings of a draft thesis, the insights and ideas of which, in keeping with this study’s “grounded theory” approach, arose
organically from the data collected. Figure 5 below shows data in the process of focused coding. A sample list of the focused codes and sub-codes generated, grouped by theme, also appears as Appendix G of this thesis.

![Focused coding of data](image)

*Figure 5. Focused coding of data.* Fieldnotes, interview transcripts, maps and diagrams, and photographs are subjected to close scrutiny and tagged with appropriate names and concepts during focused coding.

In order to bring together data more cohesively, Emerson, Fretz, and Shaw’s (1995) suggested data analysis was extended through the “matrix analysis” Miles and Huberman (1994) suggest. This resulted in the creation of many of the tables and models in this thesis that serve to not only report the data collected but also illuminate and integrate it, pointing out larger concepts and patterns such as those of:

- quantified sizes and styles of home offices (first introduced in section 4.3.5);
- categories of information, office, and non-office content (in chapter 5);
- stages in a lifecycle of information content management (in section 6.2);
- classifications of information storage structures (in section 6.2.2.1); and
- types of information use and non-use relating to participants’ job routine (in section 7.2).
Originally, NVivo QDA (qualitative data analysis) software was going to be used in order to perform cross-analysis on data supplementary to manual coding and memoing; in the end, however, just manual coding and analysis were deemed sufficient and more in line with the study’s exploratory, involved, and descriptively analytic style. By the time data was exhausted, new focused codes were still appearing, meaning that the data collected in this study cannot be considered totally saturated. Still, it is adequate to the task of exploring information practices in printing professionals’ home offices, and, as Emerson, Fretz, and Shaw (1995) write, meaningful ethnographic analysis “is less a matter of something emerging from the data, of simply finding what is there; it is more fundamentally a process of creating what is there by constantly thinking about the import of previously recorded events and meanings” (p. 168). The data collected fills the study’s objective of providing a basis from which to consider and begin to theorize about the relationship between setting and information practices as understood through the professional home office.

3.4 Chapter Summary

This chapter explicated the overarching theoretical framework for the study, defining its focuses as those of setting (both physical and social) in combination with information practices, and introduced applicable sensitizing concepts, such as “information use environment,” “personal information collection,” “keeping activities,” “finding and refinding activities,” and “meta-level activities,” which are based on the work of Taylor (1991) and Jones (2007; 2008). It then explained the research design of the study. The following chapter offers an inclusive look into this study’s field by detailing the work life of the printing professional, and by profiling each participant and their professional home office space.
IV
THE PRINTING PROFESSIONAL’S REALM

4.1 Chapter Overview
This brief chapter marks the beginning of the study’s findings. It provides the background information necessary to understand what the general work process of a printing professional entails and how information content factors into their daily work routine. It also introduces the four printing professional participants in this study, profiling each of them and their home office spaces.

4.2 The Work of the Printing Professional
In North America, one of the greatest shifts of the twentieth century has been that away from manual-based work toward knowledge-based work, or “work in an office where we use our skills to produce and analyze information…. Workers are less likely to be using their hands and more likely to be using their minds to monitor, manage, and control the flow of information” (Sellen & Harper, 2002, p. 51). The printing professional, whose work is highly document-based and usually quite predictable, is one particular type of knowledge worker, further described below.

4.2.1 Job Description
Within this study, the term printing professional is used to refer to an account manager (or sales representative) for a company that manufactures various printed materials, such as textbooks, trade books, newspapers, magazines, agendas, brochures, and more. Within their respective organizations, printing professionals act as liaisons between clients (often
publishing houses, but occasionally self-representing authors or companies) and the printing plant facility that they select to produce the client’s final order. Printing professionals oversee the printing process from start to finish and are the first point of contact for both client and printing plant facility should any questions or problems with a printing order arise.

4.2.2 Job Routine

The printing professional’s job routine is best envisioned as a sequence of steps, laid out below.

01. The printing professional may either solicit a client or be contacted by a client with printing needs. The printing professionals in this study generally had regular, long-standing relationships with the publishing houses, authors, and companies whose printing orders they handled, and considered these representatives to be friends as well as business associates.

02. The printing professional receives the client’s initial product request.

03. The printing professional translates the client’s product request into domain terms, or specifications of print run quantities, paper size, paper thickness, paper format, ink colours, and so on, and chooses the best printing plant facility to handle the job. Once this is done, they can forward the formalized specifications, readily understandable to others within the printing industry, to the chosen printing plant facility.

04. Based on the formalized specifications they created, the printing professional receives a quote or estimate from the printing plant facility and communicates this to the client.

05. The printing professional waits for the go-ahead from the client, and makes any adjustments to the client’s order as required (which will require the generation of new, updated formalized specifications and quotes or estimates).
06. The printing professional submits a formalized job order, translated into domain terms, to the printing plant facility.

After this, the better part of the printing professional’s involvement in the initial printing process, which averages two weeks, is over. Now, they must only handle changes, questions, or problems that arise throughout the actual printing and manufacturing of the order; indeed, this latter four- to five-week period may be the most challenging for the printing professional as they give back-and-forth updates to clients and printing plant facilities and work to solve any outstanding issues. Just as before, any changes will require the generation of new, updated documents that reflect the reality of the printed order at hand.

A visual representation of the printing professional’s job routine appears below, in Figure 6. It should be kept in mind, however, that, at any given time, the printing professional is simultaneously seeing multiple orders at varying stages of completeness through this printing process.
Figure 6. Job routine of the printing professional. Model depicting the job routine of the printing professional, who is most highly involved in the initial two-week preparation of a printing order, and ostensibly less involved in the latter four- to five-week printing and manufacturing of the order. The printing professional sees multiple orders at varying stages of completeness through the printing process simultaneously, liaising with the client that placed the order and the printing plant facility producing it.

4.3 Profiles of the Participants and Spaces

The four printing professional participants in this study work for two competing North American printing companies. One is a large organization (hereafter referred to as Print Edge) that employs approximately sixty-five printing professionals (based on estimates from one participant)—including Nicholas, Carol, and William from this study. The other is a smaller organization (hereafter referred to as Print Magic) that employs approximately ten printing professionals (based on estimates from its website)—including Sue from this study. All four participants are responsible for handling at least some printed book orders, and some have additional jurisdictions, such as catalogues, agendas, and calendars, as well.
Nicholas, Carol, and William are responsible for approximately 1000-1500 of Print Edge’s printing orders each per year, or $10,000,000-$15,000,000 each per year in gross corporate revenue (based on estimates from one participant). Sue is responsible for approximately 500 of Print Magic’s printing orders per year, or $5,000,000 per year in gross corporate revenue (based on estimates from the company’s website). All four participants carry out this work entirely from professional home offices, and, in fact, none have centralized traditional offices within their areas upon which they could depend: in 2006, Print Edge responded to industry consolidation by moving all of its printing professionals working in the GTA to professional home offices, and Print Magic is based out of another geographical region entirely, with several printing professionals dispersed throughout Canada in professional home offices.

Each participant, their professional history, and their home offices are profiled in more detail below.

### 4.3.1 Nicholas

For nearly twenty-five years, Nicholas has worked for a variety of different printing companies. He began at Print Edge in 1993 and spent thirteen years in its traditional professional office, until all employees were required to work from their homes permanently. Nicholas had reservations about relocating to a professional home office, not only because this would mean losing the definite separation between his home and work lives, but also because he regretted leaving the communal traditional office, which he found fostered a deep camaraderie. While he notes that adjusting his work to the “interactions of the house” was a challenge, Nicholas now cites no problems attaining the home and work distinction he had
prior to the move, but does look forward to eventually moving his home office to a detached former-garage now set within his sprawling backyard garden.

Nicholas uses his professional home office solely for professional work tasks, and he is its singular user. For personal tasks, he maintains an entirely separate personal home office with its own computer, files, and so on, on the second floor of his home. Currently, Nicholas’ professional home office is located in a smaller, enclosed room in his basement. Sparseness of anticipated information and office content gives the impression of being in a waiting room before being led further into a real office. Yet, Nicholas carries out all of his work therein five days a week, and work that is, ironically, centred upon the production of paper, the item that is most conspicuously absent from the room. Everything cleanly tucks away in drawers and on his computer, leaving behind an incredibly subdued and underemphasized office.

Figure 7. Nicholas’ professional home office. Nicholas’ professional home office depicted in four images. The first (top left) shows his home office and its structures, which include a desk, table (with lamp), and filing cabinet (in black). The second (top right) shows the “red thread” (Bates, 1999, p. 1048) of information content as distributed across the home office (bright red represents “libraries” of printed samples and dark red represents job files or “archives,” while blocks represent content in piles or groupings, X’s represent content stored electronically, squiggles represent content dispersed on or
within other storage structures; arrows are then used to make these main informational aspects clearer in black and white reproductions). The third and fourth images (bottom), photographs, ground the previous diagrams in their reality, showing Nicholas' minimalist home office.

4.3.2 Carol

Carol has worked for *Print Edge* for twenty years, and prior to this spent time in the publishing industry. Like Nicholas, her work became entirely home-based in 2006. While still mindful of the difficulties of working from home amidst the “distractions of the house,” Carol is content with the way she has established and maintained her home office, and she can rationally explain the reasons why everything is arranged as it is, just the way she wants it.

Like Nicholas, Carol is the sole user of her professional home office and employs it only to professional, work-related ends. For personal tasks, she uses the professional home office and computer of her partner, who actually conducts much of his business outside the home. Carol’s professional home office is located in an enclosed former guestroom at the back of her main floor, directly adjacent to her partner’s home office. Her placement of office furnishings capitalizes on the generous size of the room, incorporating several large bookcases, a large filing cabinet, and an elaborate hutch over her L-shaped desk for maximum storage capacity. No space is wasted; smaller bins, trays, and boxes containing substantial amounts of useful office content reside all over. Carol also keeps lesser-used files and printed samples in an off-site storage space in her basement, arranged neatly in matching filing cabinets and on matching bookcases.
Figure 8. Carol's professional home office. Carol's professional home office depicted in four images. The first (top left) shows her home office and its structures, which include an L-shaped desk with hutch, three bookcases, and filing cabinet (in black). The second (top right) shows information content as distributed across the home office (the same key as used in Figure 7 applies). The third and fourth images (bottom), photographs, ground the previous diagrams in their reality, showing Carol's standard home office and one of her many well-utilized bookcases.

4.3.3 William

William is a veteran of the printing business, having started his first job in the industry in 1961. He has worked for Print Edge since 1991 and from a professional home office for about ten years, having been one of the first to leave the traditional professional office of his own volition. He chooses to continue storing a massive amount of paper, in the form of loose documents, files, and printed order samples, in his home office, though he long ago ran out of enough drawers, shelves, and flat surfaces to hold this content.

Like Nicholas and Carol, William is the sole user of his professional home office, and employs it only for professional work tasks. He has a personal home office on his second floor, with its own computer, which he uses for all personal tasks. William’s home office is
located in his home’s large and open-concept basement. Overflow from his home office literally fills the entire basement space: it is navigable only through narrow paths that wind between the looming filing cabinets and teetering six-foot high stacks of books, files, and papers, and the perimeter is lined with floor-to-ceiling bookshelves buckling under the weight they hold. A couch, a pool table, two islands, and the floor are also exploited to hold content. Despite the crowded, claustrophobic nature of William’s office, he is able to lay a hand upon any document or book requested within minutes.

![Figure 9. William’s professional home office.](image)

**Figure 9. William’s professional home office.** William’s professional home office depicted in three images. The first (top left) shows his home office and its structures, which include two desks, multiple bookcases (lining the space), multiple filing cabinets (grey and black), a couch, and a pool table. The second (top right) shows information content as distributed across the home office (the same key as used in Figures 7 and 8 applies). The third image (bottom), a photograph, grounds the previous diagrams in their reality, showing William’s overwhelming home office filled with overflowing shelves, precarious piles of papers, and stacks of printed samples that reach to the ceiling.

### 4.3.4 Sue

Sue has worked in the publishing and printing industries alternately for more than eighteen years. She began with her current company, *Print Magic*, in 2005, and since then has always worked from a professional home office. Sue’s home office is an anomaly among those
studied as it also serves the functions of a personal home office for her family members who wish to check their email, browse the Internet, type personal documents, and so on. She laughs that when her child arrives home from school in the afternoons, the two “fight over who can have her computer” until the end of the workday, when she has “packed up” and is now at home for the evening. Outside of the normal workday, it is also her own personal home office.

Sue’s home office is located in an open-concept recreational space on her second floor. While not exactly in the thick of the home, the space serves as the only way to gain access to a bedroom and a laundry room that are also upstairs. Despite its multiple users and uses, the home office proper is sparse on office content and not at all overcrowded, appearing more like a household computer nook than someone’s sole workplace for five days of the week.

Figure 10. Sue’s professional home office. Sue’s professional home office depicted in three images. The first (top left) shows her home office and its structures, which include a desk, a small filing cabinet, a bookcase (at the top of the room), and a small set of drawers (in black). The second (top right) shows information content as distributed across the home office (the same key as used in Figures 7, 8, and 9 applies). The third image (bottom), a photograph, grounds the previous diagrams in their reality, showing Sue’s understated home office.
4.3.5 Summary of the Participants and Spaces

The four printing professional participants in this study are a diverse group, ranging significantly in years spent in the printing industry, years spent in a professional home office, the location of their professional home offices in their homes, the users and purposes of their home office spaces, as well as in the size of the professional home office they have each established. While the first four of these characteristics are easily determinable, the latter is a more subjective measure based on a combination of initial impressions from field outings, briefly explained below and elaborated in later chapters.

Immersion in the four home office spaces made apparent immediate differences across the visibility of information content each printing professional kept (more fully explicated in section 6.2.1) and the prominence of storage structures and furnishings they employed to house this content (more fully explicated in section 6.2.2.1), both factors that led to descriptions of the spaces as “sparse,” “subdued,” “underemphasized,” and “minimalist” (in Nicholas’ case), “capitalizing on space,” “standard,” and “well-utilized” (in Carol’s case), “overflowing,” “crowded,” “claustrophobic,” and “overwhelming” (in William’s case), and “like a household computer nook” and “understated” (in Sue’s case). Some participants, namely Nicholas and Sue, stored what might only be described as a striking lack of paper information content in their home offices, preferring to keep nearly all of their work-related documents in a digital format. In turn, they required minimal, if any, large office-like furnishings to facilitate their work.
Because Nicholas’ and Sue’s digital information content is rendered invisible in the physical world, it can easily skew perceptions of their professional home office space as home settings that have little in common with the traditional office and professional work. Meanwhile, some participants, namely Carol and William, kept nothing short of a shocking abundance of paper information content. Both required substantial functional office-like furnishings to effectively contain all or as much of this content as possible, foregrounding their professional home offices as spaces more akin to common expectations of a traditional office, wherein large amounts of paper content are typically kept regardless of the extent to which technology is employed.

This digital versus paper divide (and the divide in structural storage requirements that accompanies it) allows for a quantification of participants’ home offices along the lines proposed by Hartel (2007) in her study of gourmet cooks, whose “personal culinary libraries” (p. 178) may be “small” and “unobtrusive or imperceptible in the home… tucked into a cabinet, shelf, or nook”; “medium” and “more noticeable… filling, for example, a few bookshelves”; or “large” and said to “dominate or permeate a setting such that guests to the home might say, ‘Wow! You must really love to cook’” (p. 198). In this study, the qualities of a “small” professional home office include:

- location in an out-of-the-way space that may not be dedicated to professional uses;
- minimal paper information content; and
- minimal office structures to store this content.

Those of a “medium” professional home office include:

- location in a sizeable space often dedicated solely to professional uses;
• a fair amount of paper information content; and
• a fair amount of proper office structures (such as sizeable, austere bookcases, oversized, industrial filing cabinets, and desks with commanding presence and ample storage space) and the possible appropriation of non-office, or less functional home structures, to store this content.

The qualities of a “large” home office include:

• location in a sizeable space most often dedicated solely to professional uses;
• an abundance of paper information content such that it cannot be contained; and
• an abundance of proper office structures and the appropriation of non-office structures to store as much of this content as possible.

Remaining mindful that such quantification can be deceiving—participants in this study working almost entirely from invisible information noted keeping large volumes of it in the form of electronic files, documents, and emails, and this digital versus paper divide was not absolute for any of the participants but instead one of degree—it is still useful to the extent that it shows the range of difference amongst individuals who carry out the same work when they set up independently of one another in home offices. It is not meant to suggest that such a range would not or could not exist in a traditional office, but it does raise the point that the professional home office, which exists in an environment widened beyond the socio-professionalism of industry and company to include the more personal and socio-familial household, may be a factor in influencing information practices.
Below, Table 1 summarizes the diverse professional histories and home office spaces of each of the four printing professional participants in this study.

**Table 1. Summary of the printing professional participants and their spaces.**

<table>
<thead>
<tr>
<th></th>
<th>Nicholas</th>
<th>Carol</th>
<th>William</th>
<th>Sue</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Years in the Printing Industry</strong></td>
<td>25</td>
<td>20</td>
<td>49</td>
<td>18 (on and off)</td>
</tr>
<tr>
<td><strong>Years in a Professional Home Office</strong></td>
<td>4</td>
<td>4</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td><strong>Location of Professional Home Office</strong></td>
<td>enclosed basement room</td>
<td>enclosed main floor room</td>
<td>open-concept basement</td>
<td>open-concept second floor</td>
</tr>
<tr>
<td><strong>Users of and Purposes for Home Office Space</strong></td>
<td>singular user, singular purpose</td>
<td>singular user, singular purpose</td>
<td>singular user, singular purpose</td>
<td>multiple users, multiple purposes</td>
</tr>
<tr>
<td><strong>Size of Professional Home Office</strong></td>
<td>small</td>
<td>medium</td>
<td>large</td>
<td>small</td>
</tr>
</tbody>
</table>

Table summarizing the professional history and home office of each printing professional participant.

### 4.4 Chapter Summary

This chapter provided a glimpse into the realm of the printing professional by describing the work these employees do and by profiling each of the participants in this study and their professional home office spaces. In introducing the field, it offered a small taste of the rich description that characterizes the next three chapters of findings, the ethnography proper.
V

INFORMATION CONTENT IN THE HOME OFFICE

5.1 Chapter Overview

Having used the previous chapters to introduce this study and the field, this chapter presents original findings relating to information content in the participants’ professional home offices. It first surveys the landscape of information and other content that comprises the home offices of this study’s printing professional participants, and then filters these findings through the lens of setting, analyzing the intermixing and display of office and non-office artefacts as ways in which participants negotiate the personal and the professional in their intersectional home office spaces.

5.2. From the “Cheat Sheet” to the “Library”

As the profiles of the printing professional participants in this study (in section 4.3) suggest, each has set up their professional home office in a particular way in order to function within their particular environment. However, certain content—and not just the information content required in their work—reappeared again and again across many, if not all, of the home offices studied. This phenomenon of cloned artefacts emphasizes a point that two participants brought up individually during interviews: the professional home office user must necessarily embody all of the roles that are typically delegated across several organizational levels, job positions, and employees in traditional offices, and not only do their own job, but also be their own manager, secretary, and support staff. As Carol noted, “you’ve got to do it all and be the jack of all trades with a home office.” This same sentiment is echoed by Brown and

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4 The artefacts referred to using quotation marks are in vivo terms adopted from the participants themselves.
Duguid (2000), who find that tasks once spread among various specialist job roles in an office come to be “concentrated on an individual” (p. 79) in the home office.

The range of artefacts described below thus includes diligently updated calendars, extensive “archives” of files, well-stocked “libraries” of sample printed products, and a wealth of tools and supplies (objects that may not typically fall under a printing company account manager’s jurisdiction in a traditional office) on top of the ‘to-do’ list jottings, emails, and active job files that are likely to be standard fare in any printing company account manager’s holdings, no matter their office type. While the content listed does cover that which was most commonly brought up by participants and observed in photographs, it cannot claim to be an exhaustive catalogue of all materials found within the home offices of this study’s nor any other printing professionals. If a “miscellaneous” category were to be added, it might include content such as the presentations and high-level negotiations that some printing professionals like Nicholas prepare, or the promotional materials kept by printing professionals like Carol, who regularly try to solicit new clients.

5.2.1 The “Cheat Sheet”

“Cheat sheets,” explicitly referred to by Nicholas and William but variously called “pieces of handy-dandy information,” “reference,” and even “ready reference” pages, are loose, often unrelated print-outs and cut-outs that display constant or infrequently changed data of a factual nature. They may be needed when dealing with the questions or concerns of a client or printing plant representative, and commonly include such things as price per paper roll width, capabilities and specialties of different company printing plant facilities, contact
information for colleagues and clients, and even quick mathematical calculations, maps, or motivational slogans and tips and tricks.

“Cheat sheets” are afforded a permanency in their location and kept close at hand during the workday, whether tucked beside users’ desks, set inside a drawer, or pinned up on the wall, though William noted that he rarely needs to refer to most of his, being so familiar with their content. “Cheat sheets” take a deliberately physical form and are valued for this tangible readiness, something for which an electronic file or note on a computer desktop simply cannot substitute. Nicholas explained:

I have everything here in electronic files. But these [“cheat sheet” papers], these are things I would refer to on an ongoing basis, rather than click on, click on, or whatever. I would just look at it and say, “Oh, it’s this price or that price.” So I do, I do keep that here as well, you know, and this is that drawer that has all that [directly in front of him at his desk]. So if someone says to me, “Oh, do you have the paper prices… you know, for [a client]… the most recent,” I would say, “Yea, I have a hard copy here,” and I would find it here and email it to them or fax it to them.

Interestingly, in Sue’s home office “cheat sheets” were neither visible nor referred to during the field outing, begging the question (only thought of during data analysis) of whether such content is in fact stored electronically given the potential confusion of trying to keep track of loose, discrete papers in a home office that serves multiple users and multiple purposes.
Figure 11. “Cheat sheets.” “Cheat sheets,” including (1) a business card, (2) a typed list of contact numbers, (3) a map of the United States, (4) notes on paper roll width and grain, (5) notes on sustainable forestry, (6) notes on “problem solving” for salespeople, and (7) a list of fractional-decimal equivalents, are taped to the desk hutch in Sue’s office (left); a spiral-bound book for internal company use lists the contact information, “core products,” “sweet spots,” and “unique capabilities” of Print Edge’s printing plant facilities so to aid the printing professional in choosing the best printing plant facility to handle a client’s printing order, and is kept close by Nicholas’ and William’s desks (right).

5.2.2 The ‘To-Do’ List

‘To-do’ lists, which participants scribbled on random scraps of paper, posted on sticky notes, or systematically jotted in designated notebooks and agendas with a page devoted to each day spent in their home office, were also commonplace artefacts in this study. In order to both proactively and reactively respond to matters demanding their attention, Nicholas, Carol, and William all mentioned keeping either a singular running tally or employing a combination of different list types (for example, sticky notes and an agenda) to remind themselves of outstanding work. However, only simple, short-term tasks, such as sending an email or obtaining an estimate, were ‘to-do’ listed, allowing such jottings to be thrown away or new notebook pages begun at the end of every day. (More formalized business activities such as meetings, conference calls, or trips were marked on calendars instead, discussed in section 5.2.4). Like “cheat sheets,” ‘to-do’ lists always took a physical form in the home offices studied, and there seemed an almost-symbolic rituality to the crossing out of an item,
discarding of a paper, or turning of a page for which they allowed as tasks were checked off throughout the day.

Identifiable by their short-handed brevity, ‘to-do’ lists often hold little relevance outside of the time, place, and person to which they apply. In their study of mothers’ list-making, Swan and Taylor (2004) note how listed items tend to be “clumped together on the basis of being important for that day or moment-in-time… [and] are situationally dependent… ‘occasioned’ for the situation at hand” (p. 2). While many ‘to-do’ lists do have a transitory, “ephemeral” (Barreau, 1995; 2008; Barreau & Nardi, 1995) nature, as Swan and Taylor imply—and so William finds he can toss away his jottings without much consequence—other participants in this study, those keeping more concrete notebooks or agendas as opposed to scrap-paper lists, displayed a personal connection to their ‘to-do’ lists and remarkable intimacy with their contents. For example, Nicholas stated that keeping an agenda is something he does “for me,” while Carol explained that she saves her full notebooks and sometimes returns to them, locating, without problem, information that has more longevity than the typical ‘to-do’ reminder.

Figure 12. ‘To-do’ lists. ‘To-do’ lists take many forms, and users may employ multiple forms simultaneously. Nicholas employs a sticky note above his desk (left) as well as an agenda tucked beside his desk (middle), to remind him of daily tasks to complete; Carol saves her notebooks full of ‘to-do’ lists for future reference (right).
5.2.3 The “Hit List”

When asked to describe their daily work routine, all participants in this study began their explanations with some variation of, “I get up, come to my home office, and open my email.” The email inbox, which Nicholas, William, and Sue all explicitly termed their “hit list” for the day, very much serves as a scrolling ‘to-do’ list in a job where the need to multi-task and re-prioritize workflow continually arises. A similar observation has been made previously by Whittaker and Sidner (1996), who note that email inboxes become “a place that users receive and hand off tasks” (p. 3). Participants in this study kept their email inboxes open during the field outings, reading and acting upon messages as they saw fit.

The similarities between the inbox “hit list” to written ‘to-do’ list were highlighted when Nicholas referred interchangeably to both his email inbox and his paper agenda as a “hit list,” and, indeed, there is likely overlap between the two in the tasks to-be-completed that they display. He also summed up the functionality of the inbox “hit list” in a way analogous to the trashing of a ‘to-do’ list sticky note or the flipping to a new page in a ‘to-do’ agenda, saying:

I use my Outlook inbox and sent [folder] to do, you know, to do my ‘to-do’ and my follow-up. And I think by doing that it keeps a history… of everything, and once it comes to completion, you can just file it away. Yea.

Figure 13. “Hit lists.” The inbox “hit list” remains open throughout the day in the printing professional's home office, providing an automatically updated ‘to-do’ list for employees like Sue.
5.2.4 The Calendar

Three of the four participants in this study also mentioned typing in or writing on a calendar in their home offices (rather than just referring to one) in order to store the dates of larger-scale business activities such as meetings, conference calls, or trips. Calendars are used for more formal arrangements than ‘to-do’ lists, and often to mark events when other people, clients or colleagues, are depending upon the user’s presence. Nicholas and William used an electronic Microsoft Outlook application for their calendar, while Carol wrote on a monthly paper calendar that she stores beside her ‘to-do’ notebook and beneath her computer mouse.

Interestingly, no participants in this study mentioned relying just on a calendar or ‘to-do’ list (the three who said they kept calendars are the same three who said they kept ‘to-do’ lists); calendars and ‘to-do’ lists are used in tandem to supplement each other, with shorter- and longer-term responsibilities divided between them.

Figure 14. Calendars. Carol keeps a paper calendar of long-standing meetings and appointments, along with a notebook of daily ‘to-do’s, in front of her laptop as she works. Others maintain computer-based calendars of their larger tasks and events.

5.2.5 The Job File

For every order that the printing professional receives from a client, a single job file is created using a folder of either paper or electronic format. Most every job file will contain:
• a client’s initial request for printed materials;
• a translation of this request into domain terms, or specifications;
• a quote or estimate for the printing order from a printing plant facility;
• a purchase order form outlining the client’s formalized order specifications;
• records of any updates or changes that are made to the printing order; and
• a final invoice for the printed and complete job.

Job files are the mainstay of the work of printing professionals, and present throughout their job routine (as shown in Figure 6). They are the most often-sought source of information throughout the workday, and a testament to the importance that the printing professional places on metadata (a point that is further discussed in section 7.3.1). All of the printing professionals in this study kept job files—they simply could not carry out their work without them. All of the printing professionals in this study also kept the singular job files for active” or in-progress orders close by them as they worked (a point further discussed in section 6.2.2.2). Once a printing order is completed, its job file forms part of the “archives” (discussed in section 5.2.6).

Figure 15: Job files. Active job files stay close by the printing professional until orders are completed or well enough along to be filed further away, whether in a filing cabinet or in a designated folder on a computer; Carol keeps her active job files in a hanging file frame (left). Job files contain all of the
specifications, which can be both informal and formalized, for a printing order; William keeps his in paper format (right).

5.2.6 The “Archives”

Individual job files for completed printing orders are classified and archived as an aggregation of either paper or electronic formats in the printing professional’s home office. The “archives,” so termed by all of the participants in this study, are manifested as awe-inspiring filing cabinets that brim with carefully tabbed manila folders or as elaborate hierarchies of electronic folders on computers. All participants in this study conferred upon their “archives” an organization scheme by client (a point further discussed in section 6.2.2.3).

The printing professional will return to their “archives” for reference, or as a basis for determining the specifications for reprint job orders or future job orders, making these extensive collections a source of much potential value. However, Nicholas and Sue also noted that their “archives” co-exist with large amounts of “dead files” that are deemed no longer of use, either because they have been superceded or because printing orders were canceled. These await the next round of disposal and destruction (a point further discussed in section 6.2.3).
5.2.7 The “Library”

Each of the printing professionals in this study kept a “library” (so named by them, though perhaps closer in nature to an infrequently used collection of personal books) containing samples of the finished products of printing orders. However, many of these goods have never even been opened; these are not the valued artefacts for printing professionals and are referenced by them rarely, only if a problem arises with a completed order’s printing or manufacturing work that failed to be discovered at an earlier stage. Upon receipt into the home office, these samples are typically shelved automatically until, if ever, they are required. A majority of the participants in this study either already do not receive or are considering not receiving printed samples into their home offices anymore, and are content to instead rely upon colleagues (other printing professionals or printing plant facilities) who have established themselves—quite literally in this case—as “informal librarians” (Whittaker and Hirschberg, 2001, p. 166) stocked with resources.

The scale and scope of holdings in a printing professional’s “library” is therefore a matter of personal preference. For example, Nicholas’ “library” consisted of less than ten carefully...
selected books set atop a filing cabinet and Sue’s of less than one hundred books shelved alongside her family’s own books, while Carol devoted several large bookcases in her home’s basement entirely to her “library” and William warehoused books and materials in piles several stacks deep, having long since run out of adequate shelf space on his bookcases. In two of the home offices studied, separate subsections of the “library” were maintained not for the printing professional, but for an outside audience of family members or friends who might be invited to browse there and acquire (albeit illegally, since they do not pay author royalties) personal holdings.

Figure 17. “Libraries.” Printing professionals’ home office “libraries” can range greatly in size, from a small collection of a few books (top left) to a medium collection (top middle; bottom) to a vast collection so large that it must sit two and three stacks deep in front of the already-full bookcases intended to hold it (top right).
5.2.8 Tools and Supplies

While certainly not the most intriguing of the content found within the printing professionals’ home offices, the various tools and supplies required to sustain a small wing of a business operation were among the most consistently present. As previously noted, all such practicalities and “futzing, shared elsewhere, fall into the lap of the idealized, individualized entrepreneur” (Brown & Duguid, 2000, p. 79) in a professional home office. Even the more modest of home offices had large stocks of ink, toner, paper, tape, pens, staples, and other supplies well within the ready reach of their users’ desks.

Though this housekeeping aspect was swept into drawers or disguised in small groupings around the home office where possible, such tools and supplies are noteworthy as they are much of the sustenance of the independent, home-based printing professional. Professional home office users must fend for themselves and ensure that they do not end up stranded in the middle of a busy workday without the fuel required to carry on in their jobs.

*Figure 18. Tools and supplies.* Professional home office users stay well stocked with the necessary tools and supplies to sustain them through their workflow. Carol keeps paper and packaging materials close to her printer (left), while Sue keeps toner, ink, and other supplies in a small set of drawers, beside her printer and near to her desk (right).
5.3 The Role of Non-Office Artefacts

Small, personal touches are a part of any office, no matter the type, and grace most every cubicle in traditional workplaces. Upon first glance, non-office artefacts did not seem any more obvious or abundant in the home offices studied, all of which contained photographs and other mementoes of significance placed there by users. Yet, even these subtle displays of non-office content delineated the key difference between traditional office and professional home office spaces: in the latter, users are continually negotiating between the personal and the professional. Rather than viewing the intersection of living and working inherent in the professional home office as an impediment beyond the user’s control, as Fulton (2000a) does, this study found its participants to be deliberate about and even revel in the duality of their spaces.

In Nicholas’ and Sue’s home offices, non-office artefacts, or artefacts of the home, seemed almost purposefully employed as a way to blend the office into the surrounding décor of the house. These were not overstated attempts: some greeting cards and framed photographs, a decorative table lamp rather than a functional one, a mirror, and a painting in Nicholas’ home office, along with many photographs, children’s artwork and knickknacks, and functional home items like a sewing machine and closet full of clothes in Sue’s, infused the physical spaces and served to balance or even neutralize their work aspects with living ones. Sue also uses her home’s decorative bookcases to shelve her “library” of work samples beside books belonging to her family. Though a slight distinction is made between work and home books based on what side of the bookcase these are placed on, to the outsider unfamiliar with Sue’s
arrangement, the bookcase carries no quintessential office-like quality and appears as a collection of books that might be expected in any house.

![Image](image1.jpg)

*Figure 19. Non-office artefacts in small home offices.* Personal touches like a decorative console, mirror, and lamp, as well as greeting cards and an iPod docking station, neutralize professional aspects in Nicholas’ home office (left). Photographs, artwork, knickknacks, a sewing machine, and family books (on the left-hand side of the bookcase) do the same in Sue’s home office, blending work-related printed samples (on the right-hand side of the bookcase) into the background.

On the other hand, Carol’s home office proper was largely devoid of non-office content except that which might be expected in a traditional office, such as a plant, a few framed photographs, and a figurine; therein, the influence of home in her home office was no more than that which the enclosed, contained office was throughout the rest of her home.

Her off-site office storage space, a communal rec. room in the basement, however, projected a much homier feel, allowing it to fall in line with the primary intentions for the area. Similarly to the way that Sue used household books and a decorative bookcase to blend work-related content into the background and foreground the home in her home office area, Carol’s “library” of work samples is kept on larger bookcases that line a cozy living space replete with armchairs, a sofa, a coffee table, a TV, and wall art. The bookcases are a backdrop to the space not out of the ordinary for a home, especially with matching wrought-
iron decorations interspersed among the books somewhere on each unit. Still, work aspects are not washed away entirely in the space: a cut-out of Carol’s company name is on display above the bookcases, sticky notes portraying her alphabetical classification scheme for the printed samples are tacked to each shelf, and behind the bookcases stands a row of large filing cabinets that contain all of her archived job files.

At the other extreme from Nicholas’ and Sue’s downplayed home offices is William’s home office, wherein office artefacts overlay and displace artefacts of the home even beyond the boundaries of the home office proper. Stacks of printed samples, piles of job files, and miscellaneous tools and supplies spill out from William’s home office area into the surrounding communal rec. room in the basement. William’s attempt to recreate the seamless feeling of being in a traditional office in his home office has led to appropriations of spots formerly designated to home artefacts alone. Household content that once had a place somewhere within the structures in this larger space, such as travel coolers, bins of potatoes, and Christmas decorations, are thus re-imposed amidst spreading office content, reinforcing prior household routines. Because physical living and working boundaries within the space
have broken down, William’s larger basement exists in a sort-of limbo as “a site where the relations within [the] family can be played out and (re)negotiated” (Swan & Taylor, 2005, p. 4) through a series of continual shifts between office and non-office content.

Figure 21. Non-office artefacts in a large home office. Household items, such as travel coolers and a bin of potatoes (left), and Christmas decorations (right), are imbricated in a series of continual re-impositions with a mass of office content overtaking space beyond William’s home office proper.

The display and deployment of non-office artefacts in the home offices studied suggests an inverse relationship between the amount of this household content and the size of a home office (as established in section 4.3.5, which has nothing to do with the size of the actual physical space itself). Small home offices contained more non-office content than medium and large home offices, which contained progressively less. Yet, none of the participants, no matter their office size, seemed to find the particular blend of home and office content in and around their home offices to be impeding or uneasy. They even preferred to keep one hand in the home world once in their designated workspaces, as all four maintained separate home phones or phone lines within the ready reach of their home office desks. Figure 22 below acutely captures this dichotomous blend, as William’s home phone sits atop a stack of his printed samples.
While non-office artefacts were a materialization of the negotiation between personal and professional that is part and parcel with intersectional living and working spaces, they did not necessarily imply a compromise of one for the other. The content contained within the professional home office spaces studied indicates that personal and professional are not mutually exclusive concepts for participants.

5.4 Chapter Summary

This chapter surveyed the information, office, and non-office content contained within the printing professional participants’ home office spaces. It suggested an inverse relationship between the amount of non-office artefacts contained within a home office and the size of a home office, and analyzed the role of non-office artefacts as one through which participants negotiate the personal and the professional in their spaces. The following chapter examines participants’ management of information content in their home offices.
VI
INFORMATION MANAGEMENT IN THE HOME OFFICE

6.1 Chapter Overview
The last chapter surveyed the vast array of content found within the home offices of this study’s printing professional participants. This chapter builds upon the previous, presenting original findings that relate to how participants manage the information content in their home offices, and begins to build a basis from which to answer the study’s initial guiding research questions concerning the nature of information management, the conventional and unconventional approaches to information management, and “meta-level” (Jones, 2007, p. 464; Jones, 2008, p. 60) information activities in home office settings. It is structured around participants’ management of information content throughout its lifecycle, from initial acquisition to unkeep to final disposition, with special attention given to how these activities shape and are shaped by setting and space.

6.2 The Management Cycle
While information management practices in this study place emphasis on participants’ storage, organization, and maintenance activities, Jones’ (2007; 2008) definition of personal information management serves as a reminder that the acquisition (or not) and the disposal (or not) of information content—what Finneran (2007) calls acts of “keeping,” “leaving,” “saving,” and “discarding”—are too aspects of its broader overall management.

Acquisition, followed by storage, organization, and maintenance, and then the final disposition of information content were the three main stages in a lifecycle of management
identified by the printing professional participants in this study, visually represented below in Figure 23. Each invested some effort in managing the work-related information content in their home offices on a daily basis, even if this act was as little as printing or scanning a document, shifting a file to or from their computer desktop, or deleting or archiving an email.

![Figure 23. Lifecycle of information management in the home office. Model depicting the three main stages of managing information content throughout its lifecycle, those of acquisition, upkeep, and final disposition. The arrows leading from one stage to the next show that information content is in a constant state of flow in, within, and out of the home office, and also that decisions made in one stage will directly affect subsequent stages.]

Taking the initiative to manage information was seen as a necessary component of participants’ working arrangements. For example, Nicholas attempts to have everything in his inbox “taken care of” by the end of each workday and definitely by the close of each workweek, consciously mimicking the built-in network of support roles that ensure information is dealt with systematically in a traditional office. He explains:

In terms of an office environment, you know… you have secretaries and assistants that can help you manage that [information flow]. When you’re working from home you don’t have that anymore, so you want to be able to deal with that [information] quickly, [rather] than let it pile up… don’t let it pile up. So, you know, I try to have a message come in, and respond, and then file right away… right away. I just find it’s easier to deal with. I mean, I’ve had backlogs of… of stuff sitting in my inbox before and things to do and stuff like that… uhhh, you know, it makes it, you know, very complicated. So I try to keep up on it fairly, uh, evenly.
Likewise, Carol notes that “you’ve got to do it all and be the jack of all trades with a home office,” and finds that her busiest time is the last hour of each workday, which she devotes to catching up on all of the logistical functions necessary for her continued ease of work.

6.2.1 Acquisition

In order to be acquired into the printing professional’s home office, information content must meet certain criteria, which differed slightly according to the needs and preferences of each participant in this study. Finding the course of action that would best help them avoid “information overload” (or minimize it and sustain it at a workable level) by discriminating about what is acquired and under what circumstances was something done by all participants, even if it was not given conscious thought. When asked about the quick pace of information entering her home office, Sue states, “Sometimes it’s not so fast, other times I pull my hair out. I don’t know. I don’t really know how I manage it. I just do.” The main way in which the printing professional participants in this study exercised acquisition discrimination was by dictating acceptable types and formats for information content entering their home offices and falling under further management in the future.

Regarding the types of information acquired into his home office, Nicholas explains:

In terms of pertinent information, you know, and you pretty much know what those pieces of paper are going to be, I would save it to a customer file [on my computer]. If I receive, for example, purchase orders from a client, you know, I’ll take a look at them, but I won’t save them. I might save them if I see that the job is kind of going to be a trouble project and, you know, then I’ll save all that. But any of the day-to-day customer stuff, I know that the [printing plant facility] keeps a copy of everything, and they’ll archive all of their emails.
Nicholas was alone in only acquiring the most formalized, up-to-date documents using proper domain terms—order specifications, quotes or estimates, order forms, and invoices—into his home office, not bothering under regular circumstances to also acquire the informal order requests or changes that will not in and of themselves officially bear on the end printed product, “the day-to-day customer stuff.” For the other participants, at least the most up-to-date documents from each stage of processing a printing order (as modeled in Figure 6) are acquired. Carol and Sue ensure that initial order requests, formalized specifications, accurate quotes or estimates, updated formalized orders, and any changes to orders, as well as a final invoice, are acquired and kept in all of their job files, whereas William prefers to acquire all documents, informal, formalized, and even those that may no longer be accurate, so to be sure that he possesses the “history” of every order he handles.

Even though the majority of actual information content acquired so to successfully carry out the job of a printing professional will remain, with small variations, more or less static across different spaces, whether comparisons are made between home offices or with traditional offices, the second component of acquisition, the paper or digital format of information content, may change more dramatically.

Nicholas spoke of moving to his home office as a chance to completely purge himself of unwanted work habits that he had accepted as the norm in his traditional office, one being the format for dealing with information content. He wearily reflected on his time there as spent “endlessly shuffling papers from pile to pile,” impeding his efficiency. Reenergized, he spoke of how he scanned most relevant paper documents to digital versions before moving,
chooses to work almost entirely from electronic files in his home office (with the exception of “cheat sheets,” his “to-do” list, and a very few high-level negotiations with clients, for which he will often keep paper copies), and does not acquire printed samples into his home office, specifically not wanting to create the expansive “libraries” that are proudly displayed by some other participants.

Carol and Sue are equally discriminating in what they acquire into their home offices in paper format and keep in paper job files, agreeing that many of the “day-to-day” documents Nicholas referred to could be kept just as effectively in digital format and in electronic job files. Carol recalled having printed all documents to paper in her traditional office only to often end up “stuck there filing until ten P.M.,” without any significant gains or consequences in her short- or long-term work. While both Carol and Sue also keep “libraries” of printed samples, these are acquired on a case-by-case basis rather than methodically.

On the other hand, William carries over acquiring activities that were used in his previous traditional office, wherein mostly everything had been handled as a paper copy, but extends these too, creating a home office that is a veritable warehouse of archived job files and all printed samples. He spoke happily of being able to trust that he could go to his filing cabinets and at any time find “the whole history” of a given book, which he could then find within his own “library.” Indeed, his seven filing cabinets and ten bookcases filled to their brims and spilling out into several piles would never fit, physically or socially, in a traditional office. He showed no distress over his need to gingerly turn, squeeze, and maneuver through the
space in order to avoid the rare but not-unheard-of “avalanche” of materials that sometimes occurs. William’s case echoes Whittaker and Hirschberg’s (2001) suggestion that “people [end] up with large archives deliberately and not because they [lack] the time or inclination to sort through their data” (p. 154).

These differences across the printing professional participants’ acquisition activities—whether they choose to keep fewer or more types of information content and whether they choose to keep this content visibly or invisibly—correlate with the size of home office (as per section 4.3.5) they establish. Yet, at the same time as participants shape their spaces in this way, their acquisition activities are also being shaped by the broader environment of household and workplace influences within which their professional home offices sit. The participants in this study must acquire certain types of information content to carry out their jobs, but whether they do so in a paper or digital format may account as much for fellow householders as it does their own preferences. For example, Carol keeps loose documents and files contained in her home office proper and not in her home’s communal off-site storage space, William spreads his paper documents across his home’s little-used basement, and Sue keeps most of her information content digitally in the home office that she shares with the rest of her family.

6.2.2 Upkeep

Upkeep—the storage, organization, and maintenance of materials—ensures for the printing professional that the information content acquired into their home office is logically arranged and accessible when desired and required. The printing professional participants in this study
employed a variety of storage structures, systems of placement, and organizational schemas in order to manage the information content in their home offices at a “meta-level.”

6.2.2.1 Storage Structures

From wireless handheld devices like Blackberries, through laptop and desktop computers, up to overflowing filing cabinets, stuffed bookcases, desks, and any available flat surface, information in the home offices studied was housed in furniture and hardware more varied than the content itself. Moreover, just as all participants kept some combination of paper and digital information content, they too employed some combination of physical and technological storage structures. Below, Figure 24 shows some of the most common and some of the most fascinating ways that participants stored their information content.

Figure 24. Storage structures used in home offices. Some of the most common storage structures employed by participants were bookcases (top left), filing cabinets and piles (top middle), and computers (top right) while some of the most ingenious, creative ones included couches (bottom left) and the floor around pool table pockets (as well as on top of the pool table’s surface) (bottom right).
Below, Table 2 details the types of storage structures that appeared in participants’ home offices with information or other office content (for example, tools and supplies) stored either in or on them; it does not include those present in the home offices but not utilized as support for work-related documents or tasks (for example, chairs used to sit at desks, but not used as content-holding mechanisms). This list arose in a grounded manner from the data gathered during field outings, and is not meant to be an exhaustive catalogue of storage structures that are or could be used in home offices.
Table 2. Structures storing information content and their quantities in the home offices studied.

<table>
<thead>
<tr>
<th>Storage Structure</th>
<th>SMALL Nicholas’ Home Office</th>
<th>SMALL Sue’s Home Office</th>
<th>MEDIUM Carol’s Home Office</th>
<th>LARGE William’s Home Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>OFFICE/ORGANIZATIONAL</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Desk- small</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desk- large</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filing Cabinet- small</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Filing Cabinet- large</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Bookcase- large</td>
<td></td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Drawers- small</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Box, Basket, Bin, Tray, etc.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL OFFICE STRUCTURES</td>
<td>3</td>
<td>3+</td>
<td>14+</td>
<td>20</td>
</tr>
<tr>
<td>HOME</td>
<td>X</td>
<td>(1 as desk, 1 holds printer)</td>
<td>X (actually a pool table)</td>
<td>X</td>
</tr>
<tr>
<td>Table</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Couch</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Chair</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Bookcase- small</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL HOME STRUCTURES</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>BUILT</td>
<td>X</td>
<td></td>
<td></td>
<td>X (2 in outer office area)</td>
</tr>
<tr>
<td>Islands</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Floors/Walls</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>(used as makeshift shelf-like supports)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL BUILT STRUCTURES</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
</tr>
<tr>
<td>TECHNOLOGICAL</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Handheld Device</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laptop Computer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desktop Computer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL TECH. STRUCTURES</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>TOTAL STRUCTURES OVERALL</td>
<td>7</td>
<td>7+</td>
<td>18+</td>
<td>28</td>
</tr>
</tbody>
</table>

X = present (and quantity if more than 1, location, and/or other details)

Each of the home offices is classified by its size, as established in section 4.3.5. Each of the storage structures is classified by its intended purpose and use as one of: “office/organizational,” embodying maximal functionality over aesthetics; “home,” embodying aesthetics over maximal functionality; “built,” being an unchangeable feature of the physical space; or “technological,” being an electronic storage medium.
From a side-by-side comparison like that laid out in Table 2, it is obvious that the types and quantities of content-support structures participants employ bear directly on the size of home office they establish, and that the size of professional home office they establish (as per section 4.3.5) determines the types and quantities of content-support structures they employ. William’s twenty-eight structures in current use in his large home office, holding his massive volumes of paper information content, far outnumber the seven or so used in Nicholas’ and Sue’s small home offices and the eighteen or so used in Carol’s medium home office. It also shows that the built structures of physical home office spaces, even those as simple as floors and walls employed as makeshift shelves for content to be piled against, seem to only be taken advantage of in large home offices, like William’s, that have immense amounts of paper information content within them.

Interestingly, however, Table 2 shows no solid relationship between home office size and the utilization of technology, despite the fact that technology makes invisible a large amount of information content and so might be assumed well-suited to a small home office like Sue’s, where an office style is downplayed in favour of a homier one. Furthermore, Table 2 indicates that it is not necessarily small home office users who appropriate typical home structures such as small tables, chairs, couches, and small bookcases for use in their professional home office spaces, but medium and large home office users who set these structures alongside typical office structures like large bookcases, large filing cabinets, and desks with plentiful storage. Small home office users, rather, seem to use the affordances of small office structures in combination with only one or two larger office structures and at least one technological structure to house the entirety of their home offices’ information content.
6.2.2.2 Systems of Placement

All participants also employed certain systems or methods for placing content when dealing with the flow of information content into and within their home offices. These followed the general pattern of “piling” and “filing” paper and electronic documents (Malone, 1983; Whittaker and Hirschberg, 2001), but beneath this was a more finely grained system of dividing documents based on their immediacy and relevancy to the work at hand. Previous LIS literature investigating information in the traditional office has noted that most workers keep “action” (or “hot”) documents that are needed often separate from “working” (or “personal work” or “warm”) documents that are needed only sometimes, and both of these separate from “archival” (or “archived” or “cold”) documents that are needed very infrequently (see, for example, Cole, 1982; Lansdale, 1988; Barreau, 1995; Barreau & Nardi, 1995; Whittaker & Hirschberg, 2001; Sellen & Harper, 2002; Jones, 2008).

It has also been noted that information requiring an immediate action will make use of “location” (Neumann, 1999, p. 457; Taylor & Swan, 2005, p. 3). Malone (1983) stressed that office organization would consciously serve the functions of “finding” (p. 111), allowing workers accessibility to needed pieces of paper information, and of “reminding” (p. 111), engaging workers in needed tasks through the strategic placement of pieces of paper information. Likewise, Barreau and Nardi (1995) found that it was the placement of digital information on computer desktop that would serve for users a “critical reminding function” (p. 41). According to Taylor, Swan, and Harper (2008), “by being ever-present and on display, these [pieces of information]… function as reminders… [and] reminding elicits an irritation… and motivates action” (pp. 9-10).
The printing professionals studied were no exception to these well established customs; all of their organizational systems took the form of “piles” or “files” of “action,” “working,” and “archival” documents set progressively farther from the central hub of their desks and out of their direct sightlines as they lessened in importance over time.

Carol keeps her current “action” job files in a hanging file frame on her desk, and the few she does not bother to print to paper format in her email inbox until the jobs to which they refer are well under way. When she knows that a printing order is moving along in production, she moves its now-“working” paper file folder to a drawer in her office (or its now-“working” digital documents from her email inbox to an electronic file folder stored in her email), given that she will need to access these much less frequently than she did when the order was just beginning. Long after completion of the printing order, its now-“archival” paper file folder can be moved to her off-site “archives” (or its now-“archival” electronic file folder contents to her computer hard drive).

A variation on Carol’s basic system was followed by all other participants. Sue and William always create paper job files and never rely solely on electronic content. Sue keeps “action” information either in a pile on her desk or in the top drawer of a small filing cabinet directly behind her desk, “working” information for jobs that are at or near completion in the bottom drawer of the same filing cabinet, and “archival” information (more than two years old) in her basement. William notes that he keeps all initial job quotations in a pile “close to my desk until they are set to go, and then I make a job file… and put it in the in-progress filing cabinet” or piled close by there. Until then, information content is “not quite ready to be
moved further away” from his reach. When a job is completed, the job file is moved from the in-progress filing cabinet to the “archives.” All of Nicholas’ “action” and “working” job files are stored digitally in his email inbox, eventually “archived” into folders within his email.

As well as keeping the paper information most likely to be needed throughout the workday on their desks, participants also placed digital information on their computer desktops. Nicholas’ is an especially critical reminder of his looming “to-do” tasks, filled with any presentations he is currently working on. Likewise, until Sue prints invoices for jobs to mark their completion, she keeps these on her desktop, explaining, “I should print them right away and then file them, but I don’t, so they just stay there until I start cleaning up.”

This pattern of dissipating information content outward, away from participants’ desks or into the background on their desktops, the main hubs of critical and timely documents in their home offices, is reminiscent of Lee’s (2003) segregation of academics’ interactions with information content across three distinct spaces. Lee proposed that academics had an immediate space, which includes the resources stored in their offices and needed most often and repeatedly; an adjacent one, which includes the resources within campus libraries that are needed sometimes or that may function as reminding “distractions,” causing them to follow up on a task; and an outside space, which includes resources held beyond the campus, for which users rarely have an inclination (pp. 428-9). Below, Figure 25 models each printing professional’s system of placing, and outwardly dissipating, information content throughout their home office space.
Figure 25. Systems of information placement. Models showing three zones of information content in Nicholas’ (top left), Carol’s (top right), William’s (bottom left), and Sue’s (bottom right) home offices: “action,” “working,” and “archived.” Documents dissipated farther away from participants’ desks as need for them declined over time.

The widespread support for “action,” “working,” and “archived” information content (or variations thereon) in previous LIS literature indicates that these are conventional systems of placement that have likely transposed from participants’ traditional offices into their home offices. Their home office information arrangement activities are shaped by previously learned and shared systems. At the same time, however, participants have actively shaped their new spaces to be more traditionally office-like, assured to uphold and support the tasks they complete therein despite their changed physical settings and environments.

6.2.2.3 Organizational Schemas

Organizational schemas for the arrangement and classification of documents in participants’ home offices also followed a consistent pattern. Having always grouped and organized the
majority of most-often used information content—job files and printed samples—by client name in their traditional offices, participants carried this same schema with them into their home offices as well. William succinctly explains that, for the printing professional, “organizing everything by client is just the easiest way.”

Once a printing order is completed, Nicholas takes all digital documents relating to it from his email inbox and files them in the appropriate electronic client folder in his email, further sub-divided on a monthly, chronological basis, and into a folder that is specific to that job title. Likewise, William and Sue organize all of their paper job files by client name, tabbing each paper folder with the specific job title, and Carol does the same for those of hers that are kept in paper format. The minority of job files that Carol stores digitally she organizes in an electronic client folder on her hard drive, further subdivided into another folder that is specific to that job title and tagged with the current year. Printed samples, when contained within home offices, are also usually organized by client name: Carol does so alphabetically and William aggregates his in no order, with those that cannot fit on their designated bookcases and shelves kept “close by,” subdivided by two-colour and four-colour format. Sue, the other participant with a “library” of printed samples spanning a few shelves in her home office laments, “they used to be organized by client, but now they’re just… not.”

The minority of information content within printing professionals’ home offices for which an overarching organization schema by client name would not make sense is instead arranged in paper or electronic folders by subject. “Travel” folders, subdivided for each instance of a trip, containing the related itinerary and agenda, and “Presentations” folders, sub-divided for each
instance of a talk, containing all related scripts and slides, were the most common subject organizations within the home offices studied.

In a guide entitled *Personal Documentation for Professionals*, Stibic (1982) explains that relatively small, simple collections of information content can be “physically arranged according to a chosen [schema], and… directly retrievable, without auxiliary tools” (p. 31). Because these collections are personal and being used by just one person, the chosen schema need only be understandable to that one individual. Spending time to organize it flawlessly, using complex devices, following universal standards, or attempting to be objective in its design (pp. 35-38) is simply not necessary. Despite the fact that job files and printed samples took on more of the feel of personal collections in participants’ home offices, each still made use of organizational schemas that mirrored those of their previous traditional offices. However, just as they did with their systems of information placement, participants actively shaped their new settings and environments by recycling learned schemas. They chose to recreate the “office experience” (Fulton, 2000b) for their own advantage and ease of work rather than take chances on an organization that might not prove as useful.

Finally, those participants who kept subsets set of their “libraries” of printed samples for family and friends to browse and acquire from organized these zones in a bookstore fashion, with materials aggregated largely by genre (for example, non-fiction, fiction, cooking, music, and so on) and grouped by title. Since these printed goods are intended for an audience that lacks the domain knowledge of clients, colour formats, and so on held by the printing professionals themselves, they are organized differently than the types of personalized
holdings to which Stibic (1982) refers, in accordance with a schema more familiar and accessible to the general public.

Below, Table 3 summarizes the three main organizational schemas found within the home offices of the printing professional participants.

Table 3. Co-existing organizational schemas in the home offices studied.

<table>
<thead>
<tr>
<th>Organizational Schema</th>
<th>Application</th>
<th>Content Type(s)</th>
<th>Example(s)</th>
</tr>
</thead>
</table>
| Client Name            | Used to organize the printing professionals’ routine work documents | • Job files  
• Printed samples | ![Client Name Example](image1) |
| Subject                | Used to organize the printing professionals’ non-routine work documents | • Files | ![Subject Example](image2) |
| Bookstore              | Used to organize materials not intended for the printing professionals, but for outsiders | • Printed samples in subsections of the “library” designated for browsing/acquiring | ![Bookstore Example](image3) |

Each of the main co-existing organizational schemas is listed along with its application, the types of information content to which it pertains, and example(s) of it in use. The examples for client name show “archives” and “libraries” organized by client name, those for subject show a “travel” folder and subfolder for a trip, and those for bookstore show a zone intended for outsiders to browse and acquire from, aggregated by genre and title.
6.2.3 Final Disposition

Choosing a final disposition for information content that has at one time been acquired into the home office was the last stage in the management cycle identified by the participants in this study. The decision to either retain or destroy previously acquired information was also the one that, when delayed, caused a ripple effect throughout the lifecycle as information was kept longer than needed, taking up storage space for newer information content or rendering other information content less easy to access.

Nicholas and Carol were systematic in enforcing the destruction of information content no longer needed. For both, final disposition may be decided immediately upon a document’s receipt, leading to either its appropriate placement or its trashing. Nicholas explains:

I would either delete it [information], or save it into a customer file. But, you know, in terms of pertinent information, you know, and you pretty much know what those pieces of paper are going to be, I would save it… So I’ll just archive… or save… you know, hard, well not hard, but… pieces of information that I know mean something. And I don’t know how I know, but I just know!

Nicholas and Carol are equally diligent in trashing inaccurate digital and paper information content (for example, outdated documents from a job file for an order that has been changed). Carol even had a garbage bag by the door of her office and several boxes of outdated and unneeded sample books in her basement waiting to be destroyed.

In contrast, William keeps all modifications to job orders in their designated paper job files and rarely, if ever, destroys this content, likely the reason why his large home office, even with all of its large office storage structures, requires that much content be piled—there is simply no room for it to be filed. He too, like Carol, he keeps several piles of outdated
sample books designated for destruction scattered all around the outskirts of his home office, though these often end up blockaded by newer piles and so never destroyed after all.

Similarly, Sue explicitly stated that she would never delete a file from her computer though she noted:

I should. It is… you know, I think, getting crowded. I get rid of dead [superceded] files and stuff, like quotes. But sometimes I want to keep them just so that I know if our price was high, and then…

Also, never deleting emails and needing to file them, she took the opportunity during the field outing to clean her inbox, explaining while doing so, “Every now and then I would go through and purge [delete or file] but I haven’t purged in… well… I have [emails] since 2008. So it’s time to purge.”

The printing professional’s disposition activities—whether they chose to retain or destroy information content—did not alone correlate with the size of home office they established. Sue, a small home office user, was most akin to William, with his large home office, in her decision to retain nearly all content and trash very little, while Nicholas, another small home office user, was most like Carol in her medium home office, both in the habit of retaining only the necessities and few superfluous documents. However, in what format participants chose to acquire and retain their information content—paper or digital, visibly or invisibly—did, in combination with their disposition activities, correlate with their home office size. All stages in the lifecycle of information management are thus highly intertwined, as Figure 23 suggested. Acquisition, upkeep, and final disposition activities—together, the practice of information management—are all similarly shaped by the broad environment of household and workplace influences within which they occur. Professional requirements, personal
preferences, intra-home obligations, and socio-familial forces may all coalesce in the ways that individuals manage information content in their professional home offices.

6.3 Chapter Summary

This chapter chronicled the printing professional participants’ management of information content throughout its lifecycle in their home office spaces, from its initial acquisition through its upkeep to its final disposition. It found that these stages are highly intertwined and that they both shape and are shaped by the specific environment within which users operate when in their home spaces. The following chapter examines participants’ use of information content in their home offices.
7.1 Chapter Overview

The last chapter introduced methods and techniques for managing the vast information content found within the home offices of this study’s printing professional participants. This chapter builds upon the previous, presenting original findings that relate to how participants use the information content contained within their home offices, and furthers the basis from which to answer the study’s guiding research questions concerning the nature of information use and the conventional and unconventional approaches to information use that arise in home office settings. It describes the information use and non-use and the information seeking and sharing of this study’s printing professional participants, with special attention given to how these activities impact and are impacted by setting and space.

7.2 Use and Non-Use

The printing professionals in this study consistently turned to the same types of information content throughout their processing of a printing order—those contained within a job file—and then used (or did not use) these documents in the same ways. Below in Figure 26, the job routine of the printing professional (from Figure 6) is overlaid with the main types of information use and non-use as they occur at each stage in the printing professional’s work. Each type of information use and non-use is then subsequently described.
Figure 26. Information use and non-use occurring throughout the printing professional’s job routine. Four stages of information use and non-use occur throughout the job routine of the printing professional: initial orienteering at the beginning of the printing process; affirming once the process is underway; problem solving as required; and warehousing once a printing order is completed. The multi-directional arrows surrounding the orienteering, affirming, and problem solving stages indicate that these may occur at any given time throughout the printing process and consequently send the printing professional back to an earlier stage or affect subsequent stages.

7.2.1 Use: Orienteering

Orienteering refers to the type of information use that occurs at the beginning of the printing process. It may begin when a client is being solicited, during which period the printing professional uses their “cheat sheets” of contact numbers to “cold call” (Carol’s words) a publishing house, author, or organization in which they are interested to feel out potential new relationships. More commonly, it begins when a printing request is first received from a client, as the printing professional navigates through the particular details of the document and works to understand it in the way that the client intends it to be understood.
From a client’s initial and informal product request, the printing professional must decipher the printing need and the best printing plant facility to handle this need. For this task, they use their specialized knowledge to translate the client’s initial request into domain terms, or specifications that will be readily understandable within the printing industry, so that they can forward these on to a printing plant facility. While translating, they are familiarizing themselves with the job at hand and recognizing qualities that will lead them to select, with or without the help of their “cheat sheets” of reference, one printing plant facility over another.

During the orienteering stage of information use, documents are in an “action” state (as discussed in section 6.2.2.2) and kept close at hand. As noted previously (in section 6.2.1), some printing professionals do not find a client’s informal printing request worth keeping once their preliminary navigation through its basics is done; past this point, it is only the formalized, translated order specifications that have value to them.

### 7.2.2 Use: Affirming

Affirming refers to the type of information use that occurs when the printing professional is working from three documents: a client’s initial request, the order specifications they generated, and a quotation or estimate for the printing order received from a printing plant facility. The printing professional is translating back and forth between these different documents, all from different sources and all using different domain languages, in order to affirm and reaffirm that all of the client’s needs have been accounted for and that no errors or omissions have occurred during the translation of one document to another.
Using their specialized knowledge to decipher and decode, the printing professional seeks to ensure that there is congruency between the three documents in front of them; there is no supplementary means of reference that can help them with this work. During the affirming stage of information use, documents remain close by the printing professional in an “action” state (as described in section 6.2.2.2).

7.2.3 Use: Problem Solving

Problem solving refers to the type of information use that occurs when the printing professional is working across multiple different documents from multiple different sources so to solve any discrepancies that arise throughout the printing process, handle modifications to printing orders underway, or deal with errors in final printed products. It involves comparing all existing documents that pertain to the job in question, contained within its specific job file, and noting any errors in translation or misunderstandings in interpretation across these documents that may have led to the problem. Most of all, however, it involves scouring these documents for a possible solution to the problem at hand. Problem solving is situation-dependent and done on the fly: there are not documents to cover every foreseeable situation, and though “cheat sheets” might be helpful in pointing the way toward a solution, this stage of information use is heavily reliant upon the tacit information held in the minds of the printing professionals themselves.

The need to problem solve can arise at any point throughout the printing process, whether the order in question is still in a pre-printing “action” state, has moved along to a “working” state, or even after it has long since been “archived” and a final printed product has been
produced and delivered. Similarly, it can have far-reaching effects that send the printing professional back to an earlier stage of information use, needing once again to orient themselves to changes in an order and to affirm that these have been recorded and relevant documentation updated.

### 7.2.4 Non-Use: Warehousing

Just as often as information content is put to some end in the printing professional’s home office, such as the use of a job file to confirm the specifications for a printing order or the use of a “cheat sheet” to offer an early price estimate for a printing request, a wealth of information content sits untouched and unused in their “archives” and “libraries,” stowed away for unspecified points in the future that may or may not ever arrive. Once a printing order is completed and a final printed sample has been delivered, a stage of information non-use, referred to as warehousing, begins.

Printing professionals will rarely, if ever, need to reference their “archived” job files for completed printing orders, but keep these anyway in order to be proactive about possible future problem solving and in order to have a jumpstart on orienteering should reprint requests or requests for newer editions of printed goods arise. Similarly, as noted in the survey of information artefacts (in section 5.2), the “libraries” of printing professionals contain mostly “archived” printed samples that have never even been opened, let alone referenced heavily, or even occasionally, in the course of daily work. Samples may be stored as a precautionary measure, should the need for future problem solving arise, and to be
loaned to clients in attempts to solicit their future orders. Warehoused information content is therefore a source of much potential, but not upfront, value.

7.3 Seeking, Sharing, and Setting

Throughout the course of their job routine, the printing professional participants in this study perform numerous instances of information seeking and participate in numerous acts of information sharing. More so than the types of information use that occurred in their daily routines, seeking and sharing both influenced and were influenced by the professional home office setting and its hybrid personal and professional environment.

7.3.1 Seeking

Two main categories of information artefacts define the work of the printing professional and set what they do apart, as something distinct, from other professions: the job file containing all information content relating to a printing order, and the material sample of a completed printing order. These artefacts are so much the sustinence of the printing professional’s work that they never have to look to information providers beyond their own company, such as the Internet or the library, to fulfill an information need. The job file serves as a secondary information object, much like a surrogate record in a library catalogue. It is composed of metadata relating to the final printed product, a sample of which can be considered a primary information object. Below, Figure 27 visually represents the relationship between these two information objects.
Participants in this study repeatedly affirmed their reliance on the documents contained within the secondary information object—initial requests, order specifications, quotations or estimates, purchase order forms, records of order updates or changes, and final invoices—when seeking information in their professional home offices. These objects are preconditions for any printed materials, literally coming first, before the printed products that succeed them, and they are valued accordingly by the printing professional. Even when a primary information object exists in a printing professional’s “library,” they prefer to use the job file to respond to problem solving requirements, and to only revert to the printed sample if they absolutely must.

All participants reported staying near their desks and first looking in their paper or electronic job files when affirming or solving problems with a printing order. If Carol absolutely has to turn to a printed sample itself, she refers first to her job files to ensure that her off-site “library” contains the title she seeks. That she keeps her “library” set at a distance from her home office proper says much about the usefulness and role of its holdings in her daily work. Similarly, that Nicholas does not feel the need to keep a “library” of more than ten titles at all supports the notion that so long as he has his electronic job files, he has the majority of information that his work requires.
Sometimes when seeking information the printing professional may even rely upon a tertiary information object, the email messages and digital attachments containing raw metadata, which have not yet been made part of a paper or electronic job file, or for which destruction has not yet taken place. Asked how she would go about retrieving information about a printed sample, Sue answered, “…I could go to my shelf and look it up. Or I would look in my files. Or I would look in my 2423 emails. Which is why I don’t delete emails!”

Figure 28. Primary, secondary, and tertiary information objects. Within the realm of the printing professional, an email message and/or digital attachment containing raw metadata yet to be inputted in a job file acts as a tertiary information object, the job file of metadata and specifications acts as a secondary information object, and a final printed sample is the primary information object to which they both refer.

Whether or not participants’ information seeking via metadata, the secondary and tertiary information objects, adheres to the widely observed Principle of Least Effort is a point for debate. In LIS studies, the Principle of Least Effort holds that “people invest little in seeking information, preferring easy-to-use, accessible sources to sources of known high quality that are less easy to use and/or less accessible” (Bates, 2005, p. 4). The printing professional does take the most accessible information content, the job file, which is more often than not still located in their vicinity, in a pile nearby, in a filing cabinet beside them, or in an electronic folder, and use it to address their work. Yet, deciphering these documents in the context of the information they seek requires just as much technical domain knowledge as does turning to a sample in their “library,” and the information and specifications contained within them are of no lesser quality. Though the printing professional will not turn to the “library” to
answer questions that the job file could answer just as well, this is not necessarily a compromise of quality for ease. Rather, it seems more a reflection of the value that they place on the familiar, intimately known, day-to-day documents marking their own involvement in and progress through the printing process—these are their crowning achievements, not the detached sample products arriving several weeks after the chief part of their involvement with the order has ended.

Professional aspects of the printing professional’s environment dictate their main types of information use and facilitate their main mode of information seeking via metadata, yet it is the personal and socio-familial aspects of their environment that will lead them to keep (or not to keep) “libraries” of printed samples that are secondary in importance and warehoused upon receipt. Instead of the four communal bookcases to hold printed samples that William recalls Print Edge’s employees sharing in their traditional office, in professional home offices, users may have as little or as much beyond the previous par as their new physical and social settings will allow.

7.3.2 Sharing
Following from the size of home office that they establish and the “archives” and “libraries” that they choose to keep or not to keep is the role that the printing professional plays in acts of information sharing. Those like William, with large home offices, become information resources or “informal librarians” (Whittaker & Hirschberg, 2001, p. 166) to others like Nicholas, working from small home offices and keeping only the most utilitarian of information therein. Again, such a divide (like that of digital versus paper information
holdings) was not hard and fast, but one of degree instead. Nicholas notes that he and other *Print Edge* printing professionals “will always communicate back and forth and go, “hey, do you have this?” or “hey, do you have that?” Nicholas is just more content to find “a way of, uhmm, of figuring it out” through seeking information via colleagues like Carol and William or the printing plant facilities that he knows keep “a copy of everything, and… archive all of their emails” than another printing professional who prefers to keep “the whole history” of every printing order they have handled at their ready reach.

Even though large home offices may be more self-contained than a small home office, they are by no means self-sustained. Information channels reaching beyond the “immediate,” “adjacent,” and “outside spaces” (Lee, 2003) within the home office to an outer world of clients, colleagues, and printing plant facilities are equally as important for the information seeking and continued job success of the large home office user as they are the small one. As Brown and Duguid (2000) explain, the individual working from home, especially when still employed by a larger organization, “resembles not the frontier pioneer, striking out alone and renouncing society, but more a deep-sea diver. The deeper a diver works alone beneath the ocean, the more sturdy the connections to the surface have to be” (p. 89).

7.4 Chapter Summary

This chapter elucidated the printing professional participants’ four central types of information use and non-use in their home offices, and analyzed the ways that they seek and share information content as impacting and being impacted by setting. The following chapter concludes this thesis by summarizing findings in terms of its guiding research questions
(from section 1.5) and raising outstanding directions for future research toward which this study has pointed.
8.1 Chapter Overview

Although an awareness exists among many LIS scholars that setting will affect information practices, minimal research has looked beyond the traditional professional office to begin theorizing about the meaning of different spaces, particularly professional home offices which serve as their user’s sole workplace, for work-related information practices. This study broached the question of what role setting plays in shaping information practices by taking as its main objects of interest the information management and use of four printing professionals whose work is entirely home-based. Because printing professionals operate in a realm that is document-centric and highly predictable, this study generated a rich record of diagrams, photographs, transcripts, and fieldnotes from which interesting findings about information management and use practices in professional home offices could be illuminated. This concluding chapter summarizes the study’s main findings and raises outstanding issues and questions deserving of future research.

8.2 Summary of Research

Having taken an exploratory, ethnographic approach, this study can only claim to have produced tentative findings, descriptive of the information practices of particular individuals within their particular settings at particular points in time. Still, these provide a beginning point for answering the three overarching research questions that were posed at the start of this thesis (in section 1.5), being:
01. What is the nature of information management and use in the home office setting?

02. What approaches to information management and use, conventional or unconventional, arise in the home office setting?

03. What are the effects of the home office setting as manifested through what Jones (2007; 2008) terms users’ “meta-level” information activities, the ways in which they “establish, use, and maintain a mapping between information and need” (2007, p. 464; 2008, p. 60)?

After analyzing all data, it seems that these questions are best answered as variations on the same theme, rather than each as if it were a distinct line of inquiry in and of itself. Findings suggest that in the home office setting, information management and use are at least somewhat influenced by the nature of the intersectional personal and professional environment within which they occur, that approaches to information management and use reflect this intersectionality, and that “meta-level” information activities respond to this intersectionality.

Within their professional home offices, participants necessarily encapsulated several professional roles that had previously been distinct in the traditional office setting, acting as their own managers, secretaries, and support staff, on top of filling their usual positions as employees. They did all of this while too remaining a presence in their larger households, staying connected to the domestic realm via the intermixing of artefacts of the home amidst their office and work-related content (or vice versa). Even inside the designated professional home offices they established, participants chose that their professional information practices would work both with and around the home.
At the same time, participants blurred means of managing and using information content that had been inherited from their traditional offices (and their homes) with invented ones in their non-traditional work settings. Stibic (1982) explicitly notes that “personal documentation [for an individual’s own information collection] is not professional documentation on a smaller scale; it has its own rules and laws, deviating substantially from the rules established, and strictly respected [elsewhere]” (p. 38). Yet, in the professional home offices studied, the conventional aspects of participants’ environments continued to exert strong influence and sway over their systems of information placement and schemas for information organization.

However, participants did seem freer to scale back or extend conventional information systems and schemas in their professional home offices into ones based on their own (and their fellow householders’) preferences for managing—acquiring, storing, and retaining—little or much information content and establishing a small, medium, or large home office. This, in turn, affected their patterns of information use and non-use and the ways in which they participated in acts of intra-collegial information sharing, whether calling upon or being called upon as “informal librarians” (Whittaker & Hirschberg, 2001, p. 166) stocked with information resources. The more unconventional aspects of home-based professionals’ unique environments, such as their households and their own preferences, influenced their information practices. Should this same phenomenon be observed in future studies, it might lead to further speculation (or confirmation) that the non-traditional home office work setting is more conducive to and nourishing of personal styles of information management and use than the traditional office.
In response to their intersectional environments and blurred work settings, participants took more stringent, bounded approaches to their “meta-level” information activities. While still embracing personal and professional duality in their office and non-office content, their acquisition, upkeep, and final disposition activities, and their ways of using, seeking, and sharing information, they best served their need for a “mapping” through their intersectional settings by instituting boundaries between the personal and personal spheres of their lives.

All participants erected cognitive barriers between their personal and professional personas, maintaining near-separate psychological working and living arrangements. They carried out only work-related tasks on company time within their professional home offices and saved all personal business for outside of work hours. Personal information was never acquired into or dealt with in their professional home offices as participants maintained separate email accounts, files and documents, and often separate structures and machinery for storing their personal content.

In all but one case, physical barriers between participants’ personal and professional lives were also erected: within their homes, they kept entirely separate personal home offices, set apart from the professional home offices used in their everyday work. The exception to this, Sue, shared her professional home office with the rest of her family who used it as a personal home office when she “packs up” at the end of the workday. As O’Brien and Rodden (1997) note, “certain routines emerge by virtue of which certain spaces are seen as ‘belonging’ to certain individuals at certain points in time” (p. 256). Once working hours are over, Sue’s professional home office transforms into a different space, carrying with it a different
meaning apart from that of the office; the space is an office setting only within designated hours, after which professional concerns are subsidiary to personal use.

8.3 Outstanding Issues and Questions

Exploratory, ethnographic research, rather than producing sets of implications or recommendations for practice, culminates in fascinating issues and related questions that will point to fruitful directions for future research.

8.3.1 Intersectionality in the Home Office

The intersection of personal and professional and living and working is a thread traceable throughout this thesis. While participants in this study did not find hybridity problematic, Fulton (2000a; 2000b; 2002), one of the only other scholars to have studied home offices from an LIS perspective, frames her research on teleworkers from the stance of intersectionality as an inherent disjuncture with which individuals must “cope” and overcome. She calls for more organizational support for teleworking in the possible forms of “policies” and “training” (Fulton, 2000a, p. 275) that will dictate to employees what constitutes an acceptable physical space from which to conduct work in their homes.

Given the disagreement across findings from this study and Fulton’s (2000a; 2000b; 2002) studies, more research into the underexamined terrain of the home office is necessary. The professional home office users in this study, who are entirely home-based all of the time in their work, appreciated the relaxation of professional influences and the room for personalization in their information practices afforded by the home office setting. It seems
that the imposition of professional policies such as Fulton suggests would prove, for them, counter-productive. Instead of feeling themselves the “interlopers” to whom Fulton (2000a) refers, participants took great care to deliberately set up and maintain their professional home offices, and they possessed great ownership over their spaces and affinity to their practices therein.

Undeniably, the addition of household influences to participants’ environments was at times a challenge. When there are “multiple demands upon a single physical space” (O’Brien & Rodden, 1997, p. 256) as there can be for Sue, whose daughter wants to use “my [Sue’s] computer” during working hours, and for William, whose work files and papers may end up hidden beneath a bin of vegetables, individuals are made especially aware of the negotiation between personal and professional that working from a home office requires. Yet, they are not stuck in a perpetual cycle of compromising one of the personal or the professional for the other; the “blurring of physical space [which] means that the worker never really leaves home or work behind” (Fulton, 2000a, p. 272), viewed as an obstacle by Fulton, was just as much a welcome change for the participants in this study.

If there is indeed a fundamental difference between the professional requirements of occasional and permanent home-based workers, as suggested by this study and Fulton’s (2000a; 2000b; 2002) work, would policies regarding physical home office spaces always be appropriate for the former group but not the latter? In the alternative vein of thinking, is there anything that the traditional professional office could learn from the intersectional professional home office space that participants in this study seemed so to enjoy?
8.3.2 Applications in the Home Office and Beyond

Returning to the “office continuum” proposed at the beginning of this thesis (in section 2.3), it is clear that the participants in this study made the same distinctions between three main types of information-centred workspaces as were modeled, and that they worked to actively uphold these distinctions as well. Furthermore, they indicated that their information practices could be, and would be, different across these workspaces. Figure 29 below reproduces the “office continuum” model.

![Figure 29. The “office continuum” revisited. Model (reproduced from Figure 1) depicting a continuum of office types that exist, determined by the purposes for which the user(s) of the so-called office space employ it at a given time.](image)

Still, the “office continuum” poses just as many questions as it was intended to answer. Much more research into the professional home office space, and the environment that accompanies it, is required in order to find out if information practices therein can ever fall into patterns as widely recognizable as those of the traditional home office, or if they simply cannot fit standardized moulds. Even though, as Dietsch (2008) writes, “there is no single model for working at home…. The styles are as varied as the owners whose ingenious solutions underscore the spatial richness of this hybrid building type” (p. 21), is there perhaps a theory
regarding the unique blends of personal and professional that characterize home office spaces to be found through further research?

Similarly, much more research into the grey spaces, falling somewhere between the three main types of workspace, is needed. The participants in this study were employees in a larger corporate and household environment who must still carry out their work in a way sanctioned by their company and on their company’s clock. What of the environment and the information practices of other corporate employees working in home offices, in other fields and types of work? Of self-employed individuals working in home offices, seemingly answerable only to themselves? Of teleworkers like those in Fulton’s (2000a; 2000b; 2002) studies, who must move between different environments and workspaces regularly? Of teleworkers like those in Fulton’s studies who move between different environments and workspaces only rarely? Of individuals working in shared home offices, who have an added social element within their environments and immediate workspaces with which to contend?

8.3.3 Records and Recordkeeping in the Home Office

From an archival and records management perspective, the professional home office setting presents significant challenges recognized but not begun to be resolved by the community. As noted throughout this thesis, employees lack the structures of administrative support typically found in conventional offices that may aid them in the proper storage, preservation, and curation of information content, especially that which is digital and most prone to obsolescence. Moreover, corporations not already employing rigid electronic records management systems or enforcing recordkeeping policies—and arguably even those that
are—lose some, if not all, control over employees’ information practices when work decentralizes and disperses to the home. These issues suggest potential implications for organizational efficiency and risk-management in the short term, and for organizational memory in the long term.

The participants in this study possessed expansive “archives” and “libraries” of technically corporate records within their professional home offices, and the acquisition, management, and disposition of these records were left almost entirely to their discretion. Recordkeeping was idiosyncratic across each of the different spaces studied, yet this flexibility seemed to participants to be much of the allure of the home office environment. Is there a way to employ measures ensuring that records of value created and received into professional home offices are captured and managed without infringing upon the ways users choose to inject the personal into their professional information practices and routines?

8.4 Chapter Summary

This thesis set out to explore the unique dynamics that surround professional home offices as intersectional, hybrid living and working spaces, and to ethnographically document the effects of setting on individuals’ management and use of information content. By taking as its participants four printing professionals who are entirely home-based in their work, and immersing itself in their home office spaces, job routines, and ways of handling an assortment of information, this study contributes insight into the complex interplay between personal and professional, setting and information practices, that exists within professional home office spaces.
Certain informational dimensions, including the content required to carry out work, the manners of arranging and organizing this content, and the principal ways in which it is managed and used generally, suggested an independence from matters of setting. Others—slight variations across the ways that specific bits of information content were acquired, stored, retained, and consequently used—hinted at a subtle, more nuanced interweaving of setting and information practices, perceptible only through the in-depth probing and active discovery that both exploration and ethnography stress. Extending this line of inquiry will strengthen what is known about different information environments and sharpen understanding of the extent to which physical and social setting converges upon individuals’ information practices.
REFERENCES


Ethnography. (2009). In Oxford English dictionary online (2nd ed.).


Office. (2009). In *Oxford English dictionary online* (2nd ed.).


APPENDIX A
GUIDED TOUR SCRIPT

In order to begin each guided tour, the researcher will say:

“I would like you to show me around your home office, especially the different locations and resources that you would go to in order to obtain needed information throughout the workday. Let’s start here at the office entranceway.”

 Throughout the guided tour, the researcher will employ “probes” (De Leon & Cohen, 2005) as fit in order to illicit more information from participants regarding information content, their habits of information management, patterns of information use, and information spaces as a whole, or specific structures or features within their spaces. These will be situation-dependent, but may include such statements or questions as:

“Tell me more about this...”

“How would you/do you use this?”

“Would you say that this resource/structure/system/etc. is important in your daily work?”

“How does this resource/structure/system/etc. help in your daily work?”

“How do you find needed resources using this structure/system/etc.?"
APPENDIX B
SEMI-STRUCTURED INTERVIEW GUIDE

01. When did you start working in the printing business?

02. How long have you worked from your home office?

03. Can you walk me through a typical workday in the home office?

04. Is there an overall organization scheme for the information in your home office/on your desk/on your computer/etc.?

05. How do you manage the quick pace of information flowing into your home office?

06. If a colleague asked a question that required you to find out a specific piece of information, how would you go about doing this...
   • if the information sought was to be found in a sample product (book, magazine, etc.)?
   • if the information sought was to be found on a piece of paper (recently or often used)?
   • if the information sought was to be found in an archived/filed folder?
   • if the information sought was to be found in a recently received electronic document?
   • if the information sought was to be found in an archived/filed electronic document?

07. What would your typical action be once you finished using...
   • a sample book like this, for instance?
   • a piece of paper?
   • a file folder like this?
   • an email?
   • an electronic folder of archived documents?
APPENDIX C
INFORMATION LETTER/CONFIRMATION OF INTEREST LETTER
(2 PAGES)

Date:

To:

Thank you for your interest in participating in an upcoming research study to be conducted by Leslie Thomson, a Master of Information Studies student at the Faculty of Information, University of Toronto, and supervised by Professor Jenna Hartel, an Assistant Professor at the faculty. Please consider this a formal invitation to take part in the research study and a means to confirm your interest and ability to participate.

You and a small number of your coworkers have been invited to take part in this study because you meet the requirements for eligibility, which are based on job title (all invited participants in this study are printing professionals), job location (all invited participants in this study work from home offices), and geographic location (all invited participants in this study live within the GTA). This study is being carried out as part of the requirements for a Masters-level thesis at the University of Toronto’s Faculty of Information, and its purpose is to examine the information organization and use activities specific to printing professionals who work in home offices. There are no known risks to you for participating in this study. In fact, you may find that positive feelings, such as enthusiasm and pride, arise.

In order to participate in this study, you will be asked to take part in a scheduled meeting with the investigator, Leslie Thomson, at your home office. At this meeting, you will be asked to: provide Leslie with a guided tour of your home office, during which time she will create various maps and diagrams pertaining to the space; be interviewed by her about your typical work-related activities; and allow her to unobtrusively observe you carrying out some work-related activities in your home office. The entire meeting will take approximately 1-3 hours to complete. If you consent, a tape recorder will be used to record certain segments of this meeting and/or a digital camera will be used to take photographs of the space and items within it. You do not need to make a decision regarding consent now; a written consent form will be provided to you at the meeting that you arrange with Leslie.

All personally identifiable information associated with your participation in this study will be kept confidential (this includes your name, the name of your company, and the names of companies with whom you do
business). Only the investigator and the faculty supervisor will have access to this information, which will be deleted from all project-related data within three months of the completion of this study (July 15, 2009). Participation in this study is voluntary and you are free to withdraw at any point up until January 11, 2010 by indicating to the investigator, either in person or in writing, your withdrawal. If you consent, your contact information (name, email, mailing address, and phone number) will be kept in a secure file by the investigator indefinitely should the opportunity for a related study arise in the future. So long as you agree to participate in this study, you are welcome to a copy of the final written report upon its completion in approximately six months time; this can be sent via email or regular mail.

Please indicate below whether you are still interested in and able to participate in this study and, if so, please indicate three dates and times prior to December 20th, 2009 when you would be available for the 1-3 hour scheduled meeting with Leslie. Return this completed letter to her via email, and she will confirm a date and time and ensure that it still works for you in approximately one week’s time.

Thank you for taking the time to read this letter; I look forward to meeting with you in the near future!

I am still interested in and able to participate in this study:   Yes ___   No ___

________________________________________________________________________
Possible meeting time 1

________________________________________________________________________
Possible meeting time 2

________________________________________________________________________
Possible meeting time 3

________________________________________________________________________
Name (please print) ___________________________ Date __________

**Investigator:** Leslie Thomson, Master of Information Studies student, Faculty of Information  
leslie.thomson@utoronto.ca

**Supervisor:** Jenna Hartel, Assistant Professor, Faculty of Information  
jenna.hartel@utoronto.ca

**University of Toronto Office of Research Ethics:** ethics.review@utoronto.ca
APPENDIX D
REAFFIRMATION OF PARTICIPATION LETTER
(2 PAGES)

Date:

To:

Thank you for agreeing to participate in an upcoming research study to be conducted by Leslie Thomson, a Master of Information Studies student at the Faculty of Information, University of Toronto, and supervised by Professor Jenna Hartel, an Assistant Professor at the faculty. This study is being carried out as part of the requirements for a Masters-level thesis at the University of Toronto’s Faculty of Information, and its purpose is to examine the information organization and use activities specific to printing professionals who work in home offices. There are no known risks to you for participating in this study. In fact, you may find that positive feelings, such as enthusiasm and pride, arise.

In order to participate in this study, you were asked to provide possible dates and times to hold a meeting with the investigator, Leslie Thomson, at your home office. This meeting has been scheduled for ________________ (date and time will be entered). Please remember that this meeting will take approximately 1-3 hours to complete. If you are still available on this date and time, there is no need to reply to this letter; however, if at any time you need to reschedule this meeting, please contact Leslie directly by either telephone or email (provided below).

At this meeting, you will be asked to: provide Leslie with a guided tour of your home office, during which time she will create various maps and diagrams pertaining to the space; be interviewed by her about your typical work-related activities; and allow her to unobtrusively observe you carrying out some work-related activities in your home office. If you consent, a tape recorder will be used to record certain segments of this meeting and/or a digital camera will be used to take photographs of the space and items within it. You do not need to make a decision regarding consent now; a written consent form will be provided to you at your meeting with Leslie.

All personally identifiable information associated with your participation in this study will be kept confidential (this includes your name, the name of your company, and the names of companies with whom you do business). Only the investigator and the faculty supervisor will have access to this information, which will be deleted
from all project-related data within three months of the completion of this study (July 15, 2009). Participation in this study is voluntary and you are free to withdraw at any point up until January 11, 2010 by indicating to the investigator, either in person or in writing, your withdrawal. If you consent, your contact information (name, email, mailing address, and phone number) will be kept in a secure file by the investigator indefinitely should the opportunity for a related study arise in the future. So long as you agree to participate in this study, you are welcome to a copy of the final written report upon its completion in approximately six months time; this can be sent via email or regular mail.

Thank you for taking the time to read this letter; I look forward to meeting with you in the near future!

**Investigator:** Leslie Thomson, Master of Information Studies student, Faculty of Information
leslie.thomson@utoronto.ca

**Supervisor:** Jenna Hartel, Assistant Professor, Faculty of Information
jenna.hartel@utoronto.ca

**University of Toronto Office of Research Ethics:** ethics.review@utoronto.ca
APPENDIX E
INFORMED CONSENT LETTER
(2 PAGES)

Date:
To:

OVERVIEW

This scheduled meeting is part of the requirement for a Masters-level thesis at the University of Toronto’s Faculty of Information. The purpose of this scheduled meeting is to examine the information activities specific to printing professionals who work in home offices. There are no known risks to you for participating in this study. In fact, you may find that positive feelings, such as enthusiasm and pride, arise.

All personally identifiable information associated with your participation in this study will be kept confidential (this includes your name, the name of your company, and the names of companies with whom you do business). Your comments and responses will be kept confidential unless you grant the investigator permission to quote you directly, and you may request that any part of the interview remain confidential even if you agree to be quoted directly. Participation in this study is voluntary and you are free to withdraw at any point up until January 11, 2010 by indicating to the investigator, either in person or in writing, your withdrawal. So long as you participate in this study, you are welcome to a copy of the final written report upon its completion in approximately six months time; this can be sent via email or regular mail. If you consent, your contact information (name, email, mailing address, and phone number) will be kept in a secure file by the investigator indefinitely should the opportunity for a related study arise in the future.

CONSENT

I acknowledge that the topic of this study has been explained to me and that any questions that I have asked have been answered to my satisfaction. I have agreed to participate. I know that at any time I may ask any questions that I may have about this project. I understand that I can withdraw from the study at any time up until January 11, 2010. I have been assured that all data relating to me (notes, audio recordings, and photographs) will be kept confidential unless I specify otherwise, and that all information disclosing my personal identity will be kept
confidential. Only the investigator and the faculty supervisor will have access to the personally identifiable information I provide, which will be deleted from all project-related data within three months of the completion of this study (July 15, 2009).

I agree to be quoted directly in the report: Yes ___  No ___
I agree to be tape-recorded Yes ___  No ___
I agree to be photographed Yes ___  No ___
I agree to let the investigator maintain my contact information in a secure file indefinitely and to contact me should the opportunity for a related study arise in the future Yes ___  No ___

If yes, please provide:

__________________________________  ______________________________
Email address
__________________________________  ______________________________
Phone number  Mailing address

__________________________________  ______________________________  _________________
Name (please print)  Signature  Date

Investigator: Leslie Thomson, Master of Information Studies student, Faculty of Information
leslie.thomson@utoronto.ca

Supervisor: Jenna Hartel, Assistant Professor, Faculty of Information
jenna.hartel@utoronto.ca

University of Toronto Office of Research Ethics: ethics.review@utoronto.ca
APPENDIX F
THANK YOU LETTER

UNIVERSITY OF TORONTO
FACULTY OF INFORMATION

Date:

Dear ____________________,

Thank you for allowing me into your home office to explore, observe, and ask you about your information activities, and for helping me to complete the requirements for my Masters thesis at the Faculty of Information, University of Toronto. I truly appreciate your agreement to participate in my research study, and it was a pleasure to meet with you.

You will recall that any personally identifiable data collected during this study will remain confidential, and that your contact information will only be retained if you granted this permission to the investigator. Also, as you are aware, you are welcome to a copy of the final research report upon its completion in approximately six months time. Please indicate below if you would like to receive this report copy and, if so, whether you would like it to be sent to you via email or regular mail.

I would like to receive a copy of the final research report upon its completion:  Yes ___  No ___

If yes, would you like the report to be emailed or mailed to you?  Emailed ___  Mailed ___

If mailed, and the investigator does not already have your mailing address, please provide it below:

________________________________________
________________________________________
________________________________________

Thank you once again for your participation,

Leslie Thomson, MIS student
leslie.thomson@utoronto.ca

Supervisor: Jenna Hartel, Assistant Professor, Faculty of Information
jenna.hartel@utoronto.ca

University of Toronto Office of Research Ethics: ethics.review@utoronto.ca
APPENDIX G
SAMPLE LIST OF FOCUSED CODES AND SUB-CODES ORGANIZED BY THEME

Space:
Room: basement, main floor, upstairs
Layout: no built structures, few built structures, enclosed, open-concept
Qualities: isolated, expansive, out of the way, in proximity to rest of house
Intersections with the home: single-purpose space/ singular user, multi-purpose space/ multiple users

Content:
Information artefacts: digital/electronic, paper/physical “action,” “working,” “archival”
Office artefacts: tools and supplies
Home artefacts: books, knickknacks, artwork, photographs, clothing, etc.
Intersections with the home: predominance of office artefacts, predominance of home artefacts, balance

Management:
Structures: desk, filing cabinet, bookcase, drawers, table, chair, laptop, boxes, etc.
Systems: files, piles “action,” “working,” “archival”
Schemas: client name, subject, bookstore alphabetical, chronological, instance, genre, title
Practices: acquiring, upkeeping/ storing/ organizing/ maintaining, disposing
Intersections with the home: predominance of office structures, predominance of home structures, balance

Use:
Seeking/ Searching: reference, look-up, known-item
Sharing: between colleagues, with clients, within company
Intersections with the home: what, where/ location, when/ time, how