Information and learning activities in organisations: participants’ views on where and how to engage

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Abstract
The purpose of this paper is to explore how people’s views on where and how to engage in social interaction relate to how they interact. More specifically, the purpose is to examine how these views, based on negotiated social values and norms, may explain the nature of relationships. This paper is based on a qualitative study in the form of interviews at the Land Warfare Centre (LWC), a part of the Swedish Armed Forces (SwAF). The results show that interaction and learning in the studied setting are characterised by 1) local and oral learning, 2) bypassing formal processes and 3) treasuring colleagues. The conducted research provides empirical findings that show that people’s views clearly relate to how they interact and to how they construct relationships and learning within them. Thus, in order to take steps to facilitate learning in organisations, it is important to understand these dynamics.

Keywords: social; informal; formal; information behaviour; learning

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1 Introduction
This paper reports the second part of a two-phase case study conducted at the Land Warfare Centre (LWC), which is a part of the Swedish Armed Forces (SwAF). The point of departure for the conducted research is that information, as well as learning, is a social phenomenon. Thus, a social-constructivist viewpoint based on the works of Lev Vygotsky (cf. Talja, Tuominen, & Savolainen, 2005) is taken. How people interact with information to learn in relationships has been studied in library and information science as well as in organisation science. For example, studies of Communities of Practice (CoPs), small worlds and collaborative information behaviour emphasise the social nature of information and learning. The concept of CoPs was originally explored by Lave and Wenger (1991), Brown and Duguid (1991) and Wenger (1998), and small worlds by Chatman (1999). Collaborative information behaviour has been studied among others by Talja and Hansen (2006), Lloyd and Somerville (2006), Hertzum (2008) and Veinot (2009). In many of these studies of information and learning, the role of social norms, values and attitudes is evident. However, although for example Chatman (1999) and Widén-Wulff (2007) explore how people’s behaviour relates to how they view their relationships with others, much research is more focused on the activity in, rather than the nature of, relationships. This focus on activity may be illustrated by the efforts to facilitate activities in CoPs made by for example Lesser and Storck (2001), and even manage them, for example expressed by Wenger, McDermott, and Snyder (2002), McDermott and Archibald (2010), Dubé, Bourhis, and Jacob (2005), Iaquinto, Isbun, and Faggian (2011) and Borzillo, Schmitt, and Antino (2012). In contrast, to explore the nature of relationships, the study presented in this paper focuses on the role of people’s views in relation to their information and learning behaviour.

In the first part of the case study, it was concluded that the SwAF’s formally designed process for learning from experiences made in training and field action had failed (Dessne, 2013a). Lack of commitment to the process and its low status were evident, and although some information was gathered, it was rarely used to update or follow up for example directives, rules or training. Instead, learning was accomplished by using personal, informal and local relationships. In this first part, the analysis indicated that it would be fruitful to further explore whether emerging informal relationships and learning were consequences of this failure or of other factors. There were some indications of this issue in the observation and interview material. For example, it seemed that the failure might relate to how participants in the setting shared views about what and whom to engage with.

The aim of this second part of the case study is to follow up and gain insight in how the participants’ views, including personal perception biases and distortions, may explain why the informal relationships emerged to carry out the work that the SwAF’s designed process was intended for. In more general terms, the aim is to explore how participants’ views on where and how to engage in social
interaction relate to how they interact; that is, how these views, based on negotiated social values and norms, may explain how relationships and learning within them are constructed.

Next, the significance of people in some social learning theories is briefly discussed to further explain the theoretical underpinning of this paper. Thereafter follows a description of the methods used. In the ensuing section, the findings are presented followed by a discussion.

2 The significance of people’s views when participating in social interaction

Billett (2001) argues that people in an organisation strive to find meaning in their activities in the workplace, and this makes them engage in some activities and work values while disengaging from others. Wenger (1998), Chatman (1999), Sonnenwald (2006) and Widén-Wulff (2007) discuss how people in a setting construct such meaning depending on how they understand values and norms. Social norms are constructs based on what people believe to be the proper way to behave, values guide how people evaluate their world and attitudes represent feelings towards objects or social interaction (Stankov, 2011). Thus, how people construct attitudes as a response to values and norms shapes how they view themselves and others. Accordingly, people’s views are seen not only as individual understandings but as constructs that are part of a collective (c.f. Chatman, 2000). Chatman (2000) argues that social norms determine what people in a context consider “normal” and appropriate conduct, and such views further result in what information is valued, used, and shared, or avoided, given up and ignored. Values and norms therefore partly explain why people may reject potentially valuable and even vital information. People thus navigate in their settings by relying on how they perceive signals and cues (Johnsson & Boud, 2010). Johnsson and Boud (2010) argue this social context by asserting that “learning is discovered and generated together with others through a complex web of contextual, interactional and expectational factors” (p. 360).

Still, views on how to behave may not concur with actual behaviour. Argyris (1991; 2002) argues that there is a discrepancy between the espoused theory and the theory-in-use. As a consequence of this discrepancy, it is difficult to identify and define attitudes. People may hold beliefs that are contrary to what would be expected, based on what they know as facts and norms. Nevertheless, attitudes may be shared by people in a local setting. This sharing may be described as being bound by a worldview, which, according to Chatman (1999), makes people construct a phenomenon called a small world. She explains that a small world is not only a metaphor; it also represents an actual setting, which is exemplified for example by her study of prisoners. She asserts that a small world upholds a

“collective awareness about who is important and who is not; which ideas are relevant and which are trivial; whom to trust for information and whom to avoid. In its truest form, such a small world is a community of like-minded individuals who share co-ownership of social reality” (Chatman, 1999, p. 213)

This collective awareness is therefore based on how people act on their attitudes. Accordingly, when seeking information to learn from, people connect through personal networks of trusted and valued colleagues. Similarly, Wenger (1998) describes how people in CoPs develop and share a repertoire to connect with each other, and they learn through their networks of colleagues. In CoPs people are valued in relation to their experience and willingness to share (Wenger, 1998).

Likewise, Widén-Wulff (2007), in her studies of two settings of claims handlers and biotechnology experts respectively, discusses how people value colleagues as sources of information for carrying out work. In the case of the claims handlers, this evaluation results in highly appreciated close relationships. Generally, she asserts, people consider information from colleagues as reliable, which is crucial when formal structures and channels do not suffice. However, trust is compromised when someone provides incorrect information, and it is important for people in the relationships to be aware of what can be shared with whom. Furthermore, she explores how common aims and values created and shared in a setting of claims handlers, such as respectful adherence to rules and to superiors, contribute to an atmosphere of trust and willingness to share. Moreover, perceived roles and status influence and are influenced by the nature of the claims handlers’ personal networks. In a setting of biotechnology experts, trust was more on an individual level and built on expertise. Widén-Wulff (2007) also describes how people in the two settings differ in their views on information. The claims handlers view it as something that belongs to the group whereas the biotechnology experts consider it personal; that is, as an asset to be shared with the group or chosen members of it. The settings of claims handlers and of biotechnology experts could be considered small worlds, or even CoPs, where values and views are negotiated to know whom to trust and what information to consider or disregard.
Similar to Chatman (1999), Sonnenwald (1999) focuses on people and their worlds in the concept of information horizons. An information horizon is the space within which an individual may act, and it consists of resources such as social networks, colleagues, experts, and documents. Furthermore, Sonnenwald (1999) describes the role of social networks as fundamental to information behaviour and information horizons. She argues that these networks, by providing social interaction, are both part of and contribute to the construction of situations and contexts. Situations are defined as events occurring within a context, which, in turn, needs to be defined. The network, situation and context determine the resources available in information horizons. Thus this concept resembles a small world where social networks are likewise emphasised for access to information. Social interaction is therefore central to both concepts, although Sonnenwald (1999) does not emphasise attitudes and values the way Chatman (1999) does. Nevertheless, Sonnenwald (1999) describes the dynamics between social networks in relation to situations and contexts, and this suggests that a social reality, built on attitudes as argued by Chatman (1999), is created and re-created through mutual construction.

People’s views may thus be understood as socially constructed dispositions to engage in relationships that constitute a setting for learning. Hodkinson, Biesta, and James (2008) argue that situated learning changes people’s dispositions; that is, attitudes, motivations and interests and sense of possibilities, and this means that people learn through becoming. They assert that what is learned becomes part of an identity, and therefore learning in any situation depends on who interacts in it. In learning through becoming, for example a fire-fighter, people need to access social and embodied information (Lloyd & Somerville, 2006). Lloyd and Somerville (2006) explain this access as being mediated through unplanned and incidental information influenced by shared beliefs, values and norms. This sharing, they argue, is based on the perspectives of experienced fire-fighters who convey their views to each other and to new-comers in various forms, such as story-telling. Similarly, Korte and Lin (2013), as well as Lave and Wenger (1991), discuss how new-comers need to engage in relationships to become part of the social system of norms, beliefs and values. They argue that the relationships give access to information and learning, and to a shared understanding of how work ought to be carried out. Lloyd and Somerville (2006) also assert that training is crucial to becoming a fire-fighter, through becoming part of – body and mind – a social world. Training is a core activity in military settings as well, studied for example by King (2006). He argues that it is crucial for battle performance that the participating soldiers share common values and norms. Values and norms are, according to King (2006), transferred from the experienced seniors to newcomers. Similarly, O’Toole and Talbot (2011) describe how training fosters soldiers to become embedded in a setting where they are expected to demonstrate proper behaviour and trustworthiness.

Thus far, this paper has described that people’s views regarding whom or what to approach to access information, as well as expectations on how to behave, are based on values and norms, of which they are more or less aware. Accordingly, these views shape both which interactions occur and how they occur, thereby constituting a factor in the forming of the nature of interactions and thus relationships. A model by Sonnenwald and Iivonen (1999) based on research presented by Ranganathan in the 1950s (Sonnenwald & Iivonen, 1999) relates to such views. In the model, people and their social networks are recognised to influence their information behaviour. Furthermore, norms and cultural expectations may influence what is regarded as suitable or unsuitable topics of discussion at a workplace. This is articulated by Sonnenwald and Iivonen (1999) in the following quotation: “Norms such as these may influence interpersonal communication strategies that are part of larger information behaviour strategies” (Sonnenwald & Iivonen, 1999, p. 436). The precondition profile model (PPM) is another model focusing on people’s views (Dessne, 2013b). This model explores preconditions that contribute to the emergence, growth and existence of informal relationships. The main point of this model is to emphasise attitudes of the participants; that is, how their viewpoint is fundamental to the development and nature of interaction.

To summarise, both models offer a similar approach to understand social reality from the perspective of people who are embedded in the setting. The previously discussed studies emphasise how people embedded in a setting interact and develop their identities as they learn, and they base this on negotiated values and norms. Therefore, they all provide a focus and a theoretical basis for conducting this study.

3 Method
A study of the LWC, a part of the SwAF, was conducted as a continuation on a previous part of a case study of the organisation. The prior part focused on collecting empirical data regarding a learning process called Lessons Learned. This data encompassed approximately 2,400 pages of documents related to this
process, 20 observations and 14 interviews. The observations concerned trainings and exercises, seminars with home-coming international forces and meetings connected to learning from experience in the SwAF. This first part of the case study provided a thick description of learning in this setting. However, the findings showed cause for further exploration. This resulted in a follow-up study focusing on a selected sample of interviews. For this continued study, the concept of saturation (e.g. Denzin & Lincoln, 1994) was used as a guide. Although minor additional data may have emerged if a bigger sample had been chosen, the data of the sample used were consistent with each other as well as with the indications of the first part of the case study.

The method for conducting the interviews was chosen in accordance with the aim of this paper; that is, to gain insight into the views of the participants in the setting from their perspectives. Six participants were recruited for the present study based on their involvement with training and development at the SwAF. Furthermore, the choice was based on previous meetings that took place during the preceding part of the case study. The six participants were interviewed in May-June, 2013. Each interview lasted approximately one hour; the shortest one lasted one hour and the longest one hour and a half. The total interview time amounted to about eight hours. These participants were all repeatedly assured that their identities would not be revealed when the findings were presented. The interviews were semi-structured following an interview guide that gave room for follow-up questions in an attempt to explore the participants' views. The guide aimed to identify their positive and negative attitudes to various kinds of interaction and to the people they interacted with, as well as the reasoning behind these attitudes.

In an interview situation it is crucial to establish trust and openness (Wildemuth, 2009). Audio-recording may make interviewees uncomfortable and confidentiality may be compromised (Sommer & Sommer, 1997). In this study, talking about relationships with colleagues and superiors implies that the topics could be considered delicate. The participants interviewed in the earlier data gathering phase of the case study confirmed that audio-recording would have made them less open. Therefore valuable information would not have emerged to be captured. This fact, together with the possibly sensitive character of the topics, contributed to the choice of taking notes by hand instead of audio-recording. Note-taking by hand requires that notes are written up immediately afterwards to fill out any possible gaps (Wildemuth, 2009). This procedure was used and shortly after that the interviewees were given an opportunity to revise or add to the notes, to verify and validate their content. When the interviewees revised the notes, several of them confirmed that what they had said had been captured in essence, and that they recognised themselves in the wordings. One consequence of note-taking is that quotations are often not exact. However, at the same time, note-taking is a technique that facilitates the capturing of essential expressions. This technique was used by writing down key phrases relevant to the topics discussed. Using this technique, quotations were firmly anchored despite not always being exact. Quotations from the interviewees presented in this paper are thus excerpts based on note-taking, and they are also translations from Swedish. To anonymise the interviewees, their identities are kept confidential and they are referred to with aliases; “P” together with a number.

The empirical data were analysed by focusing on exploring and capturing what kinds of views participants had regarding where and how to interact, how they perceived that they interacted in relationships and which relationships they favoured or disfavoured. The analysis was guided by the previously discussed models and studies, and they were thus helpful in identifying emerging themes in the data. Accordingly, the qualitative analysis consisted of these themes based on participants and their attitudes. The themes focused on:

• which interactions appeared,
• how they viewed other participants that they interacted with and their interaction setting,
• what was perceived as positive and negative in interactions,
• what kind of interactions were valued most and least,
• what circumstances made the participant feel satisfied or dissatisfied at work,
• how or where they felt that they learned most, and
• how important informal ways of accomplishing things were perceived in relation to formal ways.

4 Findings

According to all the participants, interaction and learning is often afforded through local and oral meetings between colleagues at breaks and through personal communication. All participants claimed that they learn most from interacting with colleagues, for example through listening or taking part in unplanned
conversations in local settings, such as training or evaluation sessions. This local and oral learning is accomplished at breaks, for example, which is described by P4: “You look for opportunities to connect with people and when you have something to talk to them about you can do that face-to-face during a break since they’re there anyway”. Likewise, P5 stated that talk about work and hobbies merge during breaks, and that this is because they find their work engaging. However, sometimes they also need this time to address various work issues.

Breaks are often used to talk about work-related issues in general (P2), as well as to specifically discuss current issues at hand (P3). Furthermore, they are used as a “fast track” for resolving issues (P1). P6 stated that whether the topic discussed concerns work or leisure depends on which colleagues are present. In addition, people often drop by to just check things out (P6). Also, P1 and P2 referred to learning as local by claiming that people often lack insight into each other’s work. Likewise, P6 argued that bureaucracy inhibits communication.

All participants felt that the informal way of getting work done is the way it is supposed to be. They concluded that work in the organisation is generally expected to be carried out informally, and that this is a tradition deeply rooted in the SwAF. This is expressed in the following quotations:

“We are all fostered to talk and interact with each other and you don’t wait for formalities when you are out in the field and hungry for food – you fix it. People get upset when formal procedures replace common sense. Make a call and talk, don’t trust emails to be read; you only read them once a week” (P5)

“There is much that is deeply rooted in the organisation, the culture is that “things have always been done this way” (P4)

“Plans and documents are written, but on a detailed level people don’t put it in writing. The formal documentation is more on a general level and then you do things the way you do them anyway” (P6)

“The informal ways are the only ways to get things to work” (P3)

“When you want something to happen and not take too long, you use your own contacts. In reality, it isn’t possible to do things any other way” (P2)

However, some of the participants seemed to prefer more order and less arbitrariness. P3 expressed this viewpoint: “I would like things to be more like they were before, that rules are followed and that there is some kind of direction”. P4 stated: “I want the formal rules to apply because otherwise there will be arbitrariness. There is a big problem with arbitrariness in this organisation”. Some also felt that the SwAF’s identity has changed and that they therefore do not relate to the organisation the way they used to (P3, P5). P4 pointed out that informal relationships in the organisation are not without conflict. This is a consequence of that two different army units along with their different sub-cultures have been re-organised into one unit; that is, the LWC (P4).

All participants considered that it is often necessary to bypass or sidestep rules and directives, generally speaking, as they could not be strictly followed in practice. Moreover, P1 believed that most people were unaware that they were breaking rules. P2 expressed this attitude in: “People do as they want and in accordance with their own views. You see it all the time”. This attitude was further conveyed, for example, in how the participants more or less ignored a directive to use a specific administrative system as they found it more inhibitive than useful. Even open hostility towards the system is evident in citations from two participants: “It is a fiendish system” (P5) and “It’s the devil’s invention” (P3). To illustrate, one participant ironically stated that you could not even use this system to order more coffee to the workplace, a short-coming that would possibly compel them to sidestep the system (P5). Moreover, the attitude of bypassing and sidestepping was emphasised by the same participant when he implied that management seems more interested in making people document their work than carry it out (P5).

While decisions already made by managers may be sidestepped by participants, there are other occasions where managers may seek to regain control by making ex post decisions (P4). According to P1, managers may not even be informed enough to make adequate decisions, and P5 stated that sometimes managers do not want to take responsibility for actually making things work. Still, managers were generally considered by all the participants to be necessary for formal decision-making. The marginalising attitude towards management was further underscored by the generally held view that managers seemed to be afraid of making mistakes. This attributed fear was expressed by one of the participants: “They [managers] want to show that they have done nothing wrong” (P4). Another
participant, P1, asserted that one strategy to avoid making mistakes is to avoid making decisions. Notwithstanding their attitudes towards rules, directives and managers, all participants seemed to desire more direct communication with engaged managers. Some described their relationship with their immediate superiors as detached while others found this relationship relaxed.

All participants argued that they are aware of the general goal of the organisation, but also that they solve problems and work tasks in line with their own constructed guidelines rather than according to formal rules and directives. At the same time, it was clear that they needed managers to make decisions, although major decisions could appear to be symbolic with regard to the everyday minor decisions the participants themselves took to carry out their work. Still, P5 stated that it is important to relate to and work in accordance with an overall goal, and P1 asserted that major decisions need to be formally made. Although some of the participants preferred multi-tasking and others preferred to concentrate on fewer tasks at a time, most of them appreciated the freedom they had to carry out their work in their own way.

For example, P5, in accordance with similar statements by P1 and P4, declared that sometimes people in the lower executing levels do things without involving managers until they have already come to an agreement: “People in the lower levels talk with each other and then their superiors act on what has already been agreed upon”.

Most formal meetings were considered by all participants to be tedious, time-consuming, irrelevant and repetitive. This attitude was based on the fact that many meetings concerned matters that were not considered relevant to the participants’ work tasks, or that they felt that they had heard it all before: “Spending time in meetings that don’t result in anything is frustrating. Meetings should result in some kind of decision” (P1). In contrast, the participants felt engaged when they considered meetings relevant to their own work. P6 suggested that sometimes it seems as if meetings are used by managers to reinforce their official status.

The participants valued and treasured their relationships with their close colleagues the most. In addition, they seemed to value an open atmosphere where opinions could be voiced freely: “You are there for each other” (P3). All participants shared the attitude that they work for their colleagues. The colleagues were described as competent, helpful and engaged. The participants also viewed themselves as helpful to colleagues and expected colleagues to be equally helpful. Moreover, they were of the opinion that their work was appreciated by their colleagues. This appreciation was mostly expressed informally at breaks and other informal spaces, or indirectly when seeing the changes that their work resulted in, but sometimes also as appraisal from managers. All participants appreciated being listened to, and being able to improve conditions for their colleagues. This made them feel engaged in their work. For example, P5 said: “If I, at the end of the day, can say yes in answer to the question if I or any of those I train have become better soldiers today, then I am happy”. Most of the participants felt appreciated by managers, especially when appreciation was linked to work tasks that were highly esteemed in the organisation. In contrast, the participants were dissatisfied when they felt unappreciated and stressed due to a lack of time. Furthermore, as previously described, they lost interest when activities were deemed irrelevant or inefficiently carried out.

5 Discussion
In summary of the findings, three themes that describe the studied setting emerge: 1) local and oral learning, 2) bypassing formal processes and 3) treasuring colleagues.

The participants attribute values of strength, efficiency and power to their relationships. These values, together with the participants’ assessments of how to behave, create a collective set of beliefs in the setting. Through sharing these beliefs, the participants could be seen to be part of a small world as defined by Chatman (1999). This small world is furthermore defined by how participants act according to beliefs or views. The participants at the LWC assert that they primarily learn from close colleagues, and this suggests that they know whom to approach for information or help. The study thus implies that the participants navigate in the setting through assessing norms, values and expected behaviour. This navigation is facilitated by, and contributes to, the participants’ views. This assessing of the setting to, for example, understand whom to approach for information and help is in line with Johnsson and Boud’s (2010) reasoning that people learn together while making sense of signals and cues. This is especially crucial in training in a military setting, as described by for example King (2006) and O’Toole and Talbot (2011). This navigation thus provides the participants with the understanding that it is most efficient to engage informally to carry out their work. Accordingly, they uphold relationships through interacting informally. The consequence is that the informal nature of relationships is reinforced and continues more or less undisturbed. In contrast, formal ways are not considered to be necessary to uphold strictly, which
makes the participants less inclined to engage in them. Aspects of formality in relationships are thereby weakened.

Interaction at the LWC is typically oral and local. Thus, treasured and trusted close colleagues are the most valued resource in the participants’ information horizons, which compares to how Widén-Wulff (2007) described claims handlers view of their colleagues. Learning orally means that there is orally-based information, which according to Turner (2010) is a new and important research area in information science. Turner (2010) argues that the use of oral communication is flexible, not easily replaced, adaptive and influenced by context and time. The participants in the study assert that everybody in the organisation engages extensively in this informal, oral communication in relationships to access, construct and exchange information. Therefore, a considerable amount of oral information seems to be exchanged and constructed in these relationships. This may be explained by the participants’ attitude that oral interaction is the most efficient way to accomplish work tasks and get the job done. However, this does not mean that the nature of interaction in the studied setting is devoid of issues of power, status and trust. For example, accessing information in such an oral culture depends on perceived social position (Meyer, 2009).

Although the findings suggest that the participants are loyal to their colleagues, work tasks and managers, they are also critical. Moreover, the lack of insight, together with deliberate disregard of rules and directions, implies that there may be conflicts that need to be resolved. The commitment to social interaction at work implies that the participants in the studied setting have become deeply embedded in it. Thus their preferences for oral information rather than documents may be explained by Lloyd and Somerville’s (2006) suggestion that when the initial need for textual information has been fulfilled, the participants need to access social and embodied information.

Research has mainly emphasised interaction in relationships as something to facilitate (e.g. Lave & Wenger, 1991; Lesser & Storck, 2001; Wenger, 1998) or design (e.g. McDermott & Archibald, 2010; Wenger et al., 2002). However, such focus on activity does not extensively explore the nature of interaction and what constructs or influences it. In this paper, it is therefore suggested that the nature of relationships may be explained by which relationships are considered to be valuable for work, information and learning from the participants’ viewpoints. If they view informality as the best way to accomplish things, informality is what they will engage in; that is, participants’ views on informal ways as the where and how to engage in social interaction determine how they interact. Thus aspects of informality, such as oral communication and local relationships, or working around rules and directives, depict the nature of relationships and learning within them. As participants engage in informal relationships, these are likely to be strengthened and successful in getting things done. Success, in turn, reinforces existing attitudes and views, which seems to be the case in this study. However, success may also be a matter of individual or collective beliefs. Thus, the views forming and re-forming the local and tightly-knit nature of relationships in the studied case may turn out to be limiting and biased through heavy reliance on traditions and norms. Such a situation is important to consider when supporting learning in an organisation where informality holds a strong position.

This study confirms the findings of the previous part of the case study, which implied that informal relationships were essential for learning. The failure of the formally designed process described in the previous part may be explained by the participants’ greater reliance on informal ways. Another possibility is that these informal ways were already in place, and resisted the implemented designed process. Therefore, they turned the designed procedures of this formal process into corresponding informal ones. Hence, in accordance with the aim of this part of the study, it has been shown that the participants and their views are essential for understanding the features and construction of the nature of interactions and thus of relationships and learning within them.
References


