



The document as a primary source in nursing and health studies: a reflection

O documento como fonte primária nos estudos da enfermagem e da saúde: uma reflexão

El documento como fuente primaria en los estudios de enfermería y salud: una reflexión

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ABSTRACT

Objective: to analyze the historical-conceptual interfaces and distinctions regarding documentary studies as a research method in the field of Nursing and health. **Method:** theoretical essay with a reflective nature based on national and international literature on the subject. **Results:** the study presents a theorization about the conceptual evolution of documents and the contributions of *Annales* School, with emphasis on document expansion, also referred to as revolution. It supports concepts, organization, collection and analysis of documentary data and its relationships with historical research applied to Nursing and, therefore, to health. It addresses the production of knowledge as part of the evolution of education and research in Nursing in Brazil. **Conclusions and implications for practice:** the appropriation of documentary sources and methods in the development of research, teaching and health care sharpens curiosity and expands the capacity for analysis, criticism and autonomy of interest groups and scholars, being expected, with this, the expansion of knowledge related to the profession.

Keywords: Nursing; Research groups; History; Methods; Research.

RESUMO

Objetivo: analisar as interfaces e distinções histórico-conceituais acerca dos estudos documentais, enquanto método de pesquisa, na área da Enfermagem e da saúde. **Método:** ensaio teórico de cunho reflexivo, elaborado com base na literatura nacional e internacional sobre o tema. **Resultados:** apresenta uma teorização acerca da evolução conceitual dos documentos e as contribuições advindas da Escola de *Annales*, com ênfase na expansão documental, também referida como revolução. Fundamenta conceitos, organização, coleta e análise dos dados documentais e as relações com a pesquisa histórica aplicada à Enfermagem e, por conseguinte, à saúde. Aborda a produção do conhecimento como parte do desenvolvimento da educação e da pesquisa em Enfermagem, no Brasil. **Conclusões e implicações para a prática:** a apropriação das fontes documentais e dos métodos no desenvolvimento da pesquisa, do ensino e da assistência à saúde aguçam a curiosidade e ampliam a capacidade de análise, de crítica e de autonomia de grupos de interesse e estudiosos, esperando-se, com isso, a ampliação do conhecimento relacionado à profissão.

Palavras-chave: Enfermagem; Grupos de pesquisa; História; Métodos; Pesquisa.

RESUMEN

Objetivo: analizar las interfaces y distinciones histórico-conceptuales acerca de los estudios documentales cómo método de investigación en el campo de la Enfermería y la salud. **Método:** ensayo teórico con carácter reflexivo basado en la literatura nacional e internacional sobre el tema. **Resultados:** presenta una teorización sobre la evolución conceptual de los documentos y los aportes de la Escuela de los *Annales* con énfasis en la expansión documental. Apoya conceptos, organización, recolección y análisis de datos documentales y sus relaciones con la investigación histórica en Enfermería y, por consiguiente, en salud. Aborda la producción de conocimiento como parte de la evolución de la educación y la investigación en Enfermería en Brasil. **Conclusiones e implicaciones para la práctica:** la apropiación de fuentes y métodos documentales en el desarrollo de la investigación, la docencia y la salud agudiza la curiosidad y amplía la capacidad de análisis, crítica y autonomía de grupos de interés y académicos.

Palabras clave: Enfermería; Grupos de investigación; Historia; Métodos; Investigación.

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INTRODUCTION

History does not refer merely or exclusively to the remote or recent past. Rather, the great strength of history comes from the realization that we carry it with us, we are unconsciously controlled by it in many ways, and it is literally present in our actions and achievements. Therefore, successes or failures, events in general that occur to us in different physical and social spaces, are of interest to research historians¹ and society, and serve as purposes for historical investigation. They write, analyze and interpret events and are therefore often called “[...] detectives, looking at different stones for clues, rather than simply describing their appearance and location [...]”¹. The practice of historical investigation is an activity that allows the research historian to return to his/her roots, activate and reactivate memory, distance him/herself from possible fragmentation in this process of articulation between the present and the past, through the link between these two historical times of human activity. In any topic on an agenda, there is a previous history, since there is no identity if there is no memory². That is, history is protected by imagery, written, spoken, iconographic memory, which allows knowing and understanding events, people, places, contexts and societies.

The breaking of paradigms regarding the ways of recording history occurred after the *École des Annales* (Annales School), which, by recommending that research historians plan their studies and making them scientific, exerted an important influence throughout the world. This movement, which emerged in France in the 1920s, gained notoriety after the creation and circulation of the *Annales d'Historie Economique et Sociale* Magazine, in 1929, conceived and edited by Lucien Febvre and Marc Bloch. The *École des Annales* proposed the expansion of the meaning of “document” to tell history, claiming the importance of everything that belongs to and surrounds man. Thus, it came to be called New History, bringing the analysis of social structures, economic activity and collective behaviors as an object of study for research historians³. This approach allowed history to be viewed in a new light, in which human activities and social, political and economic structures, through various historical sources, were contextualized and understood, going beyond the simple interpretation of reality. In this conception, history was and still remains the science that studies the evolution of human societies without chronological time^{3,4}.

With this, the research historians broadened their horizons beyond those themes related to traditional history, starting to research on various contents – such as politics and economics –, providing a new understanding of remote and recent history, in a comprehensive and diversified way. Thus, the history of different social groups – determinants and conditions of the health-disease process, individual characteristics and other names, referring to the process of human living – became the focus of studies.

From 1960 forth, scholars further expanded their object of research, seeking in social issues their field of exploration of historical knowledge and, beginning in 1970, there was an appreciation and advances in historical research in the health area, through demands related to professions and construction of collective

memories. From 1980 onwards, there was an appreciation of research on individual experiences, boosting the study of cultural, social, political and contemporary history. During this period, Nursing also began to investigate more deeply about its roots, investing in studies and publications with a historical approach, for the expansion of social, cultural, political, educational, health and gender knowledge^{5,6}.

Looking at the profession, under the light of the New History, expanded the possibilities of understanding Nursing as part of a historical, political, educational, gender process, analyzing and denouncing, in a blunt way, how the professional identity was being built over the centuries. This growing movement in recent decades is evidenced by the significant increase in productions developed by nurses – professors and assistants – who, aware of their responsibilities, understood the need to properly equip their counterparts, providing elements that promote the understanding of historical determinants related to the social practice of the profession. This production is mainly due to the incentive provided by Graduate Nursing programs, resulting from the creation and functioning of historical research groups and laboratories⁷.

These groups and research laboratories draw on methodological resources from the *École des Annales*, and are based on the New History, under the contextualized, reflective and critical perspective of events as a result of sociopolitical forces, recognizing the human being as the protagonist of its world, in its time. For this effort, they interrelate knowledge accumulated by other sciences, and work under the renewed and expanded conception of historical sources⁸, considering everything that belongs to the human, depends on him/her, serves him/her, expressing and demonstrating his/her presence, activities, tastes and ways of being⁹.

Given the above, this reflection results from concerns that arose among research historians in the history of Nursing and health, regarding the need to reflect and align concepts about historical research, of the documentary type, in order to support its operationalization. Therefore, for its reach, the objective was to analyze the historical-conceptual interfaces and distinctions regarding documentary studies, as a research method, in the area of Nursing and health.

METHOD

The present paper is a reflective manuscript, drawn from the authors' experience as research historians, and from the consultation of the literature provided by electronic libraries and databases, as well as classic books on the subject and guides from the National Archives. Intended to contribute with elements to the discussion of documentary studies applied to Nursing and health, it is structured according to the following sections: (1) The *École des Annales* and document expansion; (2) Documents: concept, use and characteristics; (3) Documents: storage, conservation, handling and care; and (4) Historical-documentary research applied to Nursing.

RESULTS AND DISCUSSION

The *École des Annales* and document expansion

The *École des Annales*, since its foundation, has been training successive generations of research historians, who have imprinted new scopes on the problem-history in different strands – with particular interest in neglected social issues –, as well as adding new historical sources and use of new historiographical methods.

It corresponds, therefore, to an elaboration contrary to traditional, positivist history, based on texts and written documents; therefore, considered pseudo-history due to its superficial and simplistic approach to events. From the perspective of problem-history, it innovated in the ways of seeing and thinking about historical facts and in dignifying the multiplicity of documents. For example: writings of all kinds, figurative documents, furniture, newspapers, utensils, archaeological finds, notes, reports, contracts, clothing, interviews, signs, speeches, scrolls, tombstones, landscapes, inventories, statistical data, literary works, fossils, magazines, photographs, monuments, tools, sculptures, films, ceramic pieces, parish records, among others^{8,9}.

Therefore, the Chart 1 allows a synthetic and chronological view of the process of expansion of historical sources, provided by the *École des Annales*.

This plurality of historical sources – textual and non-textual – has supported the so-called documental revolution⁹ or documental expansion as it corresponds to the quantitative and qualitative expansion of documents, understanding that they are not neutral representatives of the past, as they result from the intentionality of social forces¹⁰.

It is noteworthy that, for proper use, the research historian performs a contextualized analysis of the various localized sources, however complex they may be, without losing the focus that they derive from a social past. Therefore, they must be meticulously examined for their temporal peculiarities. It is expected that this great challenge will keep him/her stimulated to carry out new searches, aiming to complement the information, and transform it into meritorious knowledge from reliable historical sources.

The expansion of historical documentary sources makes it possible to examine and re-examine the various materials, in

addition to new interpretations or the addition of complementary versions of the phenomena. This panorama is also due to its use by research historians, namely: anthropologists, education and health professionals, sociologists, religious, political scientists, economists, literary professionals¹¹. This reality makes documentary research a fertile field, with many possibilities, and therefore correlative to many areas of knowledge.

Documents: concept, use and characteristics

Defining the document represents in itself a great challenge, and History, among all the Social Sciences, has given the most importance to the use of this tool¹². In this regard, everything that is a vestige of the past or serves as a testimony is considered a document or source, which may be written texts, but also documents of an iconographic and cinematographic nature, or even everyday objects, folkloric elements, among many.

Documents are, therefore, considered elements that register contexts in materials, texts, hieroglyphs, videos, static images, books, art, oral transcriptions, official prints and monuments. They make up a framework of information about the past, from which we can extract, interpret, analyze and relate, in the light of the present, aiming at understanding the facts and circumstances of societies, in their period. Thus, documents, as products of societies, assume relevance due to the possibility of connections with the past¹³⁻¹⁵.

Since then, research historians have been expanding their horizons, considered that a document is every source of information from which it is possible to extract elements about the human past. Thus, it is noteworthy that they do not reflect the concrete experience in a given period and, for this reason, the need to carefully examine them to make them understandable, free from distortions, in order to avoid mistaken interpretations and conclusions of the study object and thus ensure the best clarifications. When carrying out documentary research, it is essential to observe characteristics related to the documents, such as those available in Chart 2.

Regarding the characteristics of the documents, it is worth complementing these aspects regarding: the circumstances of their creations (proper to a given context); its authenticity (faithful testimonies of moments); the heterogeneity of content; and the

Chart 1. Chronological synthesis of historical sources. Natal, 2021.

Chronology	Historical Sources
Prior to the 19 th century	Hagiography; travel reports; biographies; images; objects; journals; demographic censuses
19 th century	Laws; notes; regulations; treaties; declarations of wars; demographic censuses; birth and death certificates
1930	Facts; depositions; Law Suit; correspondences; journals
1970	Wills; property records; inventories; census; fiscal documents; Price list
After 1980	Oral sources; party programs; speeches; newspapers; theater; digital files; theses and dissertations; scientific articles, in addition to all the previous ones.

Source: Research data, 2021

Chart 2. Characteristics of documents. Natal, 2021.

Characteristics	Description
Organicity	Produced and accumulated due to the functions and activities developed by the body or entity, which contextualizes them in the set to which it belongs.
Unicity	Unique in the set of documents to which it belongs, although there are copies in groups of documents; each copy is unique in its place.
Reliability	Ability to support the facts that attest; the veracity of its content; trustworthiness; it relates to its production.
Authenticity	No tampering or modification; unchanged since its production.

Source: National Archives, 2011²⁰.

multiplicity of information (globality contained in the material)^{16,17}. Therefore, documents – contemporary or retrospective – can be used as a method, sources, techniques and analysis, being vital to adapt them to the purposes of the research regarding the information processes, the choice of material studied, organization, analysis and synthesis.

The analysis of the characteristics of the documents should not be considered a merely procedural protocol of historical research. Its achievement will challenge the research historian to develop skills and acumen to better explore the potential of the sources and establish their relationships with the investigated historical context. The development of this skill can also be seen from the perspective of better use of the time spent on research.

Documents: storage, conservation, handling and care

The production of documents is continuous and, given the existing variety, there are many challenges faced by institutions and depositaries in terms of safekeeping and conservation. From our experience as research historians, we can mention: cataloging of historical sources; spaces suitable for conducting research; maintenance of the physical structure of institutions; financial and technological investments; professional training; lack of adequate furniture, among others.

In Brazil, it can be said that these services were structured after the installation of the Royal family, in 1808, in Rio de Janeiro, with the creation and operation of the Imperial Public Archive (1838)¹⁸ – today, the National Archive – and the Historical and Geographic Brazilian Institute (1838)¹⁹ as landmarks and models for the expansion of analogous institutions. Currently, libraries, archive services – public and private –, museums and documentation centers stand out as the main ones. However, they are not the only ones responsible for keeping the documents, although they differ in terms of classifications, objectives, collection and target audience¹⁴.

Regarding safekeeping and conservation, digital files draw our attention to future guarantees, since most technological innovations are substitutes for current ones, which may, therefore, compromise the location and use of this material. The following are also listed as possible challenges for research historians: the high costs of machinery (computers, printers, software, antivirus, scanning);

the quality of the internet; cyber-attacks caused by viruses and hackers; document digitization. Therefore, it is observed that the general conservation of any documents is directly related to the guarantee of their access and use, and, for this purpose, they must all be correctly selected, identified, classified, stored and controlled in their custody, location, handling and reuse.

To this end, the ambition is for institutions and depositaries to be able to follow some recommendations, namely: monitoring the temperature and humidity of the research, work and storage areas; proper management of lighting and environmental ventilation; compliance with document cleaning routines; the control of rodents, insects (moths, cockroaches, termites, borers) and microorganisms (fungi and bacteria); the storage of documents according to their specificities; and the use of furniture suitable for the different types of documents^{20,21}.

As part of this process, the research historian must contribute to the conservation of documents, adopting the following measures: be careful when handling documents; sanitize and dry hands before and after handling; have personal protective equipment (latex gloves, masks, aprons, caps and goggles); use bristle brushes; not use adhesive tapes, text markers, metallic materials and no folding or annotation for marking documents; pay attention to care, depending on the origin and type of document such as photographs, videos, pieces and utensils, works of art; not eat or drink in the document treatment area^{20,21}.

Such considerations deserve to be appreciated in greater depth, but, for now, they serve the purpose of giving visibility to institutional challenges, pointing out elements and technical knowledge concerning the world of archives. It is believed that raising awareness of the importance of care – storage, conservation and handling – of documents will contribute to increasing the survival of these historical sources and, thus, the hope that they will be available to future generations.

Historical-documentary research applied to Nursing

The expressiveness of historical sources – textual and non-textual – and their multiple uses by research historians from different areas presuppose the use of specific techniques and methods for each purpose, making them, for this reason, applicable to qualitative and quantitative research. Therefore,

it is dimensioned how vast the debate can be, but, for the time being, some considerations will be made about documentary research, intending to motivate discussions between research historians and the awakening of new interested parties.

As in all scientific research, the documentary requires the elaboration of the project in the same structure as the others; that is, it contains an introduction, theme delimitation, literature review, justifications, general and specific objectives, theoretical-methodological framework, instruments for data collection, schedule and references^{4,8}. In addition, it is recommended that it be prepared in accordance with the guidelines on research involving human beings²² and on the use of data from participants²³. Subsequently, it is recommended to comply with the protocol of its submission to the Research Ethics Committee.

The research project is, therefore, a singular and crucial need, whose purpose is to equip the research historian to achieve his/her purposes through the systematic planning of actions that aim at the development, improvement and expansion of his/her knowledge about the object of study⁹. In view of this, the realization of any type of scientific research coexists with dynamic and interconnected cycles, and can be compared to a craft work, composed of the following phases: exploratory (project elaboration); field work (bibliographic survey, data collection); and treatment of the material collected (sorting, classification and analysis)^{1,24}.

In documentary research, the treatment of the gathered material is interested in overcoming uncertainties and enriching the reading, given the need to go beyond the appearances contained therein, seeking a contextualized understanding and interpretation of events resulting from the prudent verification of information. The execution of this process gives a new representation to the document, going from primary (gross) to secondary (interpretation of the first)^{25,26}.

The achievement of this procedure involves three steps: pre-analysis (selection and organization of documents through skimming and the constitution of the documental corpus according to the rules of exhaustiveness, representativeness, homogeneity and relevance); exploration of the material (classification, coding or categorization of raw data located by clipping, aggregation or numbering according to similar characteristics); and treatment of the results obtained and interpretations (validation and meaning of the data by the researcher's inferences)^{25,27}.

Legitimizing document sources becomes, therefore, a vital action for the development of any research. In this circumstance, when dealing with a historical study, with a qualitative approach, referring to the near past, the possibility of conducting interviews with actors who experienced the event is a valuable resource to guide information¹⁶.

In this sense, the ratification of data constitutes a great challenge to research historians, and its operationalization means giving quality and reliability to the research results. Thus, for those wishing to publish in scientific journals, *Red Equator*, in partnership with the Pan American Health Organization (PAHO), and in an effort to promote the improvement of manuscripts, has

prepared guides, making them available in several languages, such as the Consolidated Criteria for Reporting Qualitative Research (COREQ), recommended for studies with a qualitative approach that carry out interviews²⁸.

From our experience, referring to the near past, we identified the use of documental research articulated with Oral History – thematic or of life – as a method or technique, in order to evaluate and analyze the source by conducting internal and external criticism of the information collected. Thus, it is noteworthy that research of this nature began in the 1980s and are mostly products of Theses and Dissertations linked to Graduate Nursing Programs, through research groups^{29,30}. Such groups expanded after the 1990s and, despite being present in all Brazilian regions, they are concentrated in the Center-South region of the country, with a predominance of federal public institutions³¹, a phenomenon similar to the distribution of Postgraduate Programs in Nursing⁷.

These are groups that have proven qualifications and academic production, formed by doctors, masters and students (Graduate, Undergraduate and scholarship holders) that motivate the organization, scientific development and competent professional practice. From this perspective, it is noteworthy that these groups have been concurring, with contextualized elements on social relations and working conditions in Nursing, to the understanding of their implications related to the profession.

CONCLUSION AND IMPLICATIONS FOR PRACTICE

Aware that these considerations do not end here, it is worth reminding those interested in entering the world of historical research that the collections are organized based on thematic criteria. Therefore, we point out that the successful development of research implies overcoming the challenge of identifying, locating and providing these services in advance, as well as it is essential the reading similar studies. The adoption of simple care, similar to these, will certainly translate into positive perspectives for research, bringing benefits to the activities, forecasting and controlling possible unforeseen events and, mainly, motivation and satisfaction for the research historian.

Our trajectory as research historians in Nursing, gave us the opportunity to learn that the best archival services are those that equip us with the intended information. Thus, the search for the best sources becomes an exercise in perseverance and availability, and it is essential to carry it out as often as necessary for the evolution of the research, as the “mining” of documentary sources may not correspond to the expectations and time of the research historian. This possibility strengthens the importance of preparing the research project – particularly with regard to the schedule –, since unforeseen events are likely to occur and compromise the progress of the research.

When compared to other professions, the systematization of care and knowledge applied to Nursing is considered recent, with Florence Nightingale, in the 19th century, with *Notes on Nursing*, as the landmark for the publication of the first studies.

In this regard, its history can also be considered recent, and this is certainly why the World Health Organization (WHO), together with entities representing the category, in order to ennoble its practices and give visibility to its professionals, chose 2020 as International Year of Nursing, in reference to the bicentenary of the birth of its precursor. Unfortunately, the global health crisis caused by the Covid-19 pandemic overshadowed this initiative, but it served to make public the weaknesses and needs of the discussion on access to health care, working hours and conditions, remuneration, training and qualification of health professionals, all around the world.

Finally, it is expected that this reflection will contribute to the incipient production pertinent to theoretical-methodological aspects associated with historical research developed by Nursing historians. Therefore, we hope that its implementation becomes a source of consultation and encouragement for new studies on the subject, in order to add essential elements to the systematization of the history of Nursing. Beforehand, we encourage with the fact that documentary research is a broad and fertile field, and the phenomenon can be studied under various aspects.

AUTHOR'S CONTRIBUTIONS

Design of the reflection paper. Djailson José Delgado Carlos.

Collection of information. Djailson José Delgado Carlos.

Maria Lígia dos Reis Bellaguarda. Maria Itayra Padilha.

Theoretical-reflective analysis. Djailson José Delgado Carlos.

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^a In this reflection, we will refer to those who, even though are not trained in History, but upon discovering the universe of historical research, recognize its importance and find themselves motivated and/or passionate to carry it out.