



## Some Evaluations on the Prerogatives of Documents Preserved in Technical Archives

Silvano Tozzo\*

Politecnico di Milano, Milano, Italy.

### \*Corresponding Author

Silvano Tozzo

Politecnico di Milano, Milano, Italy.

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**Abstract:** Some considerations on archival material oriented towards the assessment of documents generated in the ambit of technical/construction activities. The analysis of what is produced by operative interventions (renovation, maintenance, etc.) underlines the qualitative differences perceptible in the diverse types of documents. These last ones are included in categories defined for material produced in project circumstances and also in a typological context not dissimilar to what is preserved in archives with different characteristics. The verification of some executive itineraries allows the evidence of specific documents regarding the technical/construction sector and also of archival material belonging to a more generic ambit.

**Keywords:** Archives, Documents, Construction engineering, Maintenance.

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## 1. Introduction

What is exposed in this writing comes from a vision influenced by the archival themes proposed in Literature and also from a specific orientation on the document complexes of a technical nature. Through the reproposal of extracts selected from books in which the arguments referring to archives assume a wide and diversified exposition, some topics come introduced to permit the recognition of routes concerning documents created by technical operations.

The analysis of what is preserved in a (technical) archive may interest different aspects characterizing the documents<sup>1</sup> object of evaluation. Aspects relating to the type of material present and its formation process, to the temporal dimension to which it belongs, to the environment in which it is produced, and to the quality defined by its characteristics. The operation here presented takes into consideration the nature of documents in their active and passive versions<sup>2</sup> as elements inserted in a defined context, coming from finalized technical and planning actions. Through a few examples, some of their prerogatives are highlighted as instruments created to perform certain functions. It comes, moreover, treated the theme relating to the variability of their efficacy over time and, consequently, the options regarding their inclusion in the placement phase determined by their degree of usefulness.

## 2. Characteristics and Functionalities of Archival Documents

### 2.1 Form, content, and relational level of documents.

The belonging of documents to series, characterized by thematic and typological indications, promotes a variable reading to which concur the multiple functional, aesthetic, and qualitative properties detectable in the textual and graphic archival material. Every single element is defined by qualities intrinsic and deriving from its relational level with the other pieces inserted in the same sequence and, as well, produced in different situations but correlated, for some reason, to it.

*“The evaluation of the document does not depend only on form and content (...) but also on the relationship that the document may have with the other documents of the Archive to which it belongs”.* (Carucci, 1983) (1)

The extract highlights some properties belonging to the archival material, such as form, content, and relationship in reference, as mentioned above, to the connections existing between documents.

In the presence of material preserved in document complexes of a technical nature, its recognition can probably also be supported by the *form* assumed by the documents at the moment in which they are produced for determined aims. The term may recall aesthetic connotations but also references of another type. In the technical-construction ambit, there are document models reproduced in an



analogous format, with a similar communicative skeleton, and with affine aesthetics and layout too<sup>3</sup>. The models cited concern, primarily, certain procedural types used within a project route. Form and Content are, therefore, the two elements that allow the recognition of a document type and determine its classification. Through the analysis of the content, it is possible to comprehend to which document genre the single element refers, the purposes for which it has been produced, and the time interval in which it can be inserted<sup>4</sup>. The third concept expressed, derived from the extract, emphasizes the relational relevance existing between documents. Remaining in the ambit of what is conceived by operations of a technical nature, the effective connection existing between documents preserved in an archive of this type can be verified through different keys of reading. An example could be relative to the analysis of material originating from the same intervention (the renovation of spaces within an edifice, the reorganization of an external area, etc.). A concrete situation in which it manifests one of the different types of existing relationships (between documents) can be perceived in the evaluation of a report and a graphic representation resulting from the same operation, namely, a renovation involving the implanting of a building. The first may be the report of a meeting in which the intervention is confirmed, while the second is a product of the executive phase. In this case of simple reading, the common denominator is the project action resumed in the decisional phase and in the operative one. Thus, in this circumstance, the connection between two documents that are completely different is the finalization of a technical operation. Common element for which, at least in the active phase and probably also in the deposit one, the two documents will find their position within the same container, or series of containers, selected for the positioning of the material generated by the system maintenance just mentioned.

## 2.2 Aspects relating to the collocation of archival material

*“Documents destined to be preserved have to be collected and organized to be available for future utilization. The place for excellence in which documents are collected and organized is, precisely, the archive”*. (Bertini, 2008 (2) The citation reported above introduces two arguments easily retraceable in classical Literature on archives. The expression preservation<sup>5</sup> recalls a series of considerations referring to the physical dimension and cultural value of material deposited in the Archives. The assertion *future use* expresses a generic concept related to the opportunities of revaluation of documents in the course of time. The significance detectable from the extract recalled relating to the notion of Archive<sup>6</sup> introduces the general concept, describing it synthetically as a place (physical structure) within which the material comes positioned. Of course, for the meaning of the term, for the definitions<sup>7</sup> provided by the Literature on the subject, and for the descriptions connected to the intrinsic characteristics of every archival complex, the relative interpretations expressed by the

authors inserted in the specific editorial context are multifarious, also due to the differences existing between archives in general. A further consideration could come from the recall, legible in the citation, relating to the collection and organization of documents destined for preservation in the Archive. Even in this case, the subject offers in Literature variable analyses and interpretations, with arguments that recur with a certain continuity. (Zanni Rosiello I, 2005) (3) As, for example, the three collocative phases through which the documents come divided and positioned. Therefore, the first defined “active” phase. The one following, called “of deposit,” in which documents may still be utilized, and the final one when they come positioned in the “historical” unit.

The first phase identifies the dimension in which documents are operative, if contemplated in the functions for which they have been created, and for the finalities to achieve in determined technical and procedural processes. It is therefore their usefulness, relative to the activities and purposes of the institution from which they have been produced, that defines their positioning in a context in which they can still accomplish the functions for which they were generated. The storage times in the active phase differ as a consequence (also) of the typology to which the document belongs; a financial report, a snapshot of a specific period of activity, will probably have a short life in this phase because of its validity connected to a determined time interval. On the other hand, the plan representing the internal spaces in a new edifice, formulated during the project route, will maintain a certain relevance even after its construction for the technical operations connected to the building management.

The placement phase that follows the active one is defined (as mentioned above) in literature as deposit. A citation extracted from a text published in 2014 briefly introduces the deposit archive and defines it as *“a place expressly designated for the reception and management of archival documents that are not sufficiently active to be kept in the offices (...), but too active to be transferred to the historical archive”* (Garofalo, 2014) (4). The assumption highlights in explicit mode the intermediate phase to which the documents arrive, underlining their transitory functional value. Effectively, the material produced as a result of technical interventions retains, for more or less prolonged periods, a partial efficacy majorly perceptible in the first phase of deposit, much less with the passage of time. Text documents have, probably, in project and technical ambit, a minor functionality in the course of time if compared to graphic material. A descriptive report on the work phases relating to the installation of an implant (electrical, climatization, etc.) will have, after twenty years, a minor incisiveness if resumed within a normal maintenance process. While the schematic representation of the same implant could still be useful in retracing its route across a series of internal spaces in a building (fig. 1). (Bellone,1995) (5)

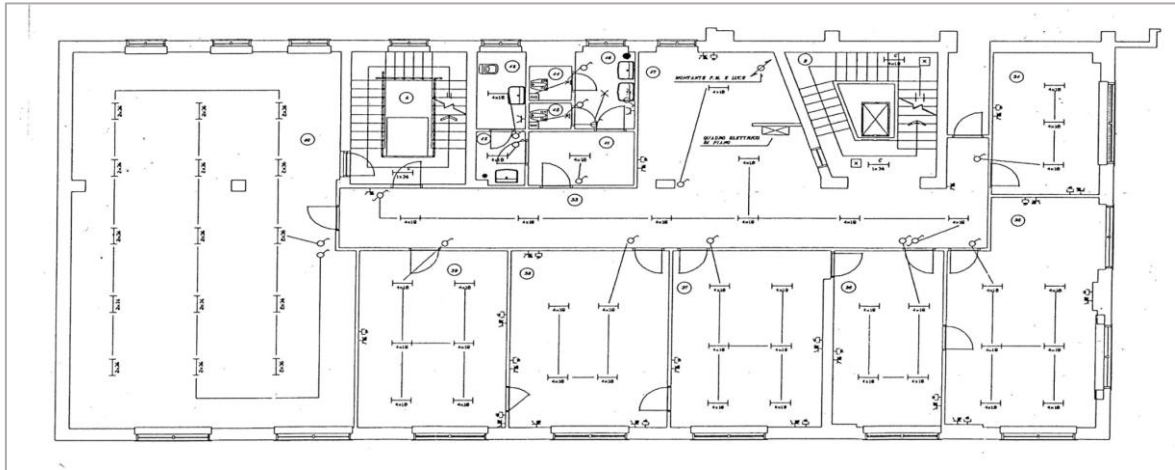


Figure 1. Schematic representation of electric system in internal spaces.

The transitory nature of documents within an archival section destined for the deposit phase is clearly perceptible from the following extract: “*The deposit archive can be considered a physical entity in continuous equilibrium between growth on the one hand and transfer on the other, whose chronological extremes change, incorporating every year documents from the active (current) archive and transferring others simultaneously to the historical archive*”. (Garofalo, 2014) The extract may instinctively suggest which relevance it may assume, the physical entity destined at the deposit phase of archival material in spatial and quantitative terms too. It is possible to imagine how documents do not remain too long in the active phase, while in the one intermediate, it is quite natural to think of a stationing more durable in terms of time. This is in consequence of the acquisition of a status defined in Literature as semi-active; namely, a condition of partial utility of documents if evaluated within specific processes. The citation reported above also introduces, through a simple mention, the final destination of the material gone out from the phases of total and partial utility and, therefore, no longer functional if considered for the finalities for which it has been created. The historical section (Carucci, 2008) (6) becomes, therefore, the final location of documents no more efficacious in achieving the purposes for which they were materialized by the reference structure/office.

### 2.3 The interpretation of documents within a project route

Remaining in the analysis of material produced by technical/construction activities, the various types of documents generated by project itineraries aimed at the multifarious operations typical of the sector allow a recomposition of facts and situations through which to reconstruct the route<sup>8</sup> of an intervention aimed at the redefinition of situations<sup>9</sup> in which it was necessary to proceed. To better comprehend the potentialities of the preserved material and render it, therefore, assimilable in a practical sense, it is possible to propose the various document types coming from operations as those cited in note 9. Coming close to material produced by interventions of this genre, come to light the different passages, technical and procedural, through which to give a general reading on the final result of a project itinerary.

Usually, documents accumulate following a temporal sequence. Therefore, in the first containers placed in the dedicated cabinet,

probably will come to light reports, correspondence, and other elements through which it is possible to reconstruct the decision-making process and motivations at the base of initiatives like those mentioned above. Along with these, there will be the first drawings regarding the project route followed, with also indications concerning the final arrangement hypothesis. Continuing the reconnaissance, it will come to light the contractual documents and the material relating to the bureaucratic procedures in terms of requests, authorizations, and declarations presented to the competent offices. In this initial context, it is probable to rediscover documents in which are defined procedures and modalities relating to project execution. Therefore, technical specifications and contracts aimed at the technical and administrative regulation of the company/client relationship. The phase after the comparative process relating to the different economic estimations presented by companies, from which it will exit that one who will execute the commissioned works, takes form with the starting of the operations decided in the project stage. Starting operations is formalized in the *verbal process of works delivery* and materialized in a paper model expressly predisposed and signed by the works management representing the client and by the company to which the executive phase has been assigned. A factor that allows the itinerary comprehension through which the works have been conducted is represented by the gradual registration - through the different document types - of the implementation phases of the project. The material that is majorly exhaustive regarding the reading of the operative process is, probably, the graphic one. By the drawings, especially in the case of an area redevelopment, it is possible to verify the different passages up to the completion of the work. In the renovation case of internal spaces, the perception may be less immediate because of the complexity of the system representations (climatization implant [fig. 2], hydraulic route, etc.), which are not easy to interpret for non- experts. The technical and procedural material produced during the executive operations allows the comprehension of the dynamics related to the realization of a project. The minutes certifying the suspension and resumption of works<sup>10</sup> and the correspondence consent, through the dates, to periodize the evolution of the process. Progress work reports, technical relations, writings, and annotations of different types become instruments from which descend operational scans, quite specific and detailed, that allow the interpretation of connection

points between the diverse working phases. Finally, the documents that officially declare the end of the operations, namely the two certificates of regular execution and completion of the works<sup>8</sup>; the two attestations permit a reconnaissance of the followed route inasmuch as it comes reported, in a synthetic way, some passages (operative stages, procedural elements, etc.) regarding the two parties contractually involved. What has just been described concerns procedures and documents relating to a recent past. A necessary clarification due to the variations, mainly dictated by the reference legislation, which in the course of time produce integrations and adjustments within the executive process.

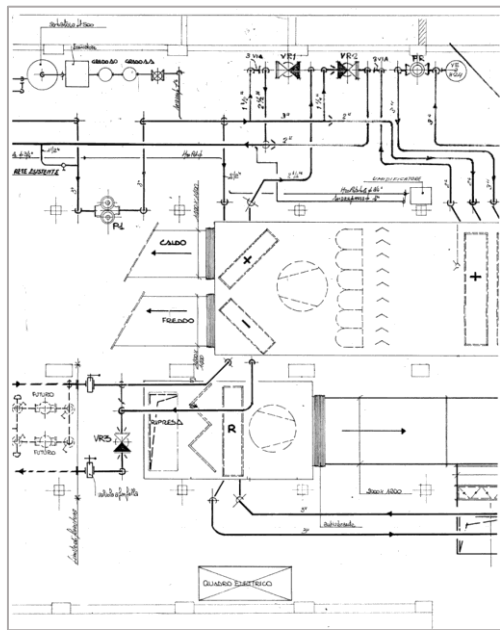


Figure 2. Climatization implant scheme

### 3. Final Considerations

The division of chapter 2 into three subsections has been necessary in order to have a better comprehension of the different elements characterizing the archival material. What is expressed in paragraphs 2.1 and 2.2 falls within, probably, the possible evaluations regarding technical documents<sup>11</sup> and also material belonging to archives of different extraction; in this case, with insertions connected to the context highlighted in this paper. Inside paragraph 2.3, the analysis of specific document types produced in the technical-construction ambit has allowed an exposition majorly connected to the sector just mentioned. In effect, in the recent past, the examples reported above were part of the practice relative to project routes referred to new constructions or to normal maintenance interventions in their various forms.

Overall, throughout the entire chapter 2, some properties belonging to the documents in the different phases of their life have been highlighted. Attributes through which it is possible to glimpse their level of usefulness and the dynamics relating to their preservation: without forgetting their informative value in the technical dimension and the historical one (Castronovo, 1995) (7) in the cultural ambit, acquired in the course of time. (Corti,1999) (8)

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## Notes

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<sup>1</sup> In this writing, the term “document” defines all typologies of textual and graphic material like Reports, Normative acts, Electrical schemes, Technical drawings, etc

<sup>2</sup> Namely, in the phase in which they comply with their functions and in the one where their usefulness comes less.

<sup>3</sup> It is possible to rediscover these connotations in some models (Buffetti series) used in the recent past, relating to the materialization of certain passages like the *Minutes of work suspension* (Verbale di sospensione lavori) and the *Certificate of completion of works* (Certificato di ultimazione lavori).

<sup>4</sup> In the absence of date references, the content of the document and its relational level with the other elements of the series often consent to recognize the period relating to its creation.

<sup>5</sup> One, among the different interpretations relating to the term preservation, could be the following: “*Preservation is not a mind category but a concatenation of concrete facts in their development starting from the fleeting moment of the document’s creation and of the crosslink of bonds that make a mass of papers or digital material an archive*” (Valacchi, 2021) (9)

<sup>6</sup> “...the term ‘archive’ may refer to an entity, to an organization, to a unit within an institution, or to the place where it is located”. (Duranti, 2014) (10)

<sup>7</sup> Some definitions of Archive:

“*If the archive is the complex of documents and their mutual relations, its meaning shifts with the variation, even partial, of these relations*” (Tamblè, 1993) (11)

“*A technical archive has to be seen as an organic collection of texts, letters, technical reports, projects, drawings, and patents destined to permit: 1. to preserve the memory of the actions performed; 2. to follow again the decision- making processes, politics, and history of a company; 3. to retrace the motivations and the consequent logical advancement of technological development; 4. to effectuate all other research and activities well-known in the world of archives.*” (Mariani, 1995) (12)

“*The archive is therefore an organic complex of documents, which implies a producing subject, a practical finality carried out by the subject himself, and the existence of connections between documents while, gradually, they take form*”. (Bertini, 2008) (13)

<sup>8</sup> Decision-making process/implementation phase/completion.

<sup>9</sup> Systems maintenance, renovation of interior spaces, etc

<sup>10</sup> Even in this case, the two models used in the recent past make part of the “Buffetti series” with the numerical sequences 8544 and 8545.

<sup>11</sup> “...a technical document is a document, and its preservation in an archive has exactly the same meaning as that one concerning a literary or historical document.”. (Mariani, 1995)