Documentary Tasks in the Context of Everyday Life

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ABSTRACT

This article analyzes two documentary tasks, planning for the future and preserving the past, within and across multiple domains in everyday life. Data come from interviews with forty-seven Canadian participants and photographs of their tools and documents. Both tasks support multiple everyday life domains (e.g., family, work, community), their associated social roles (e.g., father, employee, volunteer), and functional roles that transcend domains and their associated communities (e.g., maintainer—of a car, of one's health, or of a social or family relationship). Planning for the future supports documenting what to do and when, where, and how to do it, but also how to be and how to be in relationship with others. Preserving the past supports documenting accountable truths and commemorating a meaningful past. It involves both recording past events and archiving and curating objects of documentary significance. Taking a sociocultural approach to the analysis of tasks reveals three themes about everyday life as a context for documentary practices: everyday life is not unitary, different domains reflect different conditions and communities, and past- and future-focused tasks are not clearly demarcated.

INTRODUCTION

Everyday life, for many in the industrialized world, is made up of interwoven threads that reflect multiple domains with which an individual is involved on a day-to-day basis. Research on social identity suggests that individuals enact a variety of identities related to social roles (e.g., worker, spouse, friend) within associated theaters or domains (e.g., the home, the school, the workplace; Super 1980) and communities (e.g., the family, the class, colleagues). The significance of these domains, identities, and com-

munities may ebb and flow over the course of an individual day, a year, or a life course. Few document studies consider the everyday, and those that do tend to fall prey to the "myth of separate worlds" (Kanter 1977), conceiving of everyday life as everything that takes place apart from the workplace domain, thereby dichotomizing workplace and everyday life practices and failing to attend to the roles of documents in everyday life domains apart from these two.

The dichotomization of work and everyday as separate domains can be traced back to the movement of wage-earning activity out of the family farm or firm and into the factory during the industrial revolution (Ashforth, Kreiner, and Fugate 2000). As industrial production scaled up, industry required the ability to manage employees and operations at a distance. Rational and impersonal forms of systematic management developed, along with new document technologies and genres whose goal was to improve speed, efficiency, and control in the workplace (Levy 2016). At the same time, increased wages permitted some middle-class men to keep their wives and children out of the workforce. Home came to be understood as a haven shielded from the demands of the market, where women took on responsibility for the care and education of minor children, preparing them for their adult roles as wage earners or homemakers (Griffith and Smith 2005). Work came to be associated with the masculine, the market, rationality, order, uniformity, and control, and home with the feminine, emotion, relationships, and individual self-expression. This dichotomization is reflected in document studies. Levy (2016) sets up workplace and personal documents as representative of two fundamentally distinct ways of being, the fast-paced impersonal bureaucracy exemplified by the bureaucratic form and the relational and sensual personal world exemplified by the handwritten note or letter and the hand-annotated greeting card.

Work-life scholars (e.g., Beigi, Shirmohammadi, and Otaye-Ebede 2019; Kelliher, Richardson, and Boiarintseva 2019) argue that this kind of dichotomization overlooks the activities of those not in the labor force; neglects characteristics that pervade all of life such as race, religious identity, or health; equates "home" and "family" with everyday life as a whole; and ignores both the workful effort required in activities outside the workplace (e.g., Griffith and Smith 2005) and the social and relational within the workplace. As Lefebvre observed (1991, 29–30), "After his work is over, when resting or relaxing or occupying himself in his own particular way, a man is still the same man." Dichotomous conceptualizations also treat each domain as unitary, assuming that situations arising in a domain trigger particular needs and result in the enactment of domain-specific documentation practices. Leckie, Pettigrew, and Sylvain (1996, 180–81) challenge the conceptualization of "work" as a unitary domain, showing that doctors, lawyers, and engineers "lead complicated work lives and must assume a multiplicity of roles in the course of their daily work" (e.g., ser-

vice provider, manager, researcher, educator, and student). Each role has specific tasks associated with it (e.g., service providers assess client needs, managers budget and track). Similarly, life outside of the workplace is typically conceptualized with reference only to the home or the family (Kelliher, Richardson, and Boiarintseva 2019), which neglects the wide variety of social, educational, and community activities that are part of many everyday lives, and the ways that nonworkplace tasks may be connected to the roles people play. For example, people occupying the "mother" role might be expected to be responsible for different documentary tasks than people occupying the "father" role (Zimmerman et al. 2001).

We argue instead for a consideration of documentation in everyday life as "the totality of lived experience" (Ocepek 2018, 399), encompassing a variety of domains and recognizing that a single individual may occupy multiple roles. We explore the documentary forms and practices associated with "keeping track" within and across the multiple domains of everyday life, including, but not limited to, workplace and home. Keeping track entails the performance of a variety of tasks through a variety of document genres (e.g., tracking personal fitness or workplace performance through logs and trackers [Neff and Nafus 2016]; maintaining inventories of food in a family refrigerator or products in a workplace; or sustaining group identity and relationships, e.g., by showing who is and is not included on a list of wedding guests or religious community members). It serves both bureaucratic and relational ends, sometimes simultaneously. Regardless of function, keeping track is fundamentally tied to memory, both the prospective memory associated with recalling future events (Whittaker 2011) and retrospective memory, and both individual and collective memory (Lindley 2012). All of these may be produced, shaped, and preserved through documents. For this article, we focus on two time- and memory-related documentary tasks that occur across multiple domains of everyday life: planning for the future and preserving the past.

Literature Review
Levy (2016, 23) proposes that we look at documents as *talking things*: "bits of the material world—clay, stone, animal skin, plant fiber, sand—that we've imbued with the ability to speak." His approach allows us to understand documents as both historically situated and as performing functions within their own cultural time and place. Each document is tailored to do a particular task on our behalf: to express affection, provide an accounting, remind of an important task or event. Individual documents are able to do their job only because they are embedded in "a huge web of human practices and knowledge distributed through space and time" (Levy 2016, 18). Documents carry conventional physical and generic forms that signal something about the role documents are to play, and knowledge of genres and their characteristics and functions is established

through participation in the communities that use that genre and establish its social meaning and value through ongoing use (Levy 2016, 28–29). Because documents speak on our behalf, Levy argues that studying them, the broader context of the activities in which they play a part, and the qualities and values that documents represent provides us with a glimpse of "who we are and who we long to be" (38). This approach to studying documents within their broader contexts of use is consonant with a trend toward sociocultural approaches within document studies, library and information science (LIS), and computer-supportive cooperative work.

Within LIS, studies of tasks and documentation practices focus overwhelmingly on the workplace world or laboratory settings (Ford 2015, 120–23). LIS scholars (e.g., Byström and Lloyd 2012; Huvila 2008; Talja and Nyce 2015) have increasingly called for a sociocultural or practice-based approach to the study of tasks, which emphasizes the context within which tasks are performed and the relationships with communities of practice that, over time, develop documented or undocumented norms around appropriate action (Byström 2007). Sociocultural approaches differ from the traditional cognitivist approach (Byström 2007; Talja and Nyce 2015), which sees tasks giving rise to information needs and seeking as a result of storing and internalizing acquired information in memory, without taking into account temporal or social contexts (Liu and Li 2012; Rha 2018). A sociocultural approach recognizes that performing a task engages "shared language, values and ethics, distinct ways of attending—seeing, hearing, and observing—and ways of using the body in interaction with the material and social resources of the setting" (Talja and Nyce 2015, 65). Because tasks are embedded in the sayings, doings, and shared ways of knowing of other human and nonhuman actors, they are never performed in solitude even when undertaken by a single person (Talja and Nyce 2015, 65; Byström and Lloyd 2012, 2). Tasks may therefore be viewed as an instance of the social, cultural, and historical contexts within which they take place, and studying tasks is a way to gain an understanding of the context in which they are embedded (Byström and Lloyd 2012). This is commensurate with socially constructed (Courtright 2007) or interpretive (Talja, Keso, and Pietilainen 1999) approaches to the study of context, which understand context as "a carrier of subjectively interpreted meaning" (Savolainen 2009, 39). Information and documentation activities are therefore seen to take place within explicit or implicit communities whose knowledge, characteristics, expectations, and norms shape practices; include institutional and technological factors; and are constituted out of relations among people and between people and nonhuman actors (Courtright 2007, 296; Levy, 2016).

Research in computer-supported cooperative work (CSCW) shows that people use documents like calendars and lists for reasons apart from future functional value, that organizational systems of multiple documents

are common to manage the differing needs of different domains, and that users may prefer the flexibility of paper systems even in highly computerized environments (Beech et al. 2004; Brush and Turner 2005; Dittmar and Dardar 2014; Eliot, Neustaedter, and Greenberg 2007; Grimes and Brush 2008; Hutchinson et al. 2002; Palen 1999; Payne 1993; Swan and Taylor 2004; Tomitsch, Grechenig, and Wascher 2006; Tungare, Pérez-Quiñones, and Sams 2008). CSCW studies of households show that individuals and families place documents and other meaningful artifacts in contextual locations, like refrigerator doors (Taylor and Swan, 2005), in order to exploit family routines to ensure that the right person sees the right artifact at the right time (Eliot, Neustaedter, and Greenberg 2007). These kinds of everyday documents perform relational as well as instrumental functions (e.g., McEwan and Horn 2016; Thayer et al. 2012), and they become accountable through their ongoing creation and use by household members (Crabtree et al. 2003).

Within document studies, there is a recognition that documentation, regardless of domain, requires *document work* (Trace 2007, 145), "a myriad of behaviors and activities that [people] learn and that relate in some manner to documents." Document work follows specific forms, genres, and conventions; knowledge of how to read, write, search, and use documents appropriately is constituted and evaluated through the norms and practices of a specific community (Lloyd 2005; Trace 2007; Levy 2016). Document work is therefore not something individuals do in isolation, even when they do it alone. The very nature of documents—the ways they are created, arranged, and used—gives shape to and sustains organizational systems (Shankar 2009, 161; Taylor and Swan 2004, 2005; Levy 2016). Document researchers have been sensitive to the ways that documentation practices intertwine with the organization of work (Davies 2008), the accomplishment of accountability (Trace 2007; Yakel 2001), and the social construction of individuals as subjects (Trace 2002; Shankar 2009).

However, most documentation research continues to focus on the workplace, where Levy (2016, 76) argues that bureaucratized document forms and standardized work practices are "at once the products, the co-creators, and one of the more visible symbols of . . . an age that bears the mark of the rational, the mechanical, the impersonal, the efficient, and the disenchanted." Bureaucratic documents provide control over resources, empowering their creators to take particular courses of action. They are designed for quick and efficient reading, to "deliver to us, as quickly as possible, just the information content we need to satisfy the next item on our agenda" (Levy 2016, 196–97). Documents such as lists or calendars respond to the impulses of industrialization and bureaucratization by making and maintaining the world (Levy 2016, 159), ordering chaos in ways that make that order seem natural and erase the work done to achieve it (Shankar 2007).

In our intimate, relational lives, however, Levy (2016) argues that documents take on a very different character. They invite engagement in personal, intimate acts, and are often "made by one person for and in acknowledgement of another" (Levy 2016, 91). In an era when standardized fonts dominate, a handwritten inscription serves as a material symbol of a personal relationship, "put[ting] into material form not only an abstract message but a portion of yourself" (Levy 2016, 94). The physicality of a paper document allows a recipient to display a letter or greeting card as an enduring symbol of the character and quality of the relationship with the sender, both keeping the sender present and making the relationship visible to others. Putting documents of personal or relational significance away for safekeeping stewards both the document and the relationship, and the fixity of the document preserves the relationship and those in it, achieving a form of immortality through writing (Levy 2016, 187).

Levy argues that the depersonalized ways the bureaucracy have increasingly come to dominate our lives at the cost of deep engagement, attention, reflection, relationship, and celebration. A small number of studies counter this work/life dichotomization and consider the reach of documents across domains within the everyday "life as a whole" (Hobbs 2010, 223). McKenzie and Davies (2012) showed that documents created and used in the home are embedded both in deeply meaningful interpersonal relationships and in the structures of the multiple organizations outside the domestic sphere. Trace (2014) showed that rural children's leisurely activities in early twentieth-century 4-H clubs included creating and using record books that instructed them in proper forms of documentation for their future adult lives as farmers. Nippert-Eng (1996) demonstrated that it is partly through documentary tools such as calendars that people do the "boundary work" of placing, maintaining, and challenging social categories such as "home" and "work."

Building on this interdisciplinary research foundation, we explore the documentary tasks of planning for the future and preserving the past as they unfold within and across the multiple domains of everyday life. If, as Levy (2016) argues, documents are constituted by and constitutive of the context within which they are undertaken, and if documents are windows to ourselves, everyday documents are windows to the nature of our everyday lives in all their messiness and contingency.

Methods

With the support of research assistants (see acknowledgments for details), we conducted semistructured interviews with forty-seven participants (thirty-one identified as women and sixteen as men) in two Canadian provinces. Participants represented a variety of household arrangements (living alone, with partner and/or children, with roommates), work characteristics (home-based businesses, mobile work, shift work, full- and part-

time work, multiple jobs, retired, unemployed), and social roles they occupied in other domains (e.g., person with a chronic illness or disability, hobbyist, student). Table 1 provides an overview of participant living arrangements and employment.

We interviewed participants in locations of their choosing: their homes (forty-one, seven of which contained work-from-home spaces), workplaces (two), and other locations such as coffee shops (four). In responding to our interview questions, participants mentioned a number of domains in which they participated: education; family; health and wellness; household; hobbies and leisure, whether casual, project-based, or serious (Hartel 2010); social; community/volunteering; religious and faith; and paid work.

The work of keeping track across life domains may involve multiple physically and spatially distributed physical and digital documents as well as nondocumentary resources. Researchers must therefore be prepared to go beyond what is immediately visible and ask questions to elicit accounts from participants. At the same time, the work of keeping track may be so well integrated into everyday life that it is overlooked even by those who do it (Star and Strauss 1999). It may therefore be necessary for the researcher to observe the physical environment to identify relevant documents and artifacts as an adjunct to interviewing. We therefore interviewed while observing the documents and other tools in the setting where the interview took place. We asked participants two main questions: (1) What do you have to keep track of in your life? (2) How do you do it? We did not provide a definition of "keeping track," allowing participants to explain what it meant to them. We followed up with probes as appropriate for each interview: inviting participants to expand on their initial responses, asking about failures and breakdowns (Star and Strauss 1999) and about how they learned to keep track, and asking their thoughts about what success meant (Trace 2007). We asked participants to show us the physical and digital documents and material artifacts they used for keeping track. Some discussions (e.g., those in third spaces) were limited to the items participants had brought with them. In other cases, participants moved around their homes/workspaces to show us things in different rooms or different parts of the room. Interviews ranged from 41 to 131 minutes in length, with an average of 73 minutes. When we interviewed in participants' homes or workplaces, we attended to the documents and objects in those spaces and asked about those that participants did not mention. In all cases we photographed participants' significant documents and objects, and where possible the physical spaces they occupied. Data collection and analysis conformed to Canadian guidelines on ethical research on human subjects (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada, and Social Sciences and Humanities Research Council of Canada 2018). To maintain confi-

Table 1. Participant Characteristics

Living arrangements	
Sole adult in household	7
Lives with parent(s)/grandparent(s)	6
Lives with room mate(s)	5
Lives with a partner	33
(3 same sex, 30 different sex)	
Lives in a household with adults from multiple categories[a]	3
Lives in multiple households[b]	4
Household includes adult child(ren)	2
Household includes minor child(ren)	16
Household includes more than two generations	2
Household includes pet(s)	24
Living arrangements not discussed	1
Employment	
Employed/earns a wage[c]	34
Runs small business	18
Does itinerant/gig work, many employers or clients	14
Does shift work other than 9–5	23
Not in paid employment (student, unemployed, retired, on parental or disability leave)	13

a. Two participants lived with both a partner and a parent; one lived with a parent and an adult child.

b. Three students lived with families of origin in their home city for part of the year and with a room-mate or partner in their school city for part of the year. One participant worked away from home for months at a time and lived with roommates while at work and with a partner while at home.

c. Participants were employed in several sectors (Statistics Canada 2012) and a wide variety of jobs: manufacturing (factory worker); arts, entertainment, and recreation (journalist, genealogist, film producer, magazine editor, artist, musician, librarian); agriculture, forestry, fishing, and hunting (farmer/gardener); educational services (early childhood education, K–12 education, postsecondary teaching and teaching assisting, teaching in nonschool settings, e.g., musician or artist teaching music or art, administrative assistant); health care and social assistance (nurse, dental hygienist, medical lab technician, personal support worker, developmental support worker, veterinary technician, psychotherapist); transportation and warehousing (truck driver, delivery driver); accommodation and food services (restaurant chef, fast-food worker); other services (clergy person, business consulting, aesthetics [hairdresser, manicurist], retail sales: grocery store and other retail outlets); mining, quarrying, oil and gas extraction; life support technician; professional, scientific, and technical services (computer support technician); and construction (contractor). Several participants worked multiple jobs or had "side hustles" or hobbies that they hoped would make money but that did not provide them with significant income at the time of the interview.

dentiality, we identify participants by a generic descriptive phrase and do not associate demographic characteristics with any individual participant. The data set consists of over fifty-six hours of interviews (2,200 transcribed pages) and 1,175 photographs.

Pam used NVivo 12 to analyze the data thematically within a constructionist framework, which assumes that "meaning and experience are socially produced and reproduced" and seeks "to theorize the sociocultural contexts, and structural conditions" that underlie and enable individual accounts (Braun and Clarke 2006, 85). Analysis was recursive, using strategies of constant comparison (Corbin and Strauss 2007). We used Holstein and Gubrium's (2005, 489) strategy of "analytic bracketing," which allows for close attention to both the situated and material ways that people "do" everyday life across various domains and the ways that everyday life

is materially and discursively situated in broader social, economic, and geographic contexts. This approach requires constant shifting between the local practices and their broader context, attending to the ways that individuals' practices are situated with respect to institutions, ideals, and discourses, for example, ideas about what it means to be a "good" parent, worker, student, or other social roles. The first step was two rounds of broad content coding to identify *what* participants described keeping track of. As one participant reflected, a term like "personal" was too general to represent the items she had added to her calendar: "You're having to think between is this a personal doctor's appointment or personal fun thing, personal vacation, you know." Unlike work-life scholars who seek to identify mutually exclusive categories to represent everyday life domains (e.g., Keeney et al. 2013), we coded data with as many domains as were relevant—for example, counting socializing with friends at work as both social and work, or taking a child to the doctor as both family and health. Doing so allows us to explore both the subjective understandings of domains and the intersubjective aspects, such as social expectations of people enacting particular roles (e.g., mothers vs. fathers).

We then identified several documentary tasks (e.g., inventorying, accounting, scheduling) that share characteristics and persist across domains but are also shaped by the domains and by the roles participants occupy within those domains. In keeping with a sociocultural approach that sees tasks as embedded in context, we opted to conceptualize tasks broadly. For this article, we selected two broad tasks that participants described in relation to every domain: planning for the future and preserving the past. In the next section, we describe the characteristics of each task, and in the following section we address common themes that emerged through the analysis.

Findings
For this article we have chosen examples that best illustrate the themes and that maximize the representation of participants and domains. Quotes are edited for brevity and clarity (e.g., removing false starts and irrelevant text).

"Scrappy Notes": Planning for the Future
Documenting to plan for the future has most commonly been studied in relation to prospective memory tasks: using "actionable" items like an incoming email message as a reminder of some future event or task. The challenge is that the individual must remember to remember, and the actionable item itself serves as a reminder to complete the action (Whittaker 2011, 40).

Our participants documented many actionable future events, particularly those that were variable or unpredictable. Several worked multiple

jobs or did shift work for a single employer. One explained that he was a member of a factory work team that alternated between two weeks of "day" shifts (7:30 AM–3:30 PM) and two weeks of "afternoon" shifts (3:30–11:30 PM): "I have a calendar that lets me know when I'm on days and afternoons. See, whatever's in blue is when I'm on days." He carried this calendar with him so he could consult it before making nonwork appointments. Conversely, a professor regularly taught on the same days each week over the course of the term and did not write her teaching days on the calendar she shared with her spouse: "I don't have my class in there because it's just a given. 'Cause I do teach Mondays, so they're just a given, they're just understood." Participants also used calendars, schedules, and rosters to remind them of leisure activities such as a community skating schedule and a recreational hockey roster, both posted in a kitchen or laundry room where they would be easily visible. Some participants kept calendars dedicated to documenting friends' and family members' birthdays, and others recorded these events, along with other significant family anniversaries and events, on general calendars. Paper calendars came preprinted, and digital calendars preprogrammed, with national, provincial, cultural, and religious holidays, including those that participants did not celebrate. One participant showed me her phone calendar: "Orangeman's day whatever. I mean that's just, it populated itself. iPhone came with all of the—I have no idea what that is." Like a greeting card (Levy 2016), a blank calendar is never blank but provides a populated template that the user can customize, or not, as desired (McKenzie and Davies 2016).

Every participant kept reminders of future tasks, both event-based (e.g., hang the laundry to dry once the wash is finished) and time-based (e.g., do something after a certain period of time has elapsed; Scullin et al. 2015). Participants documented future tasks in paper and electronic calendars and agendas, but also in notebooks and on "scrappy lists" on small pieces of paper, or on sticky notes placed on bathroom mirrors or along the bottom of computer monitors. These notes were designed to be ephemeral; as Levy (2016) notes, different genres exhibit different rhythms and "scrappy" lists and notes came into existence for brief periods, possibly changing over their lifetime as they were updated or annotated, and often, but not always, discarded after the items on them were completed.

Some tasks came with calendar-date deadlines. Students and teachers talked about documenting assignment and exam dates; for the students these dates represented a task with a final due date, whereas for the teachers they represented an event (the handing in of assignments or the proctoring of exams) that prompted the subsequent task of grading. One noted, "When I prepare for my term I will always print out a blank calendar, and then will write essentially a draft of the term. You know, what topic is being taught each week for each class. What assignments are going to be due when for each class. And I do that, so I can actually see the whole

term." Some tasks were not tied to calendar dates but were contingent. A contractor managed a team of construction workers and trades at a number of worksites. He explained how he sat down at his dinner table every Sunday to create a "map" of his company for the coming week: "of where the guys are gonna work. What we need at each [site], supplies and other stuff and I end up making a list using iCalendar of what I'm gonna do. And then I make copies for the guys, for each one of my lead carpenters. And I give it to them." Another participant documented contingency in her social life with her phone calendar: "We're trying to schedule a games night next week with my friends. But I'm still waiting to hear back whether it's going to be Monday night or Tuesday night. So I have a question mark beside both things. So once I get a confirmed email, then I go back in and I just erase the question mark and then I know that it's legit and I have to be there for that day and time."

Other tasks were cyclical. A market gardener reminded herself of what to do to avoid tomato blight in the next growing year: "I literally wrote it down somewhere last year, like, 'Do not try to grow all your tomatoes just in the field. Get your tunnel plan done.'" Participants listed recurrent tasks like grocery shopping on an ongoing basis, completing the task either on a regular weekly shopping day or ad hoc as enough items accumulated for them to make purchases. Documenting daily reminders to take medications at the right time was crucial for the participants living with their own or a loved one's chronic illness. One posted a paper note on her back door so she would see it as she left the house: "I had three Ps on my door which was pills, purse, and phone. You know [Laughter]. Just remind me, don't forget to take your pills in the morning, make sure to take your purse and your pills." Another set a one-word reminder ("Pill!") in her phone. Several other participants kept pill containers in visible places, including plastic caddies with compartments labeled for each day. Barbarin, Veinot, and Klasnja (2015) showed that the arrangement of pill bottles in the home took on special significance for people with HIV, as they needed to serve as a visual reminder to the person taking the pills, but because of the stigma of HIV the presence of these collections may need to be hidden from outsiders. Their participants very carefully and thoughtfully selected containers that would be reminders for one set of people but would be unremarkable to others.

Physical objects in prominent places served as actionable items for our participants, documenting a need to do something with them. A participant described the documentary function of several objects on and around the piano beside her back door: "The Christmas present that still hasn't been delivered 'cause the weather. And this is stuff that has to be returned. That's a [work-related document]. Some wool. And some bad oil I got from [store]. And this has to go to the car. And the other stuff is

what has to go down to the cellar. This [pile of books] is what's going to the library today."

Instructions, procedures, and recipes were a common form of documentation designed to remind participants of what to do, not at a particular time, but the next time (or every time) they performed the action in question. A parent of a child with a learning disability explained, "We had all kinds of pictures showing how to get yourself dressed. He's likely to just put on a sweater and forget that he doesn't have his shirt on. Or go out without socks or something. And we have had big signs up like 'Hair, teeth, face. Hair, teeth, face.'" A professional musician explained how he annotated the standard pieces in his music repertoire when he played for a new conductor. "Sometimes you'll have . . . [looks at music] just to remind yourself what maybe the conductor wanted to change. That's what's happening here. [In the score] it's an arco [bowed], but in this edition the conductor wants to hear pizz[icato]. So . . . for at least two bars we play with our fingers. It just changes the sound. That's how the conductor likes it."

Both home and professional cooks had recipes in their kitchens, some annotated to document substitutions, variations, and conversions. A professional chef's restaurant kitchen contained printed recipes originally written for home use, which had been hand annotated with adjustments to scale them to restaurant proportions. For example, a recipe calling for 3 tablespoons of fresh basil in the home version was revised multiple times, to 110 grams, which was crossed out in favor of "10 tablespoons usually." With its coexistence of metric and imperial measures, this recipe additionally documents the vagaries of weight and volume measurement in Canada.

Four participants documented future events for which they clearly did not need written reminders to do something. One participant told us her birth date, so she clearly remembered it, but she had written "Happy birthday!" on that date on her kitchen calendar. Another had done the same ("Me!"), and a third had added her name to a birthday book that "nobody really else uses." A fourth participant had documented her upcoming wedding date on the cover of her wedding planning notebook.

These instances do not seem to serve the actionable, bureaucratic function of reminding a participant to do something, but rather honor a special day in the future in the same way a memento might do for a special day in the past. Several other examples of planning for the future are likewise not easily classified as actionable items. Two participants documented events they *might* go to, as a reminder of possibility rather than as a task to do. One of the two lived with serious mental illness and read local newspapers and Facebook groups: "I look at them and see what's coming up for the week, and just kind of make a schedule for myself. There are things that I know that are ongoing every week that I might go to. I usually just
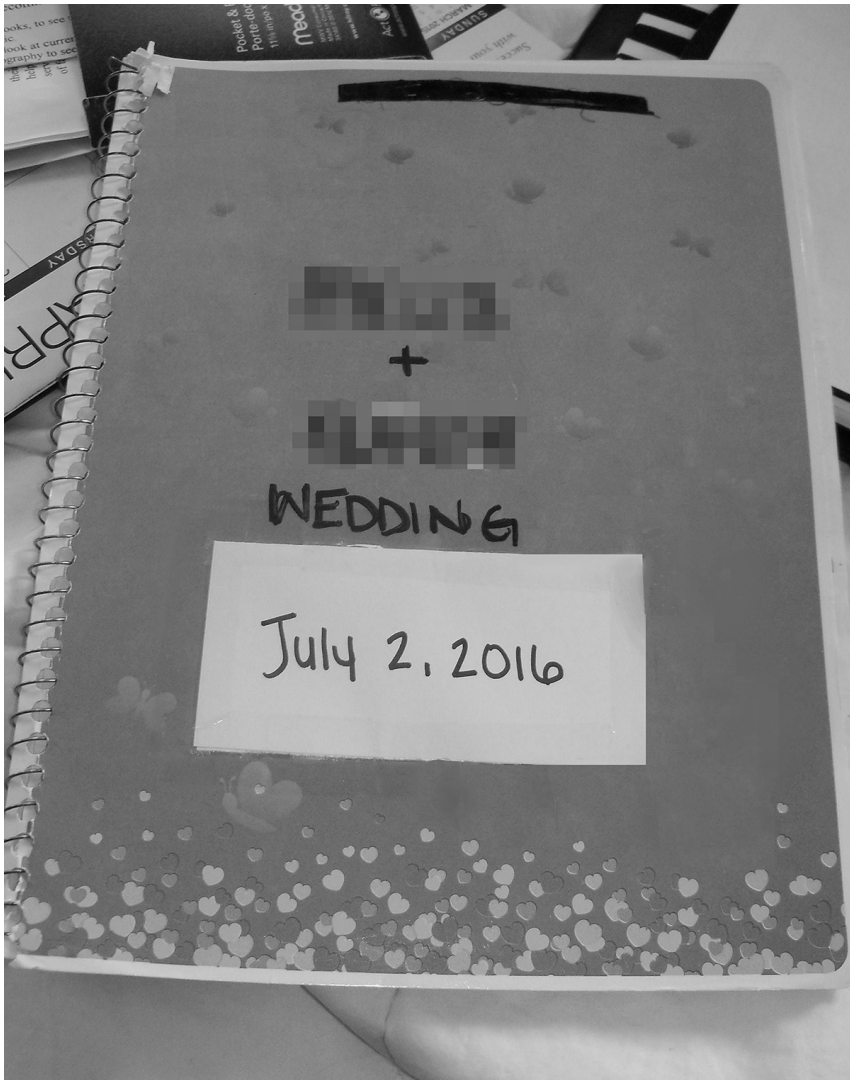
Figure 1. Wedding date. Photo courtesy of the authors.

write them all down and then even if I go to nothing all week, I've done that for myself, and it's a bit of self-protection maybe. You know, leave the house." In this instance, documenting future events was not a reminder to do something but was rather an act of self-care, a commitment to making it possible to get out of the house if the participant felt able to do so. Photos of friends and family members and pets and notes from friends and fam-
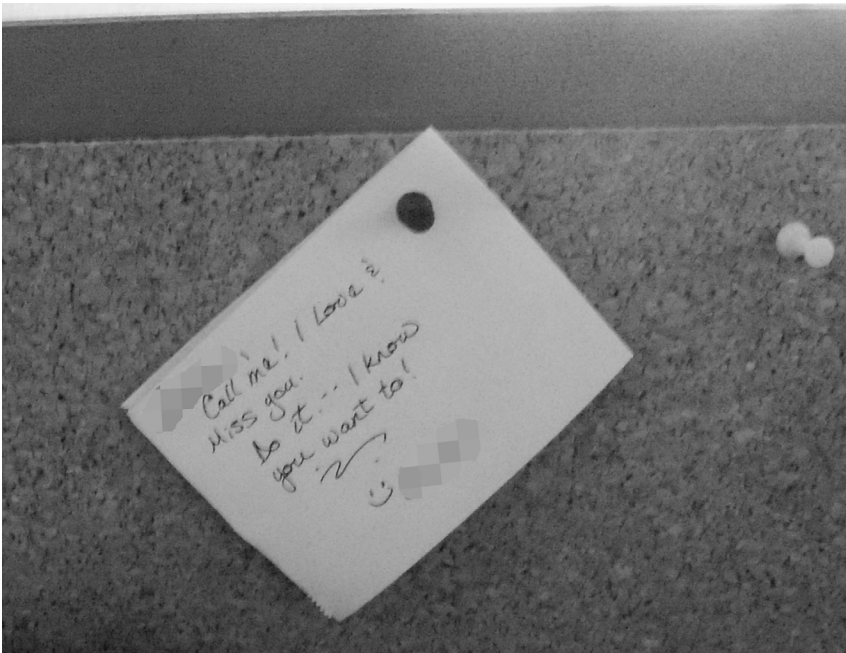
Figure 2. Workplace note. Photo courtesy of the authors.

ily in visible locations such as offices, refrigerator doors, and smartphone login screens reminded participants of their relationships with loved ones rather than of a discrete event or action.

Some items documented a quality or a feeling rather than an event or relationship. One participant explained that teddy bears "remind me of hope, you know, to keep that and to stay child-like so I've got teddy bears all over." Several participants had motivational or self-care messages for themselves or loved ones (e.g., "It's not who you are that holds you back, it's who you think you're not") in places where they were likely to be encountered again, on bathroom mirrors and home office bulletin boards, and even at work.

For our participants, the task of planning for the future therefore goes beyond the creation and maintenance of actionable items. Participants documented not only what to do and when, where, and how to do it, but also how to be and how to be in relationship with others. As a task, planning for the future supported multiple functional and social roles.

"Stuff for Later": Preserving the Past
Documenting the past similarly performed multiple functions. The first is accounting. Levy (2016, 62) argues that accounting "is about *account-*

ability: about who is accountable to whom for what. Accounting—and the acts of writing and recordkeeping that are integral to it—is all to do with power." Yakel (2001) showed how radiology records were prepared to serve as documentary evidence and found that accountabilities existed both in the record-keeping processes and in the records themselves. A participant illustrated this dual accountability when she explained that she kept her tax records in a way that documented not only her income and deductions but also her compliance and integrity: "I want it [hand] written, the same way I do all my tax stuff. I'm a self-employed contractor, and I got called in on a random audit. They were so impressed because they could see the ink was at different times, they know you can't fiddle. That would take a lot of fiddling, so I like to handwrite things."

Legal and financial obligations for home and work were a common site for participants to document accountable truths. Participants with small businesses tracked customers, orders, and payments, with several using paper binders or notebooks. One small business owner explained, "It's better for me if I just carry this together. If somebody sees me and wants to [order]." Whether she received orders in person or online, she recorded them in her paper binder: "I just, write the names, whatever: so, so, so. This name, that name, that name, that name." Another participant and his spouse traveled a lot for their joint business and he kept and managed receipts: "Every specific trip we do and every specific function that we do there are receipts involved, they go like this [shows receipts in a plastic zipper-top bag]. Then I take it to work and go through it and it's, you know, spreadsheets made and that's paid for." Many participants showed us file boxes and cabinets where they archived inactive bills and income tax documents in case of an audit. When discussing finances, more than one participant asked us to stop recording while they described classification decisions they had made and workarounds they had developed to facilitate their accounting, but which they feared were not procedurally correct and might land them in trouble if they were audited. A small number of participants discussed strategies for documenting to avoid accountability. One participant described doing unofficial subcontracted piece work for employees of an organization, outside of the standard organizational hiring procedures. "A handful of twenties [twenty-dollar bills]" was the only form of documentation they had for this unaccountable work. Another lived with a cat in a "cat-free condo" and had to get a bulky bag of cat litter up the elevator in a way that did not document the presence of an unsanctioned cat: "We have one of those granny carts on wheels," which served both to convey the litter into the condo and to hide its documenting presence.

Some truths were accountable only to the participant or their family or household. One participant explained how her centenarian grandmother's journal allowed her to track family and household happenings:

"When I would go to visit her, she'd say to me, 'You visited me this day, seven years ago!' and I just was so amazed by that. She was a big fan of wildflowers, what wildflowers were in blossom, and she'd be looking at her journal, and she would say, 'Ohhh they're earlier than last year.'" Several participants kept inventories, strategically locating them where they would be of most use: an inventory of knitting needles on a mobile phone could be consulted when a participant went to a yarn shop; a list of freezer contents on the side of the refrigerator was visible at the point of retrieving food items for meal preparation. A great deal of accountability work related to participants' bodies. Several used some form of fitness tracker or heart rate monitor to log exercise data. One used an online app that generated weekly reports with the ability to look back to assess progress toward a goal. Another logged aesthetics, using a diary to document "when I had my last pedicure, manicure, got my hair done, or had Botox or things like that." Those in perimenopause and those seeking to achieve or avoid a pregnancy tracked menstrual cycles and sometimes sexual intercourse, often using symbols that were intelligible to them but not to others, in the same way that HIV patients managed pill containers (Barbarin, Veinot, and Klasnja 2015). Another participant living with serious mental illness used pencil crayons to color the time blocks in a daily schedule as they experienced negative emotions. A participant caring for a loved one with dementia began our interview with a lengthy discussion of the challenges of ensuring that care providers were accountable to his loved one's needs. He told us that he filed away everything related to her care, "'cause you never know" when you might need it.

Many participants documented work-related details to comply with legal or professional requirements. A trucker started his day with the "pretrip inspection on the truck where you've got to make sure the vehicle's in perfect operating condition as far as the Ministry regulations are concerned. Recording anything, any defects." At the end of each day he logged "all my statuses as far as my start time, my finish time, how many hours per day," whether that be time driving, time off duty, or time on duty but not driving; for example loading and unloading or making pretrip inspections. "The Ministries [of Transportation, Labour] need to know exactly what you're doing from start to finish. All the time." An ordained clergy member was required to log baptisms, weddings, and funerals as well as how many services she conducted and how many people were present at each. A teacher explained that he needed to keep really good track of student progress to provide evidence to parents at interviews. A farmer who kept dairy goats documented the pedigrees of the kids she sold. Accountability had a very particular set of dimensions for a participant who grew and sold marijuana before its recreational legalization in Canada. He operated a legal medical marijuana dispensary where he was licensed to sell his own product to customers who had a doctor's prescription. He also operated a

head shop, where accessories could be sold but selling marijuana itself was illegal. Prior to legalization, there was a great deal of suspicion around the sale of marijuana in head shops, and they were subject to frequent police raids. Scrupulous documentation was crucial.

Compliance and reporting were not limited to workplace requirements. Parents signed permission slips to document their acceptance of risk for school field trips. Recreational athletes sent their fitness training data to a coach or trainer. A participant who volunteered as a group leader in his religious community explained how he documented the amount of time his group spent in ministry activities "for statistical purposes. I tally [their times] up and I give them to the congregation secretary who then submits them online." Those managing chronic health conditions were called on to report vital signs and symptoms to their medical care providers. One participant stopped our interview to photograph her medically fragile baby's soiled diaper because it had blood in it. She explained that she sent the photo to the baby's medical team, "Say 'Hey guys! What am I cutting back on [in baby's diet]?'"

Other forms of preserving the past were less concerned with documenting an accountable truth and more with documenting a meaningful past (e.g., Zijlema, van den Hoven, and Eggen 2016). Several participants kept lists of music, books, or quotations they had enjoyed. In addition to reminding of future events, life milestones recorded in calendars and planners also documented significant people or events in the past. Some participants recorded loved ones' death anniversaries in calendars. Photos documented past events and visits from people no longer living or no longer nearby.

Three participants described keeping notebooks of "stuff for later." Two described consulting these notebooks themselves, but a third discussed the way that she anticipated her notebook might become meaningful for other members of her family: "It's kind of scrapbook-y, and I guess I kind of save it as something that I might someday pass on to someone if they were interested. I put some of my favorite recipes. There's stuff for later, and random things, and sometimes I cut out random information. 'Cause, yeah, I guess this is something that I foresee maybe someday leaving to somebody, so I want to have all those random chunks of information that might not work for anything else."

One participant had been keeping daily journals for over fifty years, and she explained their intertwined functions as a factual account and as a record of personal significance. "When I started doing it I said, 'I want to have it for when I may be eighty-seven and I'm starting to forget my life, then I will be able to remember my life.'" However, she had burned the journals she wrote as a girl: "Got rid of them, 'cause that was all the angst about boys and things." When we asked if she ever went back to her past journals, she first said, "No, I never touch them. I think this is really bor-

ing." However, she recalled that her account of a significant event from several years past documented both factual accounting and content of personal significance: "But no, there's thoughts in it and there's ideas in it." Another participant had written memoirs to share with her family, and for her quality was less important than documenting memories of personal significance. "I took a course in how to write memoirs, and then I realized how terrible my memoirs were, and so then the year 2000 came, and I thought I'm going to give this to the kids. I don't care what it looks like, grammatical errors, whatever, doesn't matter. And so, I did. And they loved it." Lindley (2012) shows that creating and tending resources such as memoirs can be understood as creating both an individual and a joint past and reinforcing family narratives.

In addition to creating documents to preserve, participants curated documents and other physical objects as memorabilia. Orth, Thurgood, and van den Hoven (2018) have noted that physical objects may become cherished for their ties to significant memories, people, places, values, experiences, or beliefs. One participant kept a bag of welcome cards from her baby's birth. In her home workplace she had posted a handwritten letter congratulating her on starting her business, placed where she and her clients could see it. Another participant explained how a large bowl of matchbooks in her home office documented an epic journey with her university roommate: "My roommate and I drove across Canada. Five days straight. And it was, like, how do you document memories or mementos? And of course we had no money. And it was when you could get match-books at restaurants and diners so we started collecting matchbooks, and then just sort of everywhere we went traveling, or restaurants or every-where, I picked up matchbooks."

The participant who collected teddy bears told us the story of how they had come to remind her of hope: "When I had cancer, and I came out of the hospital and they had found that it hadn't gone through my system, I saw the polar bear that's on the bed, and I bought it." The participant caring for a family member with dementia explained that a Christmas-themed coffee mug in his office documented a special moment for his loved one: "This was a moment, like two years ago where [she] had a lucid moment and realized that she was basically wrapping a Christmas present for me . . . put this note on top of it. So" he kept it.

Like planning for the future, preserving the past has multiple func-tions. It documents accountable truths and commemorates a meaning-ful past. It involves both recording past events (e.g., writing journals or memoirs) and archiving and curating objects of documentary significance (e.g., baby cards, matchbooks, and objects).

Figure 3. Matchbooks. Photo courtesy of the authors.

DISCUSSION AND CONCLUSION

Analyzing these two documentary tasks reveals three themes about the everyday life context within which they take place: everyday life is not unitary, different domains reflect different conditions and communities, and past- and future-focused tasks are not clearly demarcated. This section provides an overview of each.

Everyday Life Is Not Unitary

Everyday life for our participants comprised the multiple, sometimes overlapping domains of education, family, health and wellness, household, hobbies and leisure, social, community, and work. Not every participant participated in or spoke to us about all of the domains, but collectively these reflect everyday life for our sample. Within each domain, participants enacted social roles (e.g., student, father, person with a mental illness, friend, boss, leader, team member, manager, maintainer). Although our analysis shows that broad documentary tasks like planning for the future and preserving the past can support multiple functional roles and may fulfill the same kinds of functions across domains, each domain and its attendant roles and expectations also shaped documentation practices. For example, the physical items we saw and photographed documented their own history of use within a particular domain. Recipes were food-

spattered or scorched, reflecting their active use. A farmer kept her current in-field calendar in a clear plastic sleeve to protect it from water and dirt, and some of the past examples she showed us exhibited evidence of water damage. Another participant explained the water damage on a paper set of instructions for an upcoming medical procedure, evidence of its life "beside my bed": "It just sat there, and obviously I haven't moved it and it's been a coaster since."

Jones (2012, 52) observes that a single document may serve several ends; for example, emailing a link to a colleague may share information, strengthen a relationship, and invite reciprocity. We likewise found that single documents, or single document collections, multitask by documenting multiple domains. For example, the "coaster" started life as a letter reminding the participant to renew a warranty. She repurposed it by writing medical appointment instructions on it. "When I had to have one of my scopes done, it's on my Sears Warranty thing." A military veteran described the variety of domains represented in the two drawers of a filing cabinet: "I think I've got my income tax back to 1982 [laughs]. Um, my daughter's immunizations. A bunch of military stuff. Certificates. Some course assignments. Divorce papers, home insurance, anything to do with this condo, driver's license, RRSPs [registered retirement savings plans], my security clearance. Anything with Veteran's Affairs."

Different Domains Reflect Distinct Communities

The different domains participants engaged with reflected different communities of practice or communities of justification. As Byström (2007) observes with respect to work task performers, "Individual members are adapting to more or less exclusive memberships and within each to various roles that they either take or are given, accepting, often unconsciously, the conventions of the role(s)." Their "actions mirror the conventions of the community, and thus may be explained by a membership." Super (1980) notes that significant role expectations attend social roles in different domains. For example, in families with children, mothers are often assigned responsibility for organizational labor (Zimmerman et al. 2001) and take up the bulk of work, including documentation work, to support children's organized leisure (Lareau and Weininger 2008). Our data set contains evidence that participants are mindful of these kinds of role-associated expectations. A first-time mother described her mortification at arriving on the wrong day for her baby's doctor appointment and explained how this perceived failure to meet expectations as a parent had led her to change her documentation practices: "I put the doctor's appointment card up *there* [on a small shelf beside the front door] by the keys because I actually showed up the wrong day one time. Because I put it in my day timer on the wrong day. [laughs] So it was right on the [appointment] card. I just put it in my day timer wrong. So, that was

hugely embarrassing. So now I put [the card] up there." There is certainly evidence that feelings of accountability around everyday documentation reflect bureaucratic performance expectations (Levy 2016; Gershuny 2005). McKenzie, Davies, and Williams (2014) found that a managerial imperative pervades some aspects of keeping track in domestic contexts. Numerous participants presented themselves as managerial failures when they perceived a mismatch between the contents of a household list or calendar and the actual tasks that had been accomplished or events that had taken place. However, bureaucratized expectations did not eliminate more relational forms of documentation.

Past- and Future-Focused Tasks Are Not Clearly Demarcated

The study findings show that the tasks of planning for the future and preserving the past are not always clearly demarcated and often overlapped. This overlap played out in three ways. First, a single document like a calendar or list or a collection of documents sometimes represented items that planned for the future alongside those that preserved the past. The "reminders" area of one participant's agenda at once listed a newly published book to read and logged the recent closing of the family's much-loved seasonal outdoor shower. Refrigerator doors commonly housed a collection of items that simultaneously documented the future and the past (Taylor and Swan 2005). They held children's artwork as well as permission slips to be signed for upcoming field trips. Second, participants used past documents as-is in the future. Anniversaries of births, weddings, and deaths simultaneously commemorated the past and reminded participants to observe occurrences of the anniversary in future years. The farmer's reminder to guard against tomato blight came from her experience in the previous season so could also be considered part of logging last year's crop performance. A community activist explained that she had taken notes as she participated in a recent press conference. When asked what might spur her to go back to those notes, she responded that "the media might call me at any time on any issue." As someone whose perspectives were "frequently in media," she talked about the importance of documenting her own "talking points": "I keep a lot of what I do, and especially for media, because the statistics and information I will need and can pull out at another point." Yesterday's notes can therefore become tomorrow's to-do list, and last year's past-facing log can become this year's forward-facing reminder.

Moreover, as Levy (2016, 30) argues, documents may escape the chains of their creators and go out into the world to have a life partly independent of their creators' concerns: "They can be endlessly interpreted and reinterpreted, reused, subverted, and coopted for other purposes." One participant found this to be the case when she realized that a journal she

had written to record personally meaningful details had new significance as a bearer of accountable truth in relation to a family member's car accident:

> One thing I used to do was journal every day, and when [family member] had a large lawsuit because of her accident, it was amazing to me what information I had in those journals, not even realizing that at any point I would need to provide her a track of significant changes in her life. They wanted evidence of physical and emotional kinds of changes, and I'm like, "I can't remember back there" and then I was rooting around and came upon all my journals and I'm like, "Oh my gosh!" and so I had there, you know, "Spent the day cooking so that I can leave meals for [family member], she's just really weak." You know just stuff that you would never, really be able [to remember]. So that was actually a godsend.

Third, participants annotated and edited old documents to reflect changing practices and circumstances. Levy (2016, 25) argues that what is powerful about documents, regardless of their genre or material form, is their fixity, their ability for "repeatedly delivering up the same story at different points in time and space." This fixity enables talk to be shared and held in common and is a foundational building block of human culture. At the same time, Levy acknowledges that no document can maintain fixity "forever, for all people, for all purposes"; documents are therefore "static *and* changing, fixed *and* fluid" (2016, 36). As McKenzie and Davies (2010, 797) found, documents for keeping track attempt to pinpoint a particular moment and freeze it in time, which may not be helpful for the document creator or user moving through time and changing circumstances. Adjustments may be necessary. Many paper calendars and agendas contained items that were crossed out or that used arrows or rewriting to show that an event or task been repositioned in clock or calendar time. The revision of a recipe quantity to 110 grams and then "10 tablespoons usually" documents repeated past practice as the cooking team prepared and refined a household recipe in the real restaurant setting. This recipe with its various amendments therefore provides a guide to future practice imbued with the expertise and past practice of the group of chefs who trialed the recipe. Being able to record and revisit multiple time points in a single document was very important to some participants. While old to-do lists were frequently discarded after the items on them had been completed, in some cases they became logs of what had been done and not done, sometimes serving as evidence of meeting or failing to meet role expectations (McKenzie and Davies 2016). One participant highlighted the ability of her paper list simultaneously to represent past, present, and future by showing completed tasks along with those yet to do, and observed that this difference affected her sense of herself: "With [the phone] it disappears. You write a to-do list and I sort of erase it as I go. It's gone. When I can see

like this nice long [paper] list of pages of things [that are crossed out] I feel good about myself. Whereas in a phone . . . all that's left [laughs] is the things that are left to do."

Conclusion

Levy (2016, 202) contends that looking at documents as "talking things" allows us to see something of ourselves, "something of our striving for meaning and order, as well as the mechanism by which we continually create meaning and order. It is to see the anxiety within and behind this order. And it is also, potentially, to peek at that which lies beyond all formulations—'the unimaginable universe'—not just as an object of fear and denial, but of wonder and celebration." He argues that noninstitutional documents offer a particular and a desirable window for seeing ourselves as vibrant, multifaceted individuals. "Many of us keep personal journals as a way of knowing ourselves by putting ourselves on paper," he points out, but we explicitly disown other reflections: "Who among us wants to see the massive tangle of bureaucratic documents as reflections of ourselves, as external manifestations of our tendencies toward depersonalized control?" (Levy 2016, 189). In her Pulitzer Prize–winning novel *The Stone Diaries* (1993), Carol Shields tells the life story of Daisy Goodwill Flett. The novel itself is full of documents, beginning with a family tree and including photograph plates labeled with the names of the fictional characters and the real locations described in the novel. The final chapter retells the story of Daisy's life and death through documents, interspersed with her final thoughts and her children's reflections on going through her things after her death. The chapter begins with her obituary and meanders through a list of the groups she belonged to, from childhood to retirement home; a 1927 inventory of her bridal lingerie; the menu from a 1951 Garden Club luncheon; the recipe for Aunt Daisy's Lemon Pudding; a to-do list; a list of books she read, beginning with *Black Beauty* and ending with a half-read large-print mystery novel; a list of "Must-dos—long term"; a list of illnesses she had throughout her life, written in a way that might appear as a summary of her medical record; and a list of addresses where she had lived, including their dates of demolition, repurposing, or receiving heritage designations. When Pam first read this book in the 1990s, she found this chapter depressing, feeling that this massive tangle of everyday documents reflected the instrumental and the quest for order in Daisy's life, but not the wonder and celebration. Undertaking this study has led her to revisit and reinterpret this chapter several times. Taken as a whole, the personal and organizational documents our participants used to keep track tell a multifaceted story that reflects both the instrumentality and the wonder of everyday life; its intertwined bureaucratic and relational qualities; the slipperiness of past, present, and future as represented in documents that fix a moment as a snapshot in time; and the

domains that ebb and flow in importance and urgency over the course of a day or the course of a lifetime.

Our findings illustrate the ways that individuals may make different decisions, and may make different decisions over time, about the extent to which they create and use documents to erect, manage, and cross boundaries among the various domains of their everyday lives (Ashforth, Kreiner, and Fugate 2000; McKenzie 2020; Nippert-Eng 1996), for example, maintaining separate calendars for home and work and a spreadsheet only for athletic training, or keeping a journal to record a day's occurrences regardless of the domain in which they took place. Those designing documents and document management mechanisms would be wise to provide flexibility in this regard.

Finally, this article begins to characterize the interrelated tangle of everyday documentation and everyday life. If everyday documents are "talking things" (Levy 2016), what they tell us is that everyday life, at least for our participants, comprises a number of domains including but not limited to work and home; that documentary tasks reflect the characteristics and requirements of each domain and the document creator's social and functional roles within that domain, but that tasks retain some commonalities across domains. The relational and the instrumental may operate separately or may blend seamlessly or dizzyingly together. Future research with this data set will explore the contours of keeping track within specific domains (e.g., the family) and the characteristics of the full range of tasks and the ways that documentary and nondocumentary tools achieve those tasks in ways that might inform system design.

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