

**From Data to Done: Insights into Managing Workflow
ISC/SCI Virtual Conference**

May 13, 2022
Judy Dunlop

“Indexing is writing.”

Nancy Mulvany

*What is this about?
Would anyone look for it?
Is it worth the trip?*

Post-it on my computer

- We are writers. We have permission to be adventurous and imaginative.
- Readers read until it is “good enough.”
- Readers use different reading styles: some visual, some verbal, some abstract.
- Readers are browsers and searchers.
- When imagining the reader, think of the least knowledgeable and the most knowledgeable. Serve both.

Office

Equipment and supplies

- iMac 27-inch (2017), Logitech Trackball, Apple keyboard with number pad
- MacBook Air (for backup and maybe someday, travel)
- document stand, metal (holds 40 pages)
- HP LaserJet Pro M404dw b/w printer
- binders, about 20 (1-, 2-, and 3-inch)
- binder dividers, about 20 sets (dividers for 10, 12, 15, and 25 sections)
- 3-hole paper (Staples)
- butterfly clips (to hold 3-hole paper printed on one side)
- loose leaf rings (to hold notes section)
- pens, Pilot V7 Hi-Tecpoint blue roller ball, plus a few red pens

Software and subscriptions

- Cindex 4.1 for Mac
- Microsoft Word (for index files, for Comments feature, for my invoice template)
- Microsoft Excel (for my Master Plan: invoice number, invoice date, book title, author, publisher, invoice amount, tax amount, and misc. information)
- Adobe Acrobat Pro DC (for Advanced Search using whole words only and/or case sensitive; for adding header and a footer with large page numbers)
- Dropbox (for backup of Cindex file whenever I leave my desk and/or finish a chapter)
- Chicago Manual of Style online subscription

Pass 1. Mark-up. Fun factor 10/10

See Example 1 on page 6 and pages 9 and 10.

Comfortable chair, often in early morning or evening, a “pleasure read.”

Can be weeks or days before Pass 2 indexing.

Often overlaps with indexing another book at Pass 2 or 3.

Before reading: Prelims

- Check PDF to be sure there are no security restrictions.
- Use Acrobat to add page numbers in header and footer (18 pt., top and bottom)
- Print on 3-hole paper and place in binder with dividers.
- Place table of contents page at front, use for notes on number of pages, pricing, deadlines, anything important about the job. My master sheet for job info.

Before reading: Mark-up prelims

- Mark chapter page ranges, indicate two types of page ranges: chapter range (including notes) and text range (without references).
- Mark page ranges for chapter sections and subsections.
- Circle keywords in section heads.
- Mark separator line at each paragraph (draw line at paragraph break to right page margin). Creates a boxed space in right margin. Purpose: Flags the change of topic in a new paragraph and provides box for keywords.

Before reading a chapter, browse for terms in Notes and References

- Identify substantive notes and locate keywords and phrases that might be useful.
- Identify terms of art and keywords in titles of books and articles.

Markup during reading

- Graphics (lines, circles, squares, stars, check marks)
- Multiple graphics (single, double, and triple for emphasis)
- Symbols (male or female, \$, etc.)
- Abbreviations (OV for overview, country names, theorist names, such as F for Foucault).
- All caps when needed for emphasis
- Top of page: main keyword (useful reminder)
- Lines to connect ideas (crossing over text lines)
- My style: Completely overdone. Unnecessary, except it is the best way for me to build concepts to use for the index structure. I make a mess! But I engage mentally and physically with the text.

Reading: What I am looking for:

- “About” entries (big picture, overview, introduction). A place for the reader to start.

- Main entries without subentries (often names and places). Add **check marks** in the margin.
- Main entries with subentries (concepts, theorists, etc.). Use **graphics** to flag discussions and relations to other concepts.
- Cross-references (synonyms, closely related terms)
- Structure
- Queries for the author.

Pass 2. Index. Fun factor 6/10

See Example 2 on pages 6 and 7.

Set up Cindex file.

- Label file with author name and the word “desk”. Example: Keil desk.ucdx
- Font: Verdana, 18 points (easy to read)
- Main headings in bold (in Headings, change Text Style to Bold). The bold style will be removed after the final proofreading. Purpose is to increase ease of skimming headings.
- View full format, indented
- Abbreviations file
- Style notes (Use aaa to sort to top, main entry for notes to myself on special terminology, spellings, etc. Add notes as I go.)
- Style specifications for publisher. I have a file with the specs for each publisher. Copy and paste into current file. I use zzzz to force this array to the bottom. At the end of Pass 3, I check each specification. Example for UBC Press:

zzzzUBC style

vs (no italics, no period)
 bold first letter of each alph group; do not use alph headers
 Chicago page refs
 curly quotes
 em dash in page ref
 exact cross-references for text (no clipping)
 headnote for abbreviations
 italicized n and nn
 max 10 page locators without subs
 numbers as if spelled out
 one page number, delete
 province state abbrev in 2-letter form in parens
 punctuation following an italic word is italic (styled text after punct)
 table (t); figure (f)
 word by word

Enter terms into Cindex using mark-up as guide. My approach is to **overindex**. I add any information I need to help me understand the text.

During Pass 3 I will reduce the number of draft entries by about 20 to 25% so that the final index will be roughly 5% of the text.

Specific work processes

- Labelling of final vs. draft entries. Final entries are labelled in red. Entries that need more work are unlabelled.
- Search names and places. Use Acrobat “Advanced Search” feature. If less than 10 references (and they are not particularly important), enter into **one** Cindex record the main entry and all of the page numbers, separated by commas. These records will later be expanded so that one record (with 10 page numbers) will be changed into ten records, each with one page number. Label these entries with red to indicate they are checked and complete.
- Search concepts. Use Acrobat “Advanced Search” feature. Sometimes, especially if the text is difficult, I will locate all main discussions of the topic. I then draft some subentries so that I have an overview or sketch of the concept. If needed I enter sentences to explain it. The goal is to build my understanding so that later I can use the term properly. These unlabelled entries need more work. If I cannot think of how to word the draft subentries, I simply use “subs” as the subentry, which tells me these page numbers deserve a subentry, but I don’t know what to write.
- Additional outside research on incomplete or inaccurate names or suspected errors in fact. Using Acrobat “Advanced Search,” go to the name in Reference list, select and copy name and title of article or book, and then paste both the name and title into Google search window. Browse Google findings to find the full or accurate name of the author or title. Label in red.
- After I finish draft entries for each chapter, I save a copy of the Cindex file to the Drafts folder in Dropbox. I change the title of the Cindex file by adding a number. Example: Keil desk copy 8.ucdx. I then return to the “desk file” and I expand the index (which creates a new record for each page reference) and then I “compress” the index, which deletes duplicate and deleted entries.
- Whenever I leave my desk, I also save a renumbered copy of the Cindex file to the Dropbox folder. After I finish Pass 2 I will have about 25 numbered copies of the file in the Dropbox folder. These are very useful if I later want to locate entries I have deleted during Pass 3.
- Spelling (Cindex). Whenever I am bored, I do a spell check.
- Check Index (Cindex). Do at very end after all main entries are decided.
- Queries for author. I keep a Word file open and I use the Q’s in the markup text to flag the issue. For the author’s list, I locate the problem by page number, paragraph number, and line number. I describe the problem and suggest the change of wording.

Pass 3. Page check, edit, and proofread. Fun factor 9/10

See Example 2 on pages 6 and 7.

See Examples 3 and 4 on page 8.

Page Check

This is the stage when I shorten the index by about 20%. The fun part is watching the total number of entries go down as I work through the revisions.

- Use Cindex Find All to display all entries for page 1.
- Skim read page 1, noting mark-up. Sometimes I add a check mark on top of any word that appears in the Find All group.
- Compare the index entries with the text.
- Revise, combine, or discard entries and sub-entries, labelling them in red after they are verified.
- Add cross-references.
- Use Check Index and Spelling check occasionally.
- Repeat this process. Very slow at first, but speeds up dramatically as I move through the revisions. At the very end, all entries are labelled red.

Final Edit and Proofread

- Remove all red labels.
- Start at the A's (or at the Z's) and work my way down (or up)
- Review entries for sorting problems, particularly entries that are not sorted from general to specific information.
- Add cross-references.
- Look at the index from the reader's point of view.
- Add red labels to entries that have been proofread.
- Check for "late gathering" of entries needed. These would be ones I simply missed, but that I become aware of as I review the full index.
- At the very end, I search for all entries not labelled. Check these stragglers.
- Index Check and Spelling check, final.
- Use publisher specifications entry (see UBC Press sample above) to double check the specifications.
- Done!

I send the index to the author as an indented version in Word and ask for Comments for revisions. I also send a two-column run-in version so the author can see what the index will look like in print. After the author signs off on the draft, I send two files, an indented Word file and a run-in Word file, and I include my invoice.

Example 1: Mark-up in Pass 1

See pages 9 and 10 for scanned pages.

After Suburbia: Urbanization in the Twenty-First Century, edited by Roger Keil and Fulong Wu, published by University of Toronto Press, 2022, 435 pages.

This book is an edited collection of 21 chapters on global suburban research from Asia, Africa, Australia, Europe and the Americas. Final run-in index was about 20 pages.

I was given four weeks to complete the project. I probably spent about two weeks on the actual indexing and editing. Not sure how much time for the first pass reading.

I have indexed three other books for this author, and I am indexing two more collections this fall. Author accepted draft without changes.

Example 2: Comparison of Pass 2 Draft, Pass 3 Page Check, and Final Index

Pass 2 Draft

Font: Verdana 18 pt. Main headings in bold.

Lefebvre, Henri

about, 109–14, 117, 211

abstract space, 102n12

contemporary capitalism, 95, 98

The Critique of Everyday Life, 98

Everyday Life, 104

extended urbanization, 89, 410

extended urbanization and dissolution of boundaries between city and suburb, 109

generator of centralities, polycentricity, 410

implosion/explosion, 72

life space, 98

management of social space (oekonomia), 98

The production of space, 104, 220

repoliticization of the city, 89

right to the city, 409–10

shift from production to reproduction (life quality, everyday life) way of life, 95, 98, 225

shift from urban form to urban process, 71

subs, 97

The Survival of Capitalism: Reproduction of the relations of production, 104

theme???, 102n17

urban, 211

urban era, dawn of, 91, 98, 100

urban explosion, 410

urban fabric or tissue, 18, 87, 92, 129

urbanization as complete, extended, planetary, 289–90, 408

urban-natural, 100–1, 101n8
urban revolution (planetary urbanization; complete urban society), 10, 18
The urban revolution, 122, 142, 220
utopias
 concrete utopia, 88, 92
 experimental utopia, 88, 92, 97

Pass 3 Page Check

Font: Verdana 14 pt. Main headings in bold.

Lefebvre, Henri

about, 109–14, 119–20
alienation, 98, 102n12
capitalism as abstract space, 95, 98, 102n12
contradictions and inconsistencies, 110–14
everyday life, 91, 93, 97–8, 102n12, 102n17, 225
extended urbanization, 92, 109, 410
implosion/explosion, 71–2, 87, 90, 114, 408, 410
planetary urbanization, 10–11, 18, 29n1, 87, 89, 91, 109–10, 211, 289–90
right to the city, 89, 98, 409–10
urban concepts, 112–13
urban fabric, 18, 73, 87, 112, 290
urbanization processes, 18, 111–12, 408, 410
urban-natural, 93, 100–1, 101n8
urban revolution, 109–10, 119–20
utopias, 87–8, 91–2, 97, 101n8

Lefebvre, Henri, works

The Critique of Everyday Life, 98
Everyday Life, 104
The Production of Space, 104
The Right to the City, 111
The Survival of Capitalism, 104
The Urban Revolution, 110–11

Final Index

Lefebvre, Henri: about, 109–14, 119–20; alienation, 98, 102n12; capitalism as abstract space, 95, 98, 102n12; contradictions and inconsistencies, 110–14; everyday life, 91, 93, 97–8, 102n12, 102n17, 225; extended urbanization, 92, 109, 410; implosion/explosion, 71–2, 87, 90, 114, 408, 410; planetary urbanization, 10–11, 18, 29n1, 87, 89, 91, 109–10, 211, 289–90; right to the city, 89, 98, 409–10; urban concepts, 112–13; urban fabric, 18, 73, 87, 112, 290; urbanization processes, 18, 111–12, 408, 410; urban-natural, 93, 100–1, 101n8; urban revolution, 109–10, 119–20; utopias, 87–8, 91–2, 97, 101n8
Lefebvre, Henri, works: *The Critique of Everyday Life*, 98, 104; *The Production of Space*, 104; *The Right to the City*, 111; *The Survival of Capitalism*, 104; *The Urban Revolution*, 110–11

Example 3: Pass 3, late gathering of “concepts and terms” and “concepts and terms, specific”

concepts and terms: about, 3–5, 261–2, 281–2, 285–6, 307, 401–4; comparative research, 280–8, 291–5; conceptual innovations, 294–5, 313, 401–4, 403(f), 408–11; ending points, 294; flexible and blurred concepts, 10–11, 28, 109–13, 117–18, 261–2, 281–2, 285–6; global suburbs, typology, 402, 403(f); historical continuities and comparisons, 4–5, 11, 26–7, 71, 257–8, 261–4, 272–3; importance of, 401–4; key questions, 8–11; Lefebvrian perspective, 10; limitations, 294; MCRI research, 3–5, 280–1; movement to/from periphery, 12, 282, 307, 321–2, 402, 403(f); non-English terms, 261, 281, 307, 322; objects of research, 401–4; order vs. disorder, 404–5; post-suburban centre/periphery, 308, 324, 327–30, 362–3; scholarship on, 261, 281, 295n1, 307, 402, 403(f); statistical classifications, 10; “sub” and “periphery” as less than, 308, 324, 328

concepts and terms, specific: after suburbia, 264; agrarian urbanism, 129–30; census-convenient, 402; centres, 327–8; cityism, 263; continuous city, 409; desakota (village + town), 24, 363, 384; disjunct fragments, 11; edge cities, 362; extended urbanization, 87–8, 90–1, 289–90, 410–11; exturbia, 362; path dependencies, 266; peripheries, 327–8; peri-urban spaces, 131; planetary urbanization, 10, 12, 26, 29n1, 87–8, 101n3, 289–90, 321–2; post-metropolis, 71, 204, 362; post-suburbanization, 12, 324, 407; regional urbanization, 13; sprawl, 258; squatters, 258; suburban constellations, 10–11, 401; suburb and suburban, 112, 117–19, 261, 281–4, 285–8, 305–7, 321–2, 362–3, 401–2, 403(f); suburbanisms, 402; suburbanization, 4, 90–1, 101n3; sub-urbia and sub-urb, 327; technoburbs, 203–4, 362; typology, 402; urban, 112–13, 285–8, 307, 320–2; urban clusters, 13; urban corridors, 13; urban fabric, 112; urbanization, 11; urbanized nature, 409; urbanoid galaxy, 75; urban primacy, 313n3

Example 4. Pass 3, late gathering of “sub/urban theory”

sub/urban theory: about, 73–4, 109–10, 114–20, 257–9, 288–95; after suburbia, 280; causal analysis, 80n6, 265, 267–73; centralist bias, 72, 204; cityism, 91, 101n4, 263; concepts and terms, 257–8; conceptual innovations, 293–5, 408–11; contact zones (city/country), 259–65; distensive and tectonic forces, 73; distinctiveness of cities, 114–17; diverse and interconnected urbanisms, 279–80; ex-centric perspectives, 27, 87–8, 91, 260, 279–82, 293; extended urbanization, 87–8, 90–1, 410–11; facilitation and limitation, 73–4; fixity and motion, 73–4; global suburbs, typology, 402, 403(f); historical contextualization, 266–7, 273; historical vs. ahistorical approach, 258–61; interdependence, 113; key questions, 289, 328; materialist analysis, 290; order vs. disorder, 404–5; path dependencies, 73–4; recentism, 258–61, 272; specificity, 73; suburban poverty, 321–6; trans-historical comparisons, 261–5, 272–3; triad of city-country-urban, 101n6; “the urban”, 101n5; US suburb as “origin” model, 260, 281–2, 288–9. *See also* after suburbia; concepts and terms; concepts and terms, specific; Lefebvre, Henri; planetary urbanization

6 A Dose of Density: The Urban Counter-Revolution

RICHARD HARRIS

The dose makes the poison.

109-110

- Paracelsus

Over the past generation or so, "northern" urban theory has faced two major geographical challenges (see Connell, 2007). The first has come from what we now sometimes call the Global South. There, urbanization – embracing the growth of urban areas and a rising proportion of people living in urban areas – has proceeded on an unprecedented scale and at a bewildering pace. This development has raised questions about the causes, character, and consequences of the urban trend. The second challenge has come from the urban periphery, everywhere: the explosive and discontinuous sprawl of fringe development across the landscape. To an increasing number of observers, sprawl has raised questions of identity not only about what may be called "the suburbs" but also about the city itself. As Keil (2017) has observed, "much of the urban age is, at closer inspection, rather a suburban age" (p. 4). He is right, and this chapter tries to make sense of that fact.

The suburban challenge can be met in three ways. The first and by far the most common is to duck the issue – to proceed as if nothing had happened, or to acknowledge the fact but avoid definitions and barrel on regardless. I will say no more about this. Drawing above all on the ideas of Henri Lefebvre, the second is to argue that the continuing spread of urbanization has dissolved boundaries between city, suburb, and indeed the regions beyond, so that sharp conceptual boundaries have become unhelpful. Urbanization, then, is seen to be – or at least to be becoming – present in some form everywhere. Along these lines, for example, Keil (2017) argues that "as Lefebvre's revolution turns, the suburbanization of the city region takes over the planet" (p. 12). The third response is to argue that what Lefebvre (2003) called the

* urban revolution is not on the horizon and that it is still meaningful to make qualitative distinctions between types of settlements, although these are more difficult to identify because geographical boundaries have become so blurred. Through my involvement in a multi-year research project directed by Roger Keil, I have come to believe that such a response is defensible. I was responsible for coordinating research on the subject of land, one of the three main project themes. Among other things, this required me to read widely about developments in all parts of the world. With Ute Lehrer, I have indicated some elements of the results elsewhere (Harris & Lehrer, 2018), but I now welcome the opportunity to outline a more complete case.

The point of departure has to be with a critique of Lefebvre's claims. His argument about the urban revolution has recently been sustained by a number of writers, notably Brenner, Schmid, and Monte-Mór (Brenner, 2014; Brenner & Schmid, 2015; Monte-Mór, 2014; Schmid, 2016). In part, they have done so through a challenge to the "urban age" account that speaks of the city's exceptional qualities (Brenner & Schmid, 2014a). More generally, Lefebvre is viewed as a touchstone or logical extreme by many others (e.g., Iossifova et al., 2018; Merrifield, 2013). My argument in the first section is that this line of thinking is unpersuasive because it is in part illogical, contains an unresolved tension, and is incomplete. Instead, referring to diverse and often unrelated literatures, I suggest in the second section that what we normally refer to as urban places are indeed distinctive, both in terms of their character and also their effects. This is an old argument, the elements of which I survey in a recent work (Harris, 2021). Their qualitative difference is highlighted by the unique character of urban land: beyond a certain point, more density – a larger dose – changes the impact. In this context, it becomes possible to argue that the urban periphery, which for convenience I will in the third section refer to as "the suburbs" also has a distinctive character, again in terms of land. The peculiar qualities and significance of cities and suburbs define an agenda for counter-revolutionary work.

A Critique of Revolutionary Theory

110-114

As many writers have observed, Henri Lefebvre was a prolific writer who did little empirical research but who had a fertile mind and was capable – like William Blake – of cheerfully contradicting himself (Merrifield, 2002, 2013). Various ideas of Lefebvre have been picked up by others, and the present discussion focuses on the strand of his thinking that he developed most fully in The Urban Revolution (2003). It has two