

Dr. Roddick on Note-Taking and Obsidian

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Introduction

Below are some odds and ends that might be useful for graduate students, researchers, or any folks that may have joined or watched the [Obsidian](#) workshop hosted by the [Sherman Center for Digital Scholarship](#) session [on November 9, 2022](#).

The first set of things I've pasted are from a class ([Anthropology 3FF3](#)) I taught last year using Obsidian. It lays out both my rationale for working on note-taking (i.e. "smart notes") skills and why I think markdown and Obsidian are a good avenue for students. It then gets into some quite basic elements of using the program. (FYI, these chunks of text originally lived in an Obsidian database, where some of the features can be demonstrated).

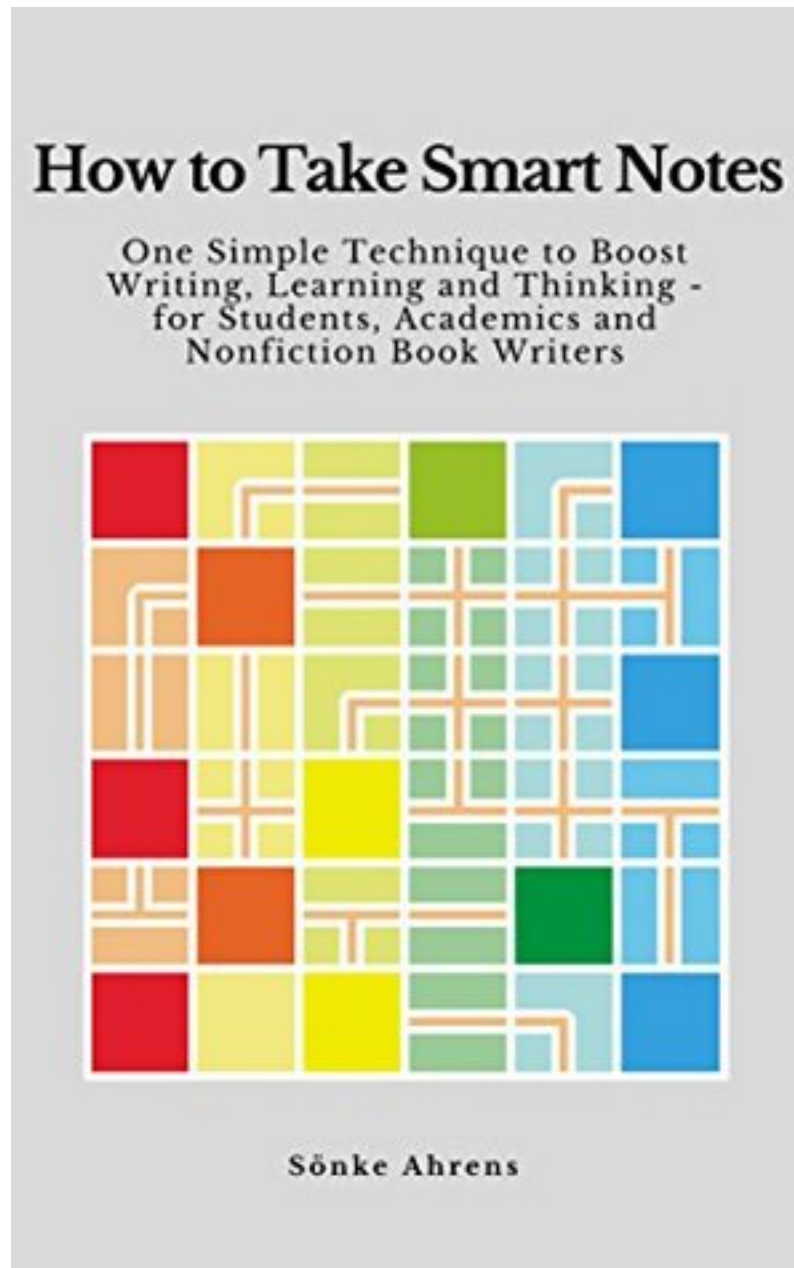
I've then laid out a few of my thoughts on "pros" and "cons" of the program, followed by a few plugins I rely on fairly extensively. (As I said in the workshop, if you are new to Obsidian, I would strongly suggest getting familiar with the core features: these can get you quite far, while not introducing needless procrastination!).

Finally, I've included a few resources I've found useful. Please note, in the workshop I did not get to my workflow of annotating and extracting reference notes into Obsidian. If there is interest in this process, I may add these steps to this document in the future.

**Apologies in advance for any typos!

From Anthropology 3FF3 Introductory Notes

Smart Notes & the Zettelkasten



Much of the note-taking I am stressing here comes from the "Smart Notes" by [Sonke Ahrens](#). I'm also asking you to read this [post by Dan Sheffler](#), on the 'Zettelkasten Method'. This term "zettelkasten" is linked back to a sociologist, who created [a fairly rigorous analog system](#) using so-called "slip boxes" that inspired the system employed here.

Here, I touch on some of the key points explored in this book, all of which you might consider this semester in this class (but also your other classes!).

On the value of "smart notes"

Ahrens makes a few simple, but important arguments through his book. Perhaps the most important for us is simply the value of good note-taking practices.

He stresses that note-taking is the foundation for the slow, yet fulfilling process of developing a paper:

> "To get a good paper written, you only have to rewrite a good draft; to get a good draft written, you only have to turn a series of notes into a continuous text. And as a series of notes is just the rearrangement of notes you already have in your slip-box, all you really have to do is have a pen in your hand when you read." (Ahrens 2017:107)

And this process can be really good for dealing with the procrastination we *all* deal with:

> "It is much easier to get started if the next step is as feasible as "writing a note," "collect what is interesting in this paper" or "turning this series of notes into a paragraph" than if we decide to spend the next days with a vague and ill-defined task like "keep working on that overdue paper." (Ahrens 2017:107)

On Reading Critically

Ahrens stresses that to produce good notes, you need to know how to read carefully and critically.

I've put [a

handout](https://www.dropbox.com/s/fvf5ch9sigv29fd/Practical_Tips_for_Reading_Critically.pdf?dl=0) in our shared Dropbox folder to get you started on this. That hand out stresses a **strategic approach** to reading. Ahrens makes similar points:

- Read with a pen in hand (or with the keyboard close to hand!). Take notes...if you read without taking notes, you may as well not have read it at all!

- You can underline/write in margins, or highlight (including using [[3. What is hypotheses? | hypotheses]] but this is not enough! (These are what Ahrens calls "fleeting notes - see below). You need to review them within a day or so and turn them into proper notes to use later.

- Translate key points into own words. This process of paraphrasing is a way of making sure you truly understand arguments that are being made.

- These literature notes are going to be archived. We need to transfer them into our external memory, where " we have an ongoing dialogue and where they can become part of our active set of ideas".

On Kinds of notes

- Fleeting notes: Reminders of information. Here you might capture every idea that is critical to your comprehension. Then slim it down into a manageable, critical summary.

- Project notes, are notes only relevant to on particular project. These can be archived after a project is finished (but not thrown away!)

- Literature notes: What you don't want to forget or use in your thinking/writing. Keep these short and selective, and ideally linked back to the PDF or source. (See the section on [[8. Kinds of Notes...Literature Notes|literature notes]] for how we will address this in this class)

- Permanent "atomic" notes (or zettel notes): By atomic, Ahrens means one note per idea. These should be precise/clear/brief. You should translate other notes to permanent notes when appropriate. These are the key puzzle pieces for developing ideas, arguments, and discussions. Scholars regularly combine ideas to generate something new. Ask yourself, how is this atomic note in conversation (in disagreement) with other notes? What questions do they generate?

Title of your Notes

- They should inform you, and not just grab your attention.

- Longer can be better, often as a clear descriptor.

- We'll work on these throughout the semester!

On Keywords

- Add keyword or tags (in obsidian using either the metadata section at the top of the note or by using #Hashtags tags). Use them carefully and sparsely.

- These keywords/tags are like "entry points" into a discussion with your other notes. Ask yourself, "in which circumstances will I want to stumble across this note, even if I forget about it?"

- Keywords point towards topics you are working on/interested in. These tags therefore requires some thought. They should lead to "a deeper elaboration of the note itself and the connection to other notes". We'll work on these throughout the semester!

Information that goes into a Permanent Zettel Note

- The first sentence should be a description of content.
- In filling your note out, ask "What does it mean? How does it connect to ... ? What is the difference between ... ? What is it similar to?"
- Only write a note if it helps with our own thinking on a class theme, a research paper, or something else you are working on.
- Think about the single idea that prompted the creation of this note file. Consider this as a rough draft of something being written.
- Treat it as if space were limited. Each note should fit onto the screen: no scrolling. About a paragraph. - if you have more than 300 words or so, you likely more than one note. That's ok! Split them up, link them, and carry on!
- We'll work on these throughout the semester!

Connections to other notes

- Add notes to other notes or links on other notes to your new note
 - Find old notes and create links. (In Obsidian, if you type `[` a modal will pop up. As you start typing, if that text exists, the note name will appear and you can make a link. See details in [[5. Using Obsidian | our discussion of using Obsidian]] and [[11. Making connections between notes | the section on making connections between notes]].
 - Look for contradictions, inconsistencies and repetitions. This is about elaboration: the meaning of what we read, how it informs different questions and topics. Our vault is storing facts/information...you should aim for elaboration. Review contents of old notes...and feel ok with editing them.
- > "The ability to spot patterns, to question the frames used and detect the distinctions made by others, is the precondition to thinking critically and looking behind the assertions of a text or a talk. Being able to re-frame questions, assertions and information is even more important than having an extensive knowledge"

Note-to-Note links

- This is the most common sort of links.
- Simple connections between notes, but can generate new lines of thought.
- Making these connections is not a "chore" or maintenance... "The search for meaningful connections is a crucial part of the thinking process towards the finished manuscript"

Topic notes

- Eventually you will want an "overview of topic" link. Here you include a list of all other relevant notes to this topic or question. (Ideally with short indication of what is on these notes.). "This kind of note helps to structure thoughts and can be seen as an in-between step towards the development of a manuscript."
- Topic notes will change over time, and might lead to another note with different topic structure. It is expected that you may have to "change the entry in the index to this new note and/or indicate on the old note that we now consider a new structure more fitting."
- For this class, this will be the kind of note you generate for your final paper. I will post an example of topic notes later in the semester.
-

Playing with notes

- Copy all notes then re-order them
- Look for what is missing/what is redundant
- Try out ideas and give time to go back to reading/note-taking to improve your ideas/arguments/structure of papers.
- Translate into something coherent and build argument. Find holes in arguments. Fill them or change your argument.
- Build clusters, combine with other clusters. Puzzle with notes and find best fit. This is meant to be playful!

On big picture/Draft writing

- Outlining and changing outline is a very different task - deal with the whole argument.

- Bring all into linear order.
- You will find yourself having to decide what does not need to be written. (So, the opposite of the "blank screen" problem).
- Every time you cut something out, copy into another document, in case you need to come back to it.

Why you, as a student, should use it

Hopefully this summary gives you all a sense of the value of this kind of note-taking - and by the end of the semester you should have a good idea of the value. Ahrens ends his book by stressing why this technique may be worthwhile for you, the undergraduate student:

> “Another reason why this technique is still a hard sell is that most students only realize the need for a good system when they are already struggling with their writing, typically towards the end of the university program, when a bachelor’s, master’s or doctoral thesis needs to be written. It certainly still helps, but it would have helped much more if one started earlier – very much like saving for retirement. It is also difficult to change behaviour in times of stress. The more pressure we feel, the more we tend to stick to our old routines – even when these routines caused the problems and the stress in the first place.”

So, let's hope a new, playful digital note-taking will convince you of this system!

Why is this class using this approach?

Our class will be putting into practice careful note-taking, but also showing the larger benefits of building up connections between ideas we encounter in the readings and discussions we have. I believe that Obsidian will be a useful tool for several reasons.

...because we need to read critically!

Hopefully by now you have taken enough classes in the Social Sciences generally, and in Anthropology more specifically, to understand the importance of reading critically in order to evaluate complex arguments and to generate your own empirically grounded (and theoretically aware) positions. A key factor in this is to read critically, but to read critically is to read with a pen in

hand, and to take ==smart== notes. (See more in the [\[\[Practical_Tips_for_Reading_Critically.pdf|practical tips for reading critically handout!\]\]](#))

...because we want to learn to "take notes" but also "make notes"

Note taking - the kind you often do listening to lectures or reading books - is often about helping you to pay attention. Note-making, in contrast, is about leaning forward and trying to add to a conversation. We need to do both, but far too often we get wrapped up in note-taking (and even then, it is about frantically "recording", not actually taking note!). Note-making is about wrestling with the ideas you encounter and trying to make linkages across domains, to think critically, creatively, and to make connections. To find unexpected ideas, and to make sense of debates like those in Andean archaeology, and even try to make a contribution!

...because we want to engage key debates!

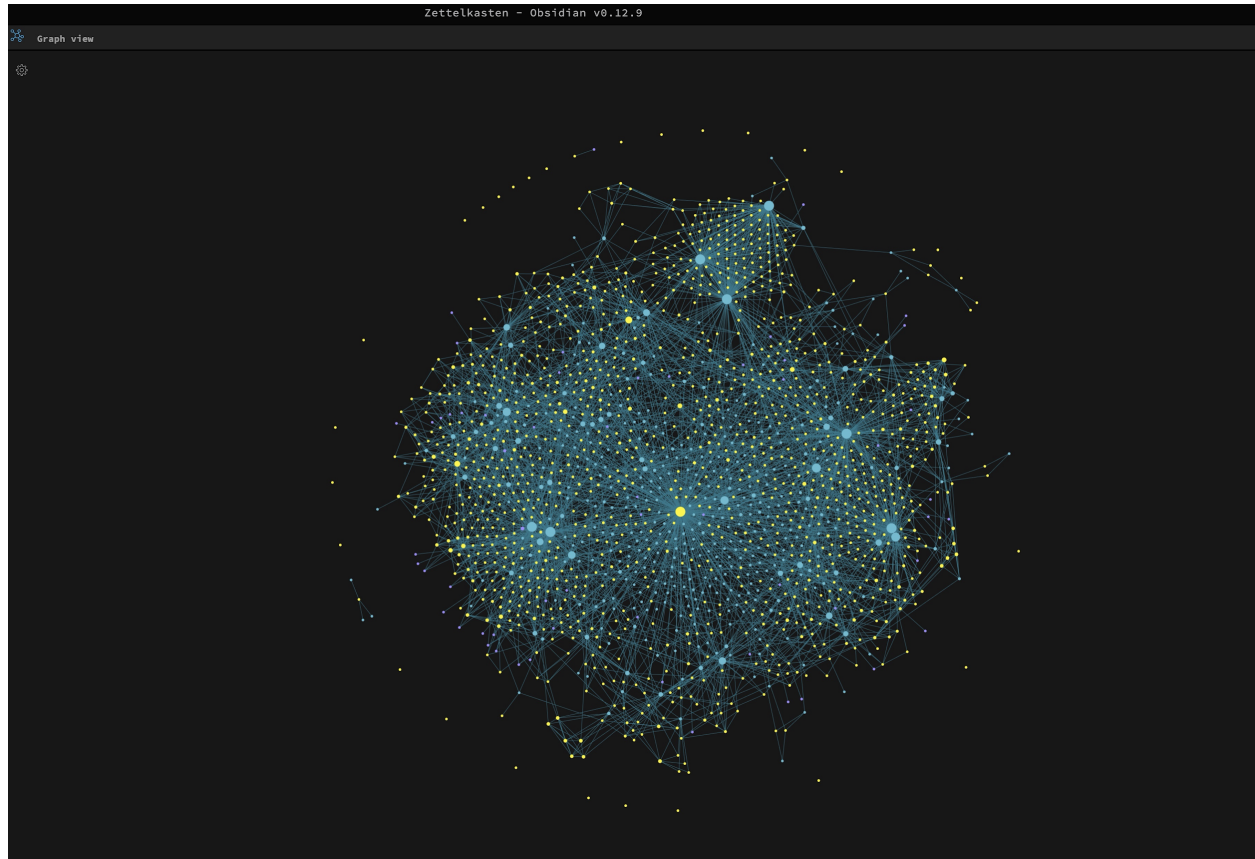
The archaeology of the Andean region, like any other place with deep material heritage, has a wide number of key debates. Scholars argue about the role of climate change and sociopolitical dynamics, they argue about the presence and nature of the state, and even the basis for comparison across time. These debates hinge on good data but also evaluation and ordering of that data, information that sometimes is hidden behind complex language or simply bad language. Note taking and making in this class will help tease these issues out, and prepare us for in-class discussions.

...because we need to write before we are ready!

You are busy. We are all busy. Deadlines for assignments rush up on us. To deal with these stresses, we need to start writing before we are ready. There is a tendency to work in a linear fashion. But to write is to think. This means that if you are holding off your writing to an all-nighter before your assignment is due, you are waiting to think. (Or, to use a metaphor, you are trying to run a marathon without putting your running shoes on until the morning of the race). Incremental notes will help every step of this and other class.

...because we can build a web of our own knowledge!

Finally, the system we are using has a rather satisfying visual element. For the original zettelkasten approach, this was a file cabinet of index cards accruing. For us, it is watching a web of connections grow as we link our ideas/notes. More on this in the next sections on Obsidian!



Dr. Roddick's vault of research notes as of July 2021. We will not build a web quite so large in this class, but the goal is to build a similar connected web of ideas around Andean Archaeology!

What is Markdown??

Ok! So you now have a sense of why we might want to mark up a text. But this semester we will be writing our notes using a specific kind of text. Markdown is a way of writing in plain text that is well suited for writing on the internet. It is an alternative to WYSIWYG (what you see is what you get) editors (like Microsoft Word), which use rich text that later gets converted to proper HTML. This means you need to add "modifiers" to make your text (enclosing a word with asterisks make them **bold**, or two *italics*). It can actually be a much quicker way to write (you don't have to wade through menus)! You can easily add headings with hashtags (with each subsequent one giving more depth). Markdown texts are saved as .MD (rather than, say, a Word document that is .docx).

This format of file is considered relatively "future-proof", when compared to file-types like Word, as it is an open, light weight system. It is also extremely useful for linking between texts, but also doing more complicated code-actions on them. (We will only touch on the latter this semester.)

Preview and Editing

...As you read through these #👉help-me files, I'd encourage you to toggle between edit and preview mode to get used the format. (As I highlight at the top of all these "Getting Started files", you do so by pressing command-e). Once you get familiar, this is a really quick way to navigate!

Markdown also easily allows you to see things in light or dark mode or in various themes. That is because they draw on stylesheets (called CSS, or Cascading Style Sheets) to be applied to the markdown text. In Obsidian, hold down command-p and type "dark", click on "use dark mode". Not my style, but perhaps easier on the eyes?

If you want to try changing the theme, hold down command-comma to bring up the settings, go to "Appearance" and scroll down to try a few community themes.

... Did you try some? Some are wacky. Others can make the layout confusing. I tend to like things rather simple. (My current favorites include "Obsidian Nord", and "Big Sur Aesthetic", but you'll find one that works for you!) But hopefully you noticed how the formatting of headers, links, etc. change.

A few other key markdown tips

Hashtags: 1/2/3/4, etc hashtags are different levels of titles.

#Hashtags: a hashtag then a word (with no spaces) like, #👉help-me is a tag. Tags are really [helpful entry point](https://help.obsidian.md/How+to/Working+with+tags) to a topic and A group of notes. A debate in Andean archaeology might receive 1, 2, or 3 different tags. We will be using tags for your contributions to [[00. Read First|discussions]]

I just used two other neat tricks. First, I embedded a link to the web, using [](). Then I connected to an internal link, by using two square brackets, with the text separated by using a bar. [[]]. Fun!

[[bracket]]

Three dashes result in a line break.

...and so on!

There are lots of other ones markdown formatting tricks can be used as seen in the help file [here](#). Much of what is required to get through the course I have set up as templates for you to fill in, so not to fear! And you'll can the hang of much of this by writing notes, and see what your peers are doing by toggling between editing and preview node. But do note that some markdown are code blocks to do some fancier things like timelines or generate "dataviews". More on that soon.

Using Obsidian

The last section introduced Markdown. There are many different popular free and paid markdown editors. For instance, [Ulysses](#), [Bear](#), [Caret](#), [Typora](https://typora.io/), etc. This semester we are using the relatively new Obsidian, a tool that is very well suited for [[1. Smart Notes & the Zettelkasten|a zettelkasten]].

What makes Obsidian particularly useful is that it simply sits on "on top" of a stack of files in a folder on your computer for easy linking and discoverability. This means that the files are not stuck in a program, but are safe on your computer (or tablet/phone). Obsidian calls a folder with markdown files in it a 'vault'. This vault can live anywhere on your computer (your icloud folder, your gdrive folder, etc.). In this class we will posting the notes in a class Dropbox folder (if you don't have Dropbox, I explain how to set it up below). While acting as a shell to your files, Obsidian also helps you identify connections, backlinks and outgoing links, between your notes. It visualizes them as a graph too. In this class we will use Obsidian to develop and track our notes, and to find connections between evidence and arguments.

This section discusses setting up Obsidian, getting your class vault going, and a few basic elements of the tool. We will also discuss this tool in [[1. Sept. 9 To Do |our first class]] and share our set-ups in week 2.

A few key commands

****The command Palette****: To bring up the "command palette" hold command-p. This brings up all your menus, and you can find all your options (start typing to find something quickly).

****Settings:**** Hold "command" + "," to bring up the settings. Take a quick gander!

The file explorer

All your notes/files are on the left hand side under the file explorer. If they are not visible now, push the > button in the top right corner to expand the left hand band to show them. The folder symbol at the top will show them all.

Panes

If you want to open a note up in split view, simple click on the note in the file explorer while holding down the command key. You can open many notes at once, if this is convenient. If you click on the three vertical dots (⋮) in the top right of the window, you can choose to "split vertically" or "split horizontally". Give it a try! To close a pane either click on the X in the top right corner, or simply hold down Command-W.

Search

The magnify glass symbol brings up search. But if you have an idea of what you are looking for, try the "quick open". Press Command-O, and start typing. (Try it now. For instance, try searching for "working with images".)

Graph view

One of the more impressive parts of Obsidian is tracking the web of notes you create in a course like this, as I discussed in the following section (Hold the command key while clicking on this link to open in a new pane) [!\[\[2. Why is this class using this approach#^b3d0f1\]\]](#)

On the left hand bar you can see an object that looks a little like a coronavirus (yikes) without spikes. Pushing on it will bring up the graph view. Let's do that now. First, let's split vertically again by using the ⋮ three dots. (Or, you can bring up the command palette- command P - and start typing "vertical", then enter to choose "Split vertically"). Once you have clicked on that new panel, click the graph view.

Ahhhh.

This is one of the nice features of Obsidian. It shows you the connections between all the notes (those that are linked). It can give you a good sense of the connections between the notes. Zoom in (using your mouse wheel, or pinching on a touch pad) and you can see some note titles. If you click on a node, you can open that note.

Within the graph view you can search by tags, by content, etc. You bring up the filter pane by pressing the  icon in the top right corner.

Note that you can also see graph view for local files (called "local graph view"). Let's try that now. Close the graph pane you had open (command-w). Click the  in the top right corner and choose "Open local graph" (Or hold down command-p to bring up the command palette, and type in "local graph view"). Here you can see all the incoming/outgoing links of this page. Just like the vault graph, you can click on the nodes to open a particular note.

Key Plug-ins for this class

Okay. Before going any further, we want to make sure a few key core plug-ins are turned on.

- Click "command" + ","
- Click on "Core Plugins"

Here make sure that the following plug-ins are turned on:

1. Tag pane
2. File Recovery
3. Starred
4. Backlinks
5. Graph View
6. Command Palette

(Many/most will already be on, but it is important to check)

We also want to install a few other "community plug-ins", that will help things run smoothly in this class. To do this:

- Click command -,
- Click on "community plug-ins"
- Make sure Safe-mode is "off" (this allows us to install a few key extras)
- Click to "Browse" community plug-ins. You want to find the following plug-ins:

1. Buttons. This plug-in will let you click on the buttons I have created on some pages, including quick ways to set up templates.

2. Timelines. This plug-in will let you create timelines from event notes. Super useful for keeping track of things! I will explain timelines briefly in [[10. Kinds of Notes... Event Notes|event notes]]
3. Dataview. We will return to the power of Dataview later in the course, but it allows you to search notes to find ideas generated in your notes this semester.

Other useful plug-ins

I've also found the following useful to play with. (But none of these are required!)

1. Table of contents: A quick way to generate a table of contents for a page. (You'll see that I have employed these on several of these #👉help-me pages). You do need to be using the hashtag headings/sub-headings for them to work. These will be not all that necessary for most of your notes, but for longer notes associated with your final paper, they may be useful.
2. Pandoc: Want to export your notes to a Word file? To a PDF? This is the way to do it. But you need to first install Pandoc on your machine ([here](https://pandoc.org/installing.html) for mac or [here](https://github.com/jgm/pandoc/releases/tag/2.14.0.3) for PC. This is likely not necessary for this class.

Working with images

This is a visually rich class, and each week you will be seeing a large number of photos of archaeological sites, of beautiful pots, of finely-made textiles, but also photomicrographs of carbonized food remains, of climate records, and maps...lots of maps.



In order to develop positions on debates, archaeologists implicitly or explicitly draw on visual information. I expect you to as well.

Finding, "capturing", and placing images

You might find interesting visual information in books, or in PDFs, or elsewhere on the internet. This is fine, but do your proper diligence, and make sure that you can clearly identify where they originally come from and give credit. In order to save these images, you can right click to save them to the class vault media folder in the class vault. . Or you can take a screenshot, and place this in the media folder. Or you can drag a drop them into the media folder in the side bar. Finally, you can simply copy and paste it into your note. If you choose this last option, make sure you have moved the image into the media folder (it may instead simply be in the general vault, not in a specific folder.)

****Please**** do not put super high resolution images in the folder...it simply isn't necessary for on-screen viewing, and will eat up your Dropbox allocation.

What to name them?

Once you have found a good image, and made sure that the image is placed in the "Media" folder in the Anthropology 3FF3 Vault, you'll want to rename them. Right click the image and choose "Rename". Please title your images in a clear way, so that if we want to use them in different notes they are easy to find!

Cite your images properly!

Images, like the information you are paraphrasing, need to be [[AAA Citation Style|cited properly]]. One way to identify this information is to identify it within a quote box, as seen in the Paracas textile image shown above. This is done in markdown by simply including > before hand.

> this is a quote box

* Please note, in your final paper, images should live in an appendix, not in the body of your text.

Making connections

Once you have written up your literature note, your zettel note or your event note, you need to think carefully about **how the newly created notes connect with your existing knowledge**. If you find some connections, connect the new notes with the older notes already in your system. Ask yourself:

- How does this idea fit into what I already know?
- What does this idea mean for some other idea that I already have?
- Does this contribute to, contradict, or explain another idea that I already have?

A major benefit of making these connections is that it helps you to remember the content better. You will remember things (and understand concepts, debates, etc.) much better if you connect them to things you already know.

In Obsidian, you are making those notes using the **two square brackets** (`` **and** ``) around the name of the note **you want to link to**. It is this way we will build our web of ideas, and explore connected issues. Try this now.

Obsidian Pros and Cons

I think some of the pros have been laid out above, but here I'll give a few more explicit things that I think make Obsidian a useful tool. The Cons list is rather brief (but also perhaps some good things to watch out for).

Pros

Markdown files in a folder

This program just sits on top of markdown files in a folder. Markdown is just text. It is lightweight and futureproof. It can be read by a large number of programs. I have Devonthink (a wonderful Mac program) index my obsidian notes. I sometimes use iaWriter on my iPad to work on my Obsidian notes. Super flexible! It also means you can easily have several vaults. I currently have one main one for my "Zettelkasten" (i.e. all research/writing/thinking stuff), another for administration (I am just starting a term as department chair, and am finding the ability to link people, problems, projects etc. extremely useful) and several collaborative projects (see below).

Linking

Linking is what really won me over. The ability to simply throw some `[[ ]]` around some text to link means you can develop ideas, concepts, etc. really quickly. You can also easily link to things outside the program - whether that is emails on your computer, images files on the web, or even embedding video. Once you start linking, any other program that doesn't have this ability feels quite flat.

Templates

I love having templates. I have them set up with keyboard shortcuts. Hit a key, and your standard note form comes up to fill in.

Plug-ins

There are so many plugins to be used. Perhaps too many (see below). This makes the app really flexible. (Also see below for a few of my current fave plug-ins)

Collaboration

I understand the developers are working on shared vaults. But for the last few years I've been using Dropbox as a useful way to collaborate. So, for the class above, we simply had a shared Dropbox folder with all our files in it. (There was the occasional sync conflict if folks were working on the

same note at the same time, but it really didn't happen that often). I am using it for a collaborative writing project right now, along with an archival project with several colleagues.

...there are probably other pros....I'll add more here when I think of them!

Cons

There really aren't many here to be honest! The program is free to use, and it is easy to get your data out (actually your data is never "in": again, just text files with an overlay). The main issue, however, is perhaps becoming too reliant on community plugins and constantly chasing the next shiny feature. The community plug-ins are just that, and I do worry sometimes about becoming too reliant on one and then the developer decides they are no longer interested in maintaining them. And it can be easy to procrastinate with setting up the "perfect system". (See the proliferation of YouTube videos by "productivity gurus"!)

Some of my current plug-ins

As per my warning above, I currently have *far* too many plugins. Below are the ones that I find particularly helpful, even critical. Most of these are "community plugins".

Cross-Reference Navigation - Still a bit rough around the edges

Dataview - a pretty deep plugin. Allows you to collect information (ie. you could develop a table of all notes with a certain tag, and include particular elements). If you want to use this it may make sense to dive into YAML (ie. a kind of frontmatter). .

Excalidraw - allows you to draw (with Apple Pencil on iPad, or just using tools on a computer) and link. Think a clever whiteboard. The developer moved *fast*, and [offers a pretty spectacular YouTube channel](#) walking you through changes.

Hover Editor - hover over a link and see a preview of the note, which you can then edit without opening it. Clever!

Obsidian Leaflet - really quite useful for archaeologists but I imagine for all sorts of researchers. A map plug in. You can use ESRI data for a nice embedded map, and place note titles. I'm building site databases in my zettelkasten this way.

Omnisearch - A better, and super fast search.

Tag Wrangler - Make sure you turn on the “tag pane” plugin offered by Obsidian. Once you’ve done this, Tag Wrangler is **really** useful — you can rename all tags quickly and painlessly

****New. Canvas!** Incredibly useful way to layout your notes, create notes. A whiteboard for Obsidian. This is a core plugin.

Useful Obsidian Resources (May add more here in the future!)

- Have a question about Obsidian? [The forums will most likely have an answer](#)
- Want to keep up with changing landscape of Obsidian - from new plug-ins, to links to guides? Eleanor has your back with her [Obsidian roundup](#).
- New to Obsidian? Check out [Shawn Graham’s starter vault](#)!
- Youtube is full of folks talking about Obsidian, although it is a lot to weed through. [Nicole van der Hoeven](#) is pretty good, as is [Danny Hatcher](#)