SMARTNOTES
Transcript

0 Introduction

0.1 Overview

Welcome to our first session! Let's start with a brief overview. The course is structured in five main sections: First, we will show you how to set everything up and get a grip on the basics. We start by installing Obsidian, showing you the starter kit we provide, and walking you through the basics of the software so you will find your way around it. Afterwards, we briefly remind you of the main principles of Smart-Note-Taking and how we intend to implement them in Obsidian here.

To get going as quickly as possible, we will create the first notes together and build a kind of dashboard for you to have an overview of your topics. The goal is to have a basic Zettelkasten framework for everything that follows.

At the end of the first section, we will show you how to set up an external reference manager, which is optional, but highly recommended. Especially researchers and academics, but also everyone who wants to keep track of their sources or needs to adhere to certain citation standards, can hardly do without having one dedicated place for all references. Here we will walk you through the setup of Zotero, our reference manager of choice, and show you how to connect it with Obsidian. After that you will be able to create basic literature notes with a simple keystroke.

Of course: If you are already familiar with Obsidian, feel free to skip the installation part and how the basics work. Just skim through it to see which Obsidian features we will use in the course and which ones we leave out.

The second section is all about mastering the basics of digital smart-note-taking. I will show you how to write and connect permanent notes, how to capture and process fleeting notes, and discuss different forms of literature notes. As a reminder, we will also briefly discuss the differences between these types of notes, how to ensure you can always distinguish them, and what kind of titles make sense for each.

This is followed by the third section, in which we will introduce two more types of notes: Hubs and Index-Notes. They will add structure and a layer of hierarchy to an otherwise quite rhizomatic organisation of our notes. This will help us to keep an overview, navigate through our Zettelkasten, and also compensate for the lack of spatiality an analogue Zettelkasten provides.

With the focus on structure, the whole section is dedicated to the question on how to deal with increasing complexity. We want to make sure you put your Zettelkasten on the right track right from the beginning, make it future-proof, and can grow without becoming overwhelming. The main lesson we hope to get across here is that - if done right - addressing the increasing complexity is not so much a question of maintenance, something we need to do to keep the system running but is actually the crucial and most interesting part of the process of thinking in writing itself. Managing complexity means building structure. How we structure our notes should mirror the way we structure our thoughts. Because structure is the very expression of the way we think about a topic. Therefore, we give that section a bit of extra attention.

We will also address typical pitfalls at various stages and answer questions that typically arise after having amassed quite a few notes.

The fourth section is then all about output—how to turn our notes into articles, books, presentations, or whatever output means for you. What we hope for here is that it becomes obvious that "creating output" is not really a distinctly different step at the end but something we were concerned with right from the start: the whole process is meant to be geared towards producing output.

But this is now also the section in which we will address the type of notes we haven't really talked about before: Project Notes and where they have their place within Obsidian.

Now, the fifth section can be seen as a bonus-section. In this section we will introduce the add-on Dataview, which can be a bit daunting in the beginning as it involves writing a few lines of code but is actually quite simple and can be done without any previous knowledge. You do not have to do anything we recommend there, but I think you will want to when you see the power of Dataview. We have also prepared everything we talk about here so that you only need to make a few adjustments. Dataview can help us to tilt the whole Zettelkasten even more towards output. It can automate certain steps and point us into the right direction in case we are stuck.

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0.2 What you can expect

Before we start with the installation, let me quickly address Obsidian's greatest advantage, which is at the same time its biggest risk: Almost everything is customizable, the setup can be improved infinitely. On top of it, a lively and creative programmer's community constantly comes up with a new feature, add-on, or idea that seems interesting enough to check out.

That's fantastic, but the risk lies in getting bogged down in technical details and trying to make something perfect, which is by nature imperfect: Writing with the Zettelkasten is always a work in progress. And so is its structure. As our ideas develop, our needs for the system change as well. The Zettelkasten system is pretty future proof, but not because it is perfect and without flaws and rough edges, it is pretty future proof, because it is evolving constantly - along with our thinking (hopefully).

In short: This is not an "Obsidian - and everything you can do with it - course"; it is about how to set up a digital Zettelkasten with as little fuss as possible and with a clear focus on what is most important: your ideas, and how you capture, combine, and develop them into something worth sharing with others. This is why we ignore many of Obsidian's features, as ingenious as they might be. The secret to an efficient use of Obsidian is to ignore most of what it can do.

To make things easier, we have provided you with a starter kit, which is a pre-configured Obsidian vault, so you don't have to set up everything yourself.

The vault we prepared contains a few example notes, but not so many you have to do a big clean-up first. It comes with the recommended add-ons installed and the settings are adjusted for the purpose of a Zettelkasten with a basic setup.

Not everything can be pre-arranged, though, and you also want to customise it to your liking or make it fit to your choice of accompanying apps, file-setup and/or operating system. During the course, we will sometimes show you alternative solutions to a problem or mention alternatives to our basic setup, but try not to overwhelm you with options. When we mention alternative solutions, we will also give you the information you need to implement them.

But keep in mind one thing: Everything we describe here and how we set up the starter kit is tried and tested and based on a real-world Zettelkasten containing thousands of notes developed over many years.

The Videos usually start with a methodological reflection, continue with a more detailed description on how to set something up (for example, the settings of the

apps or the Zettelkasten workflow) and often end with a suggestion for an exercise to put it into practice. The methodological reflections are key for multiple reasons: We believe a professional must understand the reasons for doing something in a particular way. And a good understanding is in our opinion the prerequisite for adjusting the system to one's needs. Also, we just don't believe in just giving someone instructions to follow.

We hope you enjoy it!