Note Taking

Notes and the Tools We Use

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July 2022

Notes Agenda

- whoami and whyami Doing This
- Broad Category of Notes
- Useful Features
- Tools Comparison Chart
- Screenshots from Evernote, OneNote, SimpleNote, and Obsidian
- Pros/Cons for Evernote, Onenote, and Obsidian
- Deep Dive on Obsidian

whoami and whyami

```
(base) jerryharris@Jerrys-MBP notes % whoami
jerryharris
(base) jerryharris@Jerrys-MBP notes %
```

Apropos Background

tl;dr - years and years of trying different methods and tools of taking notes

Tool Used	Use Cases
Steno Pad	Checklists, Meeting Notes, some planning
Emacs Outline-mode	Outline, Checklists, Planning, Meetings, Writing
Mind Map	2D Outline, Checklists, Planning, Meetings, Writing
Evernote	Outline, Checklists, Planning, Meetings, Writing, Web clipping
Airtable	Checklists, Status Reports, Presentations, Knowledge building, Interviewing, Data Gathering, Analysis/Calculations
Obsidian	Outline, Checklists, Planning, Writing, Presentations, Knowledge building, Publishing, Interviewing, Analysis/Calculations

whyami doing this?

- I haven’t found a system that satisfies all my use cases … until now
- The tool I’m using now has also introduced me to new use cases
- Interested in sharing with others what I’ve learned

Broad Category of Notes

Code	Name	Description
N1	Simple Text	unstructured text, ad hoc, short-term, stand alone notes
N2	Structured Text	Simple Text + outlines, check lists, hierarchical, short- to medium-term
N3	Rich Text	Structured Text + lists, pictures, bold/italic/underline, tables, daily notes
N4	Content	Rich Text + headers, TOC, tables, publish-ready
N5	Second Brain	Content + super enriched content, full-text search, plugins to enhance and add functionality, super customization, backlinks, graph view

Other Useful Features

Web clipper: *a browser extension that captures content from current page into a new note*

Publisher: *publish a set of notes for sharing with others on a Web site or PDF document*

Plugins: *adds extra functionality and possibly integrates with 3rd-party services*

Freehand Drawing: *highlighting, marking up, shapes, lines*

Background image: *different images to represent lined paper or graph paper*

File Embed: *embed a PDF or other types of files into the note; preview of the PDF is "extra credit"*

Note linking: *links across different notes of "files"*

Note organization: *organize notes into folders, tag notes with #hashtags, sync across devices*

Themes: *switchable colors, layouts, dark/light mode, etc.*

Search: *full-text, titles, file names, etc.*

Platform Decoupling: *contents stored in local files*

Tools Comparison Chart

Tool	Note Types	Main Features
Evernote	N3	Web clipper, File Embed, Note Linking, Note Org, Search, Proprietary format
OneNote	N3-ish	Drawing, Background Image, Note Linking, File Embed (no preview), check lists (poor), tables (buggy), Proprietary format
SimpleNote	N1	Note linking, Outline only, Simple Checklists, Proprietary format
Notepad/ Textedit	N1 in plain text N3 in rich text	Quick editing for copy/paste between apps
Obsidian	N5	Publisher, Integration, File Embed, Note Linking, Note Org, Themes, Second Brain, Search, Local text files

Code	Name
N1	Simple Text
N2	Structured Text
N3	Rich Text
N4	Content
N5	Second Brain

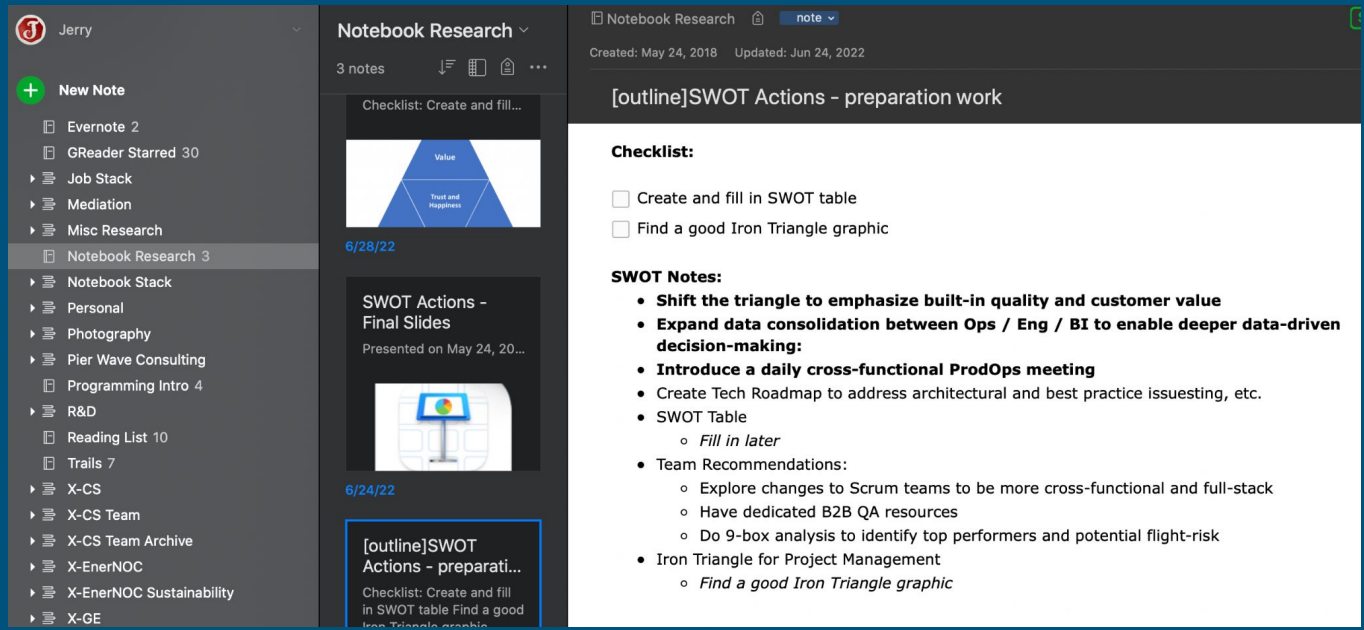
Screenshots from Evernote, OneNote, SimpleNote and Obsidian

3 Examples

- Outline - simple outline with bullet points and a few checklist items
- Content - add a table and embedded image
- Embedded File - embed a PDF – all support this, so it’s in Background section

Evernote - Outline

- Rich text
- Check list
- Outline
- Bullet points
- Only 3 levels of organization



Evernote - Content

- Tables - good features
- Images - resizing

Notebook Research note Share

Created: May 24, 2018 Updated: Jun 28, 2022

[content]SWOT Actions - preparation work

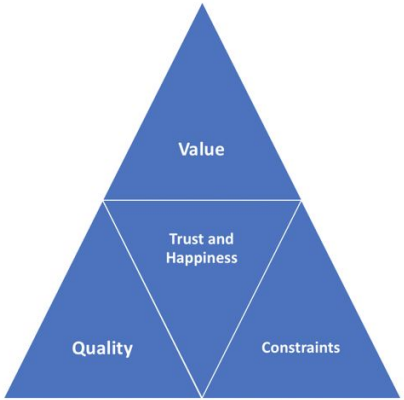
- [x] Create and fill in SWOT table
- [x] Find a good Iron Triangle graphic

SWOT Notes:

- ...removed for screen shot
- SWOT Table

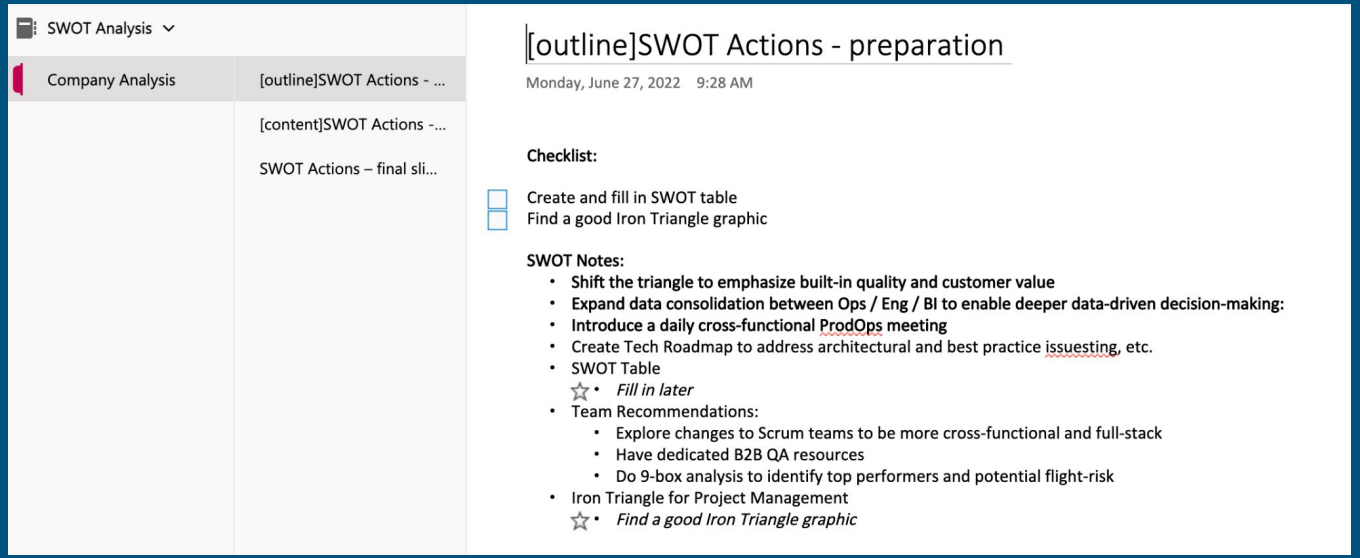
Strength: • Individual desire to do what's best for the business • Observed good team spirit and camaraderie • Long tenure with deep business and technical knowledge • Strong commitment evidenced by long commutes by key people	**Weakness:** • The Iron Triangle is unbalanced • Lower quality and reduced trust • Handling production issues is via individual and informal communication means • Data silos: Information about system breakage or releases not communication widely
Opportunities: • Shift the triangle to emphasize built-in quality and	**Threats:** • When the Iron Triangle remains unbalanced in one direction for a long time, business performance is vulnerable to inefficiencies • New features need to assure that seller data can not be easily screen scraped by a competitor

- Do 9-box analysis to identify top performers ar
- Iron Triangle for Project Management



OneNote - Outline

- Rich text
- Check list
- Outline
- Bullet points
- Only 3 levels of organization



OneNote - Content

- Tables -
  - embedded images
  - Easy creating
  - Difficult re-arranging
- Images - resizing
- Drawing layer

[content]SWOT Actions - preparation

Monday, June 27, 2022 9:30 AM

Checklist:

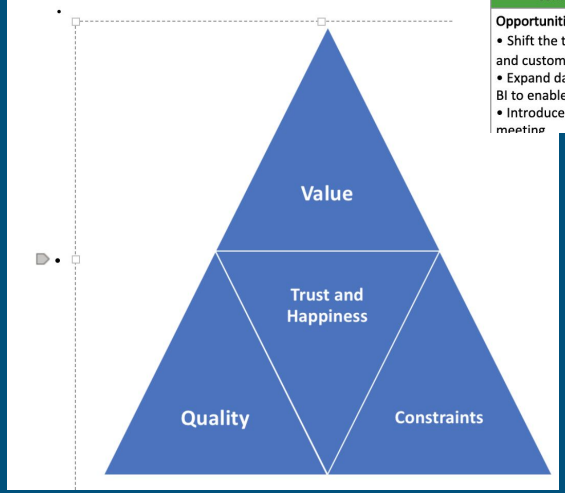
- [x] Create and fill in SWOT table
- [x] Find a good Iron Triangle graphic

SWOT Notes:

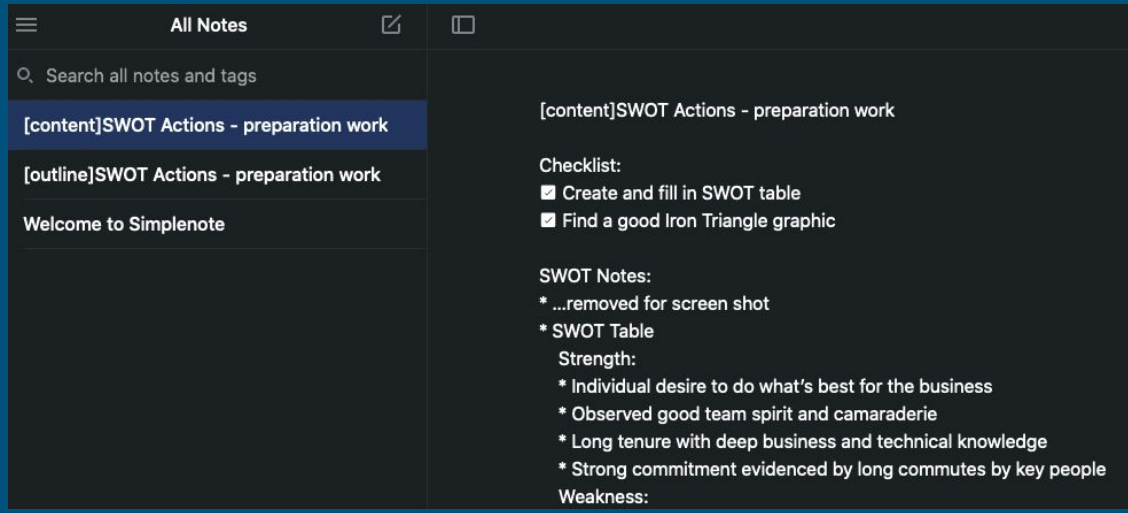
- >> deleted for screen shot
- SWOT Table

Strength:	Weakness:
• Individual desire to do what's best for the business • Observed good team spirit and camaraderie • Long tenure with deep business and technical knowledge • Strong commitment evidenced by long commutes by key people	• The Iron Triangle is unbalanced • Lower quality and reduced trust • Handling production issues is via individual and informal communication means • Data silos: Information about system breakage or releases not communication widely
Opportunities: • Shift the triangle to emphasize built-in quality and customer value • Expand data consolidation between Ops / Eng / BI to enable deeper data-driven decision-making: • Introduce a daily cross-functional ProdOps meeting	**Threats:** • When the Iron Triangle remains unbalanced in one direction for a long time, business performance is vulnerable to inefficiencies • New features need to assure that seller data can not be easily screen scraped by a competitor

- Iron Triangle for Project Management

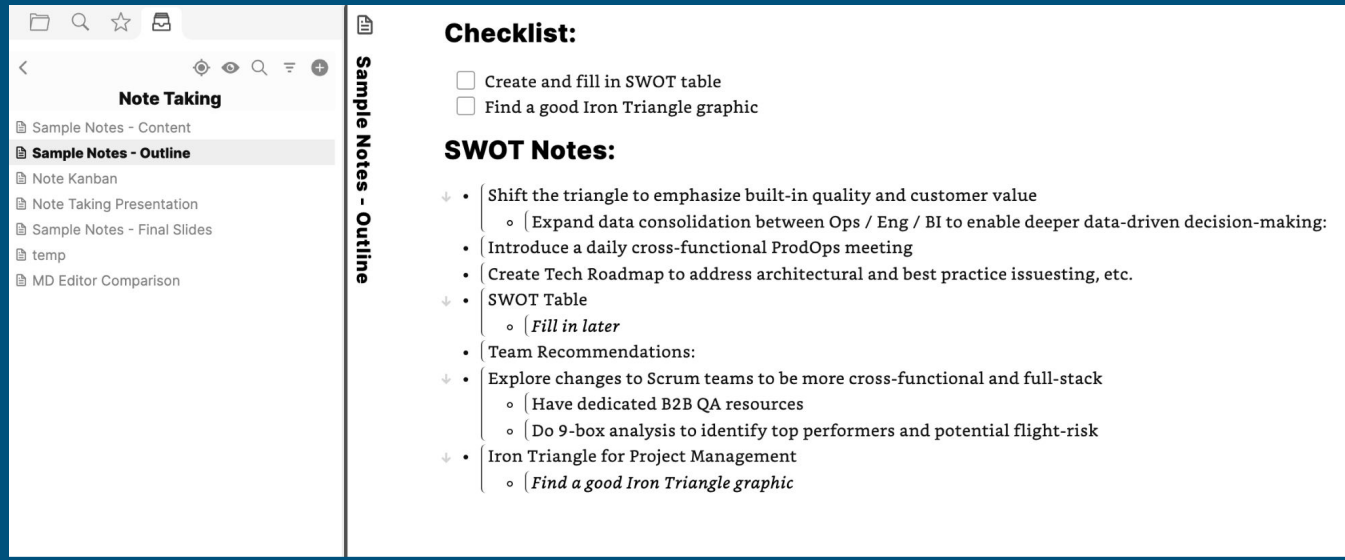


SimpleNote



- 1-level of organization
- Checklists
- Inter-note linking
- No rich text: ~~**bold,** *italics,* underline~~
- No bullet points
- No embedded images
- No tables
- Not much better than TextEdit (Mac) or Notepad (Win)

Obsidian - Outline



- Rich text
- Check lists
- Outline
- Bullet points
- Multiple levels of note organization - whatever your local file system can support
- File format is plain text using Markdown

Obsidian - Content

- Tables -
  - Easy creating
  - Difficult re-arranging
  - Complex tables hard to edit
- Images
  - Easy to re-size
  - Stored as separate files

Sample Notes - Content

Checklist:

- [x] Create and fill in SWOT table
- [x] Find a good Iron Triangle graphic
- [ ] Build slides

SWOT Notes:

- Shift the triangle to emphasize built-in quality and customer value
  - Constraints on Schedule, Cost, and Scope still exist, but aren't goals by themselves
  ...deleted for screen shot
- Do 9-box analysis to identify top performers and potential flight-risk

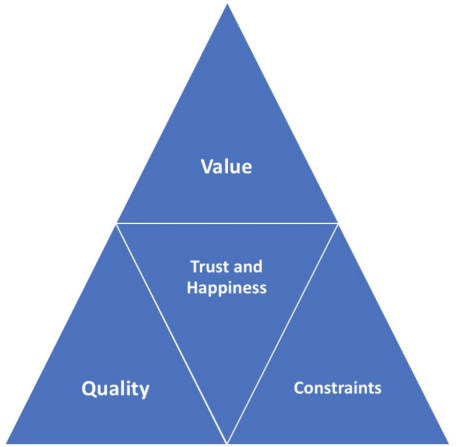
SWOT Table

Strengths
· Individual desire to do what's best for the business
· Observed good team spirit and camaraderie
· Long tenure with deep business and technical knowledge
· Strong commitment evidenced by long commutes by key people

Weakness- The Iron Triangle is unbalanced
- Lower quality and reduced trust
- Handling production issues is via individual and informal communication means
- Data silos: Information about system breakage or releases not communication widely

Threats- When the Iron Triangle remains unbalanced in one direction
…e, business performance is vulnerable to inefficiencies
…s need to assure that seller data can not be easily screen
…competitor
…ds more process, but more process can reduce personal
…g revenue restrains experimentation with user features that
…increase revenue

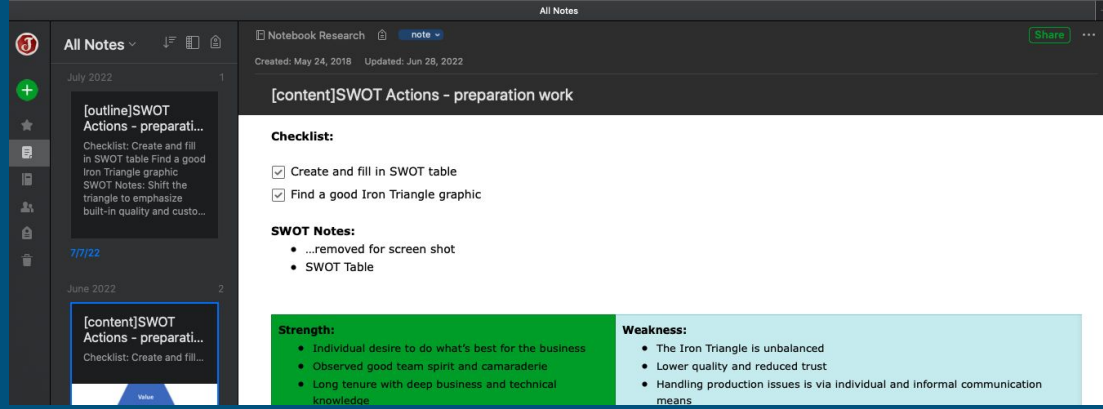
Iron Triangle for Project Management



Pros/Cons

These are based on my experiences.
ymmv

Pro/Cons - Evernote

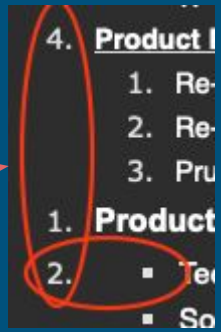


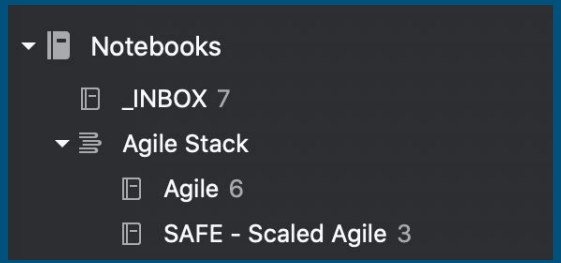
Pros:

- Good table support
- Good sharing / collab w/ others
- Sync to 1 other device for free
  - Pay $ for more

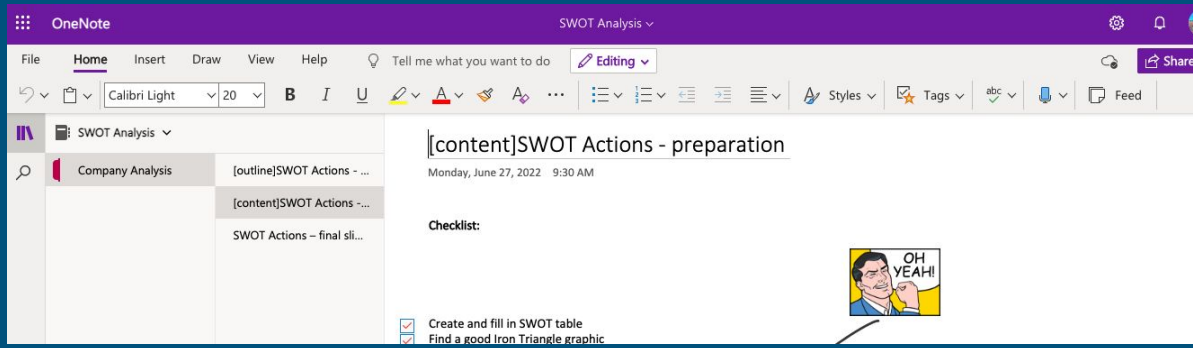
Cons:

- Buggy bullet points
- Copy/paste to other apps can often mangle them
- Hard to link to other notes
- Files stored on Evernote servers, not locally
- No Extensibility - features have stagnated
- Only 3 levels for organizing notes





Pros/Cons - OneNote

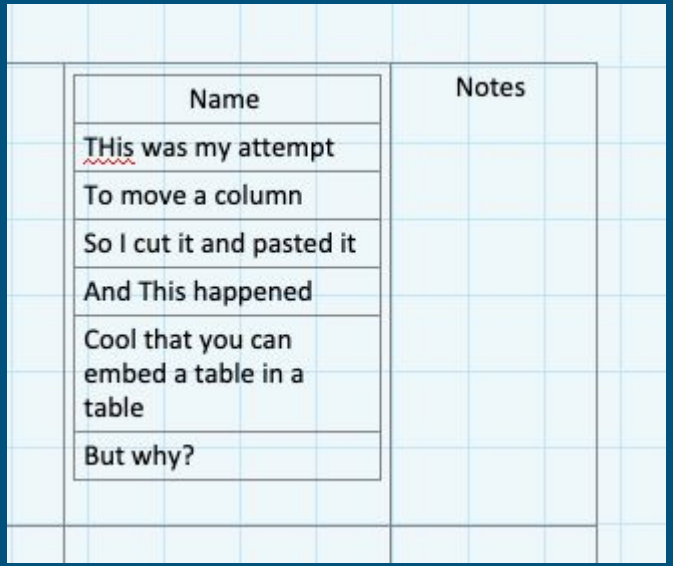


Pros:

- Free with Outlook / Office
- Drawing layer
- Background images for lines / graph paper
- Share w/ others at company
- Math support

Cons:

- Poor table management
- Hard to link to other notes
- Only 3 levels of organizing notes
- Checklists are poorly implemented



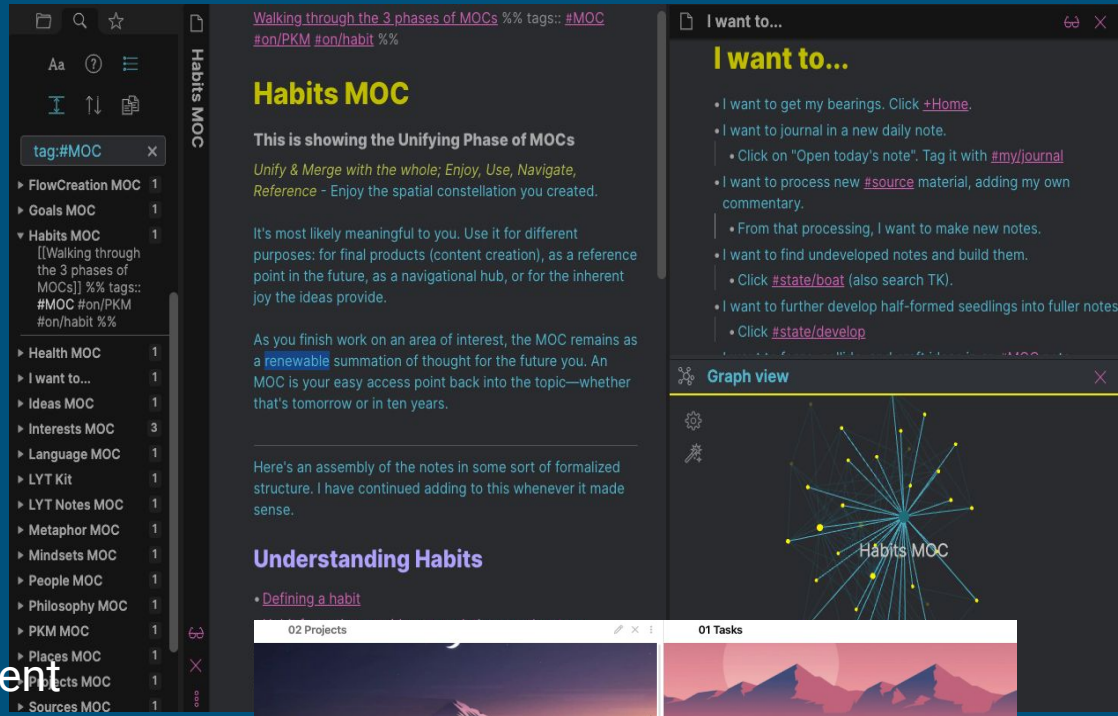
Pros/Cons - Obsidian

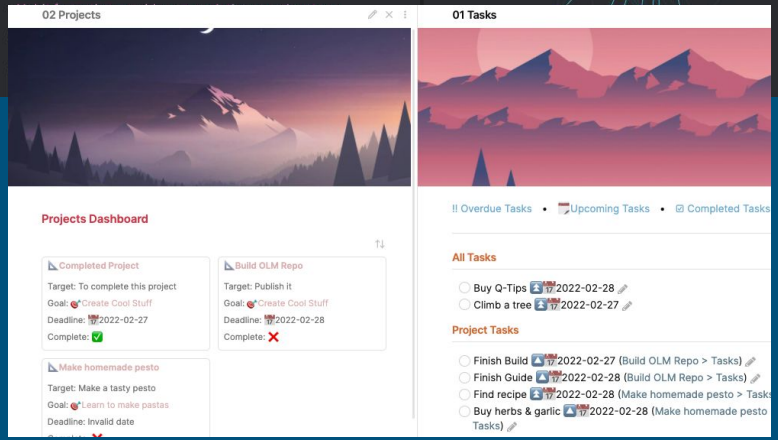
Pros:

- Free - open source
- Dynamic community support
- Markdown files stored locally
- Highly extensible
- Github syncing
- Strong hyperlinking and search
    - Useful to build Maps of Content

Cons:

- Simple tables easy to create
    - more complex tables are much harder
- Advanced uses are somewhat DIY





More About Obsidian

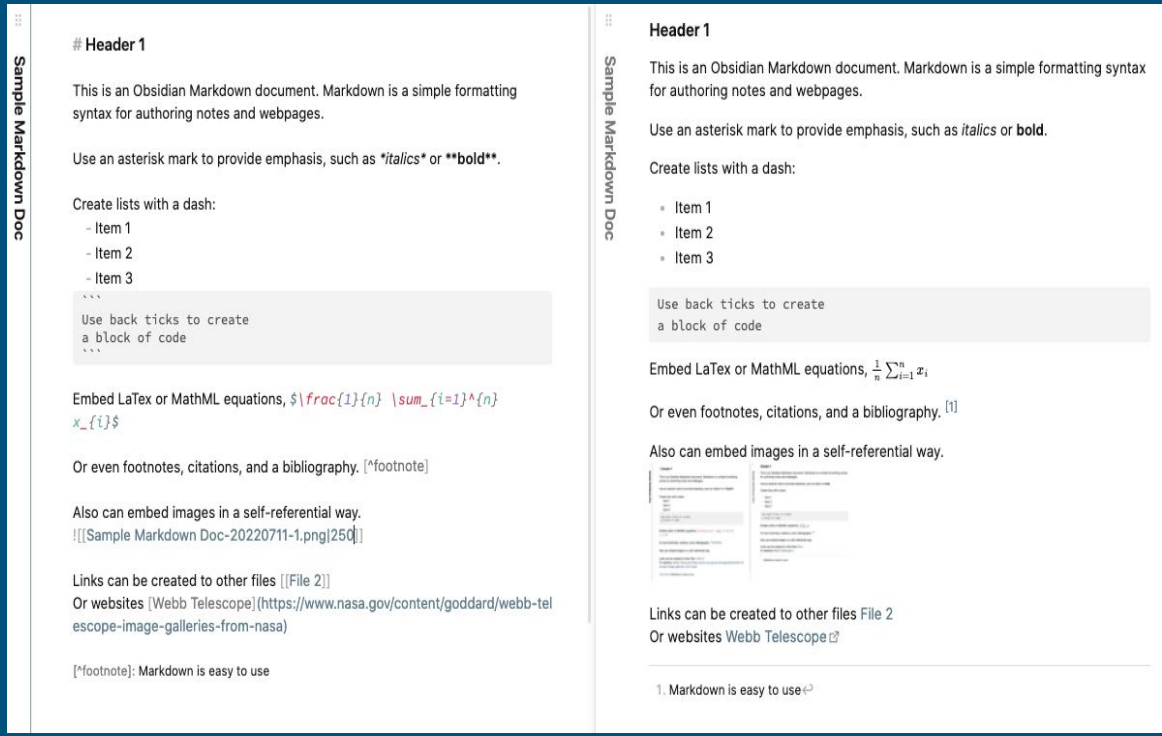
What is Markdown?

Markdown is a lightweight markup language for creating formatted text using a plain-text editor. Created 2004, Markdown is widely used in blogging, instant messaging, online forums, collaborative software, documentation pages, and readme files.

- Wikipedia

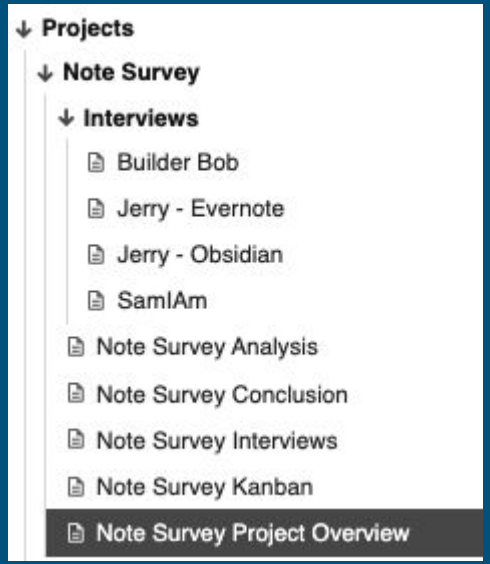
The overriding design goal for Markdown's formatting syntax is to make it as readable as possible.

- John Gruber, co-inventor



Obsidian Example Premise

- Research project
- Simple File Structure
- Interviews
  - Questions and answers captured in individual Obsidian documents
  - Want to easily surface Objections, Follow-up questions, Pain and Pleasure Indices
- Simple Graphs of some Metrics
- Data Gathering for Analysis



Overview Doc

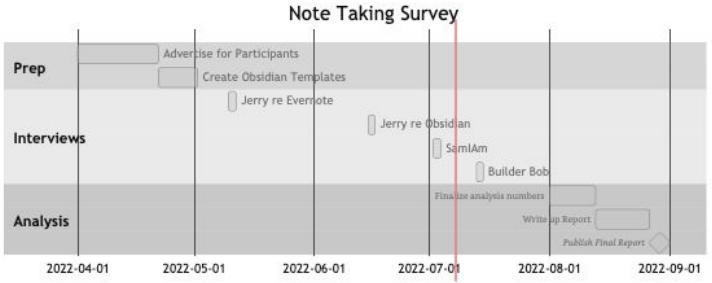
Provides an overview of the project:

- Goals
- Timeline
- Interview subjects & schedule

Project Goals

Survey users on their usage of note tools. Capture feedback on their tool(s) of choice, their primary use cases, key features, and pain and pleasure indices.

Timeline



Interviews

Subjects will be asked the same questions. Their responses will be capture in Obsidian using the same template. It's ideal if we can get an interview with a person before and after they've changed note taking apps.

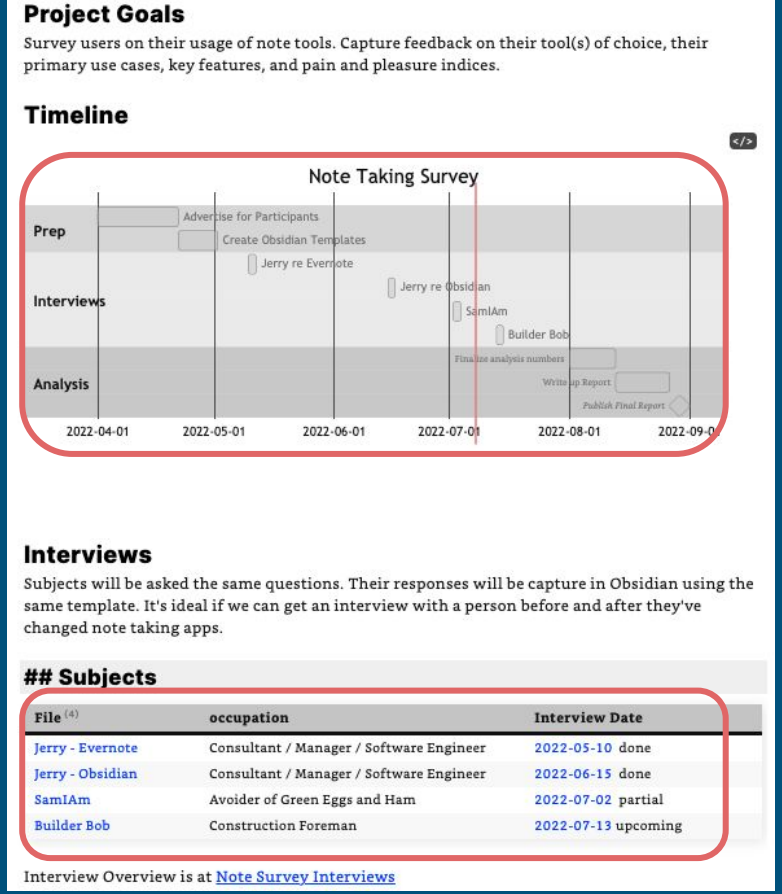
Subjects

File (4)	occupation	Interview Date
Jerry - Evernote	Consultant / Manager / Software Engineer	2022-05-10 done
Jerry - Obsidian	Consultant / Manager / Software Engineer	2022-06-15 done
SamIAm	Avoider of Green Eggs and Ham	2022-07-02 partial
Builder Bob	Construction Foreman	2022-07-13 upcoming

Interview Overview is at Note Survey Interviews

Plugins Add Features

- These sections are images pasted from another tool
- They are powered by plugins that are open source and easy to use



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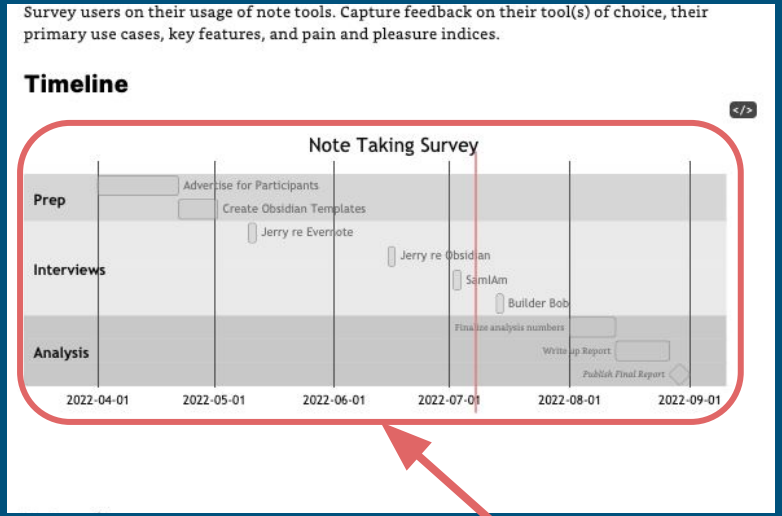
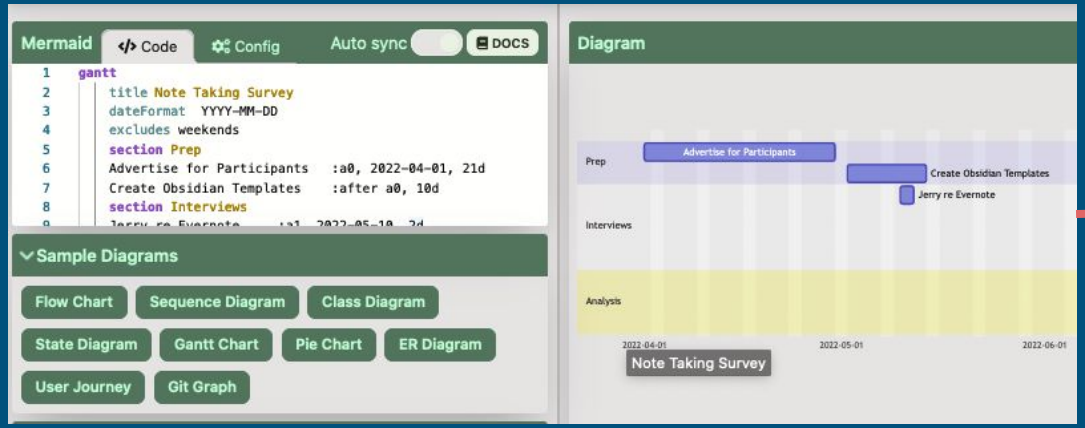
Diagrams

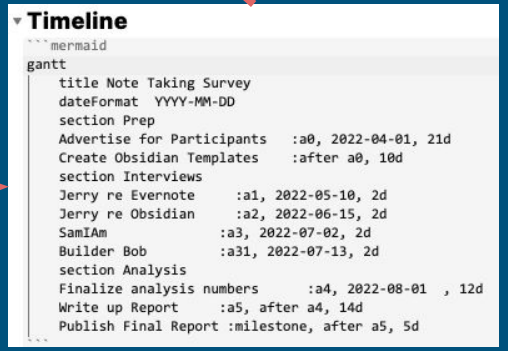
‘Mermaid’ is a plugin that renders different diagram types

It has a web-based interactive editor

The diagram is described using plain text

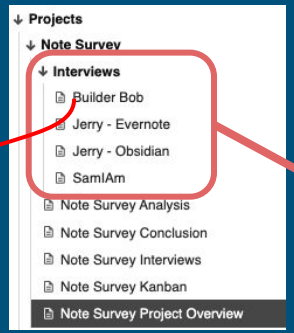


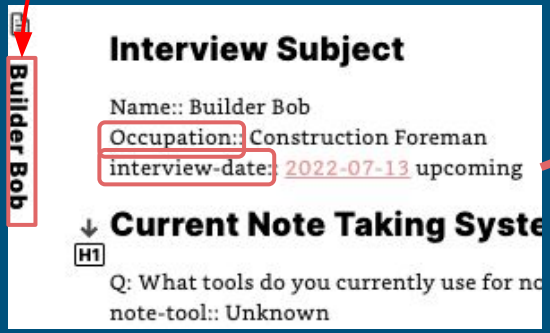


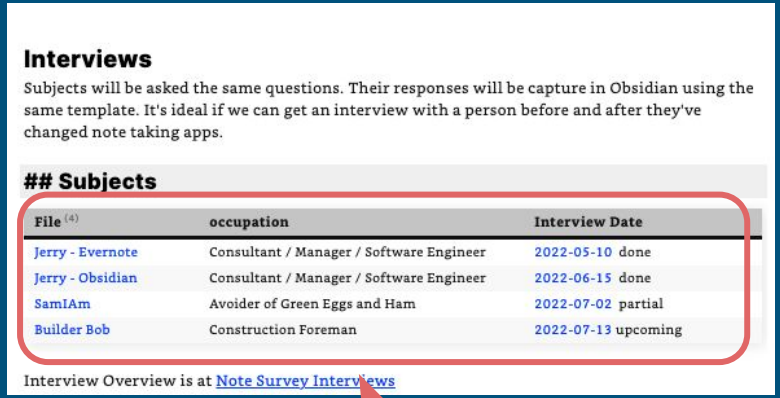


Simple Data Queries

'Dataview' plugin queries documents and extracts data







Stats and Charts

Queries do some simple statistics like average

Top-line Analysis

Average Pleasure and Pain per Note Tool

Average per Tool

Group (3)	Note Tool	Num Rows	Pleasure Avg	Pain Avg
Evernote	Evernote	1	3	8
Obsidian	Obsidian	1	9	2
OneNote	OneNote	1	2	2

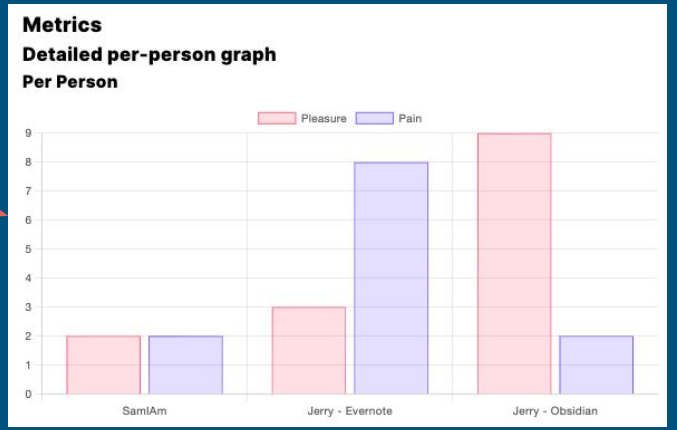
Average Pleasure and Pain per Note Type

Average per Tool

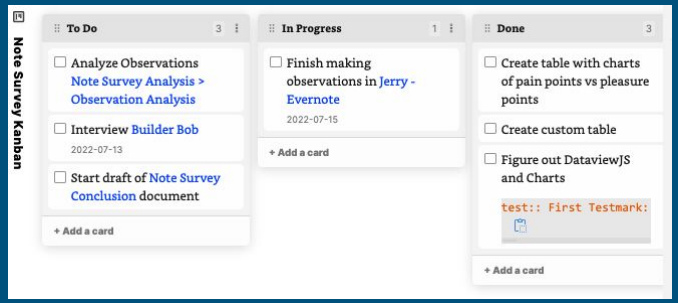
Group (3)	Pleasure Avg	Pain Avg	Num Rows
N1	2	2	1
N3	3	8	1
N5	9	2	1

Another plugin displays a wide range of charts based on data extracted from documents and continuously updated:

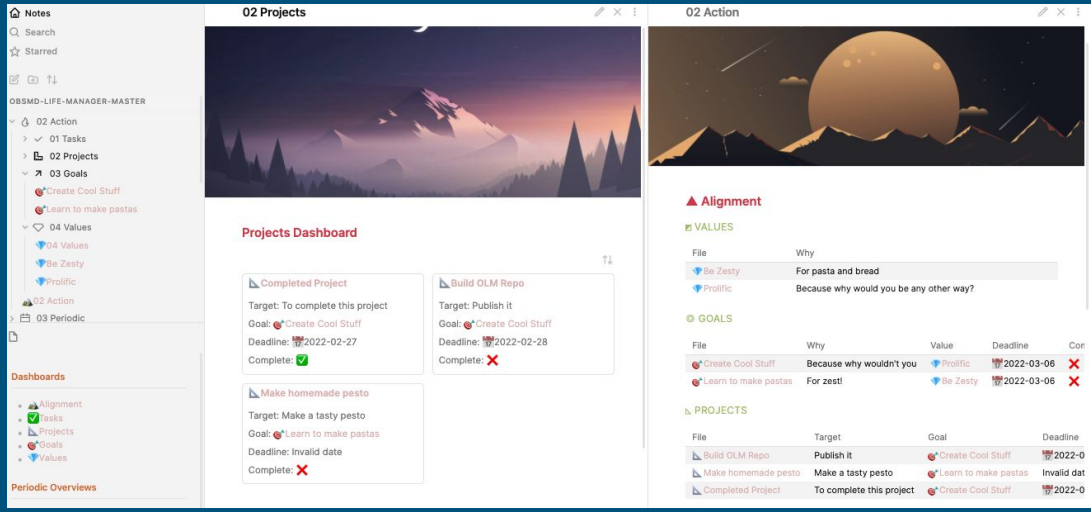
- Line, pie, bar, radar, stacked, area, etc.



Project Management



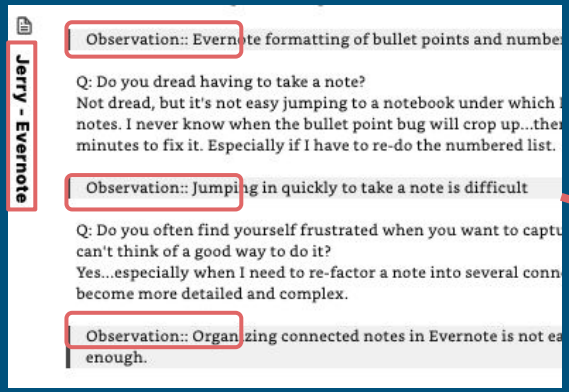
‘Kanban’ plugin displays Checklist items in configurable columns

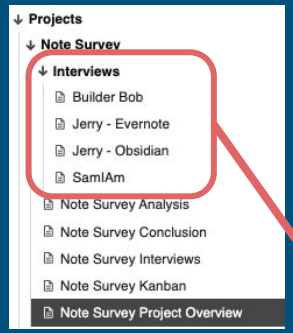


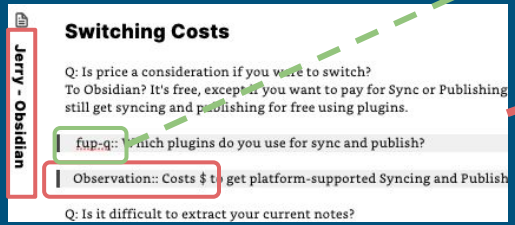
A Project/Task Framework with dashboards

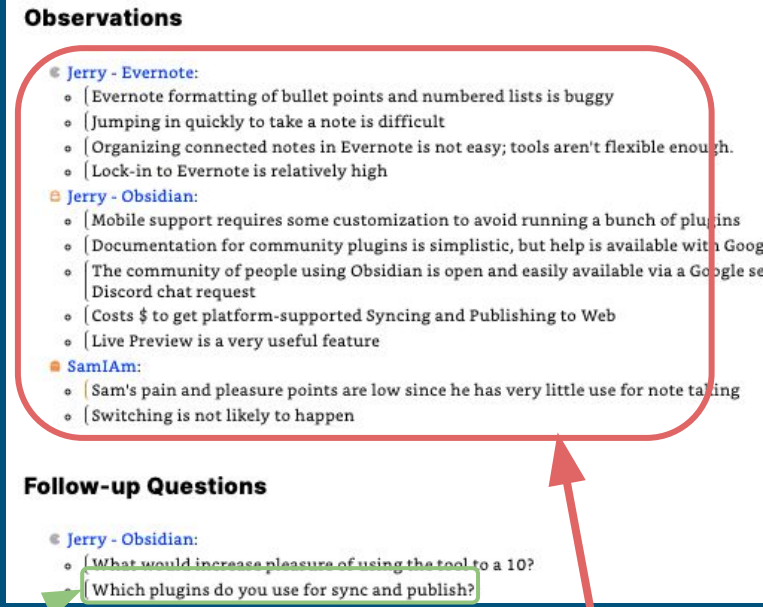
Complex Data Gathering

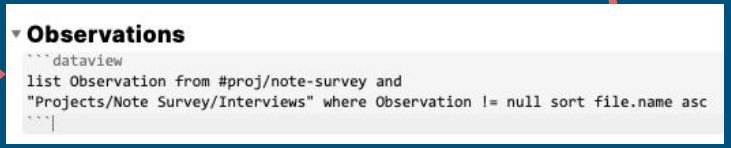
'Dataview' has even more advanced uses



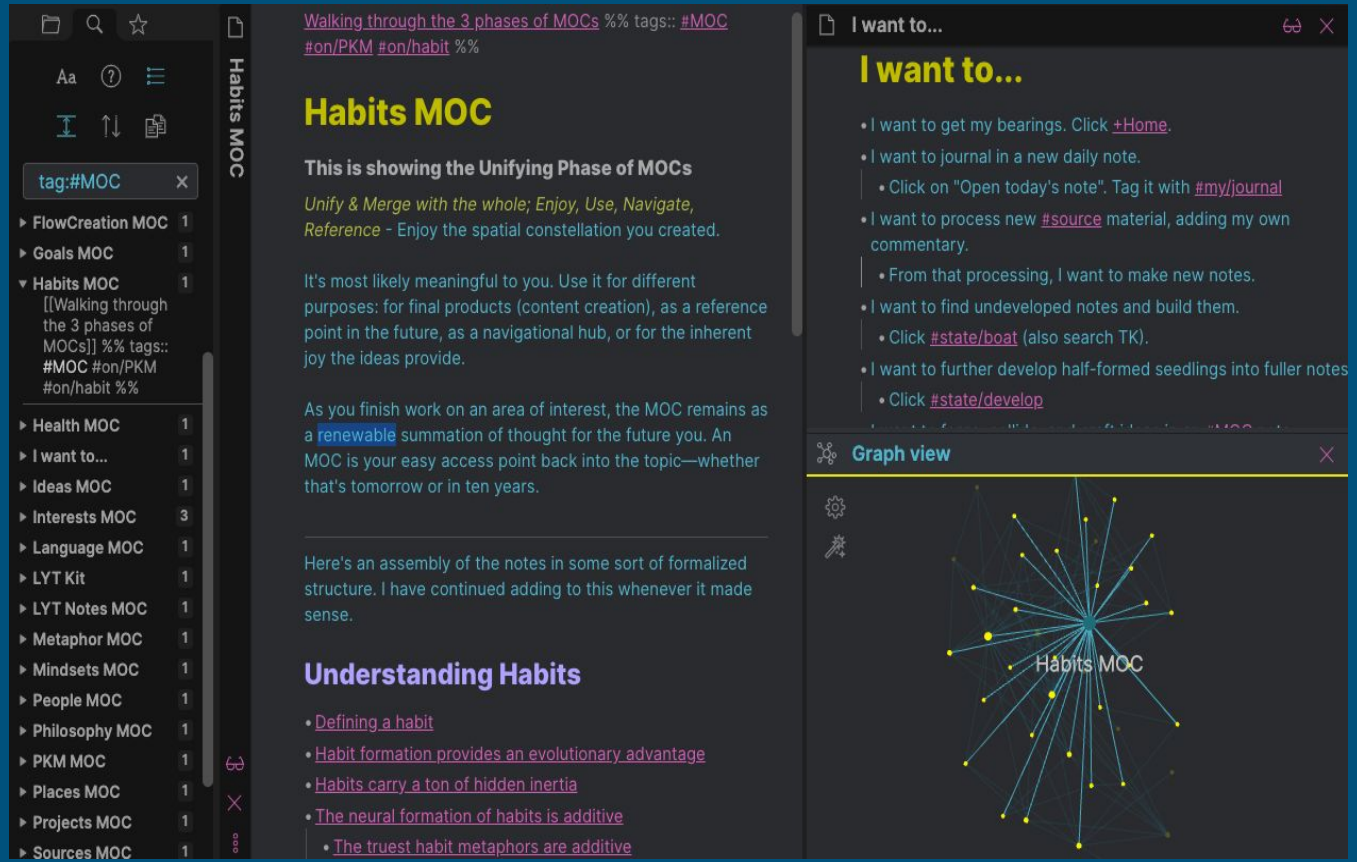








Second Brain Stuff



An open source repo of files to help you capture information and unify it using Maps of Content (MOC). The graph view shows all other files linked to this Habits MOC.

The End

Background