



# USING ZOTERO FOR SLIP-BOX / ZETTELKASTEN STYLE NOTE-TAKING

Read. Think. Write. Link. Integrate.

By Rachel Brekhus

# OBLIGATORY NOD TO NIKLAS LUHMANN (1927-1998)

- German sociologist, active in systems theory in mid-late 20<sup>th</sup> century\*
- Didn't invent **Zettelkasten** (**Kasten**=Box, **Zettel**=Note/Card/Slip) but used it extensively and publicly.
- Cabinet of notecards grew to 90,000 cards
- Published over 50 books and 550 articles as a widowed father of three
- Viewed his Zettelkasten as a writing partner with which he maintained a dialogue

\*Born in 1927, conscripted into Hitler Youth in 1943 and into the German army in 1944, served in a reconnaissance unit, and captured by U.S. forces at the end of the war, at age 17. There is no evidence of Luhman having espoused Nazi ideology.

# WRITING GOAL: “TIGHT” NOTES

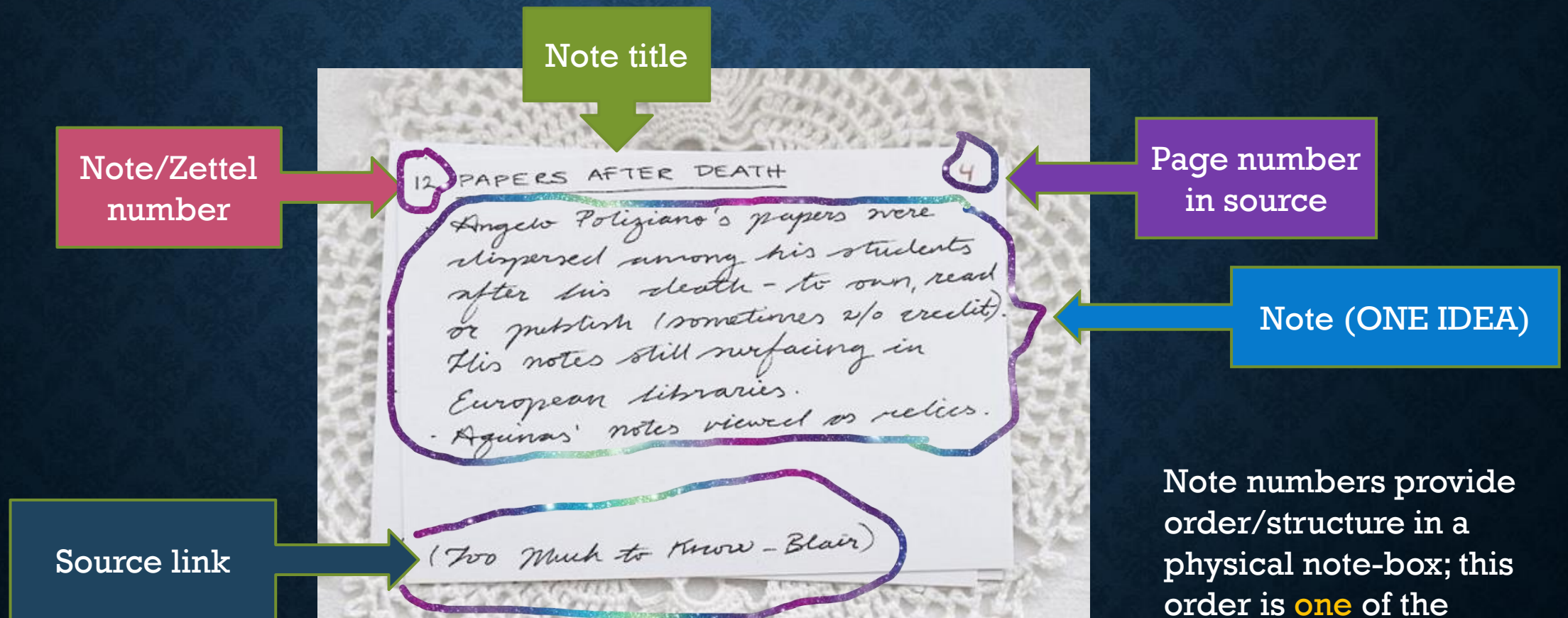
## Zettelkasten Method

- SHORT notes in *your own words* (Zettel)
- *Initial notes* from IDEAS and SOURCES
- **Long-Term Notes** assigned a PLACE in a branching knowledge structure
- Notes **LINKED** tightly to sources and other notes
- Result: less “leakage” between reading, note-taking, and writing; **more efficient writing**

## Zotero as Zettelkasten Tool

- Produces formatted citations
- Notes can be linked to sources and to one another
  - Zettel number in title (like a library call number, but personal to you)
  - **Citations within notes**
  - “Related” tab
  - Tagging

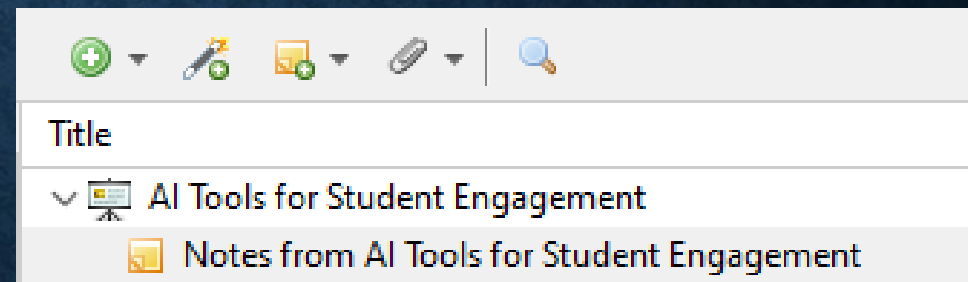
# HARDCORE MODE: NUMBERED NOTES



Note numbers provide order/structure in a physical note-box; this order is **one** of the three types of connections among notes in a ZK system.

# INITIAL NOTES VS NUMBERED NOTES

- Initial notes are “fleeting” notes or “source” notes.
- Fleeting notes may be on paper, taken at any random time of day or night.
- Source notes may be on paper or in a longer note in Zotero.
- Real-time notes taken from a lecture are Source notes. In Zotero, create a “Child Note” to the Zotero entry for the lecture/presentation itself.
- **Make time to convert both types of initial notes into Numbered Notes.**



# NUMBERED NOTES

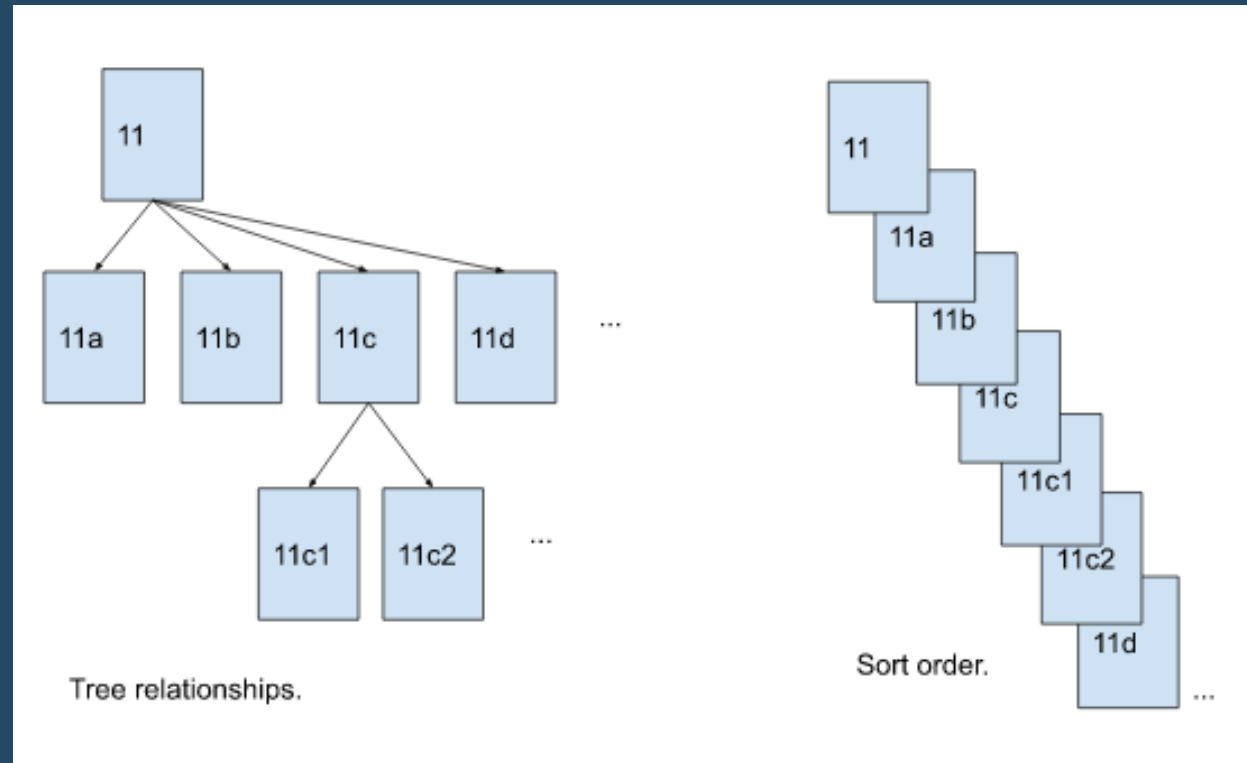
Your first numbered note is 1.

Your next note is either 2 or 1.a.

If the second idea is on a **different topic** from the first, use 2.

If the second idea is an **extension, modification, or example** of the first, use 1.a.

This structure is your own, build-as-you-go tree of knowledge, across multiple sources.



# FROM INITIAL NOTE TO NUMBERED NOTES

- Keep your numbered notes as **Standalone Notes** in **one folder** you call “Zettelkasten” or “All Notes” or similar.
- Break up notes into individual, “atomic” ideas: **one idea per note**
- Begin the note with a **number** so that Zotero will file your notes automatically into a “tree of ideas.”
- **Not everything** from an initial note will be converted into a numbered note – just the information you deem “worthy” of incorporating into your “tree of ideas.”
  - Does the idea **excite** you as much as when you first wrote it down?
  - Does the idea **contribute** meaningfully to your existing ideas in this area?
- Put notes mostly in **your own words**. If you include a quote, at least add a paraphrase or a “take” on it.
- For notes derived directly from a source, **insert a citation** using [+]
- Interfile notes with previous notes when your new notes relate to something you have taken notes on before. **Notes from one source don't all have to be filed together.**
- Non-adjacently numbered notes can be connected using **tags and/or “Related.”**

# NUMBERED NOTES IN ZOTERO

There's still a note number but it shares the top line with the title, which flows into the body of the note in many cases.

"Related" can be used to link to other Standalone Notes in Zotero...or to sources.

Tags connect notes, too.

The screenshot shows a window titled "1.a If you use software for your Zettelk..." with standard window controls. Below the title bar is a toolbar with icons for text formatting (Aa, A\*), editing (pencil), deletion (Tx), linking (chain), adding (+), search (Q), and a menu (three dots). The main content area contains the note text: "1.a If you use software for your Zettelkasten, it's important to use LINKING and to have a space that works like a desktop where you can make temporary arrangements of individual Zettel." The title "1.a If you use software for your Zettelk..." is underlined in blue. Below the text is a "Related:" section with the text "Introduction to the Zettelkasten Method" and a "Tags:" section with the text "Zettelkasten, Zettelkasten linking, Zettelkasten software".

1.a If you use software for your Zettelkasten, it's important to use LINKING and to have a space that works like a desktop where you can make temporary arrangements of individual Zettel.

**Related:** Introduction to the Zettelkasten Method

**Tags:** Zettelkasten, Zettelkasten linking, Zettelkasten software



# YOU NOTE YOU!

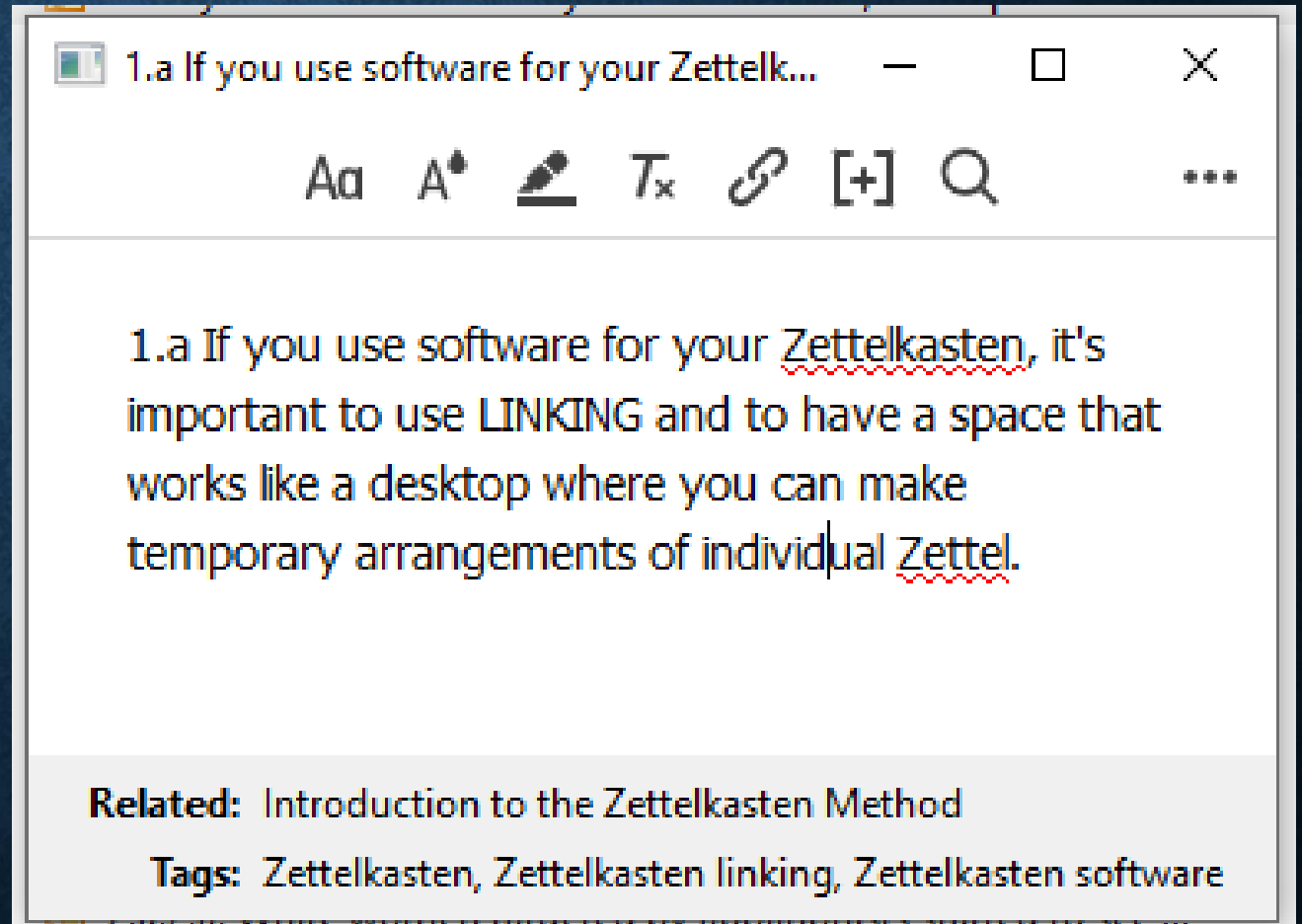
Notes in Zotero allow you to...

...paste images into your notes

...format text (color, highlight, bold, italics, etc.)

...insert links

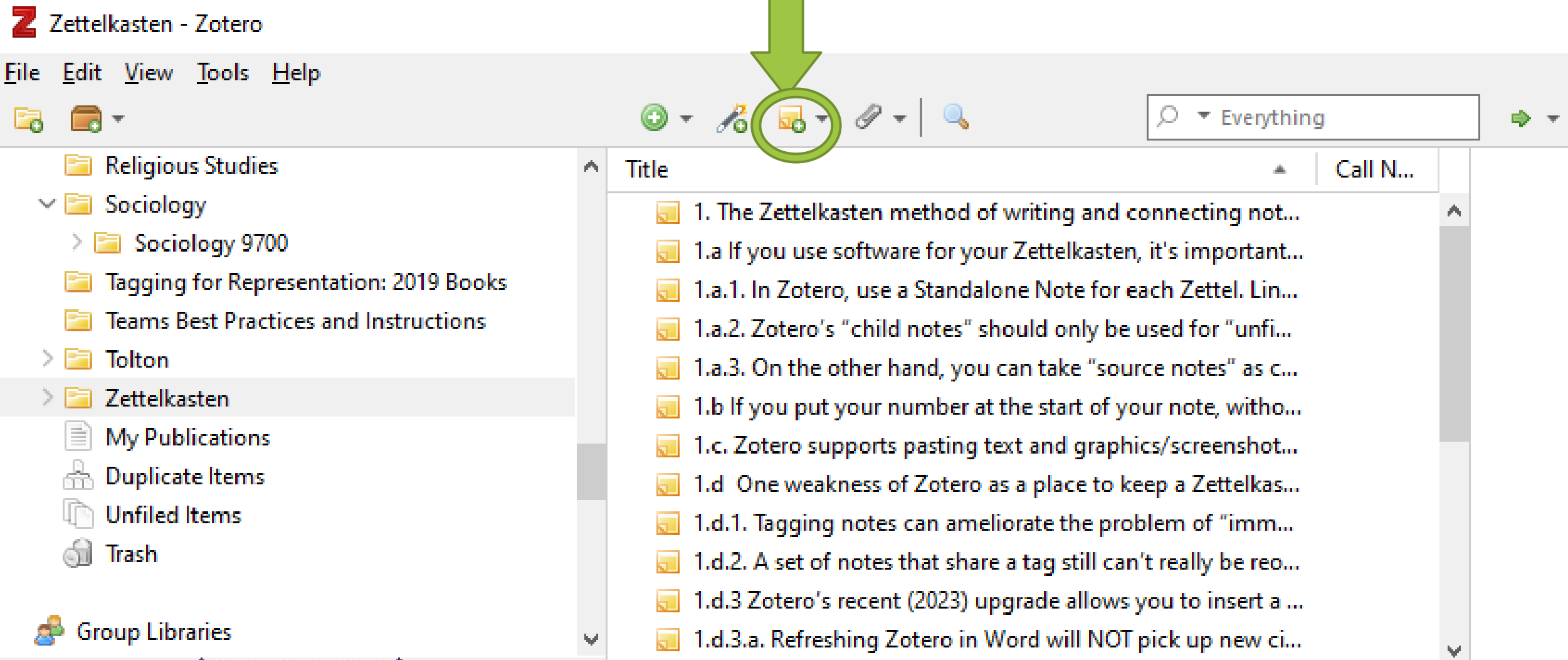
...even insert citations with [+]



The screenshot shows a window titled "1.a If you use software for your Zettelk..." with standard window controls. Below the title bar is a toolbar with icons for text formatting: bold (Aa), italic (A\*), underline (underline icon), strikethrough (Tx), link (chain icon), citation insertion ([+]), search (magnifying glass), and a menu (three dots). The main text area contains the following text: "1.a If you use software for your Zettelkasten, it's important to use LINKING and to have a space that works like a desktop where you can make temporary arrangements of individual Zettel." The words "Zettelkasten" and "Zettel" are underlined in red. At the bottom of the window, there is a grey bar with "Related: Introduction to the Zettelkasten Method" and "Tags: Zettelkasten, Zettelkasten linking, Zettelkasten software".

# NOTES IN ORDER

Click this icon to add a Standalone Note or a Child Note.



The screenshot shows the Zotero application window titled "Zettelkasten - Zotero". The menu bar includes "File", "Edit", "View", "Tools", and "Help". The toolbar contains several icons, with the "Add Note" icon (a notepad with a plus sign) circled in green. A green callout box points to this icon with the text "Click this icon to add a Standalone Note or a Child Note." The left sidebar shows a folder tree with "Zettelkasten" selected. The main pane displays a list of notes under the "Title" column, including hierarchical entries like "1. The Zettelkasten method of writing and connecting not...", "1.a If you use software for your Zettelkasten, it's important...", and "1.d.3.a. Refreshing Zotero in Word will NOT pick up new ci...".

File Edit View Tools Help

Religious Studies

Sociology

Sociology 9700

Tagging for Representation: 2019 Books

Teams Best Practices and Instructions

Tolton

Zettelkasten

My Publications

Duplicate Items

Unfiled Items

Trash

Group Libraries

Title

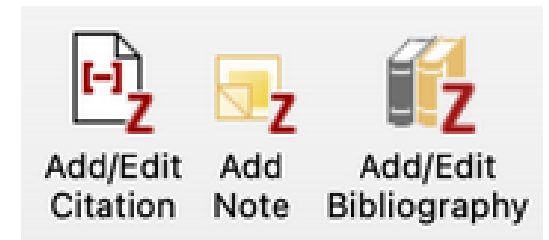
Call N...

- 1. The Zettelkasten method of writing and connecting not...
- 1.a If you use software for your Zettelkasten, it's important...
- 1.a.1. In Zotero, use a Standalone Note for each Zettel. Lin...
- 1.a.2. Zotero's "child notes" should only be used for "unfi...
- 1.a.3. On the other hand, you can take "source notes" as c...
- 1.b If you put your number at the start of your note, witho...
- 1.c. Zotero supports pasting text and graphics/screenshot...
- 1.d One weakness of Zotero as a place to keep a Zettelkas...
- 1.d.1. Tagging notes can ameliorate the problem of "imm...
- 1.d.2. A set of notes that share a tag still can't really be reo...
- 1.d.3 Zotero's recent (2023) upgrade allows you to insert a ...
- 1.d.3.a. Refreshing Zotero in Word will NOT pick up new ci...

# PUTTING YOUR NOTES TOGETHER

## Adding Notes to Word Processors

When using one of the Zotero word processor plugins, a new “Add Note” button lets you insert any Zotero note directly into the document. Citations in the note, including those generated from PDF annotations, will remain active, so they’ll automatically be added to your bibliography.



# A ZETTELKASTEN WORKFLOW IN ZOTERO

1. **Daily** – Take **fleeting notes** on paper or a smartphone app
2. **Daily**/every few days – Take **source notes** on paper or as **Child Notes** in Zotero
3. **Evenings** – **convert** selected **fleeting notes** to numbered notes, which are **Standalone Notes** in Zotero\*
4. **Weekly** or more often – **break down source notes** into numbered notes, which are **Standalone Notes** in Zotero \*
5. When you convert notes to numbered notes, add **Tags** and/or **Related items**. For source notes, add a citation using [+] in Zotero's Note interface.
6. **When writing**, gather related notes together by pulling out of your ordered, numbered list, looking at all the notes with the same tag, or simply searching your Zettelkasten folder.
7. Use **Insert Note** in the Zotero toolbar in Word to insert a group of notes (and embedded citations) into Word and start editing.

\*Numbering notes is recommended but not necessary, if you tag and connect notes well in other ways.

## Very Short List of Readings and 1 Video

Ahrens, S. (2017). *How to take smart notes: One simple technique to boost writing, learning and thinking--for students, academics and nonfiction book writers* (MU Ellis Library). [Createspace Independent Publishing Platform]. <http://proxy.msl.missouri.edu/login?url=https://search.ebscohost.com/login.aspx?direct=true&db=cat04885a&AN=merlin.b13756185&site=eds-live&scope=site>

Lozeron, N. (Director). (2022, July 24). *How to Take Smart Notes, by Sönke Ahrens | Productivity Game*. <https://www.youtube.com/watch?v=JnS3g68zCXw>

Demski, A. (2019, September 20). The Zettelkasten Method. *LESSWRONG*. <https://www.lesswrong.com/posts/NfdHG6oHBJ8Oxc26s/the-zettelkasten-method-1>

Zettelkasten for Writers & Readers—An overview with example cards. *E.a. Deverell*. <https://www.eadeverell.com/zettelkasten/>

Fast, S. (2020, October 27). Introduction to the Zettelkasten Method. *Zettelkasten.De*. <https://www.zettelkasten.de/introduction/>



Image from DALL-E prompt: “a colorful painting of a tree of knowledge, with notecards dangling from many branches”