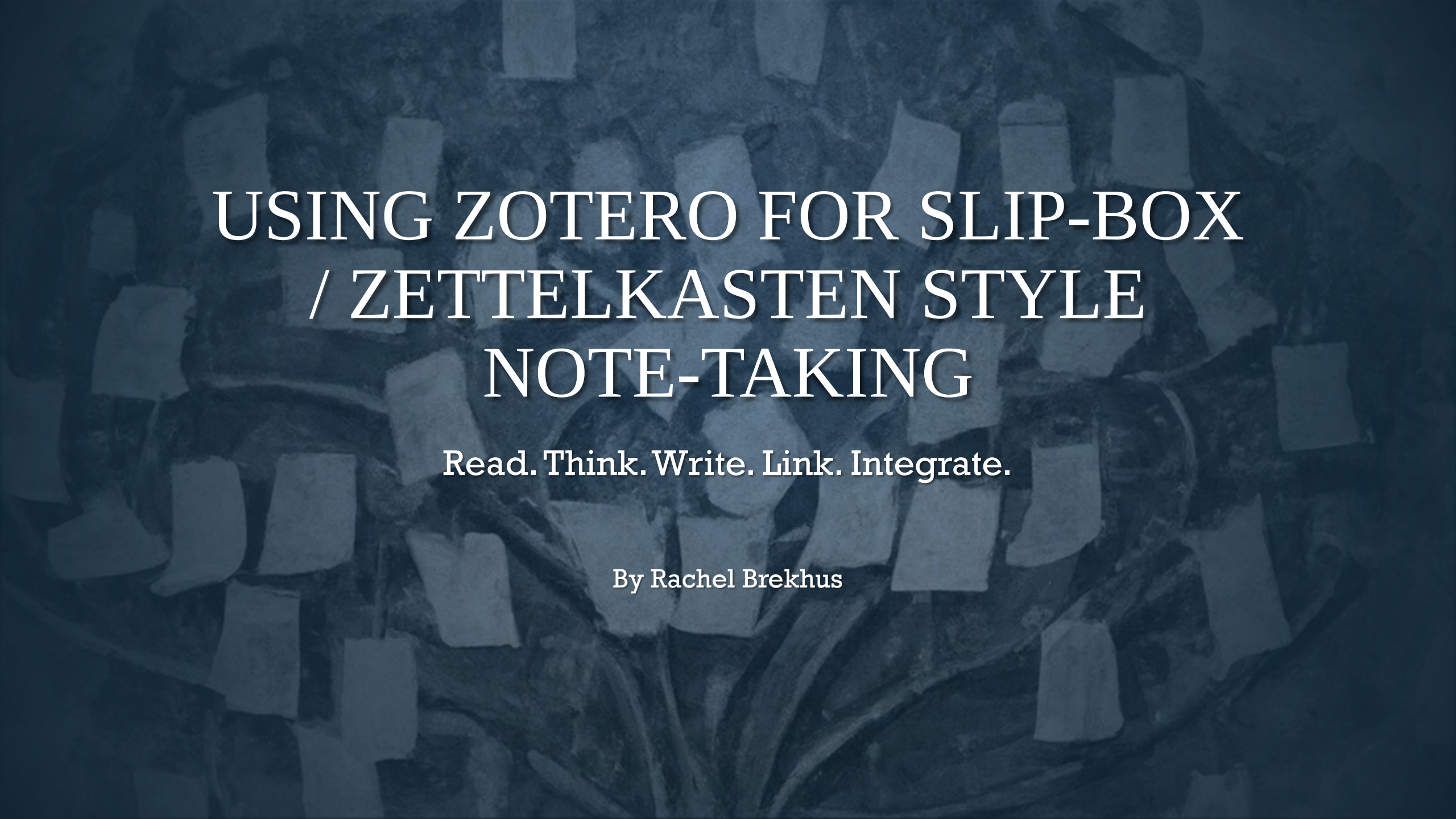


USING ZOTERO FOR SLIP-BOX / ZETTELKASTEN STYLE NOTE-TAKING

Read. Think. Write. Link. Integrate.

By Rachel Brekhus

OBLIGATORY NOD TO NIKLAS LUHMANN (1927-1998)

- German sociologist, active in systems theory in mid-late 20th 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

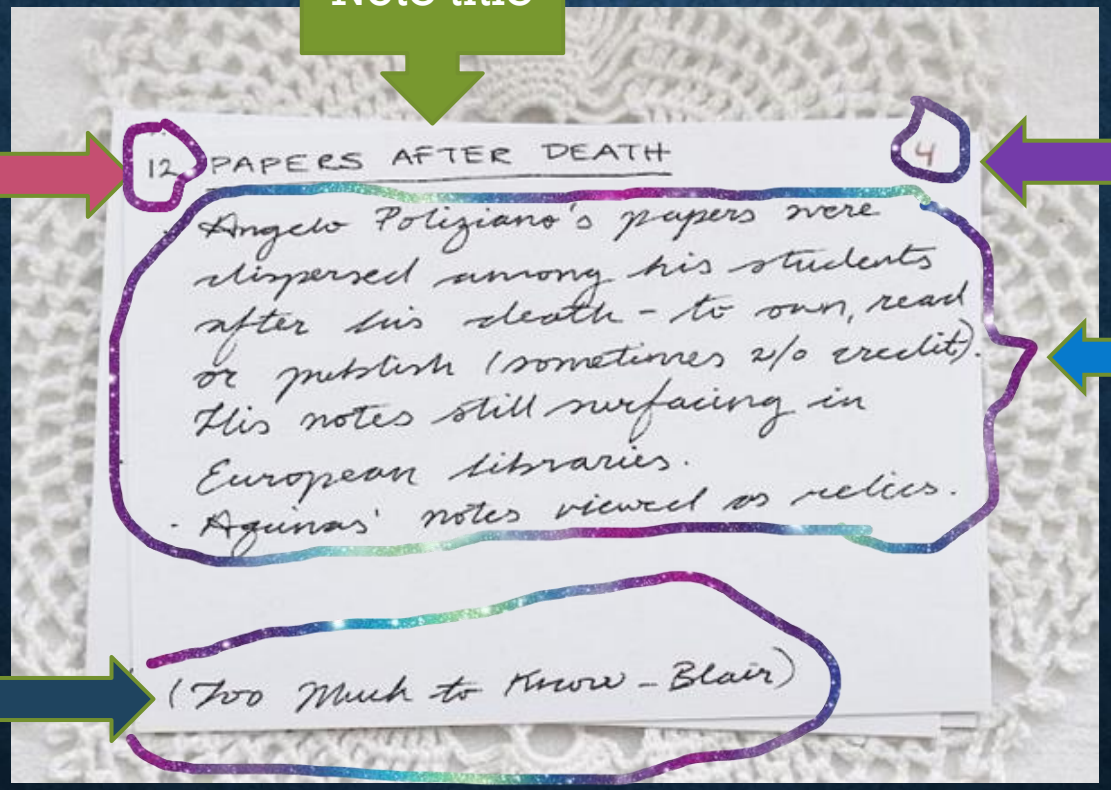
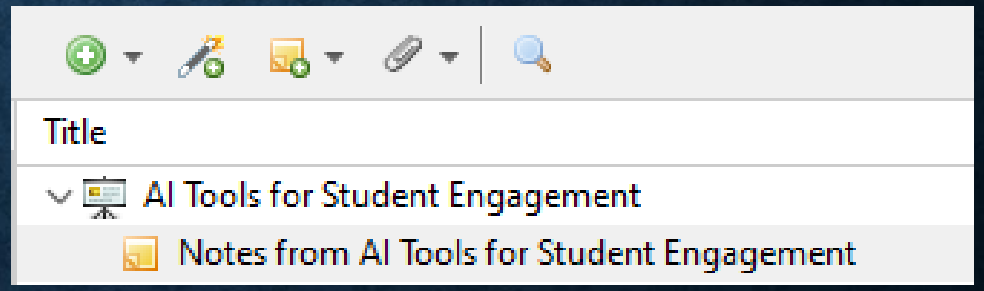


Illustration from Deverell, E.A. (2020, May 28). Zettelkasten for Writers & Readers—An overview with example cards. *E.a. Deverell*. https://www.eadeverell.com/zettelkasten/

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 1a.

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

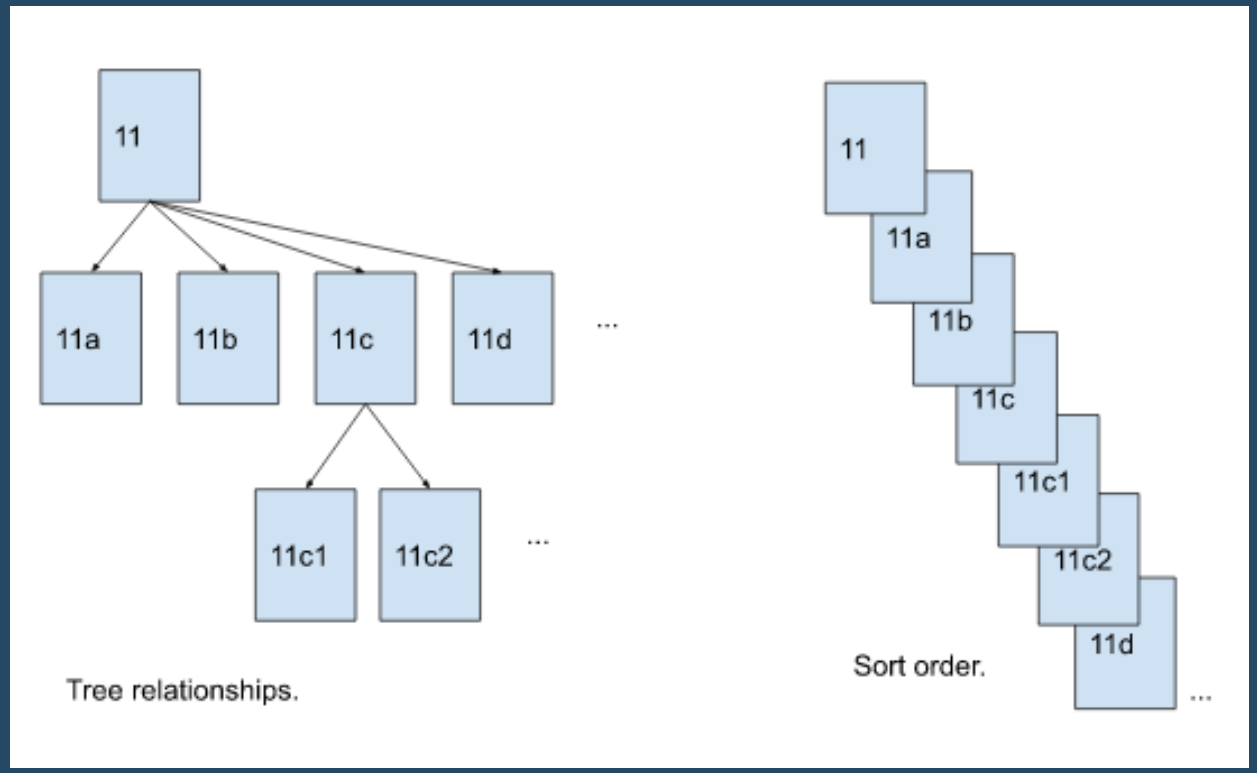


Illustration from: Demski, A. (n.d.). *The Zettelkasten Method*. Retrieved March 7, 2023, from https://www.lesswrong.com/posts/NfdHG6oHBJ8Qxc26s/the-zettelkasten-method-1

FROM INITIAL NOTE TO NUMBERED NOTES

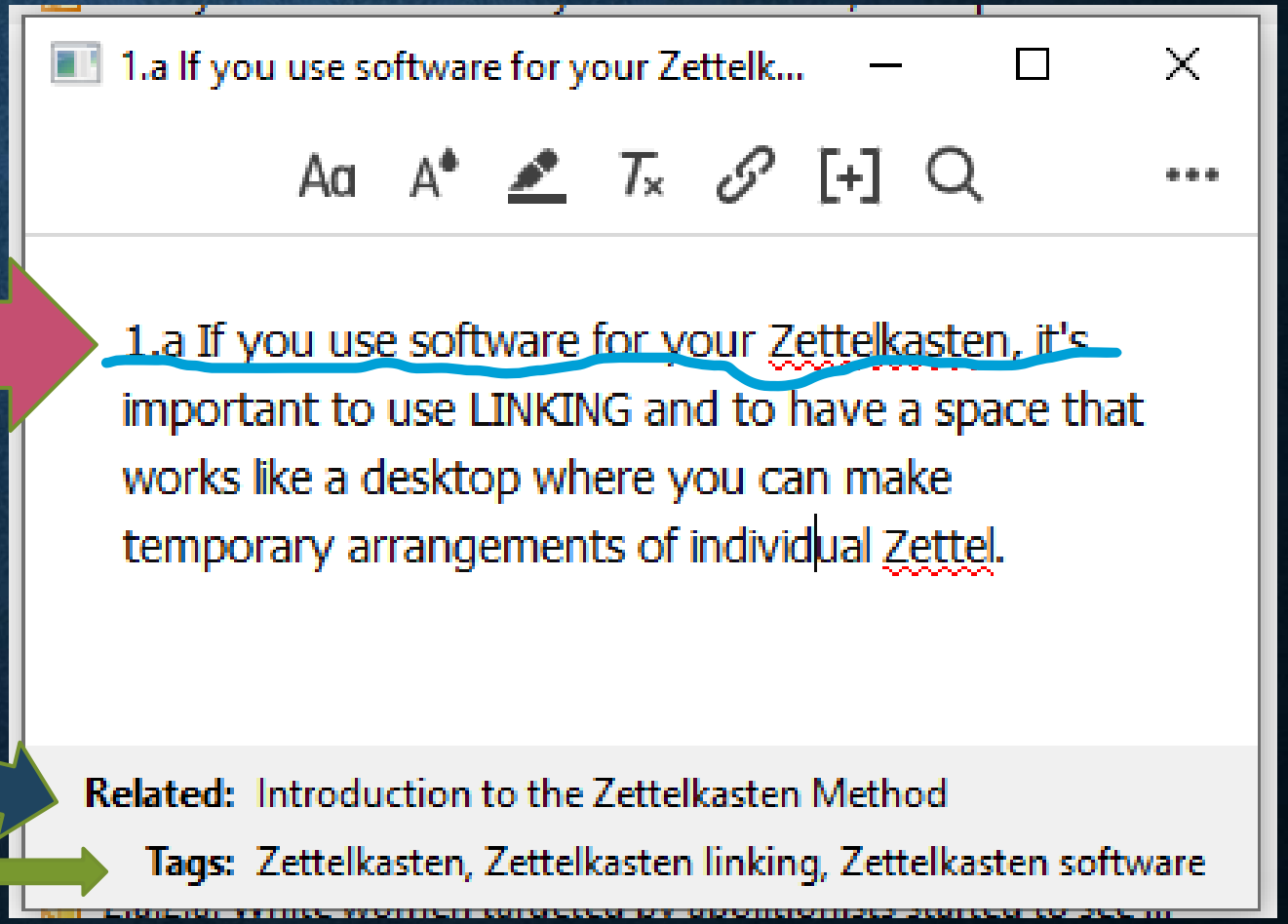
- Keep your numbered notes as Standalone Notes in one folder you call "Zettelkasten" or "All Notes" or similar.
- Break up notes into individual, "atomic" ideas: one idea per note
- Begin the note with a number so that Zotero will file your notes automatically into a "tree of ideas."
- Not everything 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.



YOU NOTE YOU!

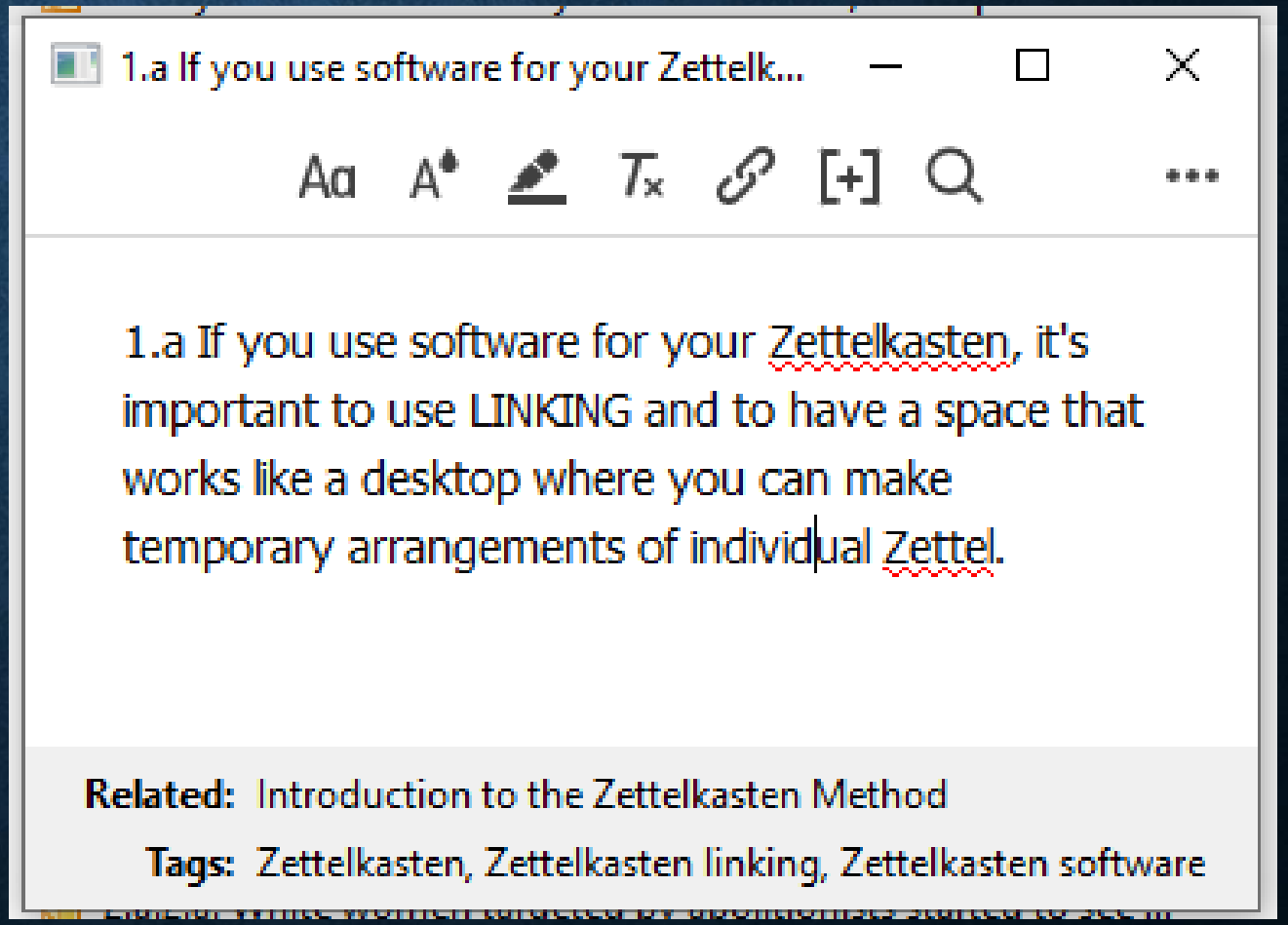
Notes in Zotero allow you to…

…paste images into your notes

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

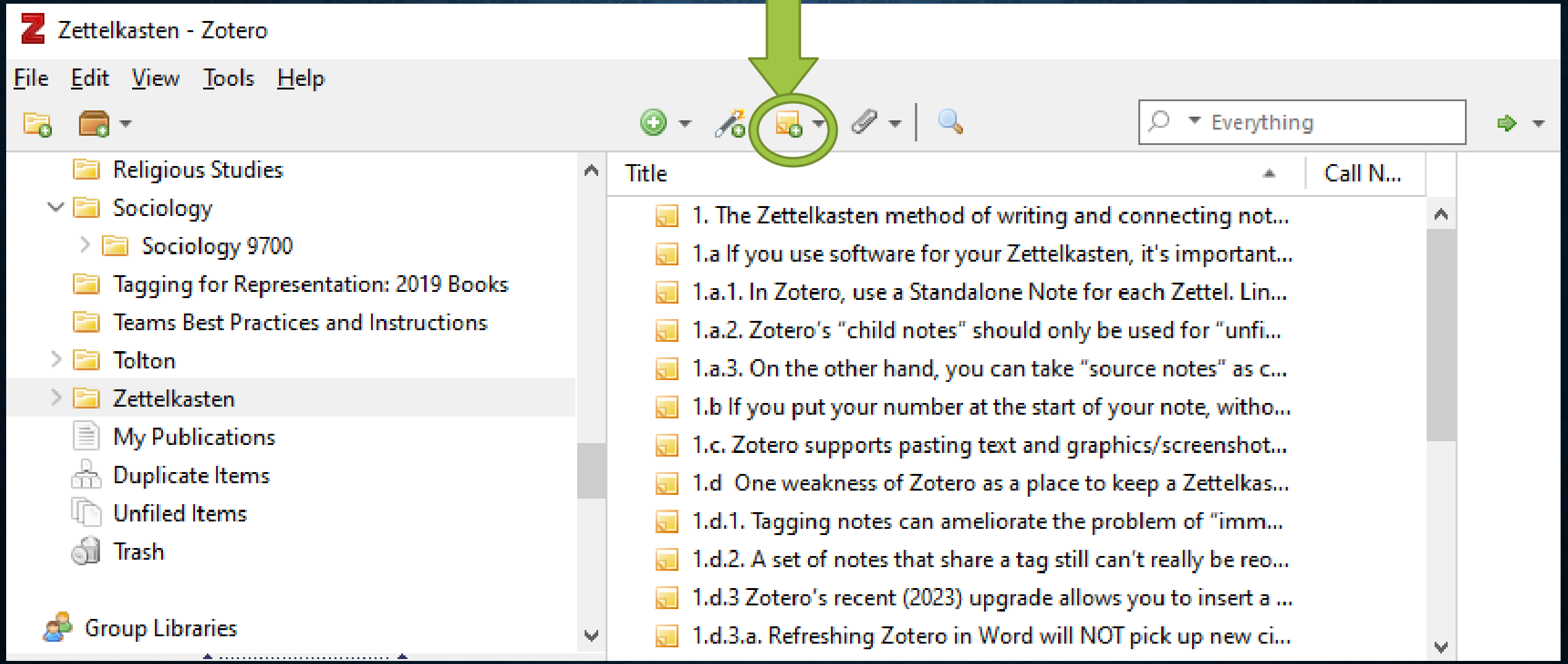
…insert links

…even insert citations with [+]



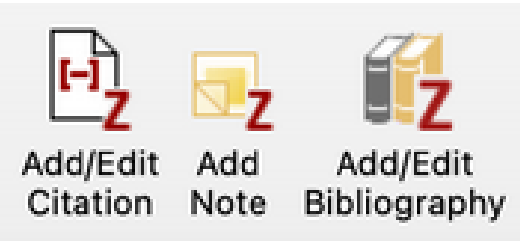
NOTES IN ORDER

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



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.mul.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/NfdHG6oHBJ8Qxc26s/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"