

Research Workflow

How I structure my notes and citations

Kate Hayes

2024-04-15

Table of contents

The basics	1
Reference notes	2
Concept notes	2
Project notes	2
The Tools	3
The weeds	3
More resources	4

I’ve played around with many different research workflows over the years - physical notebooks, notes stored in infinite word documents, color-coded index cards when I was a brand new undergraduate writing my first research paper. I’ve gone back and forth since then about whether following a system is a really important tool or whether it’s a particularly creative procrastination technique. I’d like to think I’ve found a middle ground. My current system is automated as much as possible to cut down on the busy work of maintaining the workflow itself.

An Aside: why take notes?One of the best writeups I’ve seen on how to take notes is the [following](#):

The basics

I use Obsidian, paired with zotero, to index notes in what I’d call an extremely modified zettelkasten approach (link). I im-

port articles into zotero using [their chrome extension](#), read it in PDF on a tablet - anything highlighted is saved as an annotation in zotero, . The [Citations plug-in](#) to obsidian allows me to link my notes to Zotero.

I use three different types of notes: Reference Notes, Concept Notes and Project Notes.

Reference notes

Reference notes represent individual articles - I try to follow a structure once assigned to me as a graduate student: a paragraph or two summarizing the article, a paragraph reviewing my own thoughts as I read, a sentence of takeaways and whatever citations I'd like to keep track of in a bulleted list at the end. Reviewing an article in that way can be an undertaking - I have a lot of notes in some stage of completion, and many for which a full summary might be overkill.

Concept notes

Concept notes are the connecting ideas and concepts between reference notes - some of them are just tags (*boreal*, *fire*, *herbivory*), others turn into quick notes to mark definitions (words I had to look up, things like *autotrophic respiration* or *thermophilization*), and some end up as deep file drawers (like *moose*, which is a long list of average body weight, home range sizes, preferred forage species and other values I think I might use as parameters or citations some day).

Project notes

In theory, project notes are where the ideas pieced together in references and concepts start to take shape. My current project notes are named things like *How does climate change alter the dynamics of biotic disturbances?* Or *Shrub expansion in the Arctic* - ideas I've started to pull together across articles. This is the stage where the zettelkasten method guides start to describe spontaneous idea generating - some mystical point

at which all the notes start to connect in interesting ways. Depending on the blog post, sometimes the zettelkasten can feel like a sales pitch, one where the “papers just write themselves!”. I have some skepticism around this - but I do agree that so far it’s been really useful to have a place to sort out some of these growing ideas. Some of my more developed project notes have started to read like the introduction to a literature review or a talk, which is exciting.

Some notes: Zotero crashes pretty regularly on me - aka, every first time I open it. My guess is it’s the connections I’ve set up through XX and XX, but I’ve been too lazy to double check or to look for a solution.

The Tools

- Obsidian
- [Obsidian Citation plug in](#)
- Hazel
- Zotero
- Zotero plug in

The weeds

Obsidian templates

Obsidian lets you create templates for different types of notes, stored in the Template folder in your vault. I have one for each note type, which populate with XXXHazel to sort

For a while, I would sort things into folders automatically, which I thought would incentivize me to finish notes I hadn’t sorted yet. But then the vault filled with so many unfinished notes that it made it hard to navigate. Now I’ve got Hazel set up to sort things automatically based on their tags, which helps.

Connecting reference notes to zotero

I use their short citation (Author, Year) as the title and link each to their corresponding zotero entry using a citekey (the method for which is described further in the documentation for the plugin Citations). It's not a perfect automation - sometimes I have to go in and manually edit the citekey to match the one in obsidian. I also had to change the obsidian settings to be XX, and the one in zotero is set as XX.

More resources

Here are some examples of other's workflows:

- <https://martinezponciano.es/2021/04/05/research-workflow-as-a-phd-student-in-the-humanities/><https://wippp.com/blog/taekman-zettelkasten-workflow-2023-using-devonthink-drafts-and-obsidian>https://docdrop.org/download__annotation__doc/How-to-Take-Smart-Notes-by-So%CC%88nke-Ahrens-40zol.pdf