

Obsidian for Knowledge Management — Workbook

This workbook turns the course into a real, working Obsidian vault. Tackle one section per module: stand up and structure your vault, build a linking habit and read your graph, automate daily notes and templates, then layer on a PARA and MOC organizing system with a weekly routine. Do every exercise inside your actual vault, not a throwaway one, and fill the worksheets as you go. By the end you will have a structured vault, a reusable template set, at least one Map of Content, and a capture-process-connect-retrieve loop you can keep running for years.

Getting Started with Obsidian and Your First Vault

Install Obsidian, create one durable vault, set a starter folder structure, and get fluent moving around by keyboard.

Checklist: Vault Setup Checklist

- Download and install Obsidian from [obsidian.md](#)
- Create one main vault named durably (Brain or Knowledge, not Test)
- Place the vault in a folder that syncs or backs up (Dropbox, iCloud, or Git)
- Create top-level folders: 00 Inbox, 10 Notes, 20 Daily, 90 Attachments
- In Settings, Files and links, set the default attachment folder to 90 Attachments
- Create your first note with Ctrl or Cmd plus N and give it a real title
- Pin the Command Palette shortcut Ctrl or Cmd plus P to memory

Exercise: Markdown Warm-Up

Create a note called Markdown practice and reproduce each item below using only the keyboard, watching Live Preview render it. The goal is muscle memory for the eight rules you will use daily, not memorizing syntax from a reference.

- Write an H2 heading with three bullet points, plus one bold word and one italic word

- Add three checkbox tasks using - and tick one

- Write a one-line quote using the greater-than sign

- Add a wikilink to a note that does not exist yet, then click it to create it

Worksheet: Navigation Drill Log

For one work session, force yourself to navigate only by keyboard and record what you used. Fill each field after the session. The point is to retire the file tree and prove the shortcuts are faster.

Number of times you used Quick Switcher (Ctrl or Cmd plus O)

A phrase you found with Global Search (Ctrl or Cmd plus Shift plus F)

One command you ran from the Command Palette you did not know existed

Number of times you opened a note in split view (Ctrl or Cmd plus click)

One shortcut you want to assign or rebind to fit your hands

Linking Ideas: Wikilinks, Backlinks, and the Graph

Write atomic notes, connect them with wikilinks and aliases, read the backlink panes, and tame the graph with filters.

Exercise: Turn a Messy Note into Atomic Notes

Take one long, mixed note you already have (or a page of meeting scrawl) and split it into atomic notes. Each new note covers exactly one idea, has a title written as a claim, and links to at least one other note. This is the single most valuable habit in the course.

- Identify three distinct ideas buried in the source note
 - Create three notes whose titles are claims, not topics (e.g. Short feedback loops reduce rework)
 - Link the three notes to each other where the ideas genuinely relate
 - Open one of them and confirm the Backlinks pane now shows the others
-

Worksheet: Link Audit Worksheet

Pick one important note and audit how well it is connected. Fill each field by reading its link panes. A well-connected note has multiple backlinks and is reachable from an MOC; a lonely note needs work. Note title being audited

Number of backlinks shown in the Backlinks pane

Number of outgoing links in the Outgoing Links pane

Unlinked mentions found, and how many you converted to real links

One block reference you could create to cite a specific paragraph

The MOC or Home note this should be linked from (or none yet)

Checklist: Graph View Tune-Up Checklist

- Open the global graph and identify at least two orphan notes
- Connect or delete each orphan you found
- Add a filter to hide attachments, e.g. -path:90 Attachments
- Create a colored group for tag:#moc so maps stand out
- Open a Local Graph beside an active note and set depth to 1 or 2
- Pin the local graph in a side pane for your next writing session

Automating with Daily Notes and Templates

Enable daily notes for frictionless capture, build a template set, and add Templater for prompts and auto-naming.

Checklist: Automation Setup Checklist

- [] Enable the Daily notes core plugin and set date format YYYY-MM-DD
- [] Point new daily notes at the 20 Daily folder
- [] Assign a hotkey to Open today's daily note
- [] Enable the Templates core plugin and create a 99 Templates folder
- [] Build at least a Meeting and a Permanent note template
- [] Install and enable the Templater community plugin
- [] Acknowledge the third-party plugin safety warning knowingly

Worksheet: Template Design Worksheet

Design one template for a note type you create often. Decide its sections before building it in Obsidian, so the structure is intentional. Fill every field, then create the .md file in 99 Templates.

Note type this template is for (meeting, book, project, person)

The four to six headings the template should contain

Which heading uses checkboxes for follow-ups

A Related line listing what kinds of notes it should link to

Whether a date token in double curly braces is needed, and where

One Templater prompt you want (e.g. ask for a title and rename the file)

Exercise: Run Your Capture-and-Promote Cycle

Practice the full daily-note flow once end to end. Capture freely today, then process tomorrow. This proves the holding-pen-then-promote rhythm that keeps note-taking sustainable.

- For one day, dump every stray thought and task into today's daily note only
 - The next day, reread it and mark which items are keepers
 - Promote one keeper into a permanent atomic note in 10 Notes, linked back to the source day
 - Leave the non-keepers in the log and confirm search can still find them
-

Organizing for Retrieval: PARA, MOCs, and Zettelkasten

Sort by actionability with PARA, build Maps of Content, apply Zettelkasten note types, and run a weekly review.

Worksheet: PARA Sorting Worksheet

Inventory your current commitments and sort them into PARA buckets. This becomes the spine of your folder structure. List real items, not categories, so the buckets reflect your actual life and work.

Projects — efforts with a deadline and an outcome (list 3 to 5)

Areas — ongoing responsibilities with no end date (list 3 to 5)

Resources — topics of interest you collect on (list 3 to 5)

Archive — finished or inactive items to move out of the way

One note currently in the wrong bucket and where it should go

Exercise: Build Your First Map of Content

Choose a topic on which you already have several notes and build an MOC for it. An MOC is a hand-curated note of links, created only once a topic has earned the structure. Then wire it into your front door.

- Name a topic you now have at least five notes about
 - Create a note titled [Topic] MOC, tag it #moc, and add grouping headings (Core ideas, Techniques, Open questions)
 - Link the relevant notes under each heading
 - Link this MOC from a single Home note so it is two clicks from anywhere
-

Checklist: Weekly Review Checklist

- Open the graph and link or delete every orphan note you find
- Reread the week's daily notes and promote keepers to permanent notes
- Update active project MOCs with any new notes
- Move finished projects and stale items into Archive
- Empty 00 Inbox to zero so capture stays trustworthy
- Write one open question to pull on next week

Exercise: Apply the Three Zettelkasten Note Types

Practice the fleeting-to-literature-to-permanent flow on one real source. Most fleeting notes never graduate, and that is expected; the point is to feel the pipeline and write in your own words.

- Capture a fleeting note from something you read today, in your daily note
 - Write a literature note: the source's idea in your own words, plus a citation
 - Distill one durable insight into a permanent atomic note and link it to two or three related notes
 - Add it to the relevant MOC so it is reachable, not orphaned
-

Your Action Plan

1. Install Obsidian and create one main vault with folders 00 Inbox, 10 Notes, 20 Daily, and 90 Attachments
2. Learn the four key shortcuts: Command Palette, Quick Switcher, Global Search, and toggle edit/read
3. Convert one messy note into three atomic notes whose titles are claims, and link them together
4. Open the backlinks and local graph panes daily so connections surface while you write
5. Enable Daily Notes and assign a hotkey so capture is always one keystroke away
6. Build a 99 Templates folder with a Meeting template and a Permanent note template
7. Install Templater and set up one prompt-and-rename template so notes file themselves
8. Sort your commitments into PARA and build one Map of Content linked from a Home note
9. Adopt the capture-process-connect-retrieve loop and promote keepers out of daily notes
10. Run a 15 to 30 minute weekly review to clear orphans, update MOCs, and empty the inbox to zero

