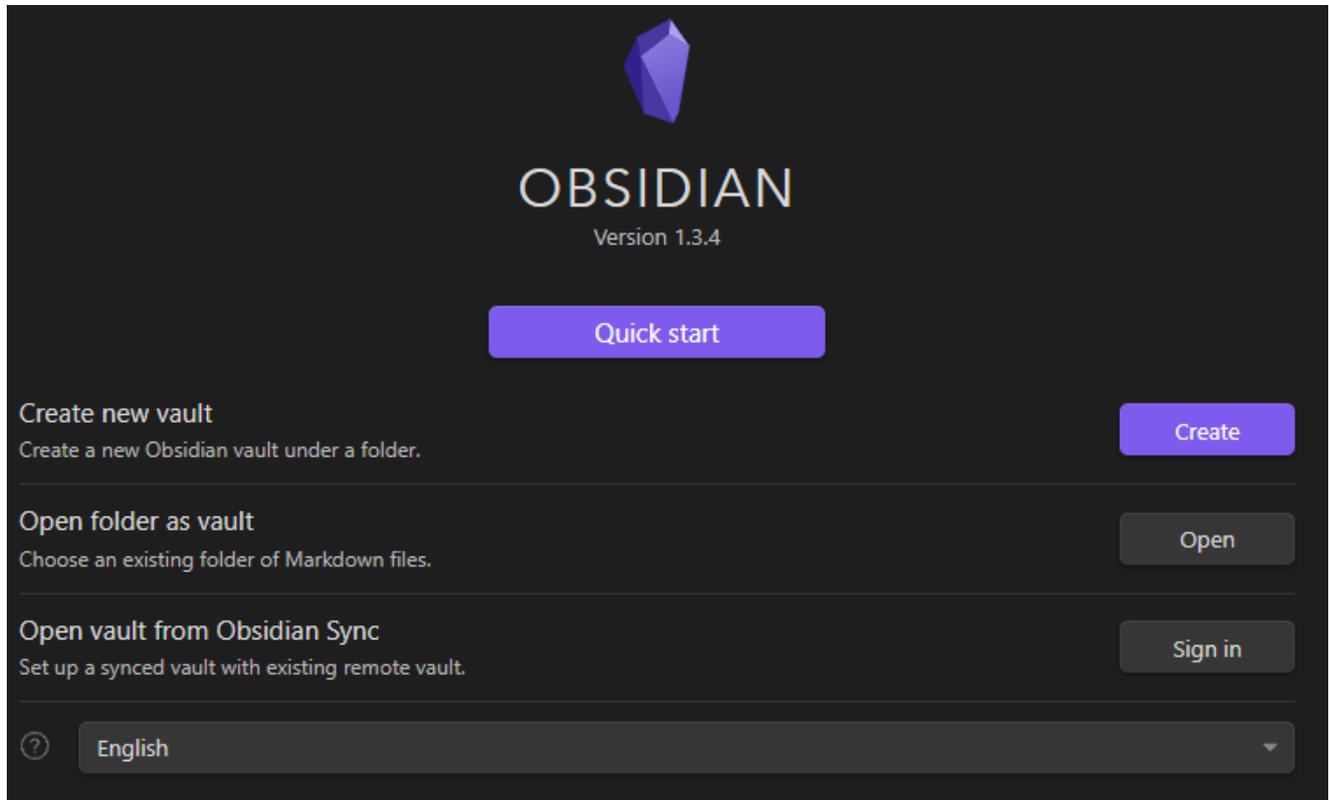


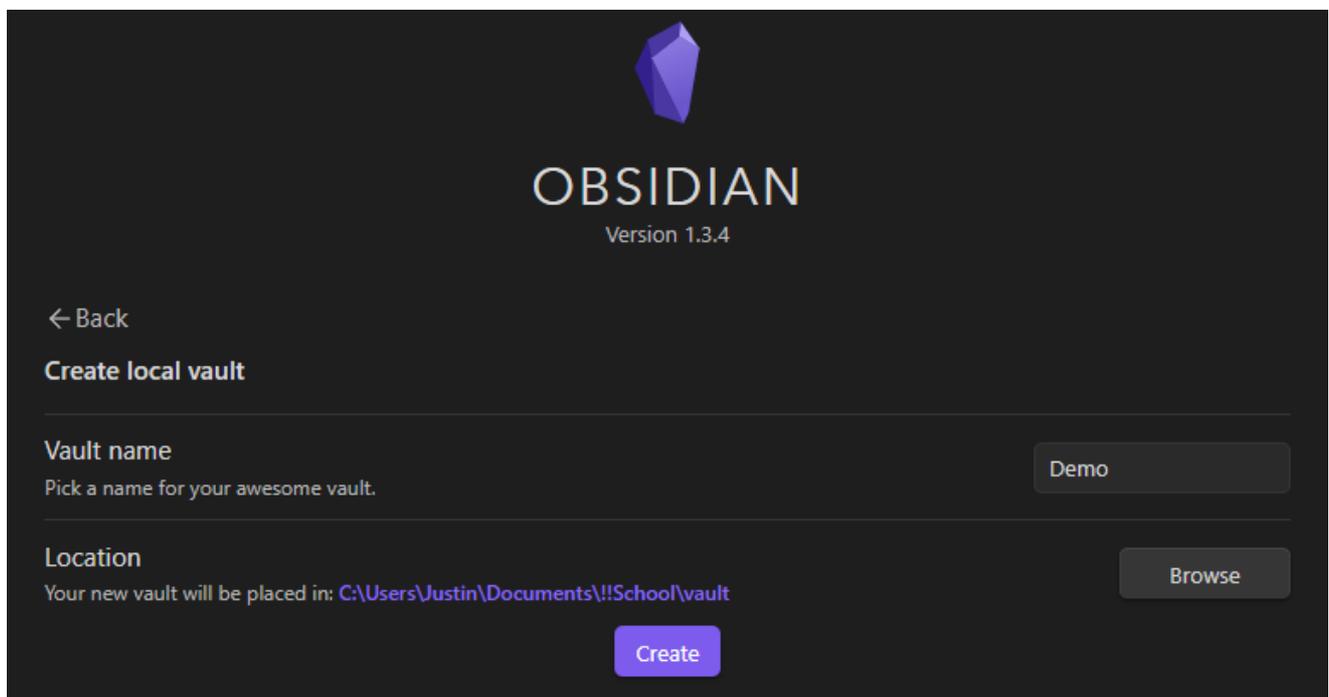
# Installing Obsidian and plugins

First [install Obsidian](#).

Once you have run the installer you will eventually see the following screen



Click on **Create new vault**

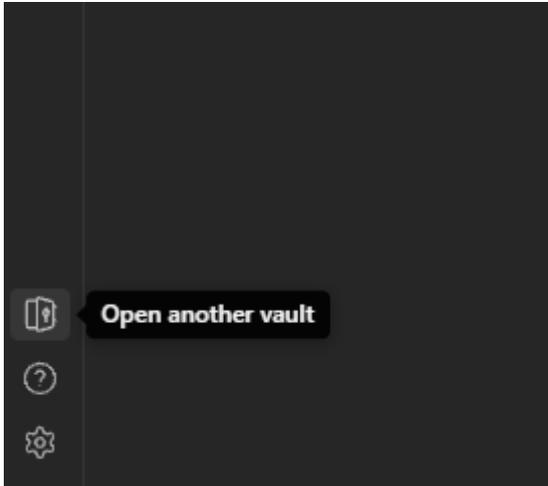


Give the vault a name and select the directory for your vault through the **Browse** button. I recommend you select a directory on your **onedrive!** This way there will always be a backup, I would also recommend the setting [Always keep on this device](#) which you can see

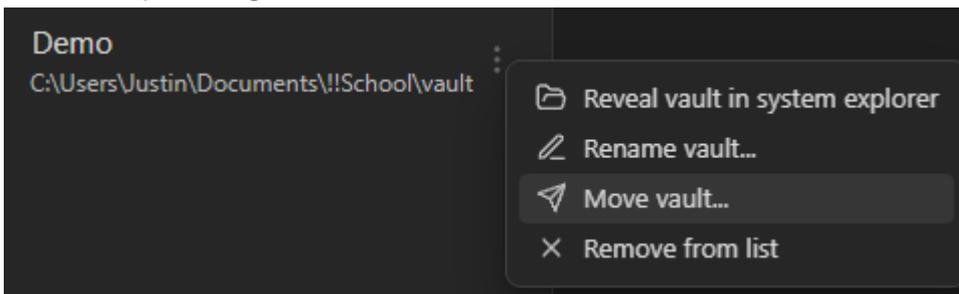
by right clicking the folder in Windows explorer. This enforces your computer to update the files whenever possible.

## Optional: Moving your vault

In case you did not select the vault folder in the location you wanted and want to move it, that can be done by clicking the open another vault option.



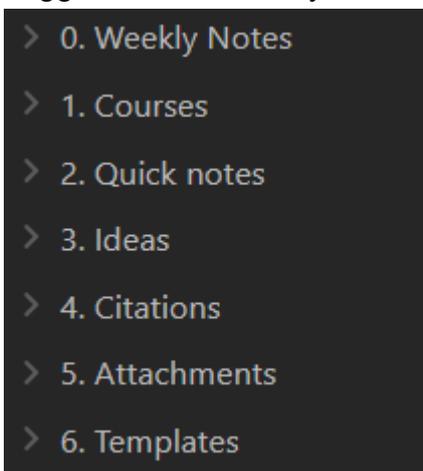
And then pressing the 3 vertical dots



This way is preferred over simply moving the files contained in the vault folder as this will automatically correct settings and addons.

## Setting up your vault

Now your vault is created you have an empty canvas, in here you can create notes or folders. This part can be customized to your own liking, so the following steps are a mere suggestions for what you can do with the software.



For example, this is how I have setup my personal vault, the numbers in front enforce,

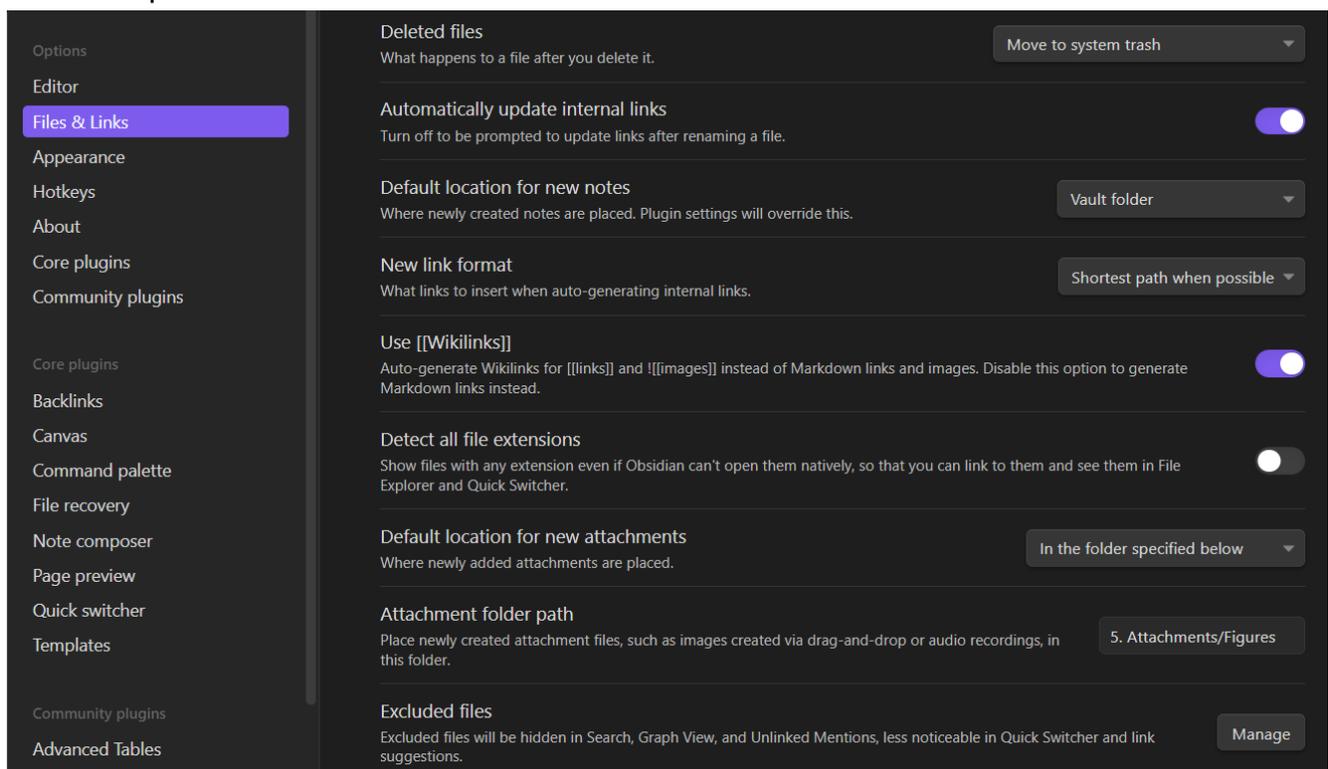
similarly to windows file explorer, the order in which they are shown. The Weekly notes, Attachments and Templates I will detail later but 1 to 4 are just folders that I use for my notes.

## Customizing the settings

In Obsidian it is possible to simply drag and drop or copy paste material into your documents, this in turn will create a copy of the file inside your vault as it is used for reference. This will create two situations:

1. if you want to use your PDF's inside your vault (for embedding), I highly recommend you select the output folder of Zotfile (Zotero plugin) to be inside the vault. This causes no problems and allows you to keep all relevant data in a single location. Simply create a folder inside your vault and you can find it in explorer to be used as the output directory in Zotero.
2. You will quickly amas a lot of images that will clutter your vault, this is why obsidian has a setting called the Attachments folder and a community plugin that allows you to clear unused images in that folder.

First set up the attachment folder



In the Files & Links settings go down to the Attachment folder path and select a folder inside your vault that you want to use for this purpose. How to install community plugins will be detailed shortly.

There are many settings in Obsidian and I highly recommend you personalize it, it is your tool! But some settings you might want to know of are:

- Editor/Behavior/Spellcheck --> ON

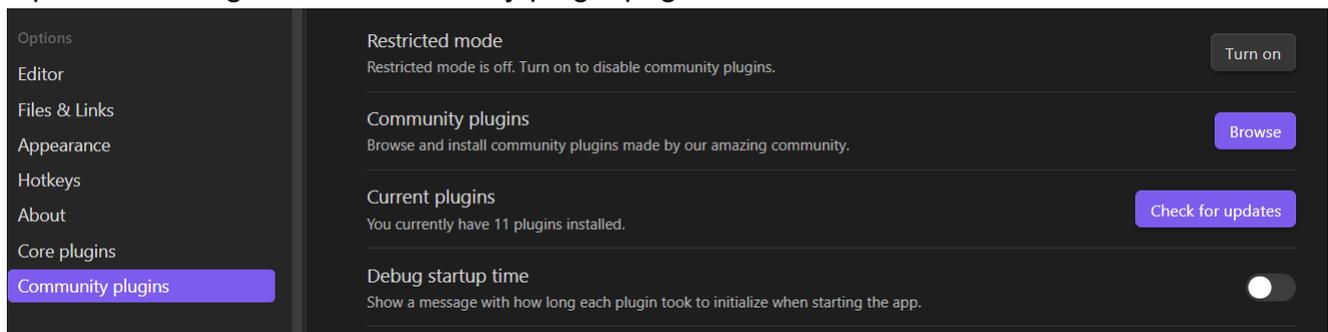
- Files & Links/Automatically update internal links --> ON
- Core plugins/Daily notes --> Depends on your preference (see community plugins)
- Core plugins/Slash commands --> ON

Then there are community plugins which deserve a separate section

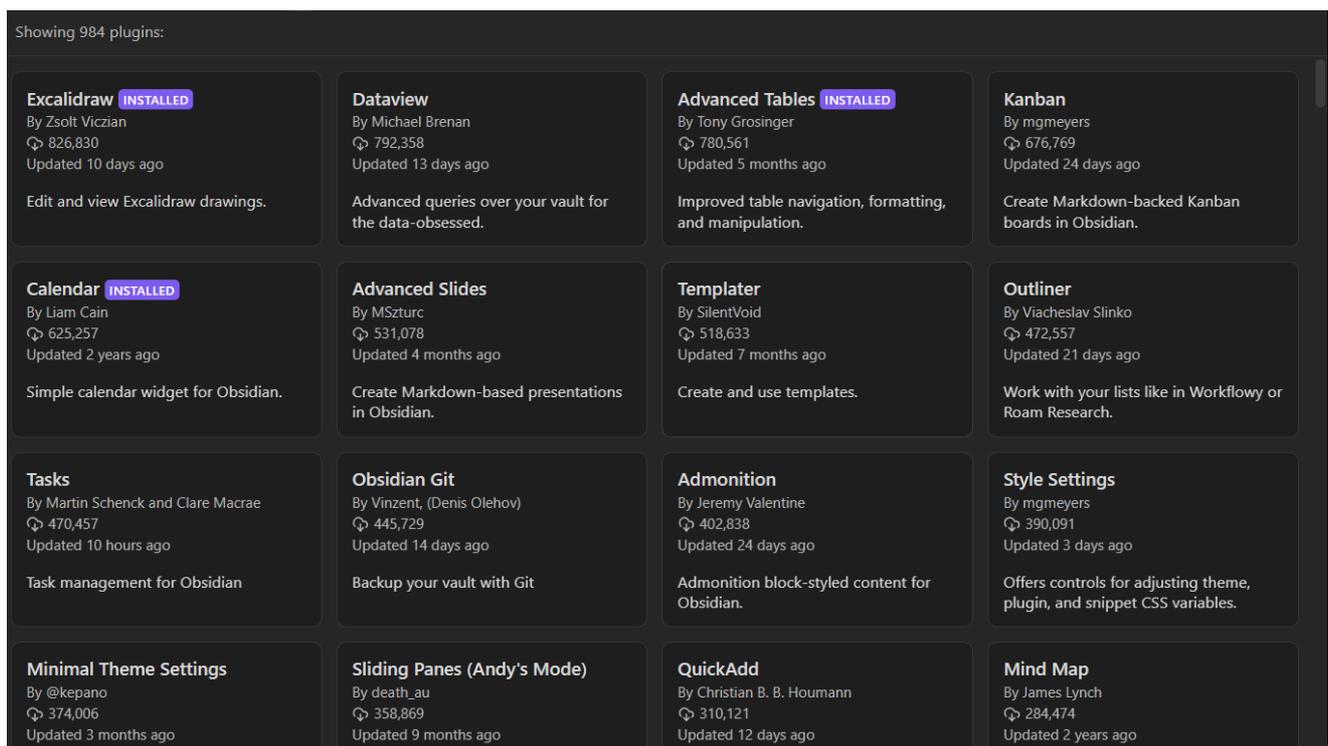
## Obsidian Community plugins

Many things you can already do without the need of community plugins, but for **ANY** pet-peeves just check the community add-on page because most likely, somebody has already written a tool to correct for it.

Open the settings to the Community plugin page



and select the **Browse** button



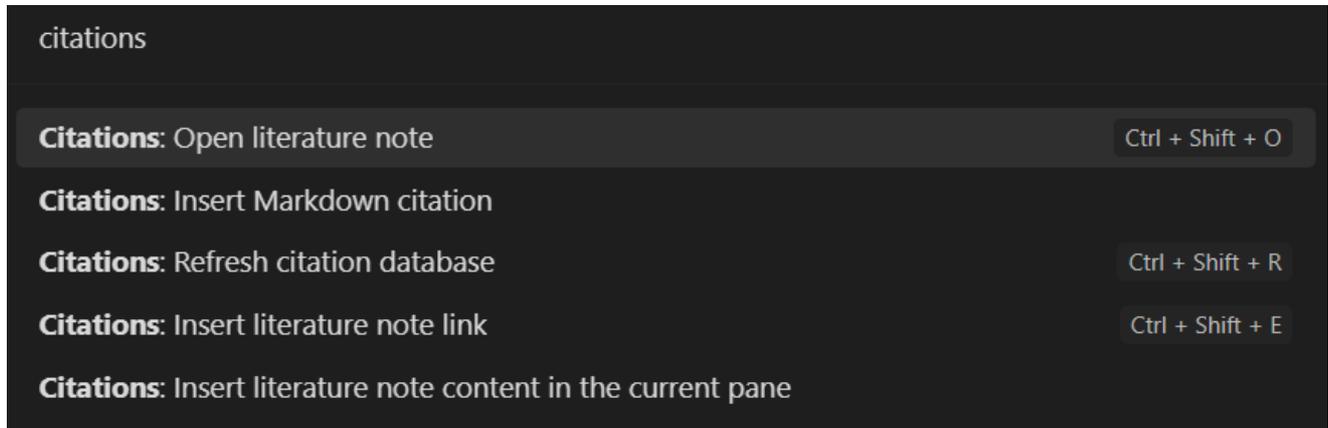
You can search for the add-ons you want, download from within Obsidian, just be mindful to not forget to click **ENABLE** after it has finished downloading. In case you did forget, in the Community plugin settings page you can enable/disable add-ons!

## The necessary plugin: Citations

Assuming you followed this workshop you now have both Zotero and Obsidian installed and running. But now why is this link between Zotero and Obsidian so important? Because we

can automatically export and update our entire bibliography through Better-BibTeX!

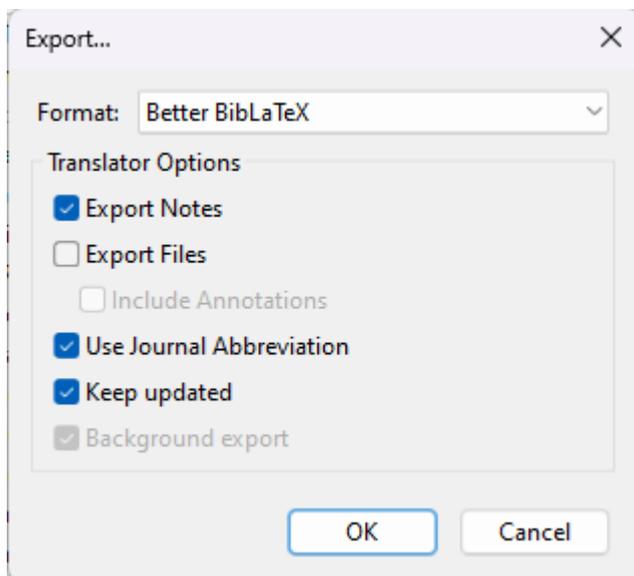
With the community plugin [Citations](#) we are able to read this .bib file and automatically create notes based on the metadata available in our bibliography! In simple terms, we can add a paper in Zotero using the magic wand, open obsidian and open the command menu (explained later) and select **Open literature note** to create a new note



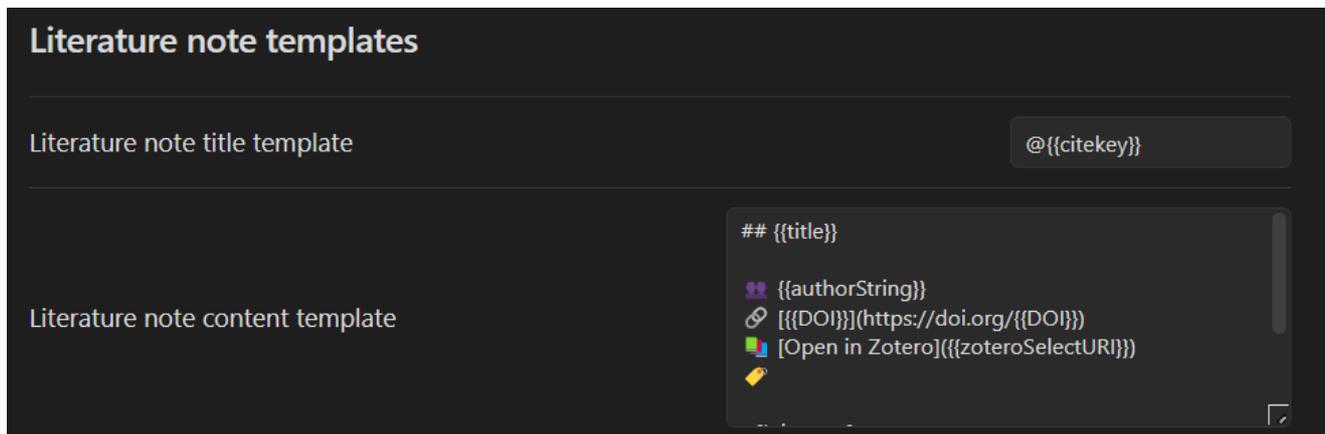
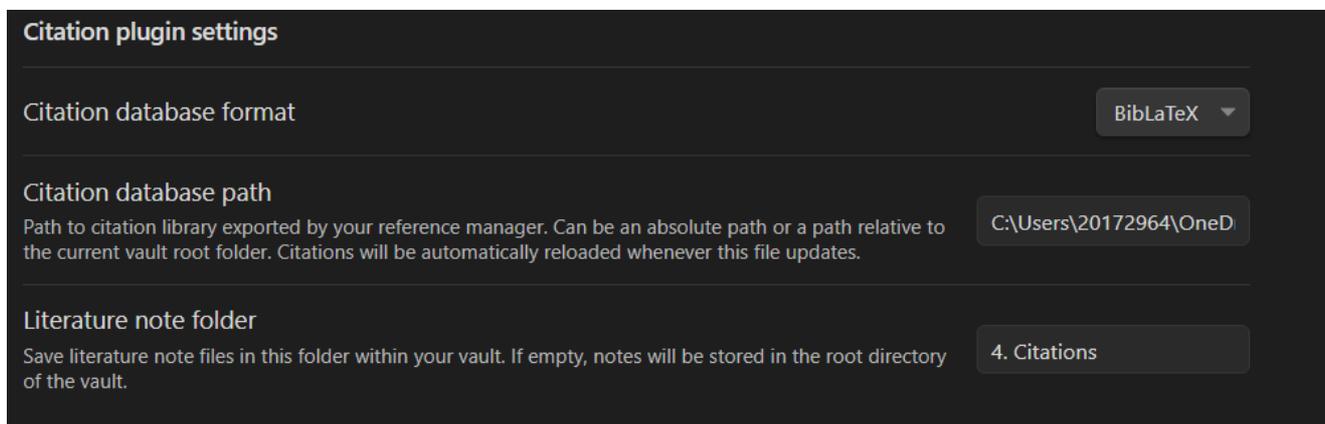
Now type the name of the author or title of the paper and it automatically creates a file that is linked to your Zotero and if you have set it up correctly the PDF as well! I have set it up such that the file name of the note is the same as the @citekey.

## Setting up Citations

First we need to export our bibliography from Zotero to a suitable file on our onedrive: Make sure to select the format: **Better BibLaTeX** and select **keep updated**.



Select a folder where this should be exported to on your onedrive, and this we can load into our citation tool in obsidian. After having **installed and enabled** the plugin through the browser in Obsidian, go to the settings and scroll down for Citations, select BibLaTeX and the folder where you set Zotero to export to.



Now you can either `ctrl+p` or `/` (if you set Slash commands to ON). And use the citations toolbox to keep track of your notes!

But this is not all, no we just scratched the basics of note taking. Through obsidian you can not only link through referring to other notes, you can even select (parts of) other notes and have it embedded inside a different note! Useful for literature reviews :)

Now if you have read many many papers, one might be interested in how do these all relate to each other. Obsidian is able to do this as well, you can find all your links be it:

- What papers did I mention in this note?
- When did I mention this paper in other notes?

## Optional addons

- I personally use [periodic notes](#) to change daily to weekly notes, it can quickly create an overview of things I need to do on a per-day basis through the template I have setup on that specific plugin. I would also recommend you keep templates in a separate folder for future reference.
- If you often use tables I will recommend [Advanced Tables](#), table generation is simply annoying in Markdown. Always just check the community addon page!
- Personally, I like to use a drawing tablet for working through mathematical problems or just general ideas. I used to switch to a drawing software and then export that image and embed it into my word file. That is not nice for 2 reasons, synchronization and annoyance. With the [Excalidraw plugin](#) one can simply work from within obsidian and draw/embed the images without the need to constantly export the image. This addon specifically has a **very** active creator which keeps introducing more and more features,

it supports *L<sup>A</sup>T<sub>E</sub>X*, embedded videos or links to drawn objects and much much more. If you use a tablet of any kind, I highly recommend installing this addon and watching some of the tutorials on the linked page.

- An alternative or additional plugin to Citations is [Zotero integration](#), it allows notes to be taken within Zotero, such as highlighting text or images and importing these to a Markdown file in Obsidian. Note that this will overwrite the file each time, so only start adding notes within Obsidian once you are done within Zotero!  
But many many many more can be installed quickly and easily within the obsidian community page!

It is not that obsidian does things no other software can, the reason it is this useful is because it can do all these things within one environment. Especially when using proper plugins.