PERSONAL KNOWLEDGE MANAGEMENT MMETHOD AND STYLE

Summary

Virginia Vidaura, Corps trainer, hands in the pockets of her coveralls, looking us over with calm speculation. Day one induction.
"Since it is logistically impossible to expect everything, she told us evenly, we will teach you not to expect anything. That way, you will be ready for it. "
(Broken angels – Richard Morgan)

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All technical information was collected in July 2022.

BIO

Alessio Sperlinga was born in 1963 in Italy.

His professional history begins with a career as an accountant, then military service.

The second part of his life includes a family, a son, and his second love: information technology.

In the third part of his life, after years of experience as a project manager and several courses on soft skills, he becomes a trainer.

His first passion remains knowledge and he spent his time during Covid updating his skills in computational linguistics, graph theory with Neo4j, Blockchain technologies and Virtual Reality with Oculus.

Nonprofit activity is the background of his life with numerous activities and participation with associations and social enterprises as a volunteer.

https://it.linkedin.com/in/alessiosperlinga
asperlinga@hotmail.com

Foreword

From my point of view, Personal Knowledge Management (P.K.M.) tools are a class of software, and Second Brain theory is a group of functional methods to make sense of the way these tools can be used.
Personal is the key word, and I write this text only about the personal use of P.K.M.. Not for teams, not for companies, but just to aid insight and deep thinking that the software tools offer.

I started using Evernote (https://evernote.com/) in 2011 because it was on the web. For me, availability is more important than features, and Evernote is the first note-taking program I used with web and mobile clients.

The first time I saw Obsidian (https://obsidian.md/) I was struck by admiring the genius of the programmers and the way the markdown editor speeds up writing.
Then I exported to markdown format using Joplin (https://joplinapp.org/) my twelve years of notes stored in Evernote to see the knowledge graph with tags as nodes. What a beautiful galaxy!
I watched many YouTube videos regarding Obsidian and Second Brain and I remembered the old book "Bpmn Method and Styles" (https://methodandstyle.com/bpmn-method-and-style/) where the problem is that we have grammatical elements but we don't have a starting method and style to use them.
The worst example is the Roam Research (https://roamresearch.com/) video tutorial. They really struck me because it seems to have been created to confuse people, not to sell this beautiful software.

When I shifted my attention to Notion (https://www.notion.so) I found the simplicity of note taking, the elegance of the structured model, and the power of blocks and database functionality. Relational databases can be difficult, but they really are the faster and more productive interface than other DBMS's I have worked with over the past 30 years, including Microsoft Access.

The second-brain theory and the popular GTD (https://gettingthingsdone.com/) and P.A.R.A. (https://fortelabs.co/blog/para/) methods walk together hand in hand. P.A.R.A has been explained very well by Tiago Forte in his videos and in his book, with meta-views on organizing information before starting to use a specific tool.
I think P.A.R.A. is a beautiful generic method and GTD too but it is almost a utopia.
In any case P.A.R.A. is a simple top-down method and this is just my point of view.
In this eBook we will not cover the Zettelkasten method.

I would like to explain the different styles and methods applied in Evernote, Obsidian and Notion to solve the classic problem in knowledge management activities.
The choice of programs is due to their numerical spread in the three different styles and methods of work.
I could have written the same eBook talking about Microsoft Onenote (https://www.microsoft.com/it-it/microsoft-365/onenote/digital-note-taking-app), Roam Research (https://roamresearch.com/) and Craft (https://www.craft.do/).
The plan is to start using Evernote for writing, use a word processor to layout everything like a book and produce a .pdf file for convenient reading, then produce a version that can be shared with Notion.
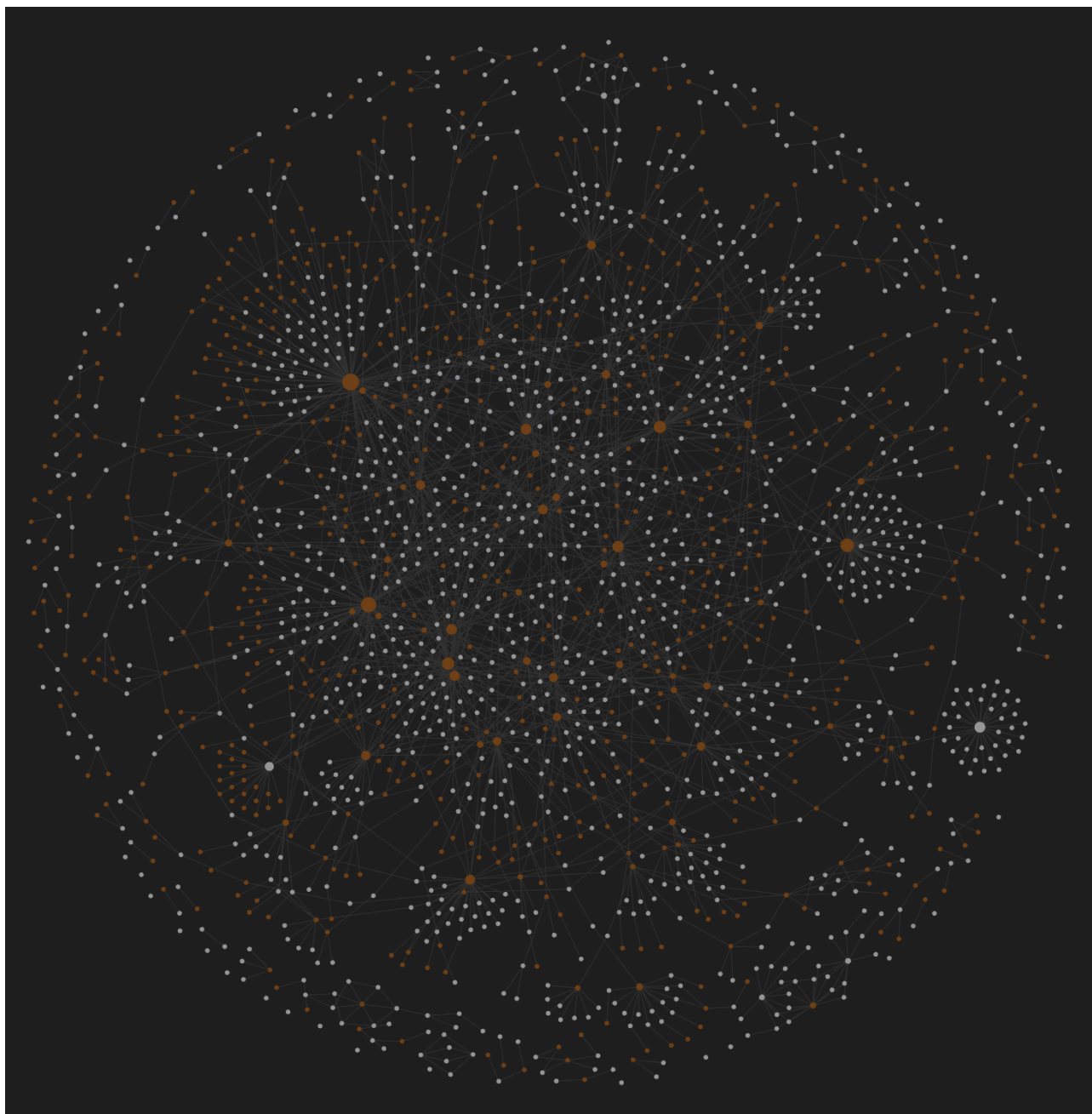
Figure 1- My 12 years of annotating from Evernote to Obsidian

What 's on my mind?

Something different

I have read many blogger articles online and watched many videos about the ways P.K.M. has been used. I have always felt that something is missing.

P.K.M. is a very rich class of software that optimizes the pace of knowledge management.

Before P.K.M. we had all the [theory of knowledge](#) (management) available, including graph theory for programming or GraphDB for qualitative and quantitative evaluation of relationships, [NLP algorithms](#) and [RDF frameworks](#) for content analysis, [concept maps](#) and [mind maps](#) to represent ideas and concepts.

For the past 20 years I have been learning these topics because my goal is to aquire a wide range of viewpoints.

My choices have always been in favor of simplicity, which often corresponds to the Pareto principle: 80% of the results will come from only 20% of the actions, in fact:

1. I have been using and teaching Mind Mapping techniques instead of concept maps to students and knowledge professionals for many years.
2. I chose to use Graph DB instead of python and graph algorithms and have been certified in Neo4j since 2020.
3. I chose to use RDF framework instead of python and NLP algorithm through a German online course at Hasso Plattner Institut in 2020.
4. I chose to use P.K.M. instead of WordPress and most Microsoft office software and task manager.
5. See Appendix A - About the information theory.

Organization

When I start learning something repetitive, I try to create a model and a defined set of steps.
- I play and rehearse in a sandbox.
- I create a space, a container, an actual model.
- If it is possible, I automate the process. Otherwise, I predefine the steps in the process.

In the other cases:

Harvesting the grain

All kinds of content that we see as interesting to us enters a convergent process, the classic funnel:
- Drag and drop
- Cut and paste
- Cropping tools
- Take linear notes

This applies only to the input stages and is clearly distinct from the other parts of the knowledge process.

Tiago Forte calls this Capture, the first part of C.O.D.E., a four-step universal process of Second Brain theory.

Fortunately, we have mind maps (I love mind maps :-)) that really summarize the content we receive and can be used in a practical way. We can also use P.K.M. software such as Obsidian or Roam Research to take notes in real time during a live lecture.

Storing the grain

You can use different locations for file storage, such as in P.A.R.A. method or GTD or whatever suits you.
Tiago Forte calls this Organizing, the second part of C.O.D.E..
You can use a P.A.R.A. method or GTD or whatever works for you. P.A.R.A. is so useful because it is simple and repeatable in every folder system from the beginning of the process.

Clean the grain

Remember the linear structure of writing technology. Every language is written on lines, and meaning can only be diffused or repeated, but it can also be an implicit consequence of written sentences. We need to know the relationships between entities to understand the meaning of a sentence.
This stage of the knowledge process is necessary to reprocess and absorb content, in order to digest something we must chew it up and restructure it into digestible elements for our bodies.
These techniques (reflect) allow us to use our mind's best abilities: imagination and connection, where connections are a part of the nonlinear process that our mind naturally uses.
Tiago Forte calls this Distill, the third part of C.O.D.E..

Packaging the grain

There are some things on my mind when I'm thinking about what I will write, painting or mash-up different types of media:

1. books
2. comics
3. blogs
4. newspapers
5. presentations

Tiago Forte calls this Explain, the last part of C.O.D.E.. I think of this as a picture of content.

On the line

There are many ways to acquire content (divergent phase) but...
The issue is that we have been educated to think in a linear, sequential process with a tree structure, and we may have tools with nonlinear methods but **in the end, we write a linear book**. It is the same when we use a TV service like Prime or Disney and search using the remote control like an old T9 phone.
This is because we can only move in a sequential timeline and can use our eyes linearly, regardless of the direction of writing. This is the bottleneck in the convergent process of information packaging.
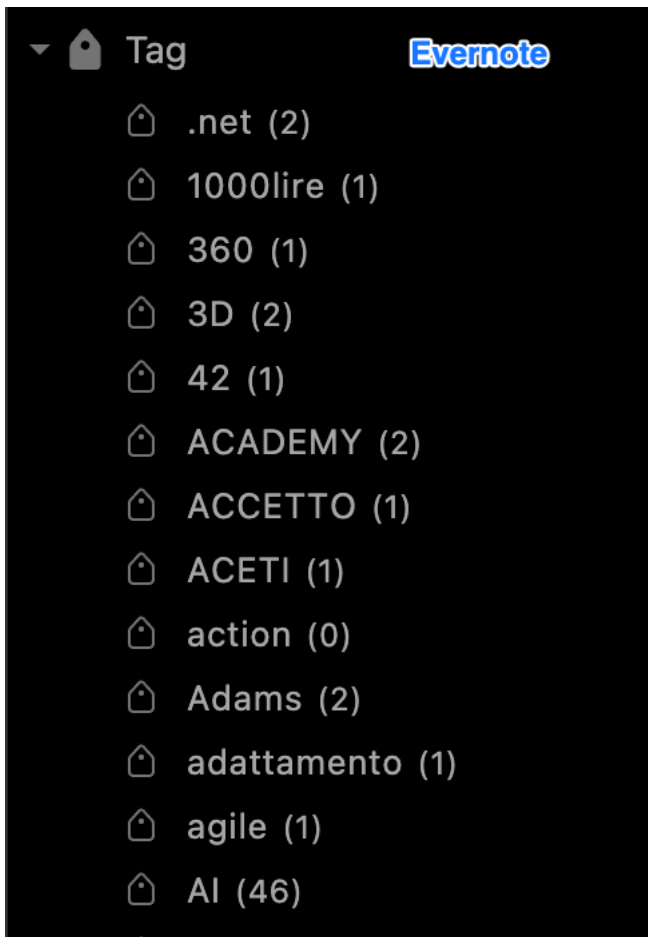The right way to put into words the meaning of something only once per topic.

If these premises are clear, we can proceed.

What is researchable?

Organization for searching

To find anything we need a type of categorization.
In accordance with the nature of the three types of software, I consider that:

- Evernote uses tags as CATEGORIES.
- Notion uses structure as TAXONOMY.
- Obsidian uses backlinks as ASSOCIATIONS.

Three different ways to make sense of content.

- Categories are sufficient because Evernote has a powerful search engine.
- Notion's taxonomy is self-organizing and is a self-explanatory sorting method.
- Associations in Obsidian creates a domain knowledge graph as an analytical index at the end of a book.
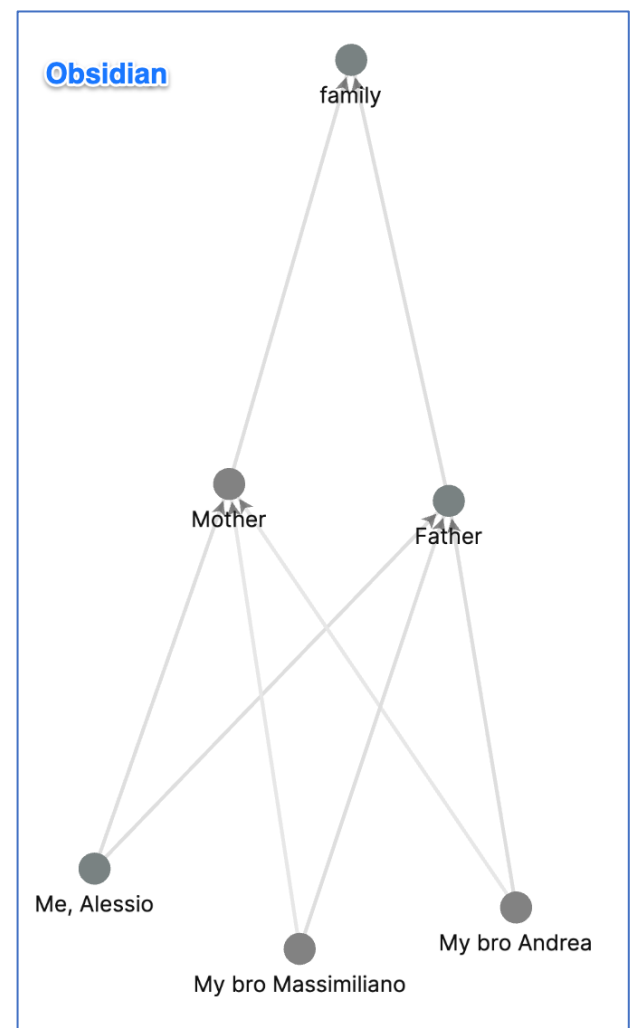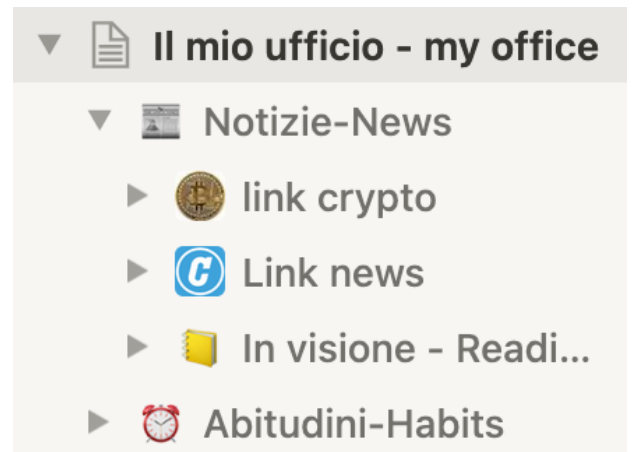
What meta data should be written in a note?

1. the motivation we bring, I use to write in the beginning
2. date and time of creation
3. date and time of modification
4. Author
5. Title
6. Tags

The only one that automatically records items 2-3-4-5-6 is Evernote. Notion has structured blocks (https://www.notion.so/blog/data-model-behind-notion) and a limited change log, and Obsidian only takes this information if you import files from certain sources or via plugins.
Sample from Obsidian:
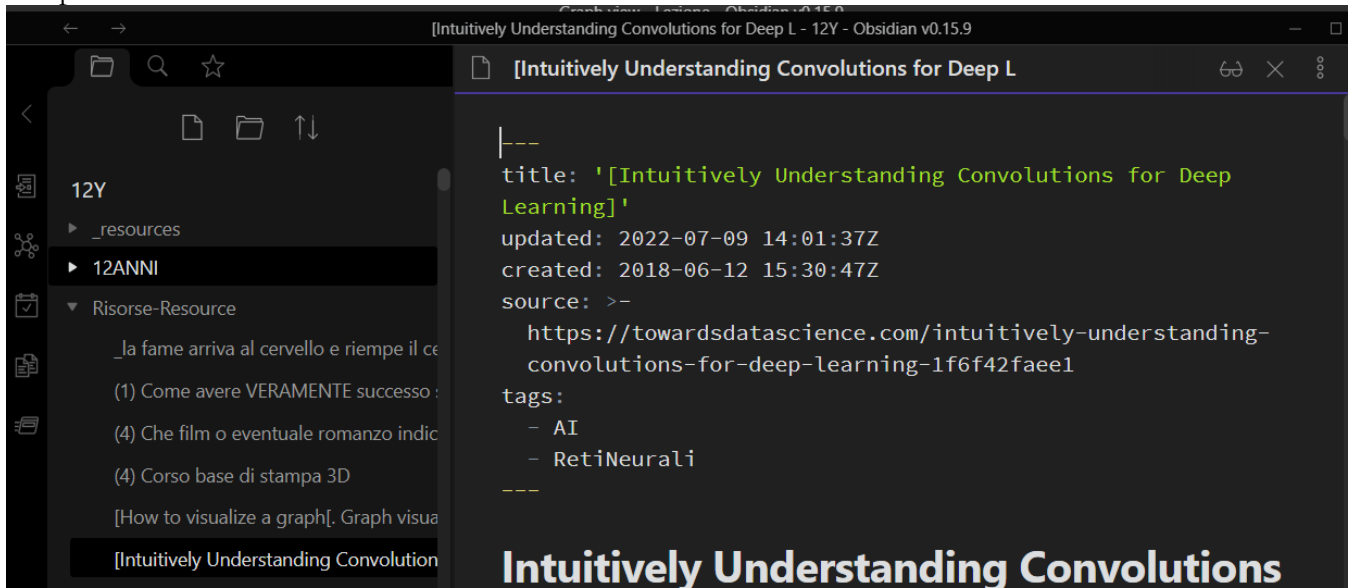
What about the file?

Obsidian uses files, in .md format. Notion and Evernote use their own cloud.

Obsidian offers a paid service for synchronizing files on each device, and you can do the same thing with cloud services such as Dropbox, Google Drive, Microsoft OneDrive.

For data import/export Obsidian uses a plug-in, Evernote uses a proprietary enex or html format, and Notion imports from Evernote, Markdown files, Trello, Asana, the file from the cloud service, and text from WinWord and Html and others.

Me and I

No one says the truth is that everyone thinks like a one-man-band.
Especially those who use Obsidian. Obsidian is a gym for the ego.
Evernote is an intimate place like a child's playroom.
Notion is for publishing, for sharing, like a stage.
Obsidian is based on files that can be synchronized for a fee or exported to other formats. Evernote has basic online sharing features and a team-specific profile, while Notion is web-native and has some smart features for publishing pages as a website and a team-specific profile.

Method and style

Goals and needs for note taking

Tiago Forte says we have different styles of note taking:

- Architect - structure and control.
- Gardener - open network for research and development.
- Librarian - cataloging all the information we capture for future use.

Students develop a personal strategy to learn and take notes with Notepad, Apple Note, Onenote, Google keep and others.
In Sönke Ahrens book "how to take smart notes", speaks about top-down and bottom-up approach in note taking.

- The top-down approach is typical of the architect and works whenever you can create something from scratch, with no constraints on how to achieve the goal. You have a free hand to do what you want and usually refers to your scientific method, as in programming, design in a private practice.
- The bottom-up method is used when the goal is as simple as making a coffee or planting a seed as gardeners, or it is a real constraint, so we must create a form to fill out or we must comply with the rules on how to build something like a librarian or a student.

Tiago Forte says that for every personal style there is the right tool or tools:

- Notion for the architect.
- Roam research or Obsidian for the gardener.
- Evernote for the librarian.

These four programs represent 75 percent of the market.

From my point of view, you can use all of them to do your work.
For example:
- I have been using Evernote since 2011 and use it to think, and now I am writing this little book.
- I use Obsidian to discover relationships and tags with different viewpoints on knowledge domains or within a topic and to build a knowledge domain.
- I use Notion to connect web services and cloud file systems like Evernote and Outlook and develop my project from a nice dashboard that I can share via the web.
- I don't need to change the tools I've been using all my life, just connect them.
- If I need to take notes in real time, I still use the mind mapping software or livescribe pen (https://eu.livescribe.com/).

What about Availability?

P.K.M.	Web	Client	Synchronization	Free account	Best practice
Evernote	1	1	Cloud	Quantitative limits	Client
Obsidian		1	To Pay	Personal use	Client
Notion	1	1	Cloud	Quantitative limits	Web

Freedom is useless without rules

The problem is this.
When you open a program for the first time you look around and start acting, typing something, clicking on buttons, searching and trying out commands. A few years ago, I had two lovely Russian hamsters and I did some experiments with them. When you take a Russian hamster out of its cage it immediately starts looking for a nest, then starts looking for food. These are their codified rules.
I have observed the same kind of behavior in a virtual reality place like AltspaceVR (https://altvr.com/). Newcomers tend to start exploring the new environment by wandering around without talking to anyone, then they play and talk.
We look for references, a point of orientation.
Rules are useful, road signs, clues.
Let's try to understand together the nature of P.K.M., how following the rules enables us to use them methodically, and the style of work they inspire.

What about Space and time for the single user?

P.K.M.	Space	Time	Pace
Evernote	Stack - notebook - notes	Slow	Classical
Obsidian	Vault - folder - files	Fast	Pop
Notion	Workspace - block object- nested object	Regular	Jazz
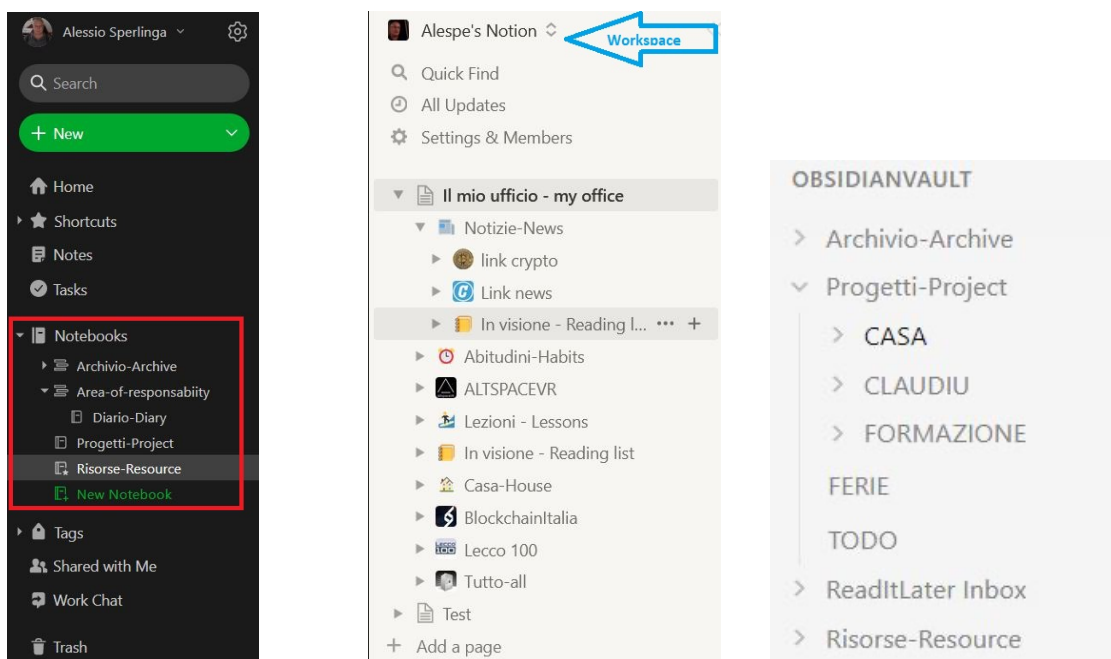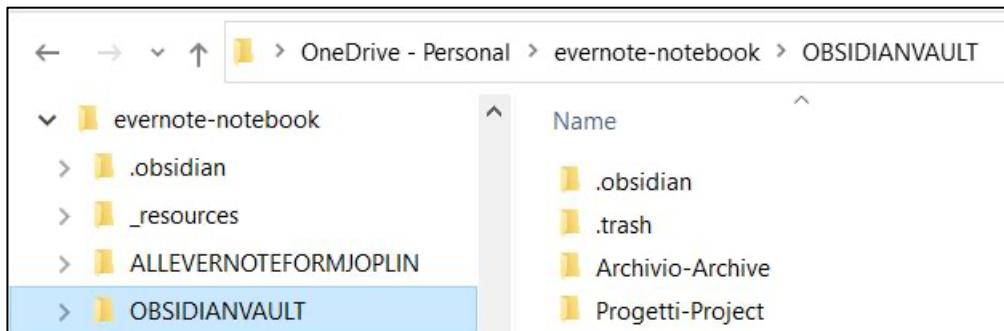
Pros and cons

P.K.M.	Process	Pros	Cons
Evernote	Bottom-up	Simplicity	Fixed structure
Obsidian	Bottom-up	Customizable	No structure
Notion	Top-down	Database and graphic design	Requires maintaining order and structure

The complexity problem

"Every system tends toward complexity, slowness, and difficulty.
Staying simple, fast, and easy to use is a battle that must be fought every day. (Guillermo Rauch)"
Metamethods such as P.A.R.A. seem to solve one part of the problem, and Templates take the part of the repeatable information process.
All the remaining parts tend to chaos like a nursery.
Sönke Ahrens wrote in his book, "We need a reliable and simple external structure for thinking that compensates for the limitations of our brains."
I have been using **Evernote** for more than ten years and I think it is a rigid solution to complexity by using folders as a taxonomy and tags as a dictionary, without complexity problems because we have a powerful search engine. Evernote users would love to have backlinks like in Obsidian.
In **Obsidian**, the solution is to create a vault for each process. Each problem can be solved in a deeply specialized way. Using tags and backlinks we can reduce complexity, because each action is atomic, tags and backlinks are created one by one, and the result is a concept map with all its complexity. Obsidian users would love to have a web version.
In **Notion** the complexity is implicit. The approach is to use complexity as a superpower. For example, you can turn a database record into a page and use backlinks to it as to any page and to a view of any database in the workspace. Notion users would love to have an internal graph, like in Obsidian.
From my point of view, striving for perfection is a beautiful utopia, an ongoing challenge.

Evernote

Evernote is simple to use, a white paper, a blank space to reflect and write.
I like to use it for my insights in a kinesthetic way, that is, guided by my feelings and sensations that I then translate into words.
The style is word processing with an outline that indexes the notes.
It is like a library with shelves and notebooks and a powerful search system.
Evernote has a clipper extension for cutting and pasting documents from the web and many integrations with external platforms such as WordPress and Microsoft Teams.
The **working method** is:

1. Create a note, you can open a template from the library inside note.
2. Write or paste information of all kinds in a sequential linear space.
3. Add tags at the bottom of the page.
4. Move the note to the right notebook.
5. Search for what you need with the power of Evernote's search engine, which is fast and able to read inside attached files.
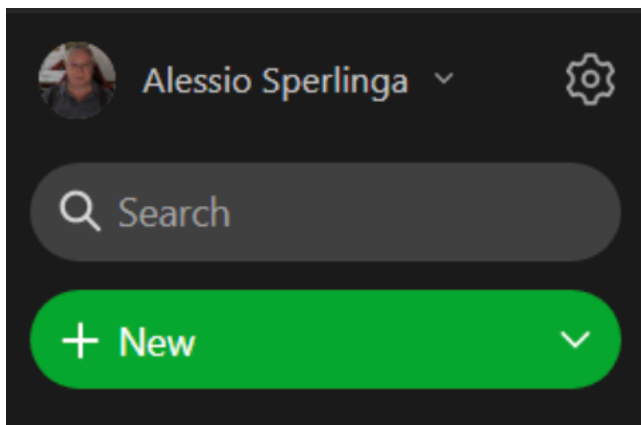
The style is slow and relaxed because the only work to be done is to reflect on the categorization of the tags.
You simply write one thing at a time without worrying about anything. It is a Kaizen exercise.
You can format text with a toolbar, and you can save the notes as a template.
Evernote has an internal system to identify each note, and you can use two types of links for a note, the web URL and the internal link. You can cut and paste the link to the notes.
Evernote is a library for the single user with shareable notes and with interfaces like a specific email folder for every user and a work chat. But if you want work with others there is specific profile with a payment plan.

Obsidian

Obsidian can be complicated at first because of backlinks and markdown commands.
I like it because I can write creatively, gather information instinctively, and find the center of different points of view through backlinks and tags in a totally auditory/grammatical state of mind.
The style is that of a code editor with an active part of the text to link other notes directly.
It is like sewing a dress.
Obsidian has a great community of programmers and hundreds of plugins and a lot of themes, and this is how everyone customized it.
The **work style is fas**t because you can automate many specific work processes using plugins and templates. Most of the youtubers who talk about Obsidian describe their personal style for everyday needs.
The **working method is** YOURS, but there are some standard commands:

1. Create a folder when you open Obsidian, you can assign it as Vault. Vault=main directory.
2. CTRL-N (Command key on Mac) creates a new document.
3. CTRL-P commands.
4. In a Markdown editor like Obsidian, it is necessary to use the keyboard to type and execute commands to format text or act on note files. This may be a little strange at first, but it is easy to memorize and incredibly fast to execute. For example, the double square bracket opens the list of existing documents and allows you to link to the word contained in the bracket. If desired, a new document can be created from the link.
5. CTRL-0 file list.
6. CTRL-CLICK open linked file in a new window.

Obsidian was clearly created for the individual user. Created for the individual user also means that you can customize each vault as a hyper-specialized dashboard and that you can open it in different windows as different programs.

Customization in Obsidian is:
- Install a plugin for a specific function, such as a calendar.
- **Organize the monitor as a canvas**, dividing it into windows.
- Save a different vault for each process or knowledge domain.
We can think of Obsidian as a tool for creating productivity applications.
Now I am taking an English course and I have created a vault in Obsidian which, in the end, is an English course for Italians.
Usually, you move files created by Obsidian with the import/export functions from other types of software or with some plugin.

12Y - Obsidian v0.15.9
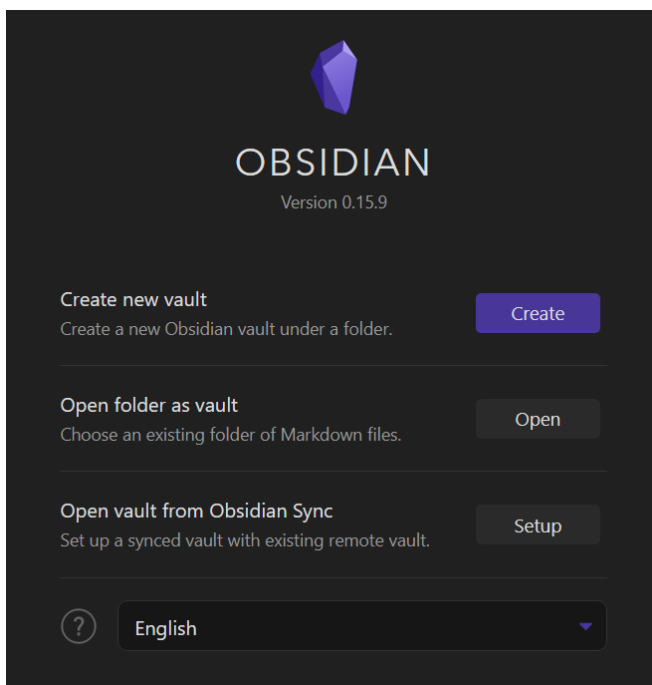
12Y
▶ _resources
▶ 12ANNI
▶ Risorse-Resource

✕ **No file is open**

Create new file (Ctrl + N)

Go to file (Ctrl + O)

See recent files (Ctrl + O)

Close

0 backlinks   0 words   0 characters

Present simple - SEMPRE - Corso_Inglese - Obsidian v0.15.9

Corso_Inglese
▼ Jarooz.com
  Jarooz.com
▶ Lessons
▶ Verbi
  PNG alespe632022-07-26_08-48-26
  PNG alespe632022-07-26_20-46-36
  Conditional-Condizionale
  PNG image
  PNG image (1)
  PNG image (2)
  PNG image (3)
  PNG image (4)
  PNG image (5)
  PNG image (6)
  PNG image (7)
  PNG ja
  PNG ja2
  PNG Pasted image 20220801114210
  PNG Pasted image 20220802082951
  PNG Pasted image 20220803101908
  PNG Pasted image 20220803101935
  PNG Pasted image 20220803101954
  PNG Pasted image 20220803102033
  PNG Schermata 2022-07-28 alle 10.06.22
  PNG Schermata 2022-08-03 alle 10.32.03

Present simple -   **Present continuo**   **Present perfect -**   **Present perfect c**

#present

Present simple
= presente

Questo tempo si forma con il verbo all'infinito senza il "to". Alla terza persona singolare bisogna aggiungere il suffisso -s. Si usa per indicare:

1. Azioni che si eseguono spesso.
2. Fatti e condizioni che non cambiano.

Esempi:

• *I study English every Friday.* (Studio inglese ogni venerdì).
• *The sun rises at 6 a.m.* (Il sole sorge alle 6 del mattino).

STUDIO

INDICATIVO

I am
You Are
He/she/it is
we are
you are
they are

#present

Present continuous
=imperfetto

Si forma con il **verbo ausiliare** al presente + il verbo principale con il suffisso -ing. Si usa per indicare:

1. Azioni che hanno luogo **nel momento** in cui si parla.
2. Azione o evento futuro **già programmato**.
3. Azioni che **si ripetono continuamente**, solitamente accompagnate da avverbi quali *always* (sempre), *often* (spesso), *all the time* (tutto il tempo), *constantly* (costantemente).

Esempi:

STO STUDIANDO

• *It is raining.* (Piove.)
• *Are they coming next summer?* (Verranno la prossima estate?)
• *Giulia and Robert are constantly arguing.* (Giulia e Robert discutono costantemente).

INDICATIVO

I am Being
You Are Being
He/she/it is Being

#present

Present perfect
= passato prossimo

Si forma usando l'ausiliare avere al presente (*have/has*) + il **participio passato** del verbo principale. Si usa per indicare:

1. Un'azione **iniziata nel passato** e tuttora in corso o avvenuta in un arco di tempo **non ancora terminato**.
2. Un'azione o un fatto **verificatosi nel passato** ma i cui effetti sono ancora evidenti.
3. Un'azione **appena terminata**, espressa con l'avverbio *just*.

Esempi:

HO STUDIATO

• *I have read over 25 books this year.* (Ho letto più di 25 libri quest'anno).
• *I have lived in London since 1991.* (Vivo a Londra dal 1991).
• *I am not ready for my exams. My health has not been good this year.* (Non sono pronto per gli esami. Non ho avuto molta buona salute quest'anno).
• *I have just finished my homework.* (Ho appena finito i compiti).
• *It has rained so far*

INDICATIVO

#present

Present **perfect continuous**
=passato prrossimo

Si forma con il verbo al present perfect + il participio del verbo principale. Si usa in modo molto simile al present perfect, con la differenza che in questo caso il focus non è solo sul risultato dell'azione ma anche sul suo sviluppo. Indica:

1. Azioni iniziate nel passato che continuano nel presente.
2. Azioni appena terminate, ma i cui risultati sono ancora presenti.

Esempi:

E' STATA STUDIANDO

• *She has been working all day.* (Ha lavorato tutto il giorno.) E lo sta ancora facendo.
• *It has been raining all day.* (Piove da tutto il giorno.)

INDICATIVO

I have been Being
You have been Being
He/she/it has been Being
we have been Being
you have been Being
they have been Being

1 riferimento   83 parole   484 caratteri

Notion

Notion is simple at first and gradually becomes more complicated with content layers (inline or pages) and a powerful eclectic database.

Notion is a building tool like Lego, but each brick (block) is a Rubik's cube.

A block is an object, such as a paragraph, an image, a page. Pages are container objects of other blocks, such as text, images, other pages or a database. A database is a table with rows and columns.
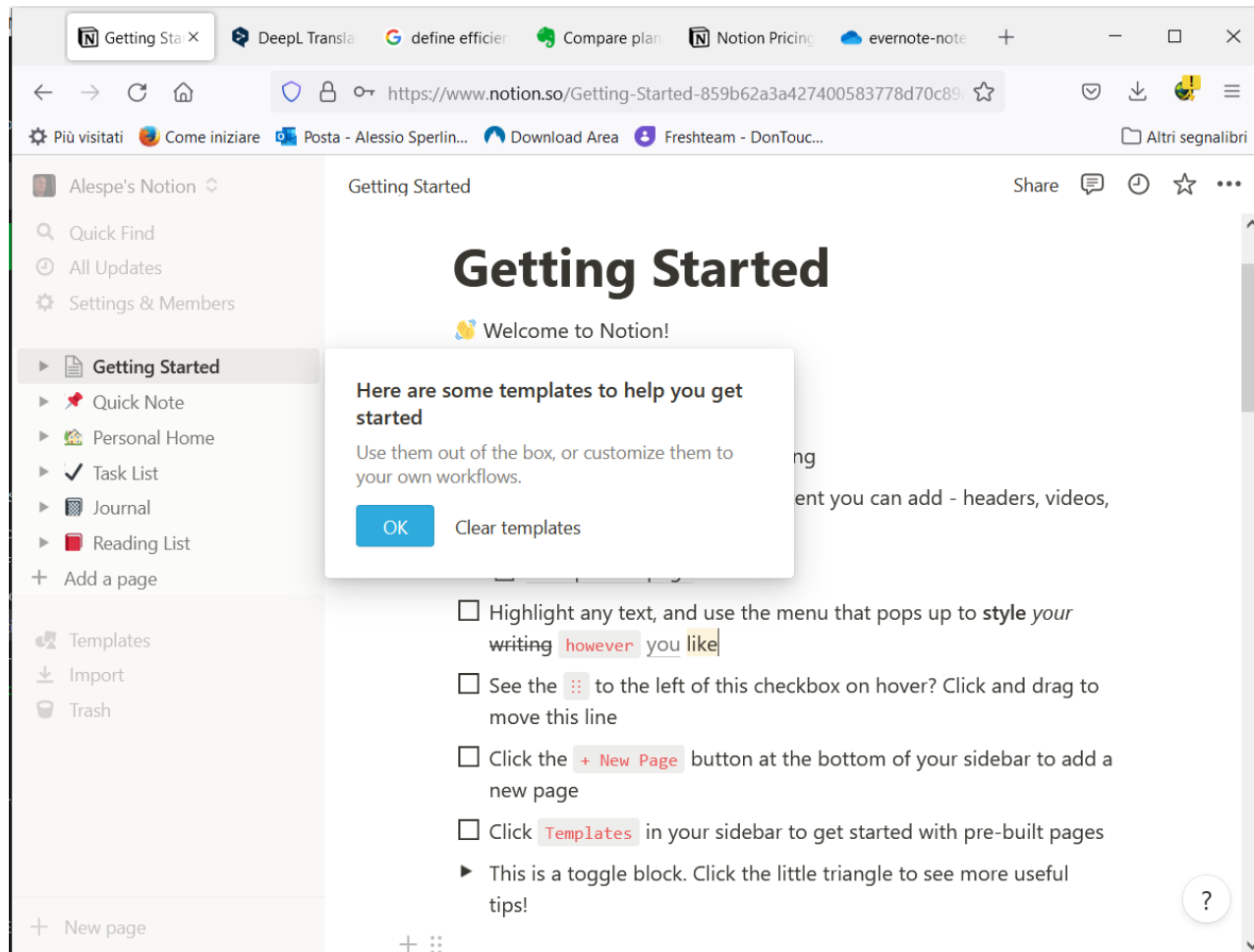
Notion's philosophy is that everything you create is a model for other people.

There are dozens of free and paid templates at https://www.notion.so/templates.

The **working method is**:

1) create a workspace
2) follow the instructions

Notion's welcome screen:

I like it because it's a visual and auditory place that I can design at different times, because it's graphically like desktop publishing, it's Web-compliant, and I can structure everything into sections and database applications. Everything is a progressive and recyclable object.

When I talk about web compliant, I mean that Notion's pages are Responsive and you can create and publish website's prototypes. If you want to use Notion Workspace as a website there are specialized services (such as https://super.so) that allow this. You can also do this by configuring your webserver to replace the visible URL with your domain name.

For the past 10 years I have been teaching WordPress to all my students because 40 percent of all websites seem to be made with WordPress, but next year I plan to teach Notion as well.

The style is that of a desktop-publishing program with an outline structure for the pages. I use a lot of mouse control and drag and drop to arrange content on pages.

The working style is regular, because you can structure and model a process by using pages and databases as standard boxes, reusable in multiple ways on a day-to-day basis.

Notion has a project management tool mentality with layers of software for teams and corporate work groups with a payment plan. It is a sophisticated team software, with a natural and pleasant interface for everyone who uses the Internet.

Acknowledgements

I would like to thank James Thorne for his patience in proofreading this and Cristina Pedretti (https://cristinapedretti.com/) who revised the content and all the students of the Lecco100 master's program (https://www.lecco100.it/) who inspire me to improve something every day.

Appendix A - About the information theory
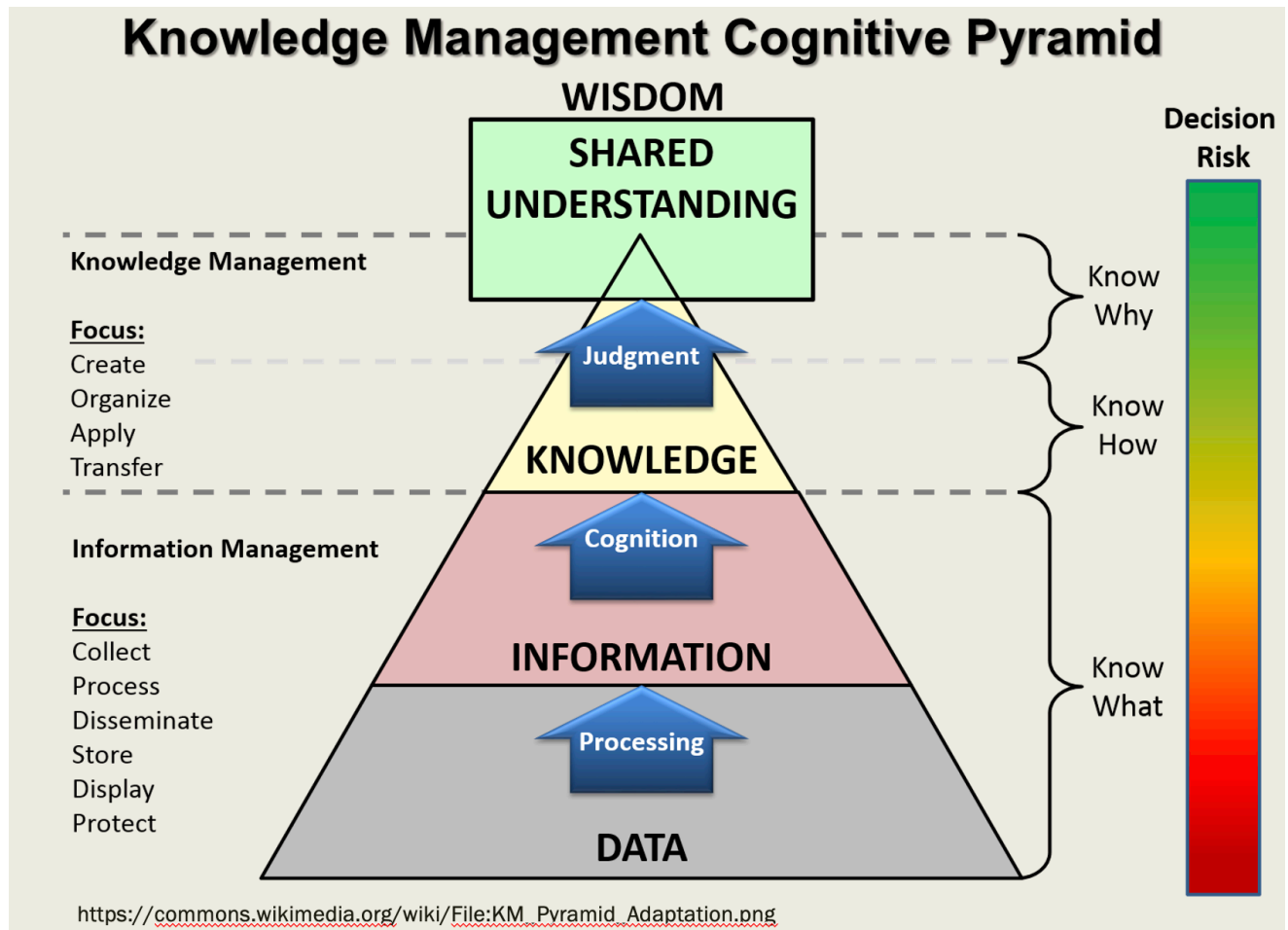
Ref: https://en.wikipedia.org/wiki/DIKW_pyramid

Depth is the enemy of efficiency. This means that, for example, I can tell a small and simple story by using:
- writing
- a concept map
- a mind map

The focus is on the relationship between the amount of information and expenditure of time; the Devil is in the details.

All numbers related to the time/completeness relationship are only rough estimates.

The written story

"Giorgio is an accountant, dark and blue-eyed.
He loves Cristina, a blond and green-eyed interpreter who works with him.
Giorgio has owned since 2018 a car that Cristina drives with a car license. The car is a green BMW SUV."
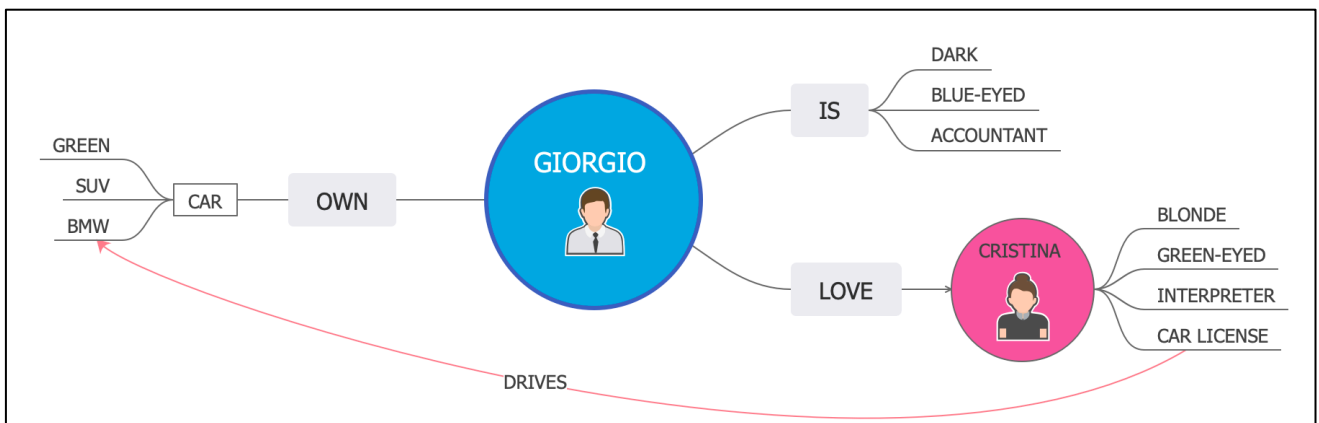
- Creation time: 5 minutes
- Amount of information: 50% words and 50% imagination.
- Pros: writing is a habit and responding in real time to our thinking.
- Cons: we can't represent the images that are the most of our ability to perceive and explain.

The concept map
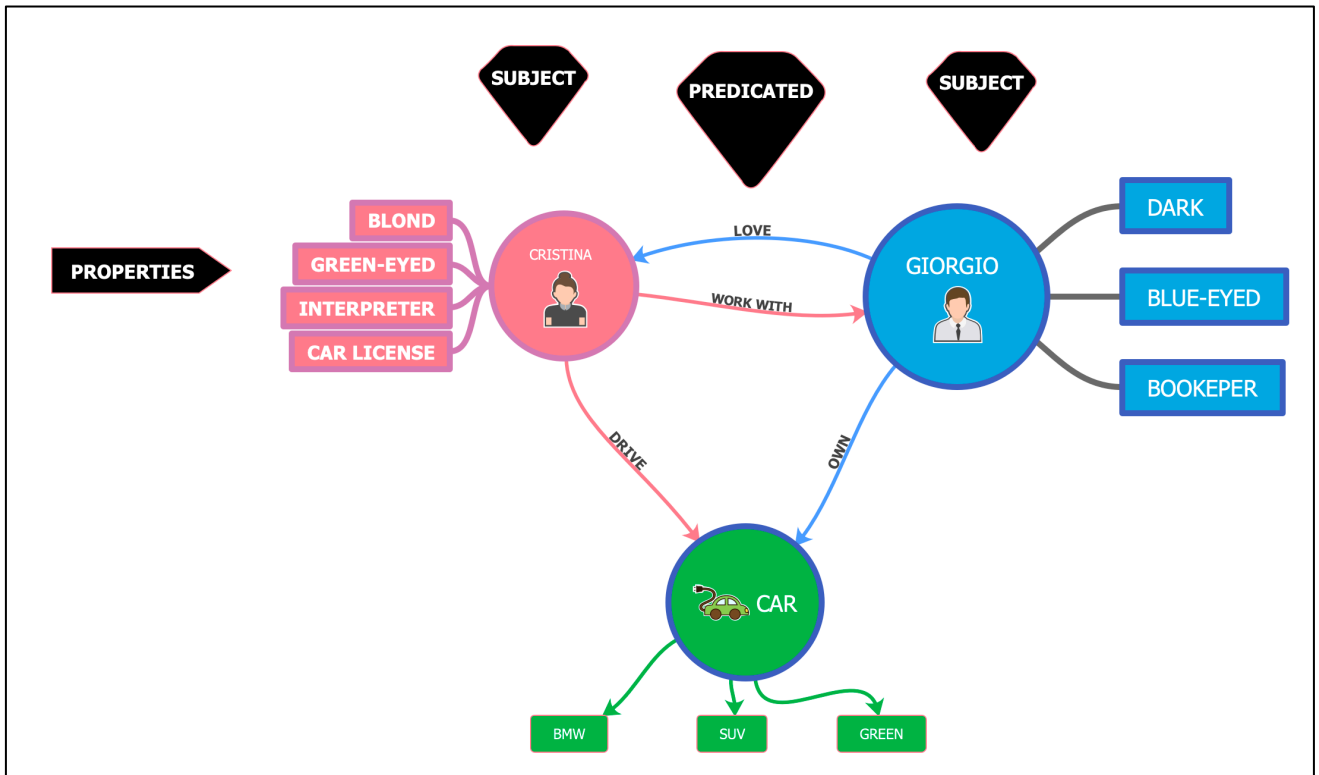
- Creation time: 20 minutes
- Amount of information: 80% words + pictures + relationships and 20% imagination.
- Pros: we don't have a center, we can start reading anywhere, and the pictures support perception and the relationships that are detailed.
- Cons: takes a lot of time.

The Mind map

- Creation time: 5 minutes
- Amount of information: 70% words + pictures + relationships and 30% imagination.
- Pros: fast writing, fast reading and pictures support perception.
- Cons: we need a center to start the story and some details of relationships may be hidden.

From the point of view of efficiency, the winner is the mind map.
From the point of view of completeness, the winner is the concept map.
When we use Obsidian or Roam research the result is a written story + concept map.

Appendix B – Learning courses and authoritative sources

All the three programs have courses on https://www.udemy.com/ and **hundreds of tutorials on YouTube**:

- Evernote - https://www.YouTube.com/results?search_query=evernote+tutorial
- Obsidian - https://www.YouTube.com/results?search_query=obsidian+tutorial
- Notion - https://www.YouTube.com/results?search_query=notion+tutorial
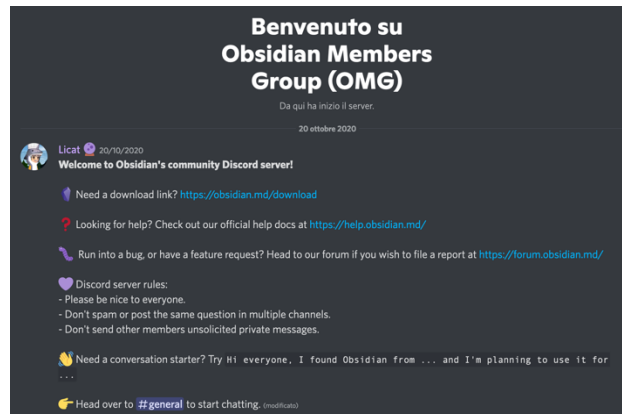
Notion and Evernote have certification programs.

Notion three level https://certifications.notion.site/Notion-Certified-1680111eddf54cd4be14d8f3fa16efd6 and Evernote one https://evernote.com/intl/it/resources/become-an-expert .

Evernote

- Has a courses and certification program https://evernote.com/intl/en/resources/become-an-expert
- Has a podcast https://evernote.com/blog/category/podcast/
- Has a blog https://evernote.com/blog/
- Has a developer support section https://dev.evernote.com/
- Has a forum https://discussion.evernote.com/
- Has a twitter channel https://twitter.com/evernote

Obsidian

- Has a help section https://help.obsidian.md/Obsidian/Index with "Getting started" subsection
- Has a forum https://forum.obsidian.md/
- Has a Discord server https://discord.com/invite/veuWUTm
- And a Twitter channel https://twitter.com/obsdmd

Notion

- It has a huge help system for beginners up to programmers https://www.notion.so/help
- Has a blog https://www.notion.so/blog
- Has channels on Discord and social network https://www.notion.so/Notion-Community-04f306fbf59a413fae15f42e2a1ab029