

A Guide to Setting Up and Using Obsidian for Academics

Addison K. Emig*

August 2026

Contents

1	What is Obsidian?	1
2	Why Use Obsidian?	1
3	Setting Up Your Vault	1
3.1	Creating Notes & Syntax	2
3.2	Organization Structure	3
3.3	Customizing the Appearance	3
3.4	Plugins	4
3.4.1	Recommended Community Plugins	4
4	Useful Features	5
4.1	Properties	5
4.2	Tags	6
4.3	Aliases	6
4.4	Links	7
4.5	Templates	8
4.6	Bookmarks	8
4.7	Bases	8
4.8	Canvas	9
4.9	Workspaces	9
5	Random Tips and Tricks	10
6	Ideas for Pages that Reflect the Academic Workflow	10
7	Additional Resources	11

*PhD Student, Vanderbilt University, Department of Political Science addison.k.emig@vanderbilt.edu

1 What is Obsidian?

Obsidian is a free markdown-based note taking application. You create a vault for your notes that lives on your computer. Notes are markdown files that render in an aesthetic manner determined by customizable themes in the Obsidian app. Notes can be linked to one another, allowing for great functionality and flexibility. It is highly customizable with thousands of plugins and themes that allow you to make your vault work how you work. You can easily integrate PDFs and images into your notes, tag related notes, visualize your note structure as a network, and more.

Getting your vault set up and figuring out how you want to organize and use it takes time and learning, but I believe it is worth it in the long run. Linking between notes helps optimize your note-taking and allows you to organize your work however best suits you. It also helps you make connections across classes and projects.

With this guide, I aim to provide you with what you need to know to get started with Obsidian all in one place. There is a wide array of information about Obsidian available online if you want to dig deeper into it. I have condensed the most important parts into this document, but I certainly do not cover it all. I include links to my favorite resources in Section 7 and scattered throughout the document. I cover a lot of features in this guide. You do not need to use them all at once. Start as simple as you want and develop your vault however you see fit over time.

2 Why Use Obsidian?

I find that Obsidian fits the academic work style well because it is so flexible. The level of **customization** you get with Obsidian is unmatched. You can make your vault reflect your unique working style. You can also make its appearance reflect your preferences. There are hundreds of themes that can themselves be further customized to help you create the look you want. Community plugins allow you to expand the functionality of your vault, expanding the types of notes you can create and what you can put in them.

The ability to **link notes** is incredibly helpful for taking notes in classes and working on big projects. You can quite literally see how your notes connect to one another. This is helpful with organization, idea generation, and synthesizing broad topics.

Your Obsidian vault can **grow with you**. As you adapt your workflow, you can make the changes you need to your vault. You are not locked into anything with your vault. It is super easy to change it as you desire. You also have no limit to how many notes you can create.

There is also a robust **online community** that continuously develops new plugins for use and has great tips and tricks for getting the most out of your use of Obsidian. If you are struggling with something, you can almost always find resources online to figure it out.

3 Setting Up Your Vault

Download Obsidian here: <https://obsidian.md/>

The home for all of your notes in Obsidian is called a vault. It is akin to the folder on your computer where everything will go. Once you download Obsidian, the first step is to create the vault, specifying where you want it to be on your computer. You will be prompted to do this when you open the application. You will specify where you want it to live and give it a name. You can create multiple vaults if needed, but you can only have one vault open at a time.

By default, Obsidian saves everything on your computer. You can set up a sync method to access your notes on multiple devices. There are multiple ways to do this, including through Obsidian's cloud program or through third party programs. I personally use iCloud, storing my vault in my iCloud so that I can access it on my computer and iPad. If you want to do this, you have to create your vault on your iPad first and store it in your iCloud drive. For detailed instructions on setting up a sync method, see this article: <https://obsidian.md/help/sync-notes>.

Congrats! You've created your vault. It's time to get to know it and start customizing it for you. Figure 1 has the main part of Obsidian's environment labeled for you. We will talk more about each of these as we go.

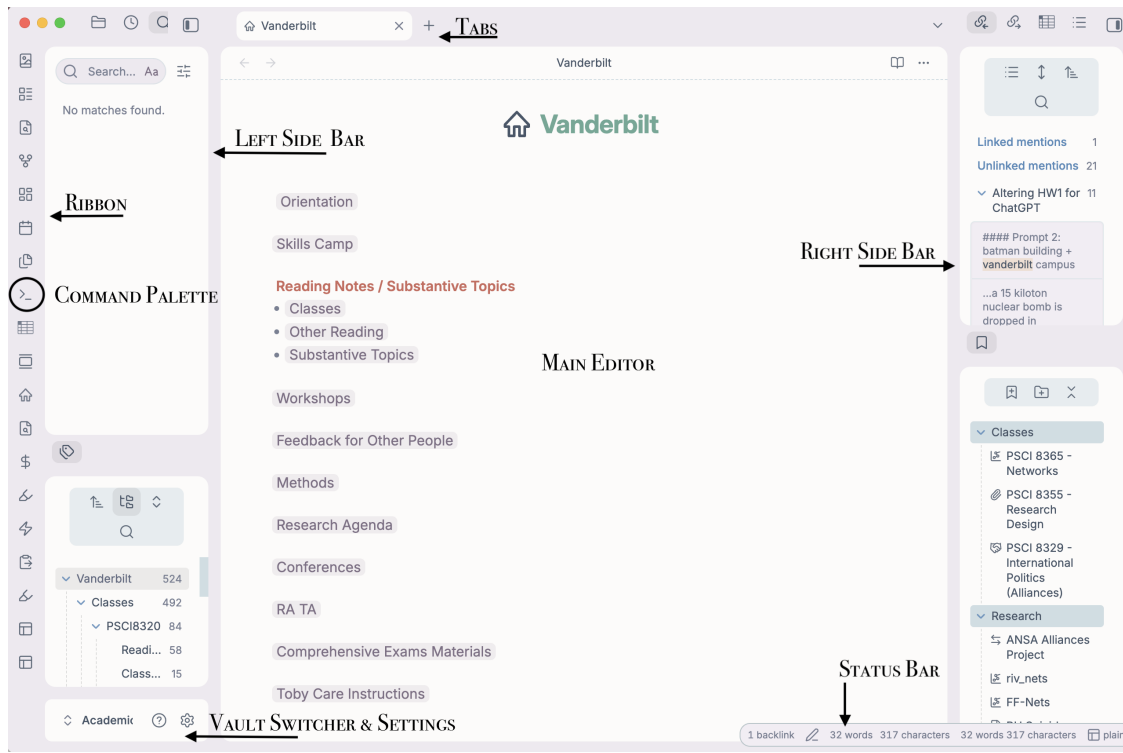


Figure 1: Main Parts of the Obsidian Environment

3.1 Creating Notes & Syntax

You can now create notes! To create a note, you can use the command palette or a hotkey. The command palette is the ">_" symbol on the left hand side. Anything you want to do, you can do through this palette. Just start typing the command you want, and it will pop up. To create a new note, start typing "new note" and click on the "create new note option." On the far right side of this option, you can see the hotkey set for it. Conventionally it is command-n.

Obsidian uses markdown language. I list some of the basic syntax here. See this article for a full guide on syntax: <https://obsidian.md/help/syntax>. Learning the syntax takes a little practice, but it becomes second-nature once you work with it for a bit.

- New paragraph: blank line of text
- Headings: # (heading 1) ## (heading 2) ... ##### (heading 6)
- **bold text**
- *italicized text*
- Internal Links: [[link]]
- External Links: [text](link)
- Code Blocks: three or more backticks at top and bottom
- Lists: -, *, or +
- Horizontal Line: ***, ---, or ___

3.2 Organization Structure

Once you've created your vault, you get to decide how to organize it. How you do this is entirely personal preference. You can organize by folder, by tags, by links, etc. There are many resources online about organization methods you can use. I recommend figuring out what works best for you, potentially creating your own style rather than rigidly locking yourself in to any you read about. Below I give an example of how I organize my vault.

More Reading on Organization:

- <https://brittanyellich.com/obsidian/>
- <https://parazettel.com/articles/obsidian-organising-notes-guide/>
- <https://obsidian.rocks/getting-started-with-obsidian-a-beginners-guide/#Organizing-your-notes>

I have my vault organized by links between pages and tags. I have a home page that has links to each section of my vault. This is the page my vault opens to. Each link then leads to a landing page for that section of my vault, which has more links to corresponding notes. Figure 2 shows examples of how this looks in my vault. Figure 2a shows the home page, Figure 2b shows my classes home page with links to all of my class pages, and Figure 2c shows one of my class pages, which has links to my class notes, reading notes, and research projects associated with the class.

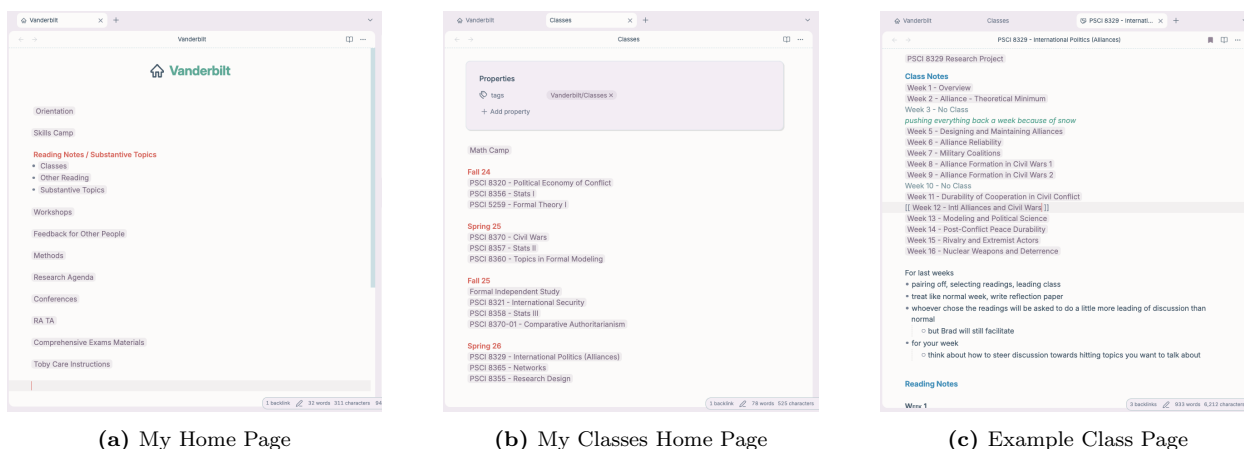


Figure 2: Example Vault Organization

Alongside the links between pages, I use tags to keep related pages grouped together. I discuss more on tags in Section 4.2.

3.3 Customizing the Appearance

There are countless ways to customize the appearance of your vault. Click the gear icon to access settings, and then under options, click appearance. This pulls up a page where you can modify how your vault looks.

Themes: One option you will see is themes. The Obsidian community has created many themes that you can install. Click manage to browse available themes. You can download as many as you want to try out. Each theme will have instructions on how to further customize it. You may need the Style Settings plugin to modify themes.

For more on themes, see:

- <https://obsidian.md/help/themes>
- <https://obsidian.rocks/getting-started-with-obsidian-themes/>

Sidebars: Obsidian has left and right sidebars where you can see different metrics and features. Each appears in its own tab, indicated by an icon. Examples of things in the sidebars include files, search, recent files (plugin), tags, backlinks, outgoing links, outline, and bookmarks. You can arrange the tabs in the sidebar however suits you by dragging and dropping the icons. Each sidebar can be split vertically into different segments with different views. You can also expand or collapse the entire sidebar using the corresponding icons.

More reading on sidebars:

- <https://obsidian.md/help/sidebar>

3.4 Plugins

Obsidian has both Core Plugins and Community Plugins. Core Plugins are those that come with the app. You can access them in settings under “core plugins.” I discuss several of them in more detail in Section 4. For more details on all the core plugins, see: <https://obsidian.md/help/plugins>.

Community Plugins are created by people in the Obsidian community. They serve a variety of different purposes, ranging from making things like tables or tags easier to work with to allowing you to customize colors for highlighting text. You can use Obsidian perfectly fine without any community plugins. That being said, they can improve the functionality of note taking and appearance in your vault. I recommend starting with some of the ones I list below and then figuring out what else you need as you go along.

No community plugins are installed when you create your vault. You download and enable them yourselves. To do so, go to Settings → Community Plugins (under options) → Browse. Here, you can browse all the available plugins and search by name or functionality. Click on the on the plugin you want to download and click Install. Once it’s installed, click Enable to activate it in your vault. You can also click Options, which will take you to the page for that plugin where you can turn various features on and off or customize the function of it.

3.4.1 Recommended Community Plugins

The sheer amount of Community Plugins can be overwhelming. Here is a list of the ones I utilize in my daily use of Obsidian to give you an idea of what you can do with them and help you find useful ones. I have put the ones that I find the most helpful in pink, but I utilize the full list here.

- Advanced Tables: Makes tables easier to work with
- Beautitab: Custom the background of a blank tab
 - You can upload photos to be the background when you open a new tab.
- **Better Word Count:** Allows you to select a segment of text and get a word count
- **Callout Manager:** Allows you to customize callouts for your notes
- Enhancing Export: Allows you to export notes to different formats
- **Fast Text Color:** Allows you to change the color of text using custom colors
 - Under options, you can add colors using hex codes. Color text by highlighting, right clicking, and choosing color, which will let you choose from a list of your colors. You can also set a hotkey.
- **Highlightr:** Allows you to highlight text using custom colors
 - Under options, you can choose the shape of the highlight and add any colors you want using hex code. Highlight text by highlighting, right clicking, and choosing highlight, which will let you choose from a list of your colors. You can also set a hotkey.
- Homepage: Allows you to open a specified note upon startup as your homepage
- Iconic: Allows you to set icons for your notes

- **Latex Suite:** Allows you to easily use Latex math typesetting. Creates shortcuts that make it flow smoother
 - You need this plugin to type math in your notes.
- Minimal Theme Settings: Customize the Minimal Theme
- Mononote: Makes sure each note is open in only one tab
- Natural Language Dates: Quickly input dates
- **Open Tab Settings:** Allows you to customize how tabs are open, such as in a new note
- **Outliner:** Allows you to easily work with and reorder lists by dragging and dropping
- PDF++: Allows you to annotate PDFs
- Quick Switcher++: Enhances Quick Switcher
- Recent Files: Provides a list of recently opened files
- Status Bar Organizer: allows you to customize how your status bar looks
- **Style Settings:** Allows you to adjust themes
- **Tag Wrangler:** Allows you to rename, merge, toggle, and search tags
- Tasks: Allows you to track tasks through your vault
- **Various Complements:** Enables auto-completion of words (very useful for linking things)
- **Workspaces Plus:** Allows you to customize and manage workspaces (works well with the Core Plugin)

There are always new articles being published online about the “best” Obsidian plugins out there, so check those out too!

4 Useful Features

4.1 Properties

Properties are characteristics of notes saved as metadata that you can use for organization in your vault. You can store a variety of information in properties, and you get to choose which properties you want to have. There are six options for types of properties: text, list, number, checkbox, date, datetime. By default, properties are visible at the top of your notes. You can change this if you want under Settings → Editor → Show Properties in Document. If you need to add a properties box to the top of your note, you can use the “Add File Properties” command in the command palette.

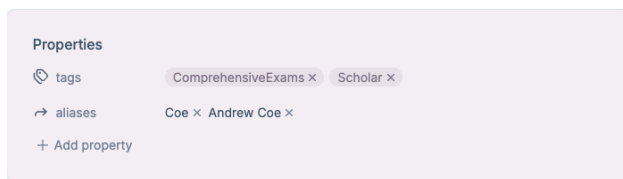


Figure 3: Example of Properties for a Note

More reading on properties:

- <https://obsidian.rocks/an-introduction-to-obsidian-properties/>
- <https://obsidian.rocks/five-pro-tips-for-obsidian-properties/>

4.2 Tags

Tags are a specific property you can use for your notes. They are phrases or key words that you can use to organize your vault. You can add tags directly in the body of your text using this syntax: `#tag`. You can also use the command “add file properties,” select tags at the type of property, and put them in the properties box. You can assign a note any number of tags. When you put tags in the metadata, you can easily search by tags in your vault.

Obsidian supports nested tags using the `/`. Using this, you can nest increasingly specific tags under one another. It will look something like `tag/subtag/subsubtag`. You can then search at any nested level and see all notes that share the tag. Figure 4 shows an example of the nested tagging structure I use within my vault.

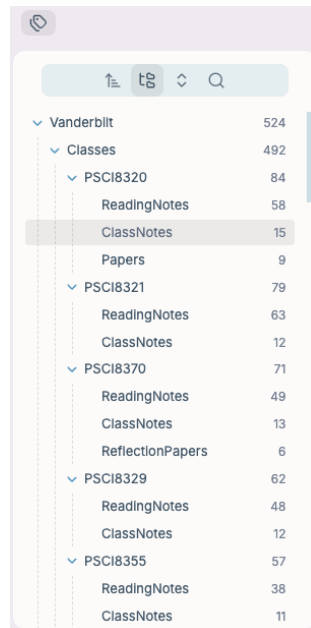


Figure 4: Example of Tags

More reading on tags:

- <https://www.alphr.com/obsidian-how-to-add-tags/>
- <https://practicalpkm.com/how-to-use-tags-effectively/>

4.3 Aliases

Aliases allow you to reference a file by multiple names. Say your note has a long title, and you want to be able to easily link it to a shorter phrase in other notes. You can assign this shorter phrase as an alias, and Obsidian will recognize that as another name for the same file. An example will help make this concrete. Figure 3 shows the aliases I assigned to Andrew Coe’s scholar page in my vault. The note itself is entitled “Coe, Andrew.” I set aliases as “Coe,” and “Andrew Coe,” so that I can easily link to any of those uses in my notes when discussing article he’s written.

You assign aliases in the properties of the document. It is one of the drop down options of properties in the properties box.

More on aliases:

- <https://obsidian.md/help/aliases>

4.4 Links

Links allow you to connect your notes to one another. You can link to notes using their title or any alias you have specified for the note.

Link Syntax

- `[[Note Name]]`: You form a link using double brackets. The name of the note you are link to goes inside of the brackets. For example, `[[Scholars]]` would link to a note entitled *Scholars*.
- `[[Note Name#Section Title]]`: You can link to a specific section of a note using `#`.
- `[[Note Name|alias]]`: You can change what shows up as the text of the link using `|`. Whatever you put after `|` is what shows up. This example would display the link text as “alias.”

For each note, you can see both backlinks and outgoing links. Backlinks show which notes link to the current note you are in. Outgoing links show which notes there are links to within the current note. You can see these in the sidebar under the links options, shown in Figure 5

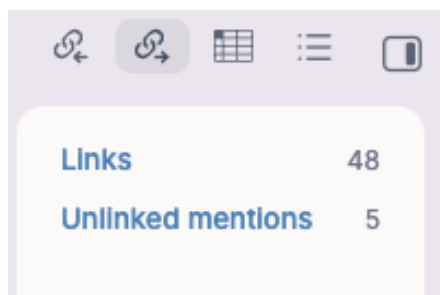


Figure 5: Icons to See Backlinks and Outgoing Links

There are different ways to automate the linking process. You can view existing links and unlinked mentions under the backlink and outgoing link views. I use the Various Complements plugin, which provides auto-suggest dropdowns as you type that include links to notes titled with what you are typing. In the settings for the plugin, you can specify for it to suggest links using both titles and aliases. Figure 6 shows how this works. I typed “ANSA,” and it has given me a list of notes I might want to link to related to my research projects. All I have to do is click on the option I want to link. You can search community plugins for more options on aiding the link process.

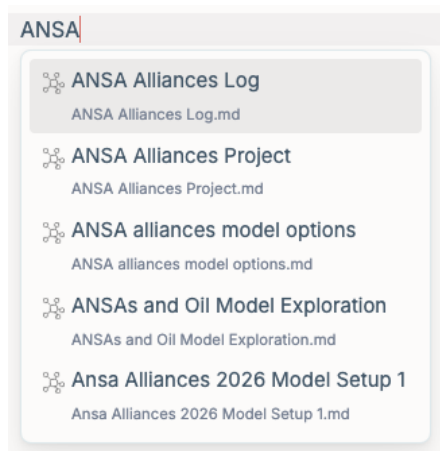


Figure 6: Auto-Populating Links Using Various Complements

Figure 7 shows how I’ve used links in Andrew Coe’s scholar page in my vault. The highlighted text in the note represents outgoing links from the page. In the top right corner, the backlinks view is open. It tells

you that 7 notes have a link to this page. It also tells you that there are 15 uses of either the title of the note or one of the aliases that are not currently linked to this page.

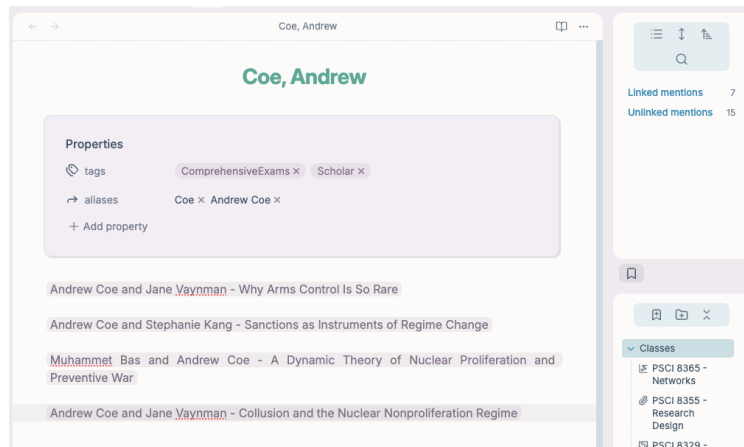


Figure 7: Example of how Links can be used in a Note

For more on using links:

- <https://obsidian.md/help/links>
- <https://planettash.com/2025/05/24/how-to-link-notes-in-obsidian-like-a-pro/>

4.5 Templates

You can create templates for note structures that you use frequently. First, you need to create a folder in which you can store your templates. Once, you've created it, go to Settings → Templates (under core plugins) → Template Folder Location and specify the folder you created. Any note that you put in this folder will now be available to select as a template in a new note using the command palette or a hotkey.

4.6 Bookmarks

You can bookmark notes you select by right-clicking on the tab and selecting bookmark. Bookmarks appear under the ribbon icon in the sidebar. You can place bookmarks in groups to keep them organized. For example, I group my bookmarked notes by classes, research projects, and RA/TA work. You can also move the bookmark tab to wherever you prefer it in the sidebar. I have it placed to that it is the only tab in its location, and I can always see my bookmarks.

More reading on bookmarks:

- <https://obsidian.md/help/plugins/bookmarks>

4.7 Bases

Bases allows you to create database-like views of notes in your vault. You can create different views, display different features of the notes, and filter by things like tags. I haven't used bases much, but there are plenty of resources online.

For more on bases:

- <https://obsidian.md/help/bases>
- <https://fleker.medium.com/obsidian-bases-what-are-they-good-for-and-what-are-they-not-da620006cb34>
- <https://effortlessacademic.com/using-obsidian-bases-for-academic-note-taking/>

- <https://obsidian.rocks/getting-started-with-obsidian-bases/>

4.8 Canvas

Canvas is a visual note taking core plugin. It provides a blank space to lay out notes, attachments, and webpages and then draw connections between them. You can also add text-only card that do not reference other files to add text to your canvas. You can drag and drop things onto your canvas or add them by right-clicking. Full instructions on how to use canvases can be found online.

More reading on canvas:

- <https://obsidian.md/canvas>
- <https://obsidian.md/help/plugins/canvas>
- <https://obsidian.rocks/getting-started-with-canvas-in-obsidian/>

4.9 Workspaces

Workspaces are a way to group open notes that you want to be able to come back to later. For example, I have workspaces for each of my research projects that have the main notes I'm currently using automatically open. This way I do not have to reopen all of my notes when I sit down to work on a project. Figure 8 shows the workspaces I have set for my vault. To switch between them, all you have to do is click the name of the one you want open. You can see the check mark next to the active workspace, and the name of the active workspace is shown on the right side of the status bar.

Once you have a set of notes open that you want to save as a workspace, you go to the command palette and find “Workspaces: Save layout,” which will allow you to name and save the group of notes as a workspace. Whichever note you are in when you save the layout is the note that will appear first upon loading the workspace. You can modify any existing layout using “Workspaces: Manage workspace layouts.” You want to modify a workspace when you open a new note that you want to stay open in the workspace, you change the order of the notes, or you want a different note to be the one it automatically goes to when you load the workspace. Once you create multiple workspaces, you can switch between them using the command palette or the workspaces quick switcher on the status bar. In the command palette, you use “Workspaces: Load NAME” to load a workspace. In the quick switcher you click the name of the workspace you want.

I find that the Workspaces Plus plugin is helpful for easily saving and modifying workspaces. It shows keyboard instructions on the workspaces quick switcher, prompts a confirmation before deleting workspaces, and adds a workspace icon to the sidebar ribbon. It also has a feature to autosave any layout change to the workspace you are in.

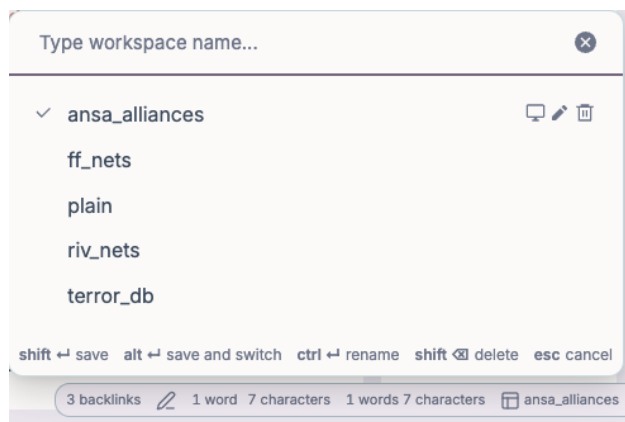


Figure 8: Workspaces in my Vault

More reading on workspaces:

- <https://obsidian.md/help/plugins/workspaces>
- <https://www.obsidianstats.com/plugins/workspaces-plus>

5 Random Tips and Tricks

As you familiarize yourself with Obsidian and establish your own workflow with it, you will start to discover capabilities or features you want for your vault. Many times, there is a way to make what you want happen! This section covers some of the random things I've discovered along the way.

Automatically Placing Attachments in a Folder: Under Settings → Files and Links (under options) → Default Location for New Attachments, you can specify where attachments you add to files, such as images or PDFs, are placed. You can set them to go in your vault folder, in the folder the note you are working on is in, in the subfolder under the document in which you are working, or in a specified folder. For example, I have all my attachments go in a specified attachment folder.

Automatically Update Internal Links: Under Settings → Files and Links (under options) → Automatically Update Internal Links, make sure this is toggled on to make it so that any time you rename a note all the links to it automatically update to the new note them. This makes it so that renaming notes does not break your links.

Graph View: You can view the structure of the links between your notes in a network form with graph view. This is a fun feature that lets you visualize your organization structure and watch your vault grow. You can even click the magic wand button and watch a time lapse of all your notes and links being added.

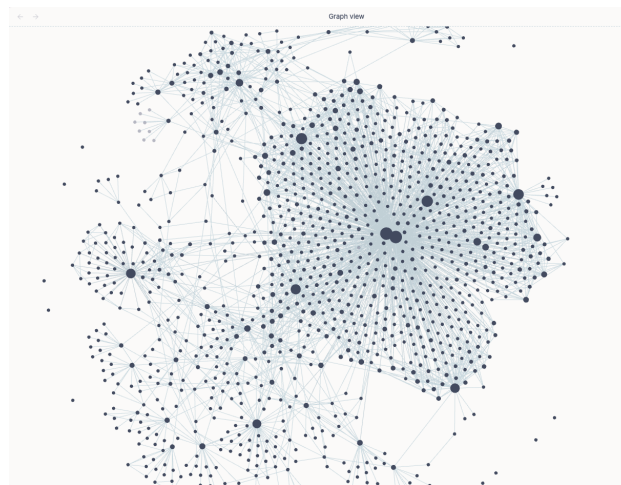


Figure 9: Graph View of My Vault

Hotkeys: You can set hotkeys for commands that you frequently use. Some plugins come with already set hotkeys while others do not. You can see all potential hotkeys, see existing hotkeys, and create hotkeys under Settings → Hotkeys (under options).

View Webpages in Obsidian: You can set it so that you can view webpages inside Obsidian upon clicking an external link rather than having the page open in your browser. To do this, go to Settings → Web Viewer (under core plugins) → Open External Links, and make sure it is toggled on.

6 Ideas for Pages that Reflect the Academic Workflow

You can create countless structures with your notes. It is your choice as to what you think will be useful. Here is a list of pages I have created to fit my research flow that you can take inspiration from.

- Scholars Page: Contains links to pages for each scholar whose work I've read for classes. Each individual scholar page has links to the reading notes I took on their works.
- Substantive Topics Page: A single page with links to all class and reading notes for my substantive courses grouped by topics. This was very useful for comps.
- A Page for Each Class: A home page for each class that has links to all the class and reading notes associated with it.
- A Research Page: Contains links to the home page for each of my research projects.
- A Page for Each Research Project: A home page for each that contains notes and links to all other notes associated with the project.
 - A Log for Each Project: Dedicate a page to be your “log” where you keep daily notes as you work on your project so that you can reference them later.
- A Comprehensive Exam Materials Page: Contained links to my scholars page, substantive topics page, syllabi for courses, and any other notes I created related to comps.

7 Additional Resources

There are many great Obsidian resources available online. Check them out for more detail on features you want to learn about. Here is a non-exhaustive list of my favorites:

- Official Obsidian Help Site: <https://obsidian.md/help/>
- Tim Miller's “Getting Started with Obsidian Notes: A Beginner's Guide” <https://obsidian.rocks/getting-started-with-obsidian-a-beginners-guide/#create-your-first-note>
- Advanced Markdown Syntax: <https://obsidian.md/help/advanced-syntax>
- Stop Overthinking Obsidian: <https://medium.com/@andremonthy/stop-overthinking-obsidian-a-beginners-guide-that-actually-works-c46ae9953ac7>
- 10 Tips for Smart Obsidian Usage: <https://dannb.org/blog/2024/obsidian-tips-smart-usage/>
- How to Use Obsidian Community Plugins: <https://obsidian.rocks/how-to-use-community-plugins-in-obsidian/>
- Getting Started with Obsidian for Academics – Absolute Beginner Tutorial: <https://effortlessacademic.com/getting-started-with-obsidian-for-beginners/>
- An Opinionated Guide to Obsidian for Studying & Research <https://obsidian-guide.neocities.org/guide>