



Make room to remember.

Your first note-taking habit with Obsidian and AI

Work, family and the things you enjoy. Turn records into your next step.



Keep your records. Own your judgment.

A note-taking habit for business, family, hobbies, finances and health
No GitHub or command line required
Practice safely with fictional notes.

Do not run a business from memory.

Keep a record, organize it with AI, and decide for yourself. What could change?

01 Reduce the burden of remembering.

Check a record to answer, "Why did we put that on hold?" You do not have to reconstruct the reasoning from scratch each time.

02 Resume the meeting where you left off.

Organize past decisions, open questions and next commitments. Spend more of the meeting on today's decisions instead of retelling the background.

03 Explain what you want to delegate.

Turn the intention in your head into a purpose, a scope and conditions for consultation, so employees can understand their next action.

04 Use experience in the next decision.

Review why you made a decision and what followed. Retrieve the conditions behind similar successes or mistakes as material for the next situation.

These are examples of possible uses, not guarantees of results or quantified time savings.

YOU ARE READY WHEN

Aim to use your notes for the next business decision, rather than simply collecting information.

Bring the context back before a meeting.

Consider a new project discussion. Do you first have to search for what you decided last time?

One fictional project, followed through several stages / Use only information your company permits.

The record you kept last time

Decision: Put Company A's new project on hold.

Reason: Give priority to deadlines on existing work.

Still to check: Staff capacity and Company A's preferred deadline.

Ask AI to prepare, not to decide.

From selected records, ask it to organize what is decided, what is unconfirmed, and what to ask now. Have it include dates and source notes, then check them yourself.

Narrow down today's questions

Before asking, "What price should we quote?"

start with, "Have we checked the deadline and staff capacity?"

Spend less time searching and recover the context for your meeting.

Past records may no longer describe current facts. Recheck changing conditions such as staff and deadlines.

YOU ARE READY WHEN

Before the meeting, be able to name one thing you need to decide today.

Turn vague wishes into a clear handoff.

Put the purpose and judgment criteria in your head into words that someone else can act on.



If you were handing the previous page's project to an employee

Purpose: Consider the new project while protecting existing deadlines.

Scope: Check Company A's preferred deadline and staff capacity.

When to consult: If existing work may be delayed, ask before starting.

Next commitment: Share findings on Friday. The business owner decides whether to accept the project.

AI draft > your check > share only what is needed.

You need not publish your entire personal vault. Check recipients, permissions and confidential information.

YOU ARE READY WHEN

Be able to explain what you are delegating and when the person should consult you.

Use experience in your next decision.

Do more than keep a record. Put the reason for your decision beside what happened afterward.

The Company A project continues / Fictional record

Original decision: Prioritize existing deadlines and pause the new project.
What we learned: Company A could move the start date back two weeks.
Next decision: Begin after delivering the existing project.

Once a week, reflect with AI.

Ask, "What conditions recur in this week's decisions? Show the dates and records that support your answer." Check for omissions and assumptions yourself.

A check to make before your next decision
Before accepting or declining a new project,
first ask whether its start date can be adjusted.

Move from memory alone to evidence you can revisit.

Do not turn one example into a universal rule. Check other conditions, including profit, quality and staffing.

YOU ARE READY WHEN

AI helps organize the material. Judgment and responsibility stay with the business owner.

You have a life beyond your business.

This approach is not just for work. The same pattern can organize records from everyday life.

01 Family and private life

Clothing and shoe sizes, travel packing and home repairs. Decide where to check instead of asking your family again each time.

02 Hobbies you want to keep enjoying

Golf lessons, SUP gear, camping and photography records. Bring previous insights into your next practice session or outing.

03 Assets and household finances

Record what you hold and what it is meant to provide for. Put plans and purposes alongside balances as material for a review.

04 Health and everyday well-being

Original health reports, past medical visits, sleep and symptom notes. Review changes and prepare what you want to tell your clinician.

Examples are generalized from Yamazaki's areas of use. No actual personal, financial or medical details are shown.

YOU ARE READY WHEN

Choose one piece of information outside work that you keep searching for again.

Save your preparation for an easier day off.

Use your notes to answer, "What did we already have?" and "What was missing last time?"



For a family outdoor trip

Record equipment, storage locations, and family clothing and shoe sizes. Link the trip plan to those notes so you know where to check before leaving. For growing children, confirm measurement dates and try items on again.

Leave a place to pick up your hobbies.

For golf, separate the coach's words from your own impressions. For SUP and camping, record gear and lessons from the last outing; for photography, settings and photo links. Ask AI to make the next checklist from selected notes.

Check sea conditions, rules and bookings before the outing. Saving a note does not create an automatic reminder.

YOU ARE READY WHEN

Link the next outing's plan to your equipment and size notes.

Connect money records with their purpose.

Alongside how much you have, record what it is for and why you hold it.

Keep three things.

Current position: Balances, terms and date checked

Purpose: Education, housing and future living costs

Approach: Reasons for choices and conditions for review



An example request to AI

From these household and asset notes, identify outdated entries and unconfirmed planned spending. Show the source records. Do not recommend buying or selling.

Prepare material for a review.

Compare notes with statements and contracts, then discuss them with family or relevant professionals. Bank and investment balances do not update automatically; manual updates or separate connection settings are needed.

This illustrates record organization, not investment or tax advice. Do not send account numbers or authentication details to AI.

YOU ARE READY WHEN

Record purposes, evidence and checking dates, not just asset amounts.

Make changes in your health easier to explain.

Before a medical visit, organize what changed and when, rather than relying only on memory.



Examples of what to record

Dates and changes in symptoms / Sleep and daily-life notes

Visit dates and the clinician's explanation / Links to original test results

Questions to ask at the next visit

Ask AI to organize the timeline and questions.

Take notes you have checked yourself to your clinician. Do not let AI diagnose you or change medication. Limit access to health information; keep it locally without sending it to AI when appropriate.

For family records, check the person's wishes and sharing boundaries. Work and personal records can be kept separate.

YOU ARE READY WHEN

Connecting records does not mean sharing all of them with AI or other people.

You do not have to do it all today.

First, try the cycle once: write, share selected text, and bring your judgment back.

01 Write three lines in one place.

Create a practice vault in Obsidian and write today's note.

02 Share only the relevant parts with AI.

Paste a short note you selected into Claude and discuss it.

03 Bring your judgment back to your notes.

Check the answer, then record why you adopted it and what you will do next.

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Getting started 13-16 / Using AI 17-20

Protecting the habit 21-26 / Next steps 27 / References 28

YOU ARE READY WHEN

For your first cycle, use pages 13-15, 17 and 19.

Notes and AI are different tools.

Obsidian is where you keep notes. Claude helps you think through the material you provide.

01

Keep

Obsidian

Save your records
and your judgment.

02

Discuss

Claude

Organize and summarize
the information you share.

03

Be able to restore

Backup

Keep earlier copies
in another location.



Remember

With the first method in this magazine, Claude does not go and read your notes automatically. You choose and provide the material it can read.

YOU ARE READY WHEN

Be able to distinguish where you save records from the tool you consult.

Make five agreements with yourself.

Before adding convenience, set boundaries that protect your information and judgment.

01 Your notes are your source of truth.

Keep notes you check and update as the basis for your judgment. Do not leave them only in AI chat.

02 Choose the sharing boundary first.

Naming a folder "Private" does not restrict access.

03 Separate your thinking from AI's draft.

Label "AI suggestion," "My judgment," and "Sources checked" separately.

04 Return to evidence for important claims.

Agreement from another AI is not enough. Check source documents or ask the responsible person.

05 A place to return matters more than categories.

If unsure, put it in today's note. Avoid excessive subdivisions at the start.

YOU ARE READY WHEN

Practice only with public information or fictional notes you have created.

Create a home for your notes.

A vault is not a special container. It is an ordinary folder that holds your notes.

01 Install Obsidian.

Go to obsidian.md/download, choose your OS, install and open it. On a company computer, check installation rules first.

02 Create a new vault.

Select "Create" beside "Create new vault," then enter "My first notes" under "Vault name."

03 Choose where to save it.

Use "Browse" to select a location on your computer, then "Create." Check page 23 before syncing. Do not practice in an existing work vault.

04 Create a test note.

Select "New note," name it "Practice," and type one line. Close and reopen it to check that the line is still there.

Official instructions: reference [1]. Labels vary with language settings and software versions.

YOU ARE READY WHEN

Know your vault's name and the location of the folder where you saved it.

Start with just two folders.

When was it recorded? What material is it? Those two distinctions are enough to begin.

At the top of the file list on the left, select "New folder," type "00_Daily notes," and press Enter. Repeat for "10_Reference." Put both directly inside the vault.

My first notes (vault)

00_Daily notes

10_Reference

00_Daily notes

Keep what you did, what you noticed, and your next action.

Date-based names make it easier to know where to return later.

10_Reference

Keep notes you revisit and summaries of reference material.

For example: "Meeting preparation" or "This month's review."

Keep confidential information out of this practice vault.

If you later connect a folder to AI, restrict its permissions in the settings. A name such as "90_Do not let AI read this" provides no protection by itself.

YOU ARE READY WHEN

You have created two folders in the file list on the left.

Three lines about today.

It does not need to be polished writing. It only needs to make sense to you tomorrow.

Example: a fictional practice note

2026-09-10

What I did: Prepared for next week's meeting.

What I noticed: What we need to decide is still unclear.

What I will do next: Write three questions to ask the other person.

To open a daily note

In Settings > Core plugins, turn on Daily notes. Then open Daily notes in Settings and set "New file location" to "00_Daily notes." Close Settings and select "Open today's daily note" on the left ribbon. This opens or creates a note for today's date.

Keeping these three lines leaves a record of events and material for decisions. You can set the daily note to open automatically on startup once you are comfortable.

Daily notes behavior: reference [2].

YOU ARE READY WHEN

You have practiced by copying the fictional three lines into today's dated note.

Move just three notes.

Moving all your old notes is not today's goal.

01 Choose notes you will use this week.

Select just three often-used notes from Apple Notes, Notion, Evernote or similar tools. Keep the originals and copy only what you need.

02 Give each a useful name.

Choose "Questions for the meeting" rather than "Note 1." Keep the original title, date and link as well.

03 Keep the main points and the source location.

For a PDF or Word file, its key points, storage location and original link are enough to begin. You can attach files, but that is not required today.

One small link between notes

Write `[[Questions for the meeting]]` in today's note to link to a note with that name.

YOU ARE READY WHEN

You have moved three notes and kept enough information to return to their sources.

Share only what AI needs.

For the first attempt, do not connect a folder. Try pasting a short passage instead.



01 Open Claude.

Sign up or log in at claude.ai and open a new chat. For company information, follow your company's designated contract and operating rules.

02 Paste only the relevant passage.

Start with the fictional note on page 15. Do not paste personal names, client information, contract terms, passwords or similar details.

03 Add a request and send it.

Ask, "Based on this note, list three things to check next." You can attach files using "+," but text alone is enough for this exercise.

File attachments: reference [3]. What you send is processed by an external service.

YOU ARE READY WHEN

You have received an AI response about text you selected yourself.

Give AI a little more than "Thoughts?"

Explain the material, the purpose and the answer format to make the response easier to check.

A request you can use

The following is a preparation note for next week's meeting.
The purpose is to clarify what we need to decide together.

1. Facts stated in the note
2. What is still unknown
3. Three questions to ask next

Organize the answer in this order.
Clearly label any inference not stated in the note.

[Paste the selected note here]

It is not about writing a long incantation.

What material did you provide? What will you use it for? How should the answer be structured? If these are clear, a short request is enough to start.

YOU ARE READY WHEN

You specified the answer format and asked AI to separate facts from inferences.

The answer is a draft. You decide.

Even a convincing answer may contain things your note never said.

Check three things.

Is it in the original note?

Are numbers, dates and names correct?

Why would I adopt this suggestion?



An example of what to put back in your note (fictional)

AI suggestion: First, confirm the meeting's purpose.

My judgment: I will adopt this suggestion.

Reason: Decisions and discussion points are currently mixed together.

Next action: Add one line to the invitation explaining what we need to decide.

Leave unsupported points marked as needing further checking. Verify important figures and rules against source documents or the responsible person.

YOU ARE READY WHEN

You brought back your own judgment and reason, rather than simply copying the whole AI answer.

Three lines a day. One review a week.

Keep the habit small. Decide where to return, rather than how much time to spend.

Write

Keep just three lines about today.

Review

Look for recurring themes in the week's notes.

Decide

Discuss with AI and choose one next step.

A weekly request

These are my notes from this week. Identify three recurring themes. For each one, include the date and a supporting sentence from the relevant note.

You do not have to fill in missed days.

If you have not opened your notes for a while, restart with today's three lines. For weekly reviews too, share only what is needed and keep company confidential information out.

YOU ARE READY WHEN

Choose a review day, such as Friday at the end of work.

Sync is not a backup.

Having the latest version everywhere is different from being able to restore an earlier one.

Sync

Align the current state.

Reflect computer changes on your phone.

Deletions and mistaken edits may also spread to other devices.

Backup

Preserve an earlier copy.

Save a dated copy somewhere else.

If you delete something by mistake, you can retrieve the state captured at that time.



Seeing a folder in the cloud does not establish that you can recover it. Keep a separate backup and test that you can open it, in addition to syncing.

Obsidian's "Back up your Obsidian files": reference [4].

YOU ARE READY WHEN

Do not stop at "It is synced, so it is safe."

Make a copy. Test that you can read it.

A manual copy is enough to begin. Store it outside the original vault.

01 Stop editing and check saved files.

First stop editing notes on every device. If using sync, wait for it to finish. Check that the actual files you need are on the computer you will copy from, then close Obsidian.

02 Copy the vault folder.

Give the copy a dated name and save it somewhere else, such as an external drive: "My first notes_20260910." If compressed, extract it to a separate location before checking.

03 Open the copy separately.

Do not overwrite the original vault. Open a note from the copy in a text editor and check that you can read the latest three lines.

04 Keep earlier copies regularly.

Aim for weekly copies and save one before important edits. For confidential material, follow organizational rules on storage and encryption.

Backup principles: reference [4]. Weekly, dated copies are this magazine's example beginner routine.

YOU ARE READY WHEN

You have read a separate copy without deleting the original notes.

When you want notes on your phone.

You can add sync later. Choose a method for your combination of devices.

Mac + iPhone / iPad

iCloud is one option. On an iPhone, you can create a vault in Obsidian with "Store in iCloud" switched on.

On your Mac, use the same Apple Account and open that same vault in the Obsidian folder within iCloud Drive.

Combinations with Windows or Android

The official paid Obsidian Sync service is a straightforward option. OneDrive can work between computers, but you cannot open it the same way on an iPhone.

Start with these safeguards

- Back up an existing vault before moving it.
- Do not layer sync services on the same vault.
- Write "Sync test" and check it on the other device.
- Avoid simultaneous editing; wait for changes to arrive before opening.

Keep the actual source files on the device too. Check the official instructions for iCloud's "Keep Downloaded" on supported OS versions and OneDrive's "Always keep on this device."

Devices and settings: references [5][6]. Avoiding iCloud on Windows is recommended.

YOU ARE READY WHEN

You can read the same line on another device. If not, you can still continue on your computer alone.

Folder access is a later step.

If selecting text each time becomes tedious, first understand the connection and its permissions.

01 Installing an app is not enough.

Using local files with Claude Desktop requires a supported desktop extension or similar setup. This is different from connecting a web service.

02 Choose an approved extension.

Start with Settings > Extensions in the official instructions. Understand the provider and read/write scope. At work, use only administrator-approved extensions.

03 Permit only a practice folder first.

Do not select the whole vault or your home folder. Use read-only access where possible, and withhold modification or deletion permissions until needed.

04 Check the settings and test the boundary.

Inspect the permission list. With harmless test files, verify reading inside the scope and refusal outside it. Do not rely only on AI saying, "I cannot read it."

Installing and managing extensions: reference [7]. Availability and labels vary by plan, OS and administrator settings.

YOU ARE READY WHEN

If you are unsure, do not connect a folder. Continue pasting text as on page 17.

Come back here when you get stuck.

Before adding settings, check one thing at a time to understand what is happening.

I cannot find my note

Check the vault name first. Look at its location: did you create another vault with the same name?

Claude does not know my notes

Without a folder connection, as in this exercise, local notes are not read automatically. Select the relevant text and paste it.

Changes do not appear on another device

Check that it is the same vault, the connection works, and sync has finished. Do not rush to delete duplicate files.

AI sounds too certain

Ask it to separate facts in the note from inferences. Return to original sources for important claims.

I do not know what to write

Write just one thing you did today. Tidy classification can wait.

YOU ARE READY WHEN

You have narrowed the problem to one question. Avoid unnecessary changes to settings.

Write down your first step.

This page is for you: turn reading into an action you can take.

My vault's name and location

What I will record in three lines today

Information I may share with AI / Information I will not share

My weekly review day and backup location

YOU ARE READY WHEN

Write, share selected text, and bring back your judgment. Those three steps are enough for day one.

Start small and let it grow.

You do not need to recreate someone else's advanced setup on your first day.

Today Write three lines on your computer. Share only what AI needs, then bring your judgment back.

In a week Review the habit and your backup. Add only notes you actually use.

Later Try sync or limited folder access. Collaboration, automation and GitHub can wait until after that.

Cost and privacy

Obsidian itself is free; Sync is a separate paid service. Check Claude's official pages for plans and usage limits.

For individual Claude accounts, check the model-improvement setting under Settings > Privacy. Turning it off does not authorize sending confidential information.

With records in your hands, you can change tools and continue.

Pricing and privacy: references [8][9][10]. Follow your company's contracts and usage rules.

YOU ARE READY WHEN

Begin with the smallest approach you can sustain.

Official sources and this magazine.

Procedures and features were checked against official sources on September 10, 2026. Interfaces and prices may change.

[1] Obsidian: Create a vault

<https://help.obsidian.md/Getting+started/Create+a+vault>

[2] Obsidian: Daily notes

<https://help.obsidian.md/Plugins/Daily+notes>

[3] Claude: Upload files

support.claude.com / Upload files to Claude

[4] Obsidian: Back up your files

<https://help.obsidian.md/Getting+started/Back+up+your+Obsidian+files>

[5] Obsidian: Sync notes across devices

<https://help.obsidian.md/Getting+started/Sync+your+notes+across+devices>

[6] Obsidian Sync: Setup

<https://obsidian.md/help/sync/setup>

[7] Claude Desktop: Local MCP and extensions

support.claude.com / Getting Started with Local MCP Servers on Claude Desktop

[8] Obsidian: Pricing

<https://obsidian.md/pricing>

[9] Claude: Plans

<https://claude.com/pricing>

[10] Claude: Model-improvement settings

privacy.claude.com / How do I change my model improvement privacy settings?

In the digital PDF, click an entry. In print, search the official site for the article title.

Based on Yamazaki Office's 10-page A4 guide v1, "From reading to practice: becoming a business owner who remembers with Obsidian and AI."

This magazine separates sync from backup, starts with pasted text, and makes folder connections optional. Examples are fictional; illustrations show concepts, not actual app screens.



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