FREE PDF

Personal Knowledge Management with AI

Practical methods for organizing notes, ideas and research, with AI used to summarize and connect them.

23	11	28
AI prompts	fill-in templates	A4 pages

What is inside

Inbox and Processing Rules
Capture quickly and turn raw material into useful notes

Note Linking Strategies
Connect ideas so notes become more than a pile

AI Summarization Workflows
Use AI to condense long material without losing your own thinking

Project and Area Organization
A simple structure for where notes live

Long-Term Retention Techniques
Keep what you learn available and alive

Two-week start plan
A simple sequence for putting the system into practice

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Who this is for

Students, researchers, professionals and anyone who collects notes, articles and ideas, especially if the current system feels cluttered, unused or hard to search.

How to use it

Pick one primary tool
Keep the structure simple and use a single main place for notes.

Process regularly
Empty your inbox on a schedule so captured items do not pile up.

Keep insights in your words
Use AI for summaries, but write the important ideas yourself so you understand them.

Please note: results vary by tool version and settings, so review AI output before relying on it.

Why Every System Needs an Inbox

Notes pile up when there is nowhere simple to put them. An inbox is a single landing spot for anything you want to look at later, so capturing stays effortless.

1. **Use one inbox**
   Choose a single note, folder or app as the place where everything lands first. Fewer capture points mean fewer lost ideas.

2. **Capture without sorting**
   When you save something, do not decide where it belongs. Sorting at capture time slows you down and often discourages saving.

3. **Add a short reason**
   Write one line about why the item matters. This helps you decide later and makes the note useful on its own.

4. **Set a processing time**
   Review the inbox on a schedule, such as daily for five minutes or weekly for twenty. Unprocessed inboxes grow quickly.

5. **Be willing to delete**
   Not everything deserves to stay. Delete items that no longer interest you without guilt.

PROMPT 1 · INBOX TRIAGE

> Here are the items in my inbox: [PASTE]. Group them into: keep and file, act on soon, reference for later, and delete. Give a short reason for each and flag any item that needs more information.

Tip: If an inbox item sits unprocessed for a month, you probably do not need it.

NOTES

Inbox and Processing Rules

Write your own rules once so processing becomes automatic. Keep them short.

MY INBOX LOCATION

WHAT GOES INTO THE INBOX

HOW OFTEN I PROCESS IT

RULE: IF IT TAKES UNDER TWO MINUTES what I do

RULE: IF IT IS A PROJECT ITEM where it goes

RULE: IF IT IS REFERENCE MATERIAL where it goes

RULE: IF I AM UNSURE what I do

WHAT I DELETE WITHOUT HESITATION

Processing Checklist

Use this each time you work through the inbox.

Review

- [ ] Read or skim the item
- [ ] Remember why I saved it
- [ ] Decide if it is still relevant
- [ ] Delete it if not

Decide

- [ ] Add it to a project
- [ ] File it as reference
- [ ] Turn it into a task
- [ ] Merge it into an existing note

Improve

- [ ] Add a clear title
- [ ] Write a one-line summary
- [ ] Add tags or links if useful
- [ ] Note the source

Finish

- [ ] Remove it from the inbox
- [ ] Update any related notes
- [ ] Add any tasks to my list
- [ ] Note ideas for later

Three Prompts for Processing Notes

Use these on raw captures. Remove private or confidential details before pasting into an AI tool.

2 Clean up a raw capture

Use it when: You saved a messy note quickly.

PROMPT

> Clean up the raw note below. Give it a clear title, a two-sentence summary, three key points and any actions. Keep my wording where possible and do not add new facts.
>
> [PASTE NOTE]

MY VERSION

3 Suggest a destination

Use it when: You are unsure where a note belongs.

PROMPT

> My folders and projects are [LIST]. Here is a note: [PASTE]. Suggest which folder it belongs in, a good title and two related topics I may want to link.

MY VERSION

4 Extract the task

Use it when: A note hides an action.

PROMPT

> Read the note below and list any actions I need to take, with dates if mentioned. If there is no action, say so.
>
> [PASTE NOTE]

MY VERSION

Example: Processing a Saved Article

This fictional example shows how a quick capture becomes a useful note in about five minutes.

CAPTURE
A saved link titled “New study on sleep and learning”, with the reason “useful for the student workshop”.

REVIEW
The writer reads the article quickly and decides it is relevant to the workshop.

SUMMARIZE
Writes two sentences in their own words, then asks an AI tool for a five-bullet summary to compare.

CHECK
Fixes one point the summary got wrong by checking the original article.

FILE
Moves the note to the workshop project folder and adds a link to the main outline note.

ACT
Adds a task: “Include one slide on the study in the workshop deck”.

CLEAR
Removes the item from the inbox. Total time: about five minutes.

YOUR EXAMPLE

Why Links Make Notes Useful

A note on its own is easy to forget. Links connect ideas, show relationships and help you find related material when you need it.

1. **Write one idea per note**
   Short notes about a single idea are easier to link, reuse and understand later than long, mixed notes.

2. **Link as you write**
   When a note reminds you of another, link them straight away and write a few words about the connection.

3. **Explain every link**
   A link with no reason is weak. A short phrase such as “supports” or “conflicts with” makes it meaningful.

4. **Create hub notes**
   Make a hub note for each major topic or project that lists links to the most important related notes.

5. **Review links when you revisit**
   Each time you open a note, add or fix links. Your system improves gradually.

PROMPT 5 · LINK FINDER

> Here is a new note: [PASTE]. Here are titles of my existing notes: [LIST]. Suggest up to five notes it could link to and a short phrase explaining each connection.

Tip: Do not link everything. A few meaningful links are better than many vague ones.

NOTES

Linked Note Template

Use this layout for notes you want to keep. Fill it in your own words.

TITLE a clear statement of the idea

THE IDEA IN MY WORDS

SOURCE where it came from

WHY IT MATTERS TO ME

LINKS TO OTHER NOTES and why

QUESTIONS IT RAISES

WHERE I MIGHT USE IT

Three Prompts for Linking Ideas

Use these to find connections you might have missed.

6 Find connections

Use it when: You suspect two topics relate.

PROMPT

> Explain possible connections between [TOPIC A] and [TOPIC B] as five short bullets. Mark each as obvious, plausible or speculative so I know what to investigate.

MY VERSION

7 Build a hub note

Use it when: You have many notes on one subject.

PROMPT

> Here are titles and one-line summaries of my notes on [TOPIC]: [PASTE]. Organize them into a hub note with 3 to 5 headings and a short intro paragraph.
>
> Keep every original title.

MY VERSION

8 Spot gaps

Use it when: You want to know what is missing.

PROMPT

> Based on these notes on [TOPIC] [PASTE TITLES], suggest what questions or subtopics are missing from my coverage and what I should read or think about next.

MY VERSION

Link Map

Record important links between notes. Write the note names and the reason for the connection.

Note	Linked note	Relationship	Why it matters
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Example: Linked Notes in Practice

This fictional example shows three small notes and how links give them meaning.

NOTE A: SPACED REVIEW
Reviewing material at increasing intervals helps it stay in memory. Links to Note B because it needs a review schedule.

NOTE B: WEEKLY REVIEW HABIT
A weekly twenty-minute review keeps the system alive. Supports Note A by providing the regular slot.

NOTE C: READING SUMMARIES
Summaries in my own words are easier to review than highlights. Conflicts with the idea of saving everything.

HUB NOTE: LEARNING SYSTEM
Lists A, B and C with a sentence on how they fit together and a question about what to test next.

WHAT THE LINKS REVEAL
Without links these are three separate ideas. Together they form the start of a learning routine.

NEXT STEP
Add a link from Note C to a note on how to create summaries, and review the hub note monthly.

HOW THE WRITER FOUND IT LATER
Searching for “review” surfaced the hub note first, and its links led straight to the other three notes within seconds.

WHAT TO TRY YOURSELF
Pick three notes you already have, write one sentence explaining how they relate, and create a hub note for them.

YOUR EXAMPLE

A Careful Summarization Workflow

AI can condense long material quickly, but summaries can miss detail or add errors. A short workflow keeps you in control.

1. **Read or skim first**
   Spend a few minutes reading the headings and introduction yourself so you can tell whether the summary is accurate.

2. **Ask for a specific kind of summary**
   Request key points, questions raised or actions, rather than just “summarize this”. Specific requests produce more useful output.

3. **Check against the source**
   Compare the summary with the original on key facts, numbers and names. Fix anything that is wrong.

4. **Rewrite the key insight**
   In your own words, write one or two sentences about what matters to you. This is the part you will remember.

5. **Store the summary with the source**
   Keep the link to the original beside your summary so you can return to the full text.

PROMPT 9 · CAREFUL SUMMARY

> Summarize the text below in five bullets. Then list two points that may be oversimplified and three questions the text leaves unanswered. Do not add information that is not in the text.
>
> [PASTE TEXT]

Tip: Never use an AI summary for something important without checking the original.

NOTES

Three Prompts for Summarizing

Make sure you have the right to use the text you paste, and remove confidential details.

10 Layered summary

Use it when: You want different levels of detail.

PROMPT

> Summarize the text below at three levels: one sentence, one paragraph and ten bullet points. Keep the same meaning at every level.
>
> [PASTE TEXT]

MY VERSION

11 Argument map

Use it when: You are reading a persuasive piece.

PROMPT

> Identify the main claim, the supporting reasons, the evidence offered and any weaknesses or missing information in the text below.
>
> [PASTE TEXT]

MY VERSION

12 Compare two sources

Use it when: You read two things on the same topic.

PROMPT

> Compare the two texts below. List where they agree, where they differ and which claims need checking. Keep each point to one sentence.
>
> TEXT 1: [PASTE]
> TEXT 2: [PASTE]

MY VERSION

Source Summary Template

Complete one for each important article, book or talk.

TITLE, AUTHOR AND DATE

LINK OR LOCATION

MAIN IDEA IN ONE SENTENCE

THREE KEY POINTS

EVIDENCE THAT CONVINCED ME

WHAT I DOUBT OR WANT TO VERIFY

HOW I MIGHT USE IT

Summary Quality Checklist

Run through this before saving any AI-assisted summary.

Accuracy

- [ ] Key facts match the source
- [ ] Names and numbers are correct
- [ ] Nothing important is missing
- [ ] Nothing was invented

Usefulness

- [ ] It answers why I saved the source
- [ ] It is short enough to review
- [ ] It includes questions or actions
- [ ] It uses clear headings

My own thinking

- [ ] I wrote one insight myself
- [ ] I noted what I disagree with
- [ ] I linked it to another note
- [ ] I know where I may use it

Housekeeping

- [ ] Source link is saved
- [ ] Date is recorded
- [ ] Tags or folder are set
- [ ] Original is easy to find

Three Prompts for Extracting Value

Use these to pull specific kinds of information out of longer material.

13 Actionable takeaways

Use it when: You want to apply what you read.

PROMPT

> From the text below, list up to five practical actions a reader could take. For each, note how much effort it needs and what result to expect.
>
> [PASTE TEXT]

MY VERSION

14 Key terms

Use it when: The material is full of jargon.

PROMPT

> List the ten most important terms in the text below with a plain-language definition and an example for each.
>
> [PASTE TEXT]

MY VERSION

15 Study questions

Use it when: You want to test your understanding.

PROMPT

> Write eight questions about the text below, ranging from basic recall to deeper thinking. Do not provide answers until I ask.
>
> [PASTE TEXT]

MY VERSION

Organizing by Projects and Areas

A practical structure separates active work from ongoing responsibilities and from reference material. Four categories are enough for most people.

1. **Projects**
   Efforts with an end point, such as planning a trip or finishing a report. Each project gets a folder while it is active.

2. **Areas**
   Ongoing responsibilities with no end date, such as health, finances or a job role. They collect notes you need to maintain.

3. **Resources**
   Topics of interest and reference material that may be useful later, such as recipes, research or design inspiration.

4. **Archive**
   Finished projects and inactive items. Moving things here keeps your active spaces light without deleting history.

5. **Keep the structure shallow**
   Avoid deep folders. Two levels are enough, and search and links can do the rest.

PROMPT 16 · STRUCTURE ADVICE

> I keep notes about [LIST OF TOPICS]. My active projects are [LIST] and my ongoing responsibilities are [LIST]. Suggest a simple folder structure with projects, areas, resources and archive, with no more than two levels.

Tip: If you need more than a minute to decide where a note goes, your structure is too complicated.

NOTES

Folder Structure Planner

Sketch your structure before building it in your tool.

ACTIVE PROJECTS

ONGOING AREAS OF RESPONSIBILITY

RESOURCE TOPICS

WHAT GOES IN THE ARCHIVE, AND WHEN

NAMING STYLE FOR NOTES AND FOLDERS

TAGS I WILL USE keep to a small, consistent set

WHAT I WILL NOT FILE AT ALL

Project and Area Inventory

List your active projects and areas, with a next action and a review date for each.

Name	Type	Next action	Review date
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Three Prompts for Organizing

Use these to bring order to a messy collection.

17 Sort a pile of notes

Use it when: You have a long, unsorted list.

PROMPT

> Sort the list of note titles below into the categories project, area, resource and archive, and suggest a folder name for each group.
>
> [PASTE TITLES]

MY VERSION

18 Consistent naming

Use it when: Your titles are inconsistent.

PROMPT

> Suggest a simple naming convention for notes about [TOPICS] and rewrite these ten titles to follow it. Keep titles short and descriptive.
>
> [PASTE TITLES]

MY VERSION

19 Archive candidates

Use it when: Your active space is crowded.

PROMPT

> From the list of projects below, identify which are probably finished or inactive and suggest what to archive, with a short reason for each. I will decide.
>
> [PASTE LIST]

MY VERSION

Monthly Cleanup Checklist

Spend fifteen minutes each month keeping the system tidy.

Projects

- [ ] Finished projects are archived
- [ ] Each active project has a next action
- [ ] Stalled projects are decided on
- [ ] New projects have folders

Areas

- [ ] Each area has a current review note
- [ ] Outdated notes are removed
- [ ] Important documents are filed
- [ ] Areas still match my life

Resources

- [ ] Duplicates are merged
- [ ] Useless clippings are deleted
- [ ] Key resources are linked from hubs
- [ ] Tags are consistent

System

- [ ] Inbox is empty
- [ ] Backup is up to date
- [ ] Templates still work
- [ ] One improvement is chosen

Making Knowledge Last

Saving a note is not the same as remembering it. A few simple habits help ideas stay accessible and useful over months and years.

1. **Write in your own words**
   Restating an idea forces you to understand it, which makes it far easier to recall later.

2. **Review on a schedule**
   Revisit important notes after a few days, a few weeks and a few months. Short, spaced reviews work better than long cramming sessions.

3. **Test yourself**
   Ask questions about your notes and try to answer them before checking. Retrieval strengthens memory.

4. **Use ideas in real work**
   Apply what you learn in writing, projects or conversations. Using knowledge makes it stick.

5. **Prune what no longer matters**
   Archive notes that you will not use, so the valuable ones stay visible.

PROMPT 20 · STUDY QUESTIONS

> From my note below, write six questions that test understanding rather than word-for-word recall, then give short model answers for me to check against my own.
>
> [PASTE NOTE]

Tip: A few notes reviewed regularly are worth more than thousands saved and never opened.

NOTES

Weekly Notes Review

Spend twenty minutes each week keeping your knowledge alive.

NOTES I ADDED THIS WEEK

NOTES I REVIEWED

IDEAS I USED IN REAL WORK

NOTES TO LINK OR IMPROVE

NOTES TO ARCHIVE OR DELETE

QUESTIONS I WANT TO EXPLORE

NOTES TO REVIEW NEXT WEEK

Three Prompts for Retention

These prompts turn passive notes into active practice. Check answers against your sources.

21 Flashcard set

Use it when: You want to memorize key facts.

PROMPT

> Turn the note below into ten question-and-answer flashcards, each with one clear fact on the answer side. Do not include trick questions.
>
> [PASTE NOTE]

MY VERSION

22 Explain it simply

Use it when: You want to check your understanding.

PROMPT

> I will explain [TOPIC] in my own words. After I finish, point out anything unclear or incorrect and ask me two follow-up questions. Here is my explanation: [PASTE]

MY VERSION

23 Review plan

Use it when: You want a schedule.

PROMPT

> Create a simple review schedule for these topics [LIST] over the next three months, with short review sessions that fit into 15 minutes each week.

MY VERSION

Review Schedule Tracker

Plan reviews for important notes. Tick the review dates as you complete them.

Note	First review	Second review	Third review
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

Example: From Notes to Lasting Knowledge

This fictional example follows one idea from first note to regular use.

CAPTURE
A note on a useful budgeting method from a book, saved with a one-line reason.

REWRITE
Two days later the writer restates the method in their own words and adds a personal example.

TEST
A week later the writer answers three questions about the method without looking at the note.

APPLY
The writer uses the method to plan next month's spending and records what worked.

LINK
The note is linked to a hub note on household planning and to a note on tracking expenses.

REVIEW
Added to the weekly review for the next two months, then moved to the resources folder.

OUTCOME
The method is now used regularly, and the note includes real results rather than only summaries.

WHAT MADE IT STICK
The writer used the idea in real planning, tested recall at spaced intervals and linked it to related notes, rather than just rereading it.

WHAT TO TRY YOURSELF
Choose one idea you want to remember, rewrite it in your own words, and put a first review date in your calendar.

YOUR EXAMPLE

Your two-week start plan

Choose one tool and keep the structure simple. Build the habits in order, and stop adding features once the system feels easy to maintain.

Days 1–2

Set up your inbox

Choose one tool and one inbox, then write your processing rules.

Days 3–4

Process what you have

Work through a first batch of saved items with the processing checklist.

Days 5–7

Start linking

Write three linked notes using the template and create one hub note.

Days 8–10

Try an AI summary

Summarize one long article, check it against the source and write your own insight.

Days 11–12

Organize by project and area

Sketch your folder structure and complete the inventory.

Days 13–14

Begin your review habit

Do a first weekly notes review and schedule reviews for important notes.

Use AI to summarize long material when helpful, but keep important insights in your own words. Results vary by tool version and settings.