

The Gluey Method

Get More From Your Notes

The Gluey Method provides a systematic approach for capturing and organizing information that enables notes to be more fully utilized such as being integrated into workflows and used for team communication.

The best notes are **consistent, concise, and categorized** (3Cs). Consistency ensures we capture all the right information. Concise eliminates clutter that may obfuscate important details. Categorized ensures information can resurface when needed (the true measure of our notes) and be shared with the right people who need it.

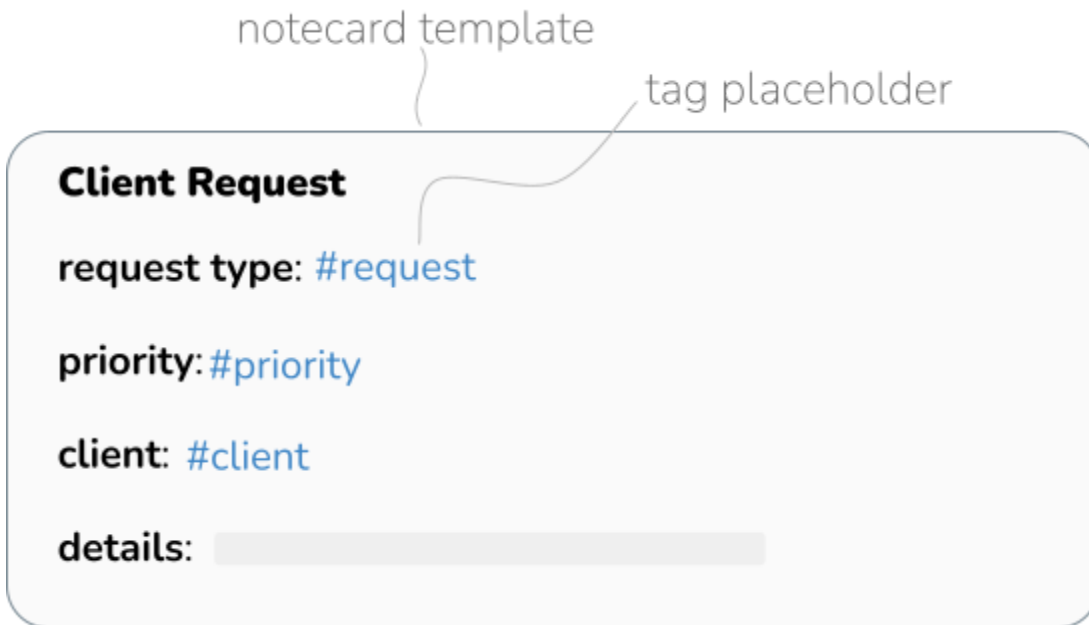
The Gluey method is built around **templates** and **Smart tags**. Templates are just normal notes with guidance for what information to capture in the form of text and tag placeholders. These tags represent a broad group of tags and act as a drop-down menu for picking a specific tag. For example, "clients" could be a tag placement for picking a tag of a specific client, "priority" could be a placement tag for picking a specific priority level (eg. urgent, low priority).

Gluey's Smart Tags not only categorize/organize notes but they are a short-cut for adding a significant amount of details to a note. Smart tags can have full definitions, icons, aliases, and relationships to other tags.

Let's look at an example to see how this would work.

Example - Client requests



The first step of using Gluey is to identify your templates. These are just common scenarios for when you take notes. For example, if you regularly take notes on client requests, this would be one of your templates. When creating your template, you ask yourself what are the details I may want to capture? Are there standard categories for these details? This might look as follows:



In Gluey, notes are referred to as notecards since this is the ideal size for note-taking. You want notes to be concise, consistent, and categorized. This ensures their maximum effectiveness.

The tags from the template provide placeholders for categorizing the notecard. Clicking on a tag provides details about the tag and a list of subtags to select. In the example below, clicking on #clients provides a list of the client names as subtags.

Client Request
request type: #request
priority: #priority
client: #clients
details:



tags are placeholders

clients

Paying customers. _____

Subtags:
samsAuto
joesFlowers

Select a subtag to add details

The placeholder tags allow you to create powerful templates with a menu-driven approach to taking notes. With a few clicks, we've updated all the placeholder tags and we've captured and categorized our new note quickly and consistently.

Client Request
request type: #upgrade
priority: #urgent
client: #joesFlowers
details: client is requesting to upgrade asap since....

placeholder tags replaced

Each tag is well-defined and can add a significant amount of information to a notecard. Hovering over a tag shows its details.

Client Request

request type: #upgrade

priority: #urgent

client: #joesFlowers

details: client request to upgrade asap since...



 Client/joesFlowers

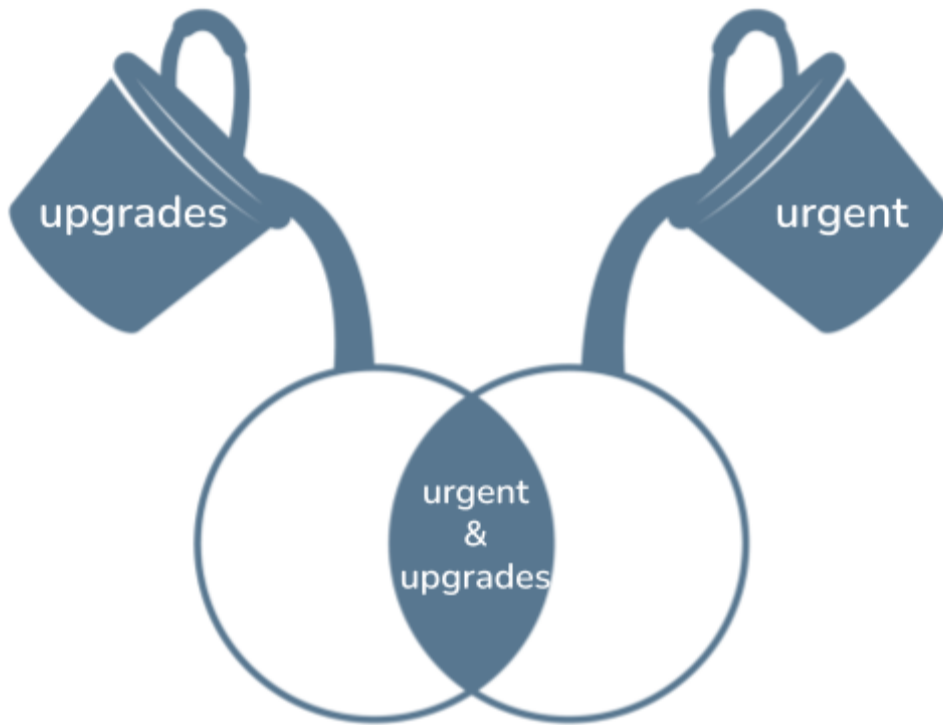
Main contact: John Smith
123 Main St.

Office Hours: M-F 9-5p

alias: flowers

Data Mining (Aggregation)

By systematically capturing information, notes can become a reliable knowledge base of information that can be Data Mined, the ability to extract and discover patterns in your notes.



When aggregating notes, it is often useful to get notes based on multiple tags. Whenever multiple tags are used, there is an explicit or implicit use of the logical operators of AND, OR, and NOT.

AND of multiple tags means notes must contain all tags (or one of their subtags) to be included in the retrieved notes. AND reduces the number of results since it is adding a greater restriction. Google searches default to an AND of the terms.

OR of multiple tags means notes only need to contain one of the tags to be retrieved in the results. **NOT** of a tag means the notes must not contain that tag. This is a very powerful feature since it provides a way to retrieve notes based on what was not done to it.

When aggregating notes from a parent tag, there is an implicit OR of all its subtags.

Let's look at some examples of the aggregation that can be done with only the tags on the client request template example:

Query	Results
request	all requests
upgrade	all upgrade requests
clients	all client notes

joesFlowers	all notes related to the client Joe's Flowers
urgent	all urgent notes
request AND urgent	only requests that are urgent
request AND client	only requests that are from clients
request AND joesFlowers	only requests that are from the client Joe's Flowers.
upgrade AND urgent	only upgrade requests that are urgent
upgrade NOT urgent	only upgrade requests that are not urgent
etc. etc. etc.	many more combinations

NOT is an efficient way to provide defaults. For example, a note without a Priority can be assumed to have a default (e.g. medium). So it is only necessary to add a Priority tag to a note if it is something other than the default of medium.

Summary

Unlike other note-taking tools, Gluey is focused on capturing and organizing information. Gluey is a great compliment to other tools as a knowledge base of information that can be aggregated into documents and exported..

Try Gluey at <http://gluey.app>