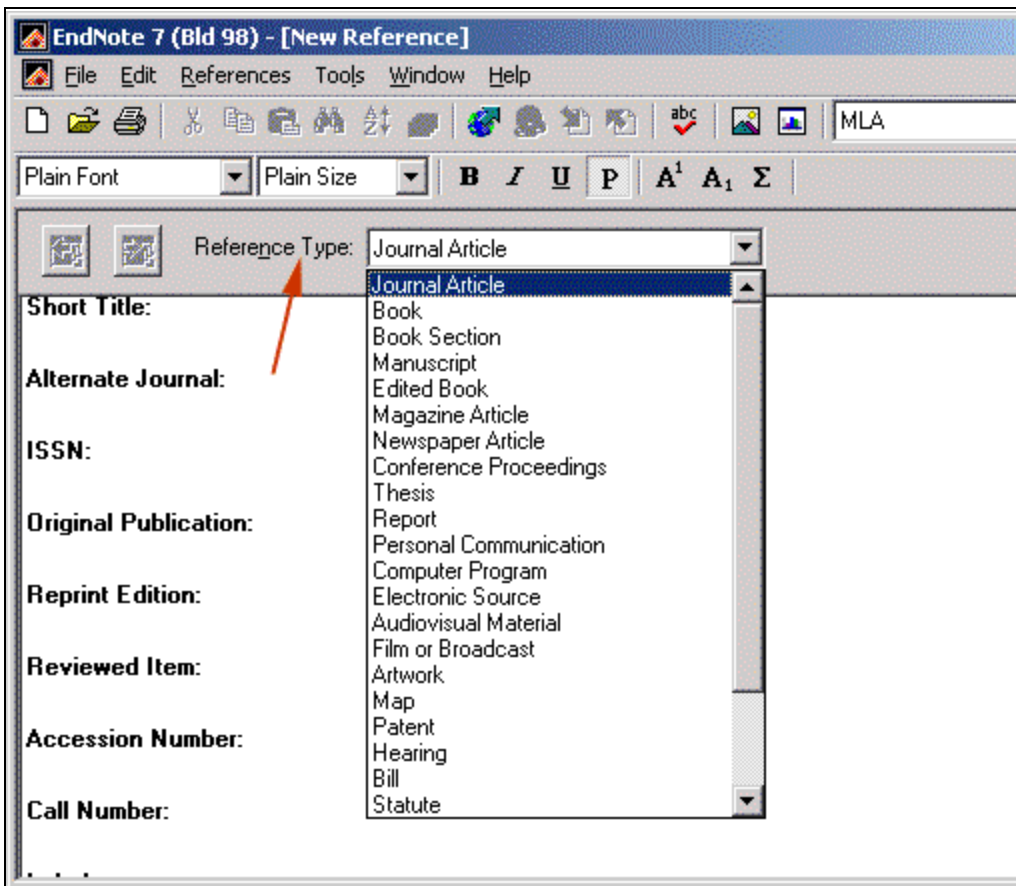




## Using and Customizing Reference Type Tables

EndNote allows you to create references for sources in many different formats. The different types of sources are called reference types. EndNote has predefined data entry tables for 26 different reference types and 3 blank types. The following directions will outline how to select the appropriate reference type as well as how to modify or create new reference types if none of the templates suit your needs.

1. Open the EndNote Library you want to work with.
2. Under References on the menu bar select New Reference...
3. Choose the correct type of reference from the drop-down menu labeled Reference Type. Review the included fields to make sure the data entry template includes all of the data fields you need.



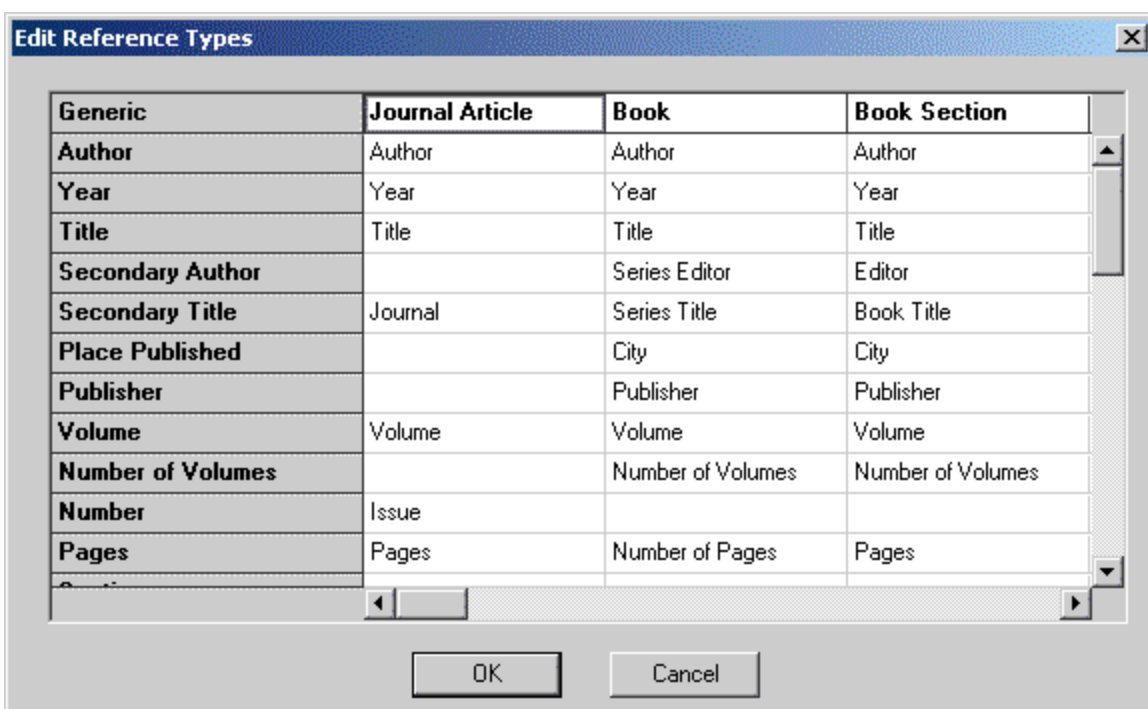
If one of these types will work for you, great! You can begin entering the appropriate data. When finished, simply close the data entry window and the reference will be added to your library. But if you don't find what you need...

## How to Customize a Reference Type

**Note:** Changes made to the Reference Type Table will apply to all libraries opened on that computer. If you move your library to a different computer, **the references will follow the layout of the Reference Type Table on that computer.**

Each reference type displays a set of fields that are relevant to that particular format. The Reference Types Table shows all available reference types and the fields associated with them. You can add, remove, and rename reference type fields from this table, as well as create completely new reference types. You should not enter your data into the Reference Type Table.

In the table, the columns represent each of the reference types, and the rows indicate the 40 possible data fields each reference type can contain. If a particular field is blank, that reference type does not use the field.



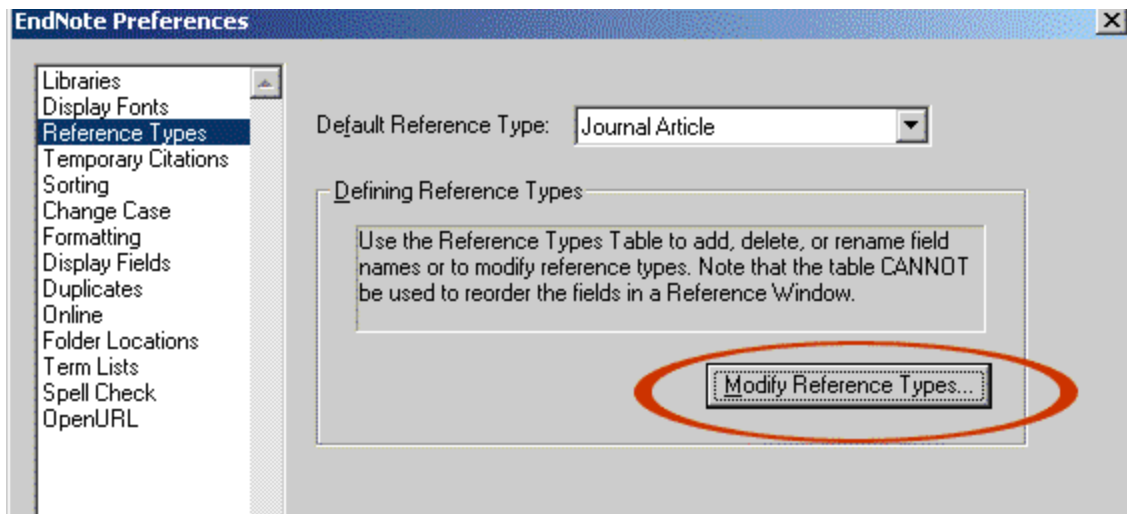
Generic	Journal Article	Book	Book Section
Author	Author	Author	Author
Year	Year	Year	Year
Title	Title	Title	Title
Secondary Author		Series Editor	Editor
Secondary Title	Journal	Series Title	Book Title
Place Published		City	City
Publisher		Publisher	Publisher
Volume	Volume	Volume	Volume
Number of Volumes		Number of Volumes	Number of Volumes
Number	Issue		
Pages	Pages	Number of Pages	Pages

The first column represents the Generic reference type; you cannot modify this table. However, since all available fields are used in the Generic reference type, you can use it as a reference for modifying or creating other reference types. The name given to a field in the Generic reference type is the name used throughout the EndNote program to refer to all of the fields in that row of the Reference Type Table, including those of other reference types that may have different field names. For example if you search on the Generic field Secondary Author, EndNote will search all fields in that row of the Reference Types Table, including Secondary Author, Series Editor, and Editor. This means that when you edit, you should keep similar reference types in the same row, even if you call the field something different.

While most fields of the reference type can contain many different kinds of data, only names should be stored in Author fields. EndNote will interpret any text in these fields as a name, reformatting the data according to the output style chosen. If the author is a corporation or entity other than a person, you must enter the data with a comma at the end, to indicate to the EndNote software that it should not reformat the author's name.

### To display the Reference Type Table:

1. From the Edit menu, choose Preferences.
2. Click on Reference Type in the list of preferences
3. Click on Modify Reference Types and the Reference Types Table will open. **Note:** all style, filter, connection and reference windows must be closed for the table to appear.



### To rename a field:

1. Find the reference type you would like to change by using the horizontal scroll bar.
2. Click on the field name you would like to change, and type a new name to replace the current name.
3. Click OK to return to the main Preferences window.
4. Click OK to save your changes. The software will update the field name automatically for all styles, filters, and connections.

### To add a field:

1. Find the reference type you would like to change by using the horizontal scroll bar.
2. Look at the field names listed in the Generic column and find the field that seems to match most closely to the field you would like to add, and make sure that this field is blank in the reference type you would like to modify.
3. Click on the blank cell and type the name of the new field.
4. Click OK to return to the main Preferences window.
5. Click OK to save your changes.

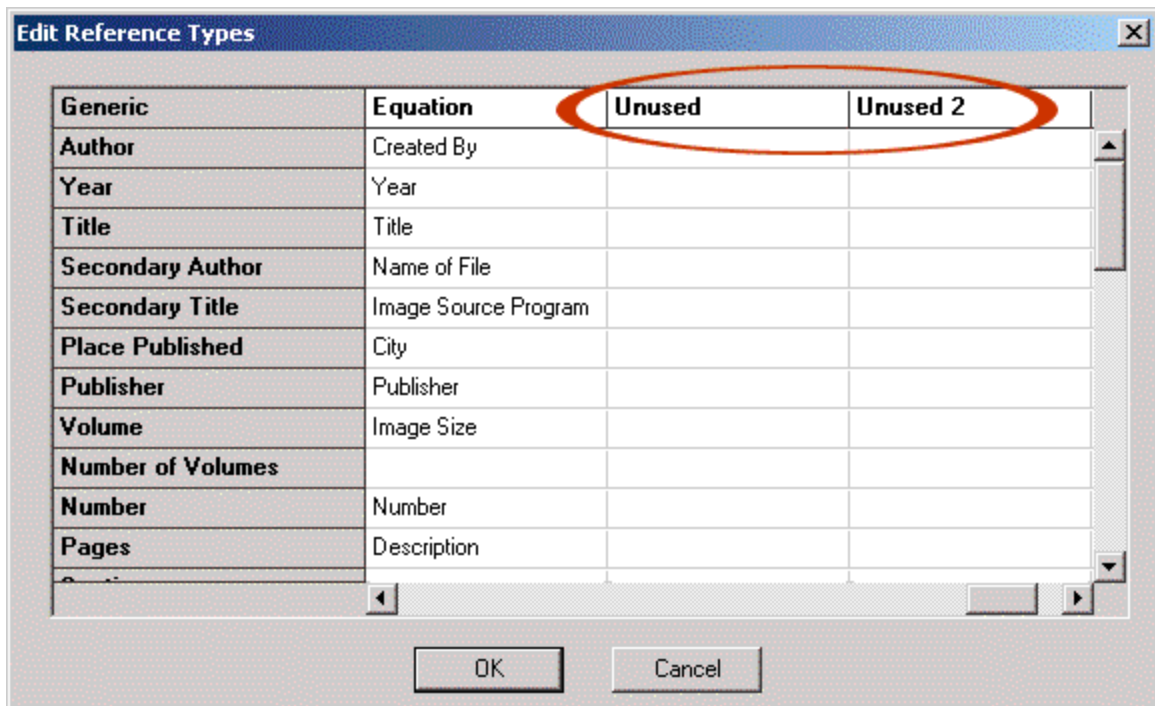
### To delete a field:

1. Find the reference type you would like to change by using the horizontal scroll bar.
2. Find the name of the field you would like to delete and select it.
3. Press the delete or backspace key to clear the name.
4. Click OK to return to the main Preferences window.
5. Click OK to save your changes.

**Note:** If there was any data in the deleted field, it will still appear in the reference, but the field will be displayed with the Generic field name. To remove all text from a field, use the Clear Field option in the Change Field command. You can also move the data to another field using the Move Field command in the References menu.

**To add a new reference type:**

1. Scroll across the Reference Type Table to the Unused reference types. If all reference types are used, you will have to select a reference type you are willing to overwrite.



3. Type the name of the new reference type in the column heading.
4. Continue down the column, adding the new fields you require. Make sure to match the meaning of the fields to the Generic reference type as closely as possible.
5. Click OK when you are finished adding fields to the new reference type.