

Reference Types in *EndNote*

EndNote can handle references of many different types, and as installed it has provision for over 40 specialised reference types, each offering appropriate fields.

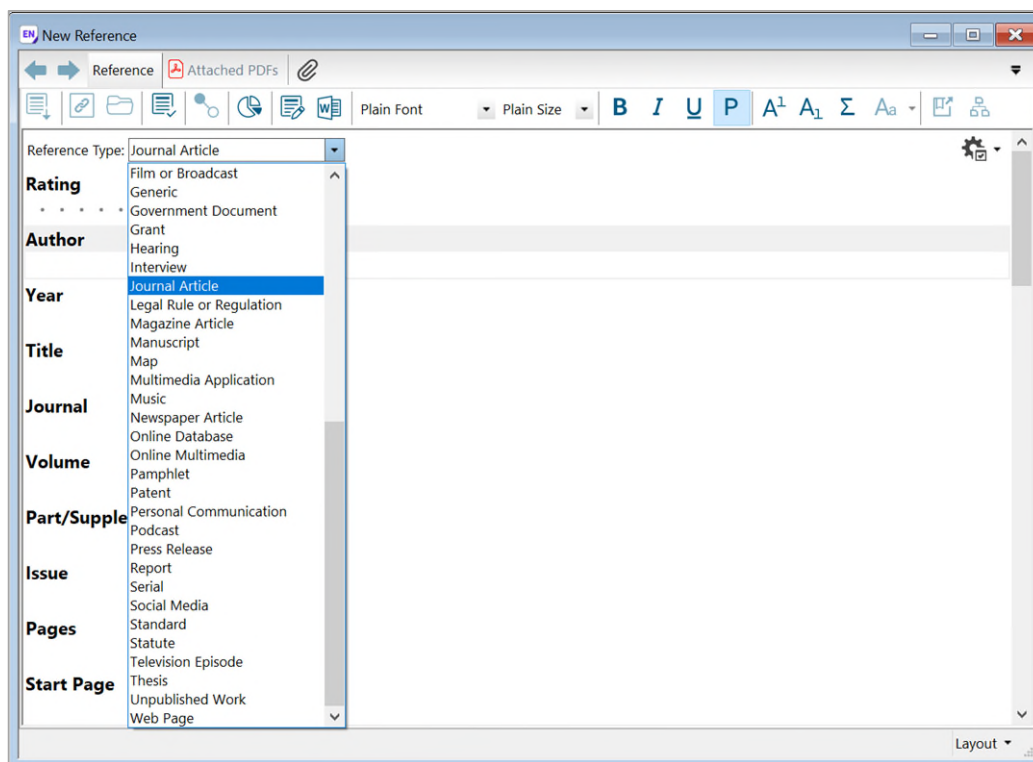


Figure 1: Reference types available

It is likely that those provided will suit most of your work. However, if it is necessary to record information about some other sort of object which does not fit the reference types available, it is possible to modify those provided or to create a new type.

Customising a Reference Type

Among the **Edit|Preferences** (or **EndNote|Preferences** using a Mac), there is a category **Reference Types**. Clicking **Modify Reference Types...** displays a grid of the fields in a reference type.

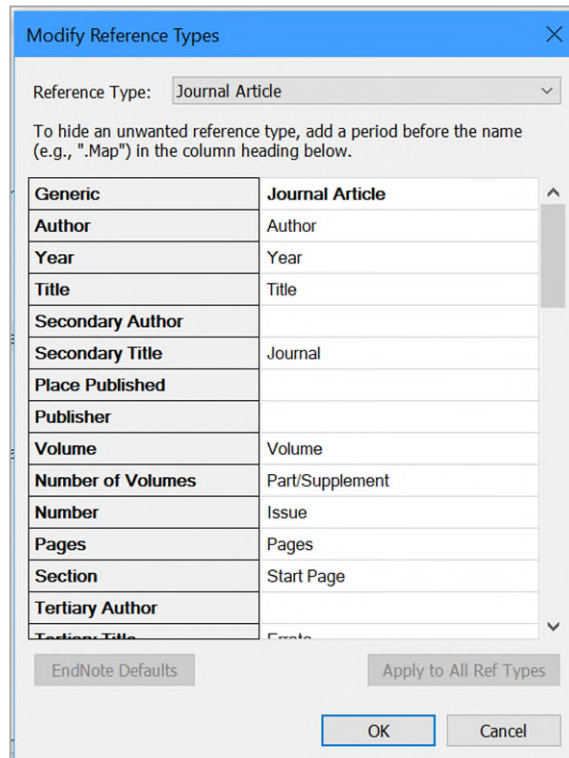


Figure 2: Specialist Fields in a Reference Type

In this dialog, the drop-down list box at the top selects the reference type you are modifying. The most direct approach is to identify an existing reference type which you expect never to use and make changes to that one as required.

The left-hand column shows the standard names of the fields, which are the same for all reference types and cannot be changed. The right-hand column shows the aliases: names that are used for the fields when this particular reference type is applied. In Figure 2, for example, the Secondary Title is known as the Journal, for a Journal Article.

Hiding Unwanted Fields

Notice that in Figure 2, several of the fields have no alias given, because they will not be used for this reference type.

A good first step is to scroll down the right-hand column, deleting the alias labels for any fields that you will never use. This makes the reference display in the library list more compact.

Customising Field Names

It may be useful to add in some new fields, to hold extra information that is not already provided for. This is done by replacing the label given with your preferred alias, in the right-hand column of one of the fields.

Each reference type can have its own mix of field names - use one of those offered or make up your own. Several Custom fields are available, which you can use for any type of data as needed.

Where possible, choose a field which already has the same type of data. For example, if adding a new field for people's names, re-use a field that has names of some sort, because name-type fields can calculate initials.

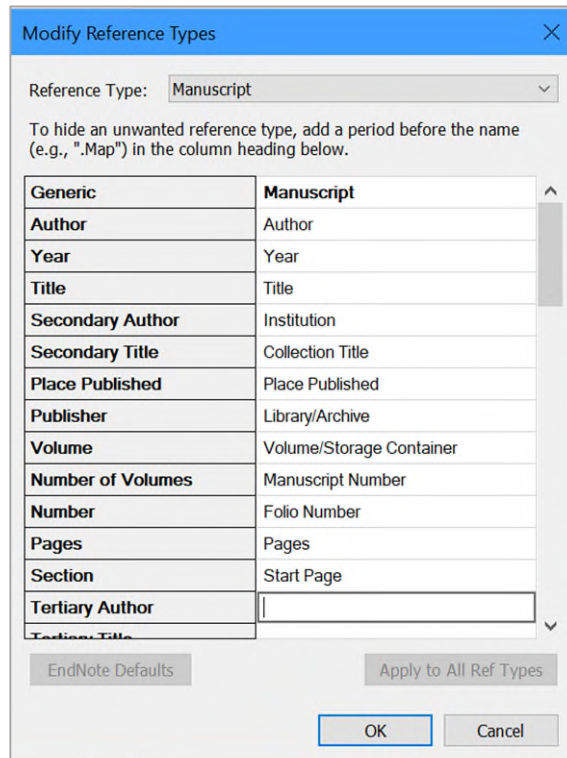


Figure 3: Modifying a Reference Type

When the fields needed have all been named, clicking **OK** creates the new or modified reference type, and you will be able to use this when adding new references to the library.

Creating a New Reference Type

For a completely new kind of reference, it may be simpler to create the reference type afresh. Three “unused” reference types are provided, which you can name appropriately and assign only the fields that are relevant to your work. Use the same steps you used when modifying an existing reference type.

Hiding Unwanted Reference Types

Many of the reference types provided will be completely irrelevant to your work. Hide an unwanted one by inserting a full stop before its name in the **Modify** dialog. This makes the list more compact, whenever you are adding a new reference.

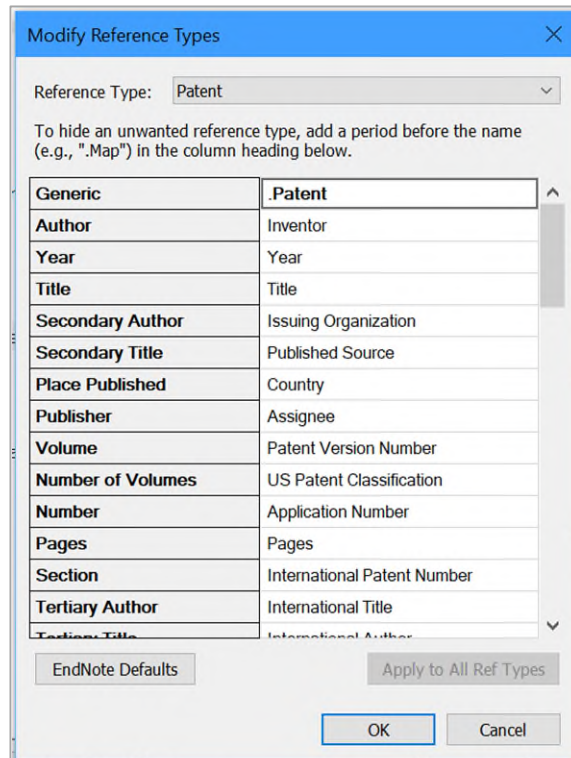


Figure 4: Hiding an Unwanted Reference Type

Managing Reference Types

Customised reference types are saved locally on your computer, and are available when you start up using the same Username. They are saved in a special table of reference types. This table can be exported or imported between users or between computers, using the buttons on the Reference Types part of the **Preferences** dialog.

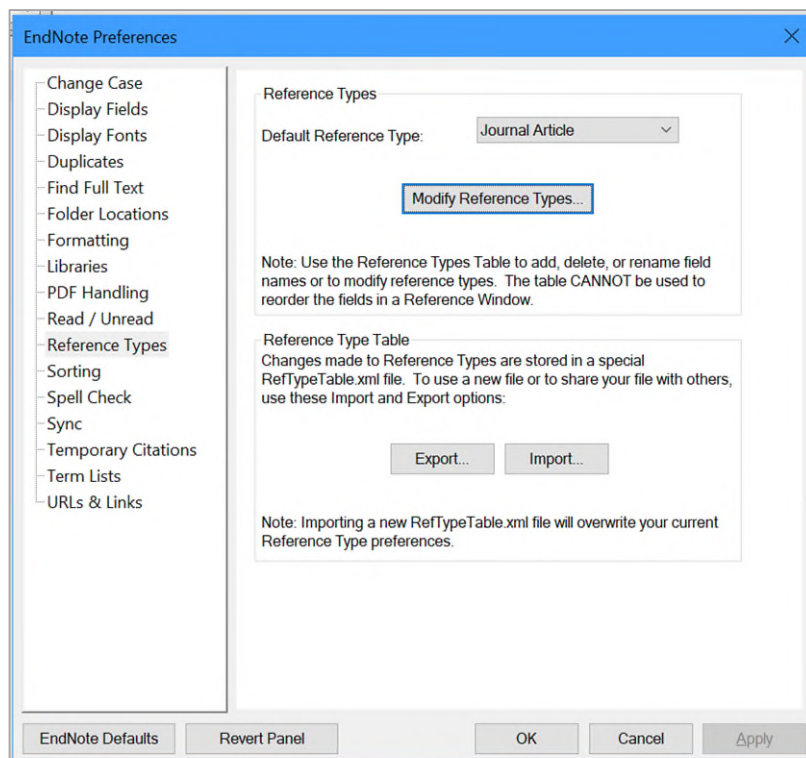


Figure 5: Export and Import Buttons for Reference Types

On the other hand, if you are likely to move frequently between computers, it may be simplest to use only the standard reference types.