

Creating & Editing Reference Types

(from Chapter 14 of EndNote 7 Manual)

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What is a Reference Type?

Your EndNote library can contain references from a variety of different sources, such as books, journal articles, and newspaper articles. We call these different sources reference types. EndNote provides built-in forms for these and other common reference types. Each reference type has specific field information. As you change reference types the field names change (compare Figure 1 and Figure 2).

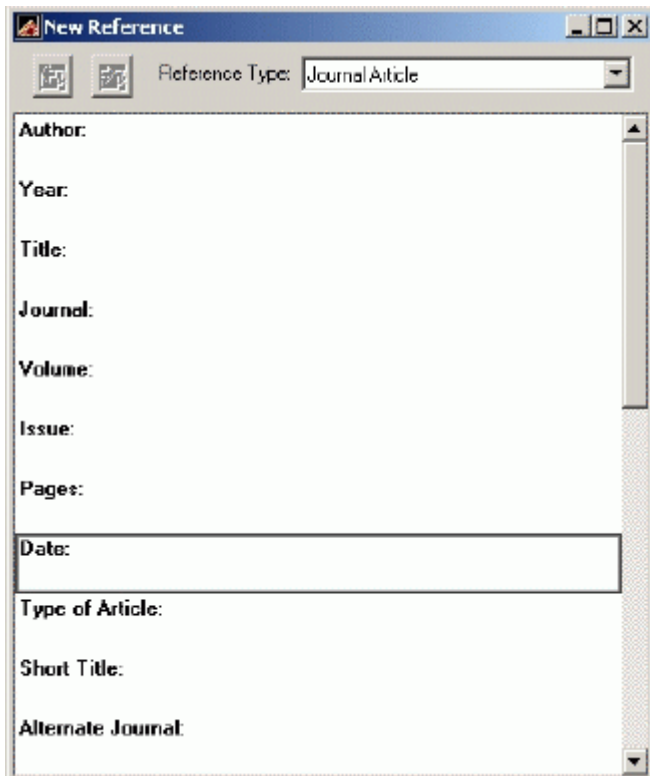


Figure 1: Journal Article reference type

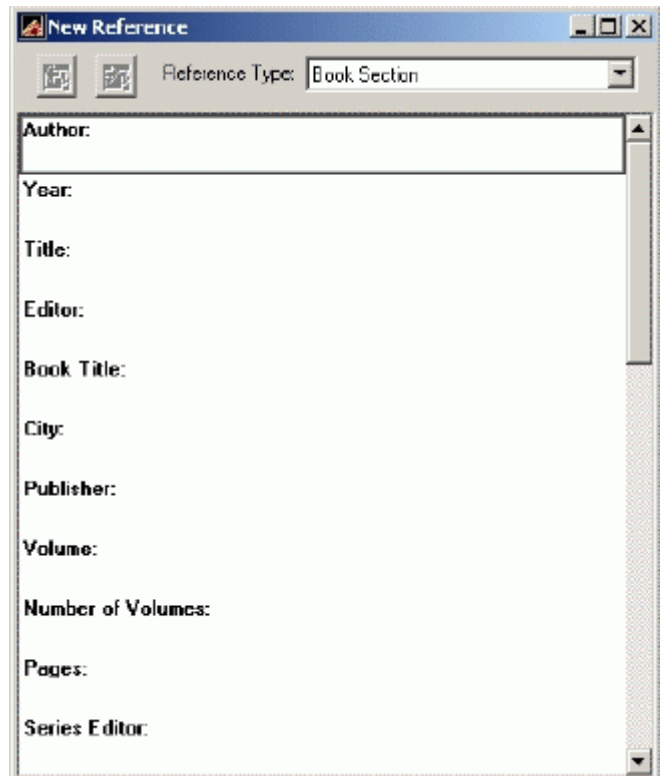


Figure 2: Book Section reference type

EndNote has 26 defined reference types and three unused reference types (total 29) that may be customised to your individual needs.

- The layout of the Generic reference type should be used as a guide when modifying or creating reference types. *Some fields are used for specific purposes, for example, rows reserved for Authors*

should only be used for names.

- Changes made to the **Reference Types** table are stored in the Windows system registry files. They apply to all libraries opened on that computer. If you are access your EndNote library from more than one computer, you should ensure that the Reference Types are customised in the same manner. For future reference it is advisable to keep a written record of the customisation of Reference Types on your computer. You cannot save these changes when moving from one computer to another and will have to redo the customisation.
- If you move your library to a different computer, your references will follow the layout of the Reference Types table on that computer.
- *Do not enter reference data into the Reference Types table.* This table is designed to store only the names of the reference fields.

NOTE: EndNote has not changed or added any additional reference types in response to the changes in electronic delivery of information. Reference types not available include: Conference Paper; Online journal article; Journal article accessed through an online database.

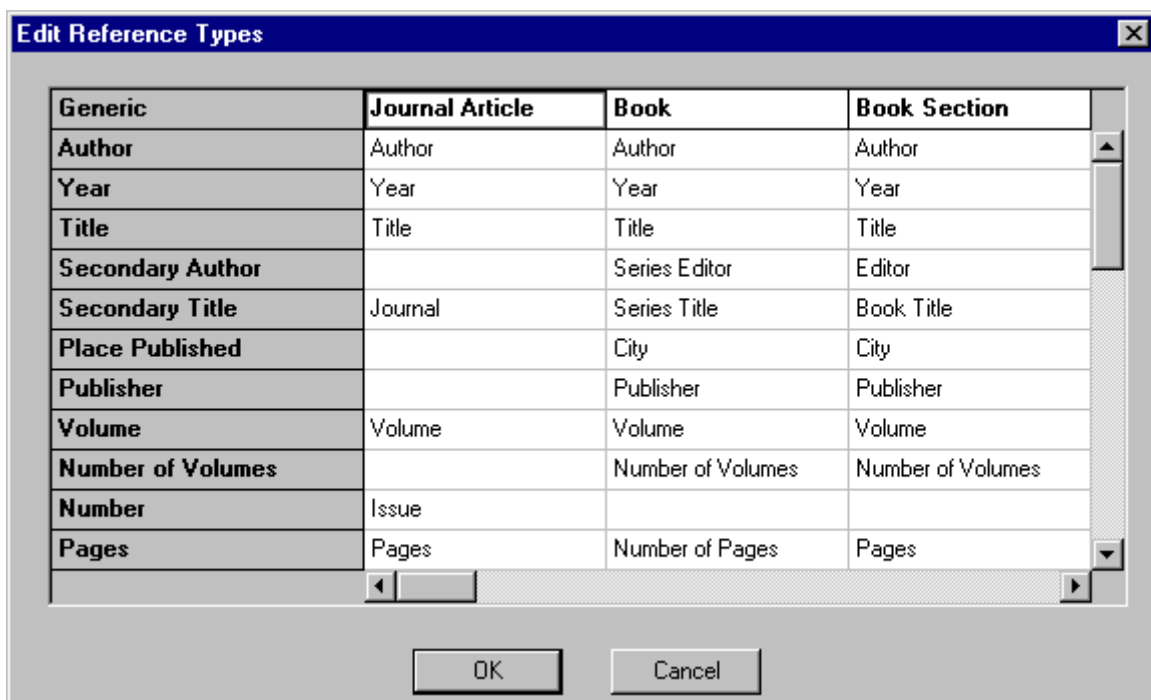
Reference Types & Data Entry

It is best to select the reference type before entering the bibliographic information in a reference. However, you can change the reference type of a reference at any time using the **Reference Type** list at the top of the **Reference** window.



Styles, filters, and connection files can include templates for all of the different reference types. When changes are made to the Reference Types it will be reflected in the importing of data via filters and connection files, and in the output styles of EndNote.

The Reference Types Table



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

Reference Types Table

The **Reference Types** table (illustrated above) displays all available reference types and the fields that each reference type contains. Use the **Reference Types** table to add, remove, or rename fields—or to add a completely new reference type.

To access the Reference Types table:

1. Choose **Preferences** from the **Edit** menu.
2. Click the **Reference Types** option from the list of preferences.
3. Click the **Modify Reference Types** button and the **Reference Types** table will open.

Each column in the table represents a different type of reference. The rows correspond to the 40 possible fields that each reference type can contain. The first column of the **Reference Types** table is reserved for the **Generic** reference type which lists all of the available fields. The remaining columns in the **Reference Types** table represent the 29 other reference types.

Each cell in a column represents a field that appears in the reference. The name of the fields should correspond to their **Generic** field names at the start of the row. The **Generic** column is the complete set of fields that can be included in any type of reference—no fields can be added to this list, nor can the names of the Generic fields be changed. As described below, the **Generic** reference type serves as a model for constructing all other reference types.

The Generic Type

The Generic field names are used throughout the EndNote program (for example, in the Sort Library and Search dialogs) to refer to a similar category of fields that can be found in the different reference types. When you choose a **Generic** field name in any of these actions, it refers to all fields in that row of the **Reference Types** table.

For example, if you use the Search command to search the Author field, EndNote searches all fields that appear in the Generic "**Author**" row of the Reference Types table, including fields such as "**Artist**," "**Reporter**," and "**Cartographer**."

As a result, when editing the **Reference Types** table it is important that you keep similar fields across the reference types in the same row, as defined by the **Generic** field names at the start of the row. Each reference type can call these fields by a different name; however, the content of the fields should be similar.

Special Fields

(EndNote handles the information stored in these fields in a particular manner. If you enter information dissimilar in nature to the generic field, EndNote may not display the information correctly.)

Author Fields

The **Author**, **Secondary Author**, **Tertiary Author**, and **Subsidiary Author** rows in the **Reference Types** table are specially configured to handle author names, and should not be used for any data other than names.

Title Fields

The three fields that the Generic type uses for titles—**Title**, **Secondary Title**, and **Tertiary Title**—are usually found under different names in other reference types. For example, a section of a book which is part of a series will use all three title fields: the chapter title would belong in the main Title field, the book title corresponds to the Secondary Title field, and the series title corresponds to the Tertiary Title field.

Pages Field

The fields in the row reserved for page numbers are the only ones that work with the Page Numbers option in the styles. This feature lets you specify how EndNote should format the page numbers in the bibliography (first page only or a full or abbreviated range of pages).

URL Field

When a reference is selected and **Open Link** is chosen, EndNote checks the **URL** field for a URL. No other fields are checked.

Image Field

The image field stores a graphic or file attachment. It is included in the Figure, Chart and Equation reference types. This field can be added to any reference type. It is important that the **Caption field** is entered along with the image field, so that relevant information pertaining to the image or file can be entered.

Customising the Reference Types

All of the reference types, except for Generic, can be modified using the **Reference Types** table. Whenever you make a change to a reference type, you should also edit your styles to make sure that they correctly format the new or modified reference types.

Note: Do not try to use the **Reference Types** table to rearrange information within your references. EndNote does not allow for a change in the order of information; however you can remove fields from displaying within each reference type.

Adding, Deleting, & Renaming Fields

There are different ways you can customize the various reference types. If an existing reference type does not contain all of the fields that you need, you can define a new field or rename an existing field. Similarly, if there is a field that you know you will never use, you can delete it from the reference type so that it no longer appears in your references.

To rename a field:

1. Choose **Preferences** from the **Edit** menu, select the **Reference Type** option in the list of preferences, and click **Modify Reference Types** to open the **Reference Types** table.
2. Using the horizontal scroll bar, browse the column headings to find the reference type that you want to change.
3. Within the column for that reference type, find the name that you want to change, click on it, and type a new name for the field to replace the current name.
4. Click **OK** to return to the main **Preferences** window for **Reference Types**.
5. Click **OK** to save your changes.

Styles, filters, and connection files update automatically to use the new name.

To add a field to a reference type:

1. Choose **Preferences** from the **Edit** menu, select the **Reference Type** option in the list of preferences, and click **Modify Reference Types** to open the **Reference Types** table.
2. Find the column for the reference type you want to modify.
3. Look at the field names listed in the **Generic** column and find the one with the most similar meaning to the field that you want to add. Make sure that the corresponding cell is blank for the reference type that you are modifying. If it is not blank, then you should use another field.
4. Click in the blank cell and type the name for the field.
5. Click **OK** to return to the main **Preferences** window for **Reference Types**.
6. Click **OK** to save your changes.

To delete a field from a reference type:

1. Choose **Preferences** from the **Edit** menu, select the **Reference Type** option in the list of preferences, and click **Modify Reference Types** to open the **Reference Types** table.
2. Find the column for the reference type where the field appears. Find the name of the field you want to delete and select it.
3. Press the **DELETE** or **BACKSPACE** key to clear that field name.
4. Click **OK** to return to the main Preferences window for Reference Types.
5. Click **OK** to save your changes.

Note: If you delete a field that has information in it, the information is not lost. The field will be displayed under the generic name.

Adding & Deleting Reference Types

There are three **Unused** columns in the **Reference Types** table where a new type of reference can be added. If these unused types are already used, you can overwrite other reference types you don't need.

To add a new reference type:

1. Choose **Preferences** from the **Edit** menu, select the **Reference Type** option in the list of preferences, and click **Modify Reference Types** to open the **Reference Types** table.
2. Scroll across to the far right of the **Reference Types** table and select one of the "**Unused**" column headings.
3. Type a name for that new reference type into the heading.
4. Continue down the column for that reference type, adding new fields as necessary. Delete or rename unwanted fields if you are overwriting another reference type. Remember to match the meaning of the fields you add with the **Generic** row headings. It is often helpful to use the other reference types as guides.
5. Click **OK** after you have added all of the necessary fields, and you will return to the main **Preferences** window for **Reference Types**. Remember to make note of the fields you have used for future reference.

Edit Reference Types [X]

Generic	Case	Conference Paper	Unused 2
Author		Author	
Year	Year	Year	
Title	Case Name	Title	
Secondary Author		Editor	
Secondary Title	Reporter	Conference Proceedings	
Place Published		City	
Publisher	Court	Publisher	
Volume	Reporter Volume	Volume	
Number of Volumes		Number of Volumes	
Number			
Pages	First Page	Pages	

OK Cancel

6. Click **OK** to save your changes. You can now use this new reference type when entering references.

You should also edit your styles so that they correctly reflect the type of format required for this new reference type.

Hiding reference types:

You may wish to hide a reference type so that it no longer appears on the dropdown list.

If you add a period in front of the reference type name, EndNote will no longer display that reference type from the dropdown list.

The information regarding the reference type is maintained and by removing the period, the reference type will be available for selection from the dropdown list.

Edit Reference Types [X]

Generic	Artwork	.Map	Patent
Author	Artist	Cartographer	Author
Year	Year	Year	Year
Title	Title	Title	Title
Secondary Author			
Secondary Title			Published Source
Place Published	City	City	Country
Publisher	Publisher	Publisher	Assignee
Volume			Volume
Number of Volumes			
Number			Issue
Pages			Pages

OK Cancel

Table of Predefined Reference Types

Fields with special functions are shaded. Descriptions of the unique qualities of these fields are provided [above](#). For full details of all EndNote defined Reference Types see pages 366-371 of the manual.

The table below provides the example for creating a new reference types - **Conference Paper (in a published conference proceedings) & Online journal article**.

Generic	Conference Paper	Online Journal Article
Author	Author	Author
Year	Year	Year
Title	Title	Title
Secondary Author	Editor	
Secondary Title	Proceedings Title	Journal
Place Published	City	
Publisher	Publisher	
Volume		Volume
Number of Volumes		
Number		Issue
Pages	Pages	Pages
Section		
Tertiary Author		
Tertiary Title	Conference Name	
Edition		
Date	Date of Conference	Date accessed
Type of Work		
Subsidiary Author	Translator	
Short Title	Short Title	Short Title
Alternate Title		Alternate Journal
ISBN/ISSN	ISBN	ISSN
Original publication	Original Publication	Original Publication
Reprint Edition	Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item	Reviewed Item
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Accession Number	Accession Number	
Call Number	Call Number	
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
URL	URL	URL
Author Address	Author Address	Author Address
Image		
Caption		

Table for recording changes to reference types

Generic			
Author			
Year			
Title			
Secondary Author			
Secondary Title			
Place Published			
Publisher			
Volume			
Number of Volumes			
Number			
Pages			
Section			
Tertiary Author			
Tertiary Title			
Edition			
Date			
Type of Work			
Subsidiary Author			
Short Title			
Alternate Title			
ISBN/ISSN			
Original publication			
Reprint Edition			
Reviewed Item			
Custom 1			
Custom 2			
Custom 3			
Custom 4			
Custom 5			
Custom 6			
Accession Number			
Call Number			
Label			
Keywords			
Abstract			
Notes			
URL			
Author Address			
Image			
Caption			

Changing output styles for new reference types.

Examples using APA 5th referencing style

Published conference paper:

According to APA 5th edition the following information is required in a reference list.

Author of paper (year). Title of paper. In Editor (Ed.), Title of published conference proceedings (pp. Pages).
Place of publication: Publisher.

Deci, E.L., & Ryan, R. M. (1991). A motivational approach to self: Intergration in personality. In R. Dienstbier (Ed.), Nebraska Symposium on Motivation: Vol 38. Perspectives on motivation (pp. 237-288). Lincoln: University of Nebraska Press.

The edited style should look like:

Conference Paper

Author. (Year). Title. In Editor (Ed.),
(Eds.), Proceedings Title (pp. Pages).
Conference Name. City: Publisher.

Copy and paste the book section information and then make the necessary changes.

Conference paper from a recurring conference.

Conference papers that are published regularly are referenced as periodicals so use the journal article reference type.

Cynx, J., Williams, H., & Nottebohm, F. (1992). Hemispheric differences in avian song discrimination. *Proceedings of the National Academy of Sciences, USA, 89*, 1372-1375.

Unpublished contribution to a symposium

NOTE: The month of the symposium / conference is to be included together with the year. Simply include the month in the year field.

Using the style above the reference will appear as:

Lichstein, K. L., Johnson, R. S., Womack, T. D., Dean, J. E., & Childers, C. K. (1990, June). Relaxation therapy for poly-pharmacy use in elderly insomniacs and noninsomniacs. In T. L. Rosenthal (**Ed.**), *Reducing medication in geriatric populations*. Symposium conducted at the meeting of the First International Congress of Behavioural Medicine. Uppsala, Sweden.

For the reference to be correct you need to change **(Ed.)** to **(Chair)**.

Lichstein, K. L., Johnson, R. S., Womack, T. D., Dean, J. E., & Childers, C. K. (1990, June). Relaxation therapy for poly-pharmacy use in elderly insomniacs and noninsomniacs. In T. L. Rosenthal (Chair), *Reducing medication in geriatric populations*. Symposium conducted at the meeting of the First International Congress of Behavioural Medicine. Uppsala, Sweden.

From the examples above it is important to know when to use what reference type. Also no matter how hard you try, some editing is often required with conference papers after removing endnote field codes.

Online Journal article accessed from the web (no print version)

Fredrickson, B. L. (2000, March 7). Cultivating positive emotions to optimize health and well-being. *Prevention & Treatment*, 3, Article 0001a. Retrieved November 20, 2000, from <http://journals.apa.org/prevention/volume3/pre0030001a.html>

Online Journal Article

Author. (Year). Title. *Journal*, *Volume*
(*Issue*), *Pages*. Retrieved Date
Accessed, from URL

Copy and paste Journal Article information, then make the necessary changes.

Online Journal article that is available as HTML only – print version produced

This format is to be used when the print version and online version are likely to be different (eg no page numbers).

Burgess, L. A. (2003). WebCT as an e-learning tool: a study of technology students' perceptions. *Journal of Technology Education*, 15(1), 6-15. Retrieved January 21, 2004, <http://scholar.lib.vt.edu/ejournals/JTE/v15n1/burgess.html>

Online Journal article – based on a print source

Add [Electronic version] after the article title after removing field codes.

Bales, J. I. (2000). Doing it right: Web design for library types **[Electronic version]**. *Computers in Libraries*, 20(1), 56-59.