Modifying a Reference Type

This how-to guide will show you how to add fields or make other modifications to an EndNote reference type.

First, you will need to create the custom field in the reference type. *(In this example, we will add a field named “Chapter” to the “Thesis” reference type.)* Second, you will add the field to the bibliography template for your chosen citation style.

1. On PC systems, in your EndNote library, click **Edit** then **Preferences** to open the EndNote Preferences box. On Mac systems, click **EndNoteX7** and then **Preferences** to open the EndNote Preferences box.

2. In the EndNote Preferences box, click **Reference Types** from the list on the left then from the drop-down Default Reference Type list, choose the reference type that you plan to modify, then click **Modify Reference Types...**

3. Next, in the Modify Reference Types box, scroll down to the Custom fields and assign a name to one that is open. When you are finished, click **Apply to all Ref Types** then **OK**. The box will close, leaving you back in the EndNote Preferences box *(shown above)*. Click **Apply** here and then **OK**. (On Mac systems, you will simply click **Save** here and close the window.)

*The field will now appear in the edit-able References pane of your EndNote library and you can fill it in as you add citation. You will still need to modify the bibliography template for the reference type, though, as described below.*
4. In your EndNote library, change to the citation style in which you plan to apply this change. (If you use a different citation style in the future, you will need to repeat this process to add the change there as well.)

5. Next you will need to edit the output style, so from your EndNote library, click Edit then hover over Output Styles and choose Edit “MLA.”

6. In the EndNote X7 – [Citation Style] screen, find the Bibliography section in the outline on the left then click Templates. The templates for the reference types will appear on the right.

7. Find the reference type you plan to change.

8. Within this reference type, place the cursor exactly where you would like the new field to appear then click Insert Field from the upper right-hand side of the bibliography templates box. (The red arrow in the illustration to the right shows where I would insert a field called “Chapter” to the Thesis reference type.)

9. From the Insert Fields drop-down list, click the field you added in step 3 above (Chapter, in this case).

10. Add any necessary punctuation or other words that should be included as part of the template. In the example on the right, Chapter is the added field, but it is followed by the inserted word “in” which will appear in all bibliographies for this reference type.

11. You will be prompted to save the changes when you close the Edit Output Styles box and return to EndNote.

11. If you saved the style under a different name, be sure to switch to it in your Word document.