

## Advanced cross referencing

### Working with References

Curio Professional customers can create cross references from Curio figures and Organizer items to other Curio figures, Organizer items, and even web sites using a sophisticated new feature we call references.

These reference connections can be of a specified type, such as a *Rebuttal* or *Evidence*, allowing you to create a number of typed connections between your Curio items, even if they're scattered throughout a project or in different projects.

Compared to regular jumps, a reference is much more advanced, where instead of a simple one-way jump, you can create multiple types of connections between figures and even Organizer items, creating a graph of typed connections.

A single figure might have references to multiple figures such as two *Source* figures, three *Rebuttal* figures, and one *Example* figure. Likewise, a figure can have multiple figures that all point to it, such as a figure which is an *Agree* reference for some figures (thus a support for those statements), and *Disagree* reference for others (thus a counterargument).

### Defining Reference Types

1. Using the inspector shelf, click the Project tab and then use the new Reference Types inspector panel to see all the available reference types.
2. At the top use the popup to specify whether you want to view and modify (a) bundled reference types that are included with Curio and available to all projects, (b) custom reference types for all projects, or (c) custom reference types for this project, specifically.
3. Bundled reference types are read-only, however, if there are types you don't think you'll ever use you can uncheck the visible checkbox and they won't clutter your interface when creating references.
4. With custom types you can edit these names and colors at any time. Uncheck a type if you no longer want it to be available for new references, or delete it via the Delete key or Delete Type button to remove it permanently.

### Adding a Reference

1. Select and copy the figure or Organizer item you want to reference. This is the item you want to refer to.
2. Next select one or more other figures where you want to add a new reference which points to that copied item. Right-click, and in the context menu that appears choose a reference type in the Add Reference to Copied Item As submenu to create your new reference.
3. The reference connection has now been created, and a reference adornment will then appear beside both the source and destination figure, if within the same project.

### Adding a URL Reference

1. In your browser:
  - a. Right-click on a link and choose Copy Link, which should also give Curio the title of the page.
  - b. Or copy the URL location itself (ex: [www.zengobi.com/support](http://www.zengobi.com/support)).
2. Next select one or more other figures where you want to add a new reference which points to that copied URL. Right-click, and in the context menu that appears choose a reference type in the Add URL Reference As submenu to create your new reference.

### Viewing an Item's References

1. If a figure either has references or is a reference (in the same project) then it will have a special references link adornment. Clicking it will list all references, grouped and color coded by reference type, and allow you to add or remove references.
2. Alternatively, right-click on a figure or an Organizer item which either has references or is a reference and its context menu will contain a References submenu identical to the one displayed when clicking an adornment.
3. If you select a reference either referred to or referenced from then you will instantly jump to that figure or Organizer item.

### Removing a Reference

1. Click on the references adornment or right-click and choose the References submenu.
2. Within that menu you should see a Remove Reference option so you can select a reference to remove.

### Search References

1. You can use the Search shelf to find all figures which include any reference or just those with a specific reference type, such as *Agree*.
2. When you use the export button on the search results screen, any references associated with a figure are included in the resulting rich text, markdown, or CSV export.
3. By default, references are included in CSV exports under named columns such as "Agree Reference" and "Disagree Reference". As each figure's row entry is exported, if the figure includes one or more references of that type then those jump URLs are exported in that column. The search results export button also has a new menu option, Export Resulting References as CSV, which can be used to export only figure reference information to a separate CSV file with reference named columns.