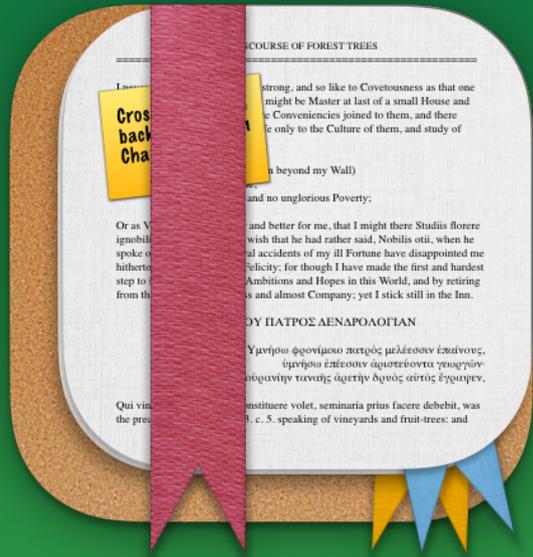


# Reference Tracker 3 Features Guide



## Reference Tracker Overview

### *Easy Management and Formatting of References and Citations*

Reference Tracker is a tool for writers, researchers or students. It creates documents that store all the citations and references in an essay, research project or book and automatically creates formatted reference lists.

Reference Tracker's publication lookup can fetch the full details for a referenced publication from a DOI or ISBN. Reference Tracker also features a publication search to find books and articles by key terms such as title, author, etc.

Reference Tracker has the latest versions of the most popular reference list formatting styles built in, and also features a styles editor where users can create and customize their own styles. Users can share their custom styles via the cloud.

Reference Tracker 3 runs on Macs with macOS Big Sur (11.1) or later and iPads with iPadOS 16.0 or later.

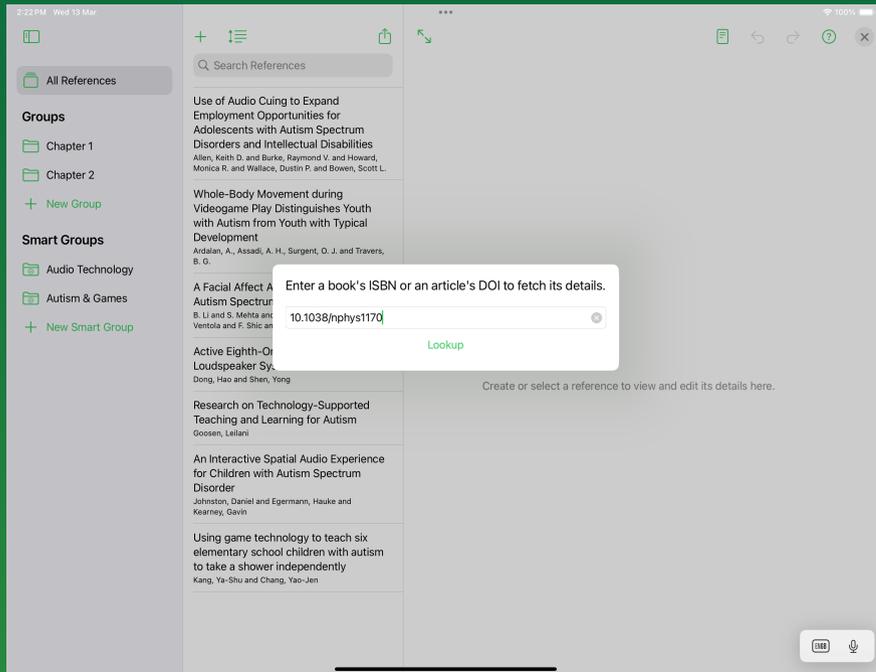
# Reference Tracker Documents

A Reference Tracker document stores publications as individual objects, and has many templates for different publication types including: printed and electronic books; book chapters; articles in journals, newspapers and blogs; and internet and multimedia resources. If you have a the publication as a file, such as a PDF copy of a journal article or ebook, you can attach that file to to corresponding publication entry in Reference Tracker to help manage your research resources. You can create regular and smart folders within each document to help organise references, for example, by creating a folder for each section of a research paper or chapter of a book or a smart folder that is updated with references on a particular topic. References can be drag-and-dropped between folders and can exist in multiple folders at once. Sticky notes can be added to publications, and each publication entry has a field to note the actual passages cited.

Reference Tracker uses macOS' document autosaving and versioning system and integrates with iCloud to keep documents in sync across multiple devices.

The desktop application interface shows a document titled "Autism and Technology Essay". On the left, a sidebar lists "Groups" including "All References", "Chapter 1", "Chapter 2", "Audio Technology", and "Autism & Games". The main content area displays a list of references. The selected reference is "Active Eighth-Order Band-Pass Loudspeaker Systems" by Dong, Hao and Shen, Yong. To the right, a detailed view of this article is shown, including fields for "Article Title", "Author", "Journal Name", "Year of Publication", "Volume Number", "Issue Number", "Page Numbers", and "Reference Number". A "Cited Text" section contains a paragraph of text from the article.

The mobile application interface shows the same document and reference list as the desktop version. The sidebar lists "All References", "Chapter 1", "Chapter 2", "New Group", "Audio Technology", "Autism & Games", and "New Smart Group". The selected reference is "Active Eighth-Order Band-Pass Loudspeaker Systems" by Dong, Hao and Shen, Yong. The detailed view on the right includes the same fields as the desktop version, with a "Keywords" field containing "audio technology filters". The "Cited Text" section also displays the same paragraph of text.



## Adding and Importing References

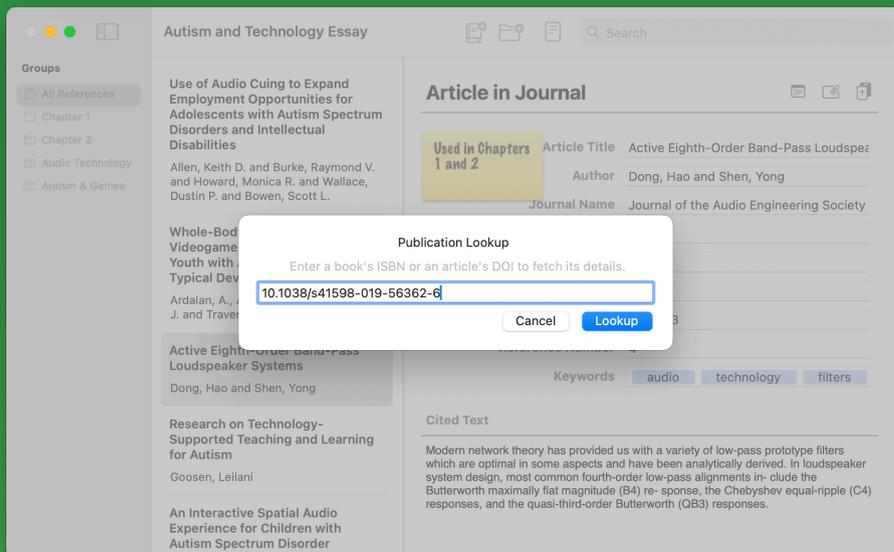
Reference Tracker provides several ways to input references. You can look up a publication by entering its DOI or ISBN, search for a publication, import a BibTeX or RIS file, or enter the details manually.

On macOS, click the corresponding toolbar icon at the top of the document window or from the menu bar select *File > Import...*, or *References > Lookup/Search for Publication*. On iPadOS tap the + button at the top left of the publications list, then tap the method you want to use.

The publication lookup will show you the matching publication for the ISBN or DOI if a match can be found. Add this to your document by clicking/tapping *Import*.

Publication search results can be individually added to your document by clicking/tapping the import to the right of each result.

Publication details in BibTeX or RIS files will be added directly to your document.



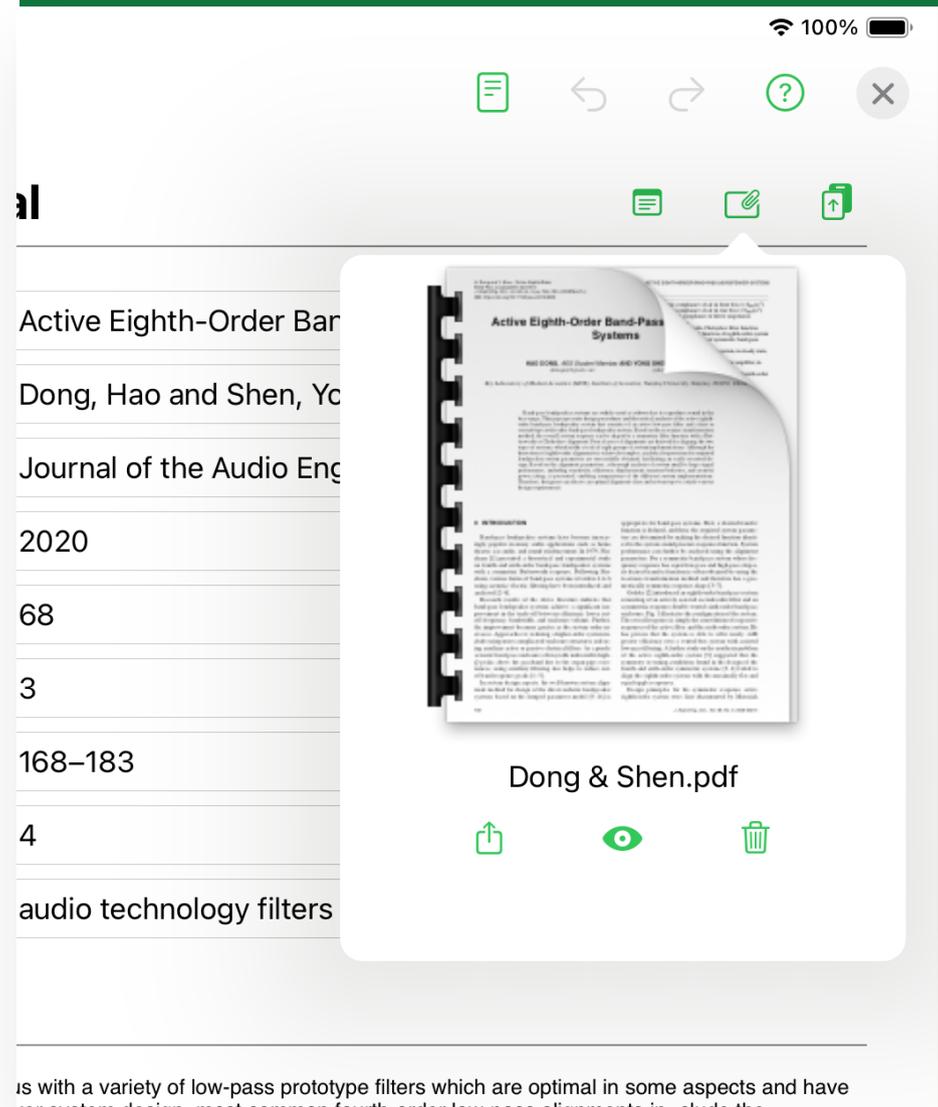
## Attaching Files to References

Reference Tracker allows you to attach a file to each publication reference in a document. If you have a copy of the publication you are referencing on your computer, such as a PDF copy of a journal article, you can attach that file to the publication reference in your Reference Tracker document for easy reference and organisation.

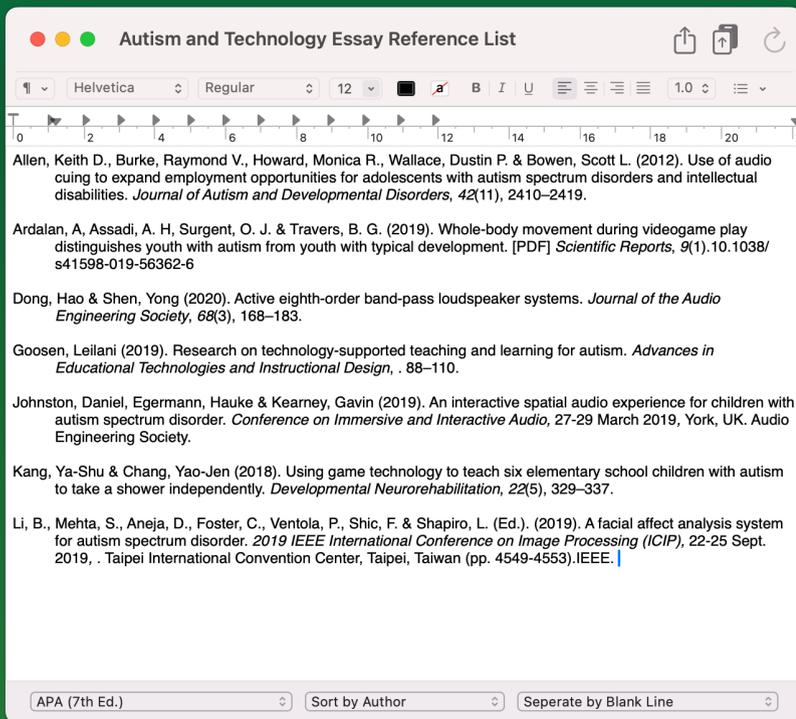
To attach a file on macOS, select the corresponding reference in your document, then either drag the file from Finder into your reference details area of the document window or click on the attachment icon at the top left of the publication details area. On iPadOS tap on the attachment icon at the top left of the publication details area

The contents of the file are copied into your reference tracker document. You can view an attached file by clicking/tapping on the attachment icon.

From the popup you can use the buttons along the bottom to open (macOS only), quicklook, export or remove the attached file.



is with a variety of low-pass prototype filters which are optimal in some aspects and have for system design, most common fourth-order low-pass alignments include the

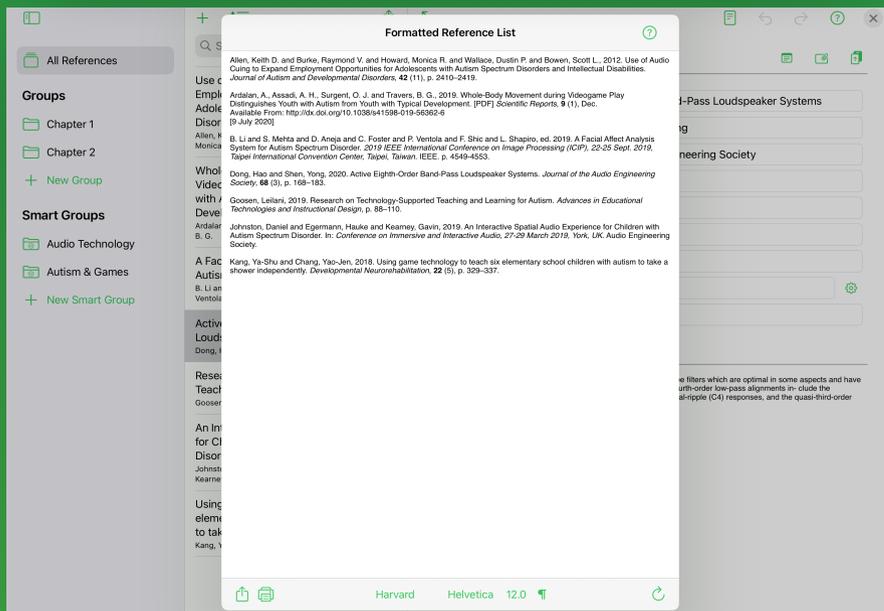


## Preparing Formatted Reference Lists

A formatted reference list is created by clicking the ‘Generate Reference List’ item in a document window’s toolbar on macOS or tapping the Formatted List button at the top of the document window on iPadOS. The generated list will include all the references in the currently selected group.

On macOS the ordering, layout and font of the list is set in the application’s preferences. On iPadOS the ordering is set from the button at the top of the publication list, and fonts and styles are chosen from the options at the bottom of the Formatted Reference List window.

The generated formatted list is presented in a full rich text editor. You can fine tune the list, using the editor’s tools. Any changes made too the formatted list are saved in the document, so the next time you generate a list, your modifications are preserved. You can have Reference Tracker reset the formatted list back to its original state by clicking on the ‘Regenerate’ button in the Formatted List window toolbar.

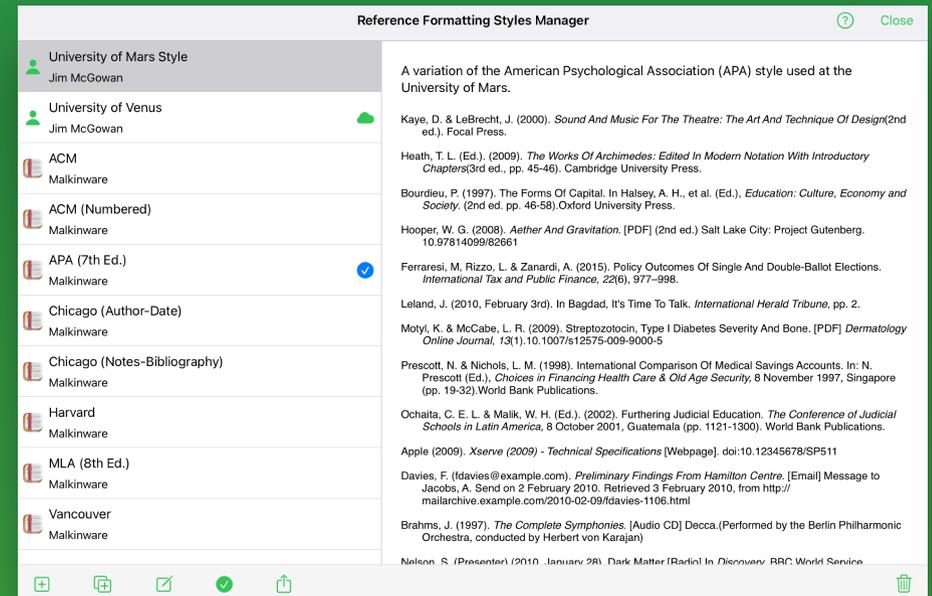
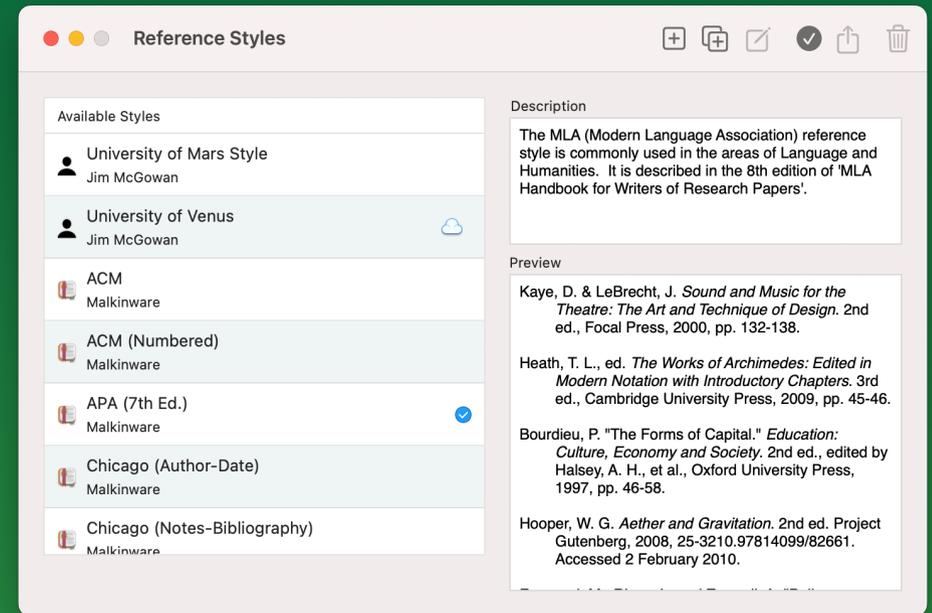


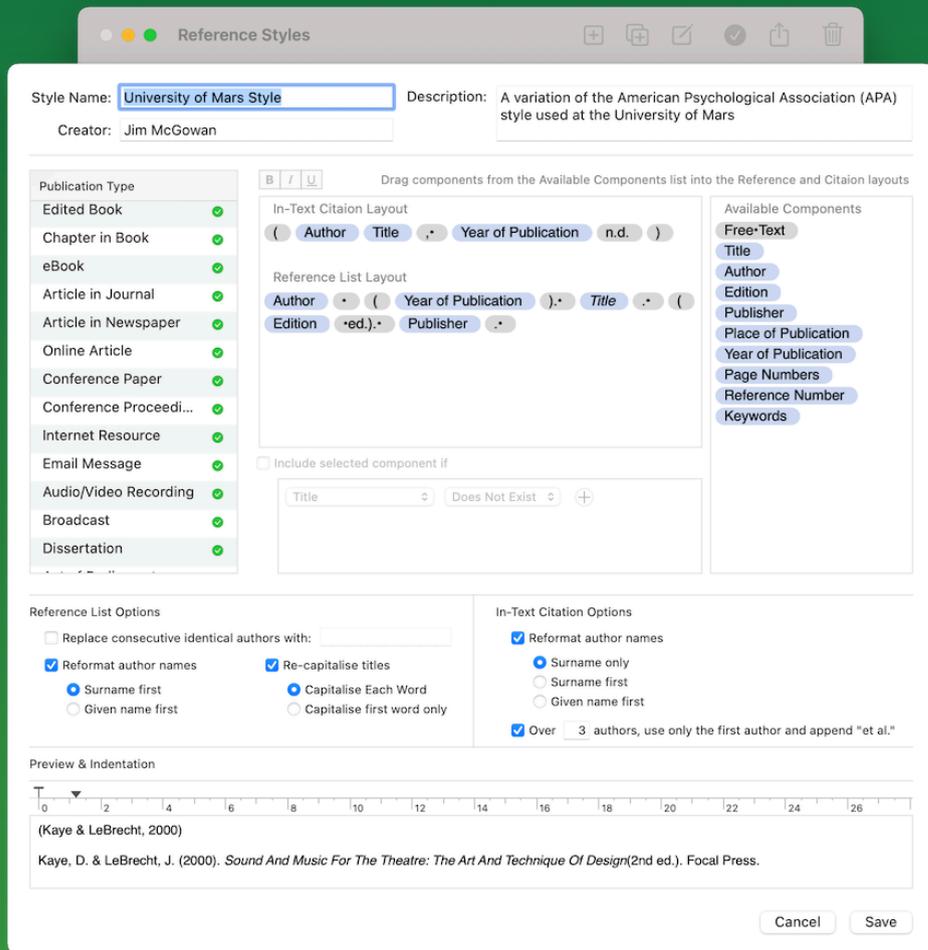
# Reference Styles

Selecting the default style for formatted reference lists is done in the Styles Manager Window. On macOS this is opened from the *Reference Tracker > Manage Styles...* menu option. On iPadOS this is opened by tapping on *Manage Styles* at the top of the document browser. The default style can also be set in the Preferences window on macOS and in the Formatted Reference List window on iPadOS.

In the Styles Manager window styles with the Reference Tracker icon next to them are the built-in styles created by Malkinware. Styles with a cloud icon are styles that have been created and shared by other Reference Tracker users. Styles with a person icon are ones you have created yourself.

To create a new style from scratch, click/tap on the New Style button in the toolbar. To modify a copy of an existing style, select an existing style from the list on the left, click/tap on Duplicate Style in the toolbar, followed by Edit Style.





## Custom Reference Styles

The style editor is where you design your style. On Mac this is presented in a single sheet. On iPad it is spread across 2 tabs.

Basic information about the style is entered in the Name, Description and Creator fields. Line indentation options can be set in the Preview and Indentation area, using the sliders. Options for formatting creator names and titles are set in the Reference List Options and In-Text Citation options areas.

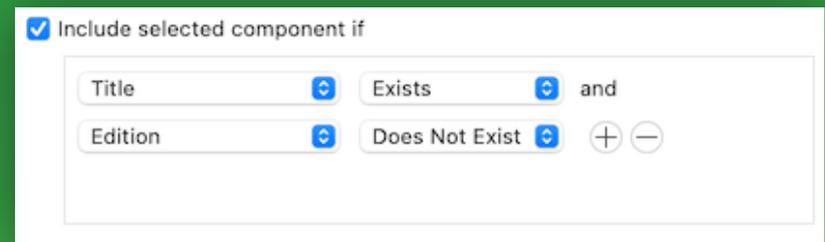
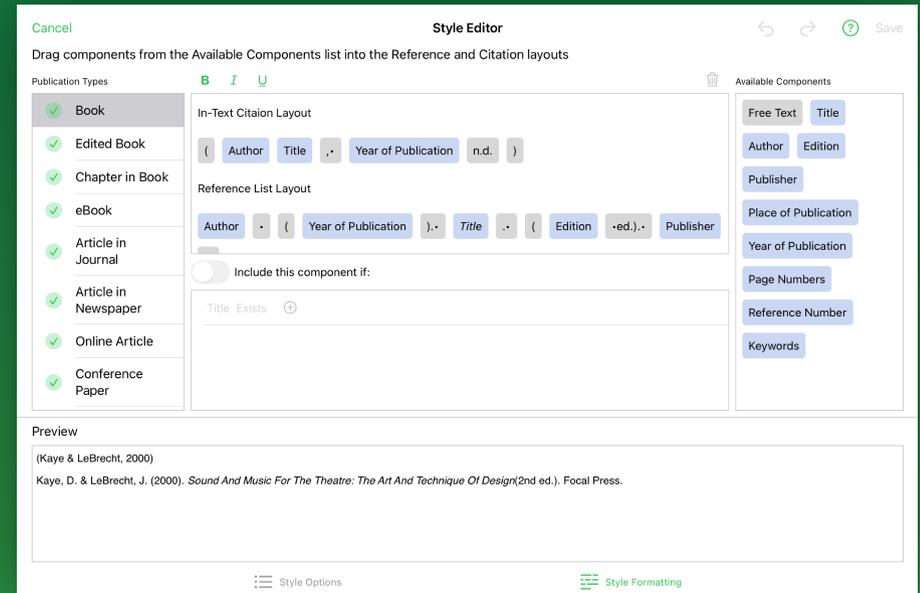
Designing the format and layout of the reference and citation information is done in the main format editor, in the middle of the Mac sheet or in the Style Formatting tab on iPad. The layout for the selected publication type is created by dragging items from the 'Available Components' list on the right into the In-text Citation and Reference List layout fields on the left.

As the reference layout is constructed, a preview is generated at the bottom of the window.

The layout component items in blue are representative of the various pieces of information about a publication that would be available, such as Title, Author, Publisher, etc. When Reference Tracker generates a reference list in this style, these components are substituted for the corresponding values in each publication reference in the document. The grey 'Free Text' component can be used to insert arbitrary text or punctuation into the layout. The contents of a Free Text component are edited by double clicking or double tapping on it in the layout fields. When editing a Free Text component, pressing Enter, Return or Tab on the keyboard will complete the edit. However, to include a newline or tab character in the Free Text item, the Option key must be held down with Enter, Return or Tab. To make clear that a Free Text component includes whitespace characters such as spaces, tabs and newlines, these are displayed as dots, arrows and paragraph markers respectively.

All the component items in the reference layout can have conditions attached to them, meaning they will only be included in a formatted reference if all the conditions are met. For example a Free Text component with the text "Unknown Author" could be included if a reference being formatted has no Author value. In this case the "Unknown Author" text component would be conditional on the Author value not existing. If the author value does exist, the alternate text would not be included.

Conditions are added to a component item by selecting it in the Reference Layout field, then clicking/tapping the checkbox underneath labelled "Include this component if". The conditions editor becomes enabled and you can select the other component that this one is conditional on, and whether the condition is the other component existing or not existing. Clicking/tapping on the plus button on the right adds additional conditions.





### Share University of Mars Style

By sharing this reference style you will make it available for other all Reference Tracker users. Click 'More Info...' for info, terms & conditions.

More Info...

Cancel

Share Style

## Sharing Custom Reference Styles

If you have created a new reference style that you think could be of use to other users, you can share it via iCloud. Shared styles are displayed in the 'Available Styles' lists for all other Reference Tracker users.

Sharing styles is done from the 'Manage Styles' window. To share a style you have created, select it in the 'Available Styles' list on the left and click/tap on the 'Share' icon in the toolbar. When you are ready to share your style, click/tap on the 'Share Style' button.

If you make further edits to your custom style after you have shared it, you can share it again, and the newer version will replace the previously shared version for other users.

*All shared styles are manually checked by Malkinware to prevent spam and other inappropriate content being shared Reference Tracker users. Any such inappropriate style will be removed without warning*

## Further Information

For any further information, including requests for review licenses, please contact Jim McGowan at [jim@malkinware.com](mailto:jim@malkinware.com). Jim is the founder of Malkinware and the developer of Reference Tracker.

Press Resources, including high resolution screen shots and example documents, can be found at:  
<http://www.malkinware.com/pr>

Support and FAQs for Reference Tracker can be found at:  
<http://www.malkinware.com/support/>

