

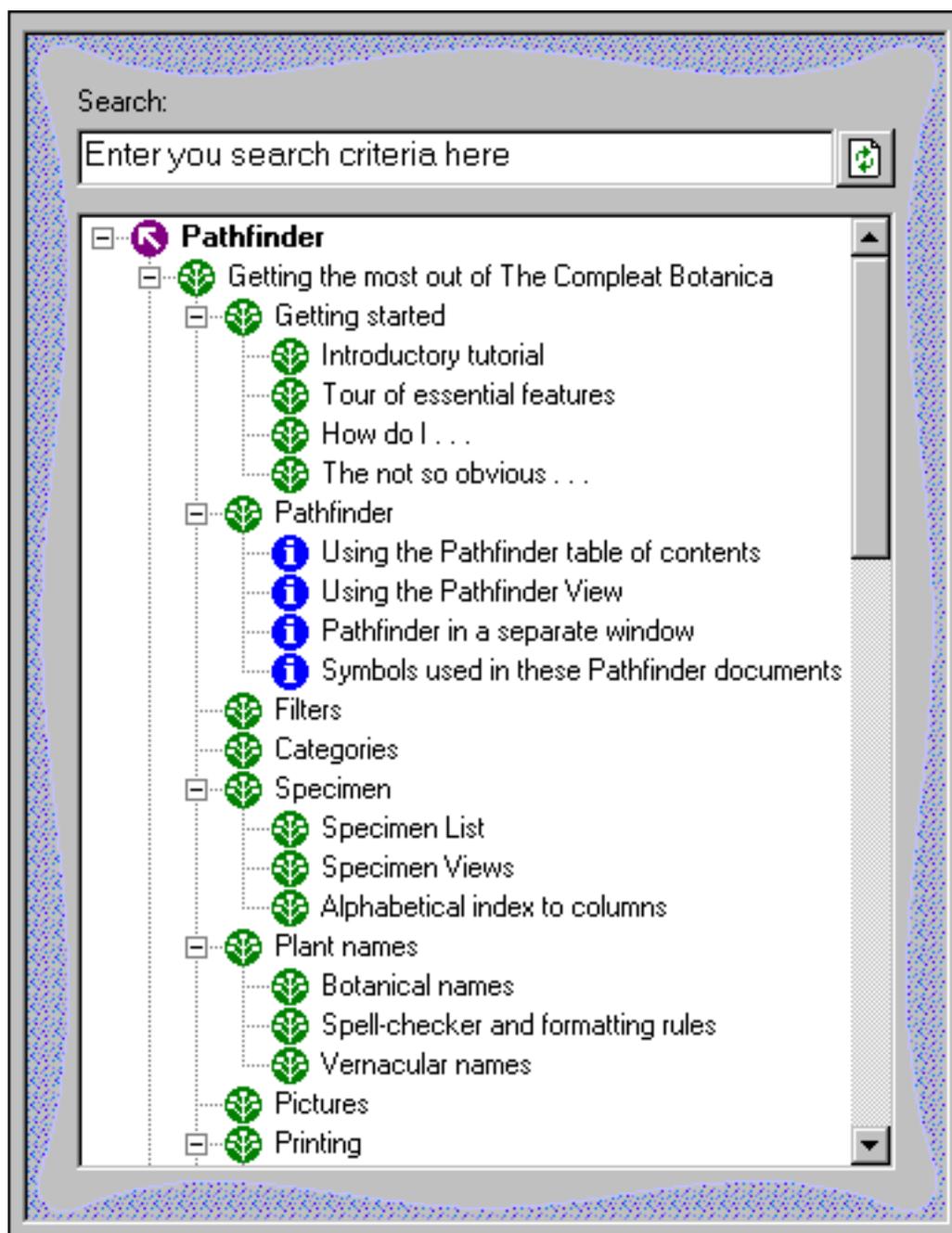
How to use the Pathfinder facility

 Using the Pathfinder table of contents	The Pathfinder table of contents is an easy way to find documents by topic. Each topic in the table of contents contains documents related to an area of general interest.
 Using the Pathfinder View	The Pathfinder View is a specialized Web browser for displaying documentation about The Compleat Botanica. In addition, the Pathfinder View can be used as a general purpose Web browser when your computer is connected to the Internet.
 Pathfinder in a separate window	Pathfinder documentation can be displayed in three different ways: 1) through the integrated Pathfinder View, 2) through the Pathfinder on Top menu item, and 3) through the separate Pathfinder program from the Start menu.
 Symbols used in these Pathfinder documents	Hypertext links within Pathfinder are accompanied by small icons to indicate the type of document to be displayed. This visual cue will give you some idea about the relevancy and location of the document.
 Pathfinder behind firewalls	You'll need to decide whether to allow Pathfinder to have direct access to the Internet.

Compleat Botanica - Using the Pathfinder table of contents

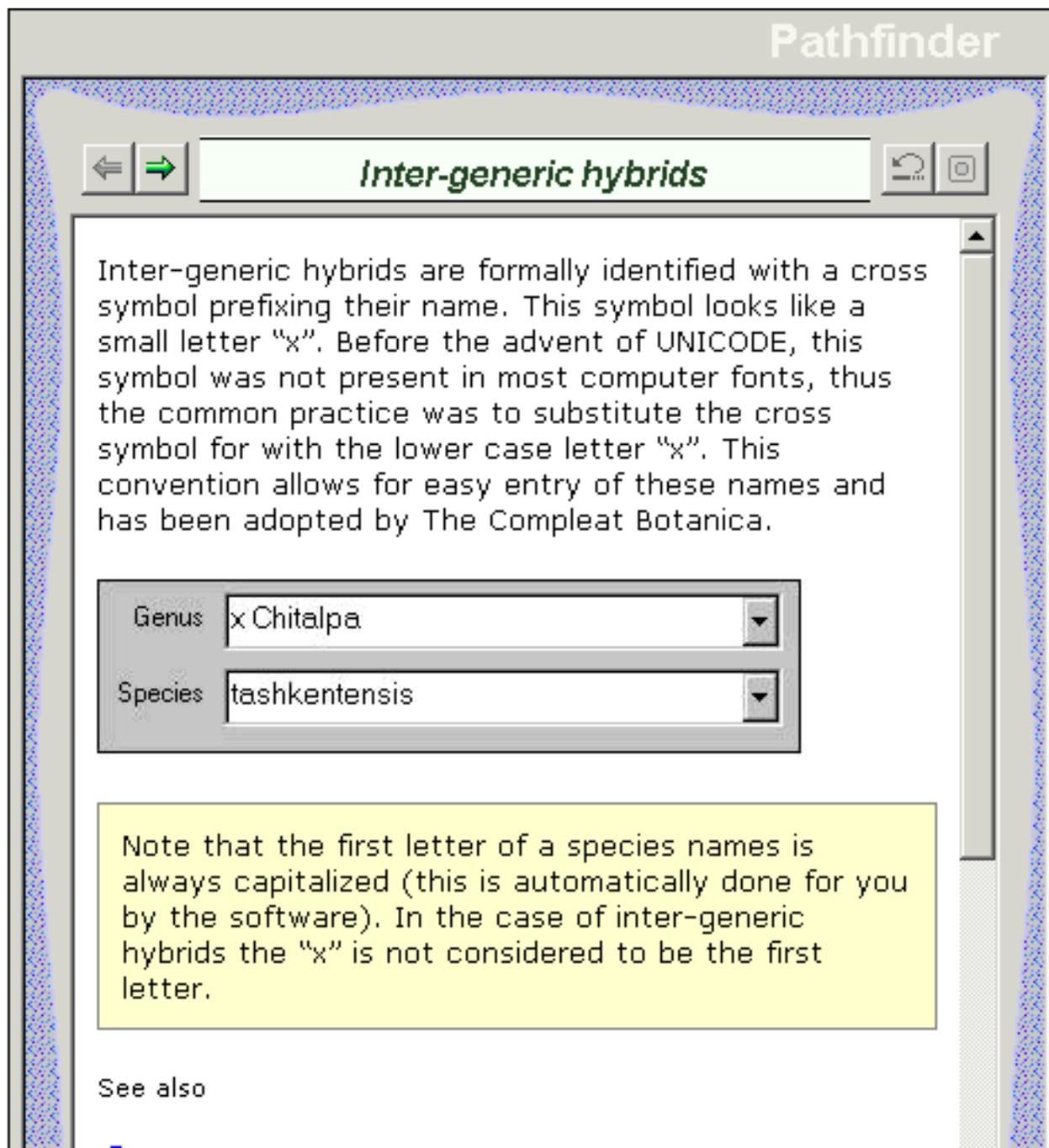
The Pathfinder table of contents is an easy way to find documents by topic. Each topic in the table of contents contains documents related to an area of general interest.

Clicking a topic in the table of contents shows an index of related documents in the Pathfinder View. Double-clicking a topic in the table of contents expands that portion of the hierarchy to display the related document titles.





The **Pathfinder view** is a specialized Web browser for displaying documentation about The Compleat Botanica. In addition, the Pathfinder View can be used as a general purpose Web browser when your computer is connected to the Internet. This integrated approach to documentation and browsing allows you to reduce the window clutter that usually accompanies on-line help systems.



The screenshot shows a window titled "Pathfinder" with a search bar containing "Inter-generic hybrids". The main content area displays a paragraph explaining the use of the "x" symbol for inter-generic hybrids. Below the text are two dropdown menus: "Genus" with "x Chitalpa" selected and "Species" with "tashkentensis" selected. A yellow note box at the bottom explains that the first letter of species names is capitalized, and for hybrids, the "x" is not the first letter. The text "See also" is visible at the bottom left.

Pathfinder

← → *Inter-generic hybrids* ↺ 🖼

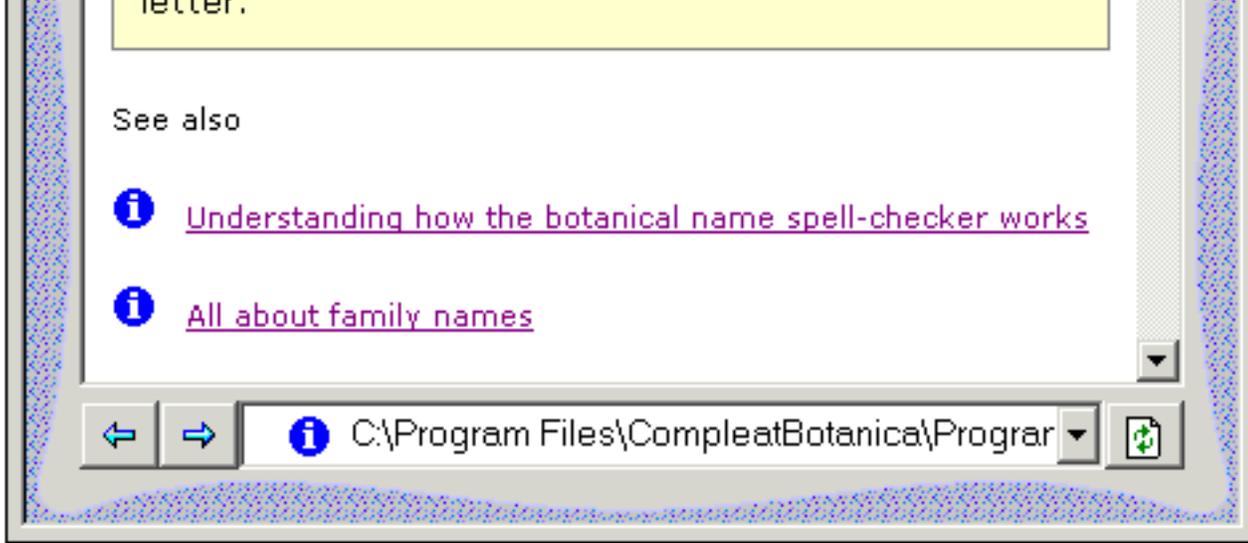
Inter-generic hybrids are formally identified with a cross symbol prefixing their name. This symbol looks like a small letter "x". Before the advent of UNICODE, this symbol was not present in most computer fonts, thus the common practice was to substitute the cross symbol for with the lower case letter "x". This convention allows for easy entry of these names and has been adopted by The Compleat Botanica.

Genus

Species

Note that the first letter of a species names is always capitalized (this is automatically done for you by the software). In the case of inter-generic hybrids the "x" is not considered to be the first letter.

See also



At the bottom portion of the Pathfinder View is a navigation toolbar. Use the blue arrows to return to previously shown documents. Use the address box and the green button on the right to go directly to a particular document or Web site.

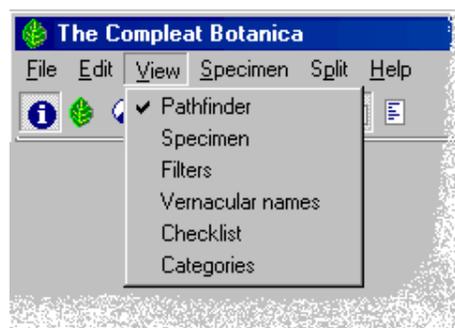
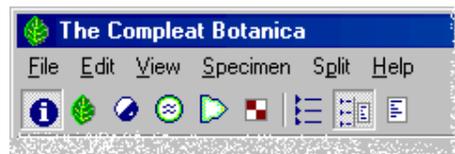
Compleat Botanica - Pathfinder in a separate window

➤ Using the software ➤ Pathfinder

Pathfinder documentation can be displayed in three different ways: 1) through the integrated Pathfinder View, 2) through the Pathfinder on Top menu item, and 3) through the separate Pathfinder program from the Start menu.

Integrated Pathfinder View

Accessing documents through the integrated Pathfinder View reduces window clutter by using the same space used for all of the Specimen Views, the Filter View, the Checklist View, and the Category View. Simply click on the toolbar icon at the top of the main window

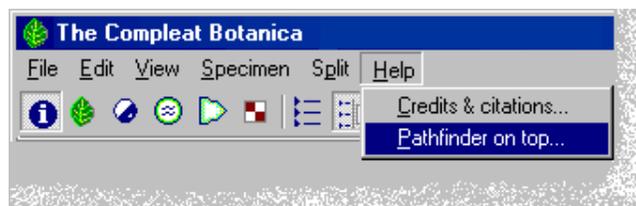


You can also use the View menu to access the integrated Pathfinder View.

Pathfinder on Top

Sometimes it's helpful to be able to read documentation side-by-side with the area of the software that you're trying to learn about.

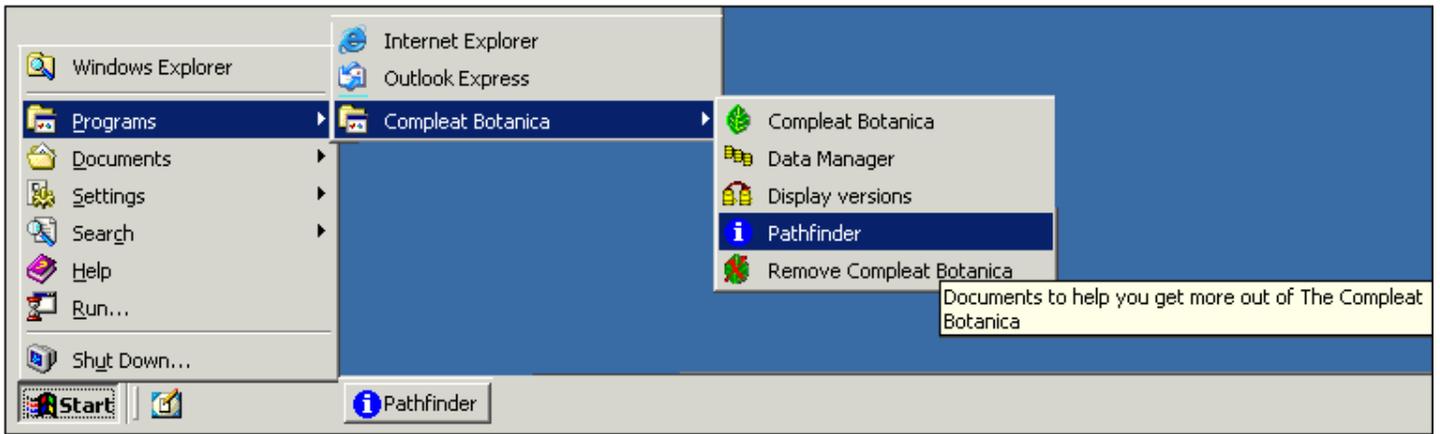
The Pathfinder on Top feature displays documents in a separate window that floats on top of The Compleat Botanica program. To access it, use the Help menu item.



Separate Pathfinder

To access the Pathfinder documents without using The Compleat Botanica, use the Windows Start menu.

The separate window can be sized and positioned to best suit your display monitor.



Compleat Botanica - Symbols used in these Pathfinder documents

 Using the software  Pathfinder

Hypertext links within Pathfinder are accompanied by small icons to indicate the type of document to be displayed. This visual clue will give you some idea about the relevancy and location of the document.

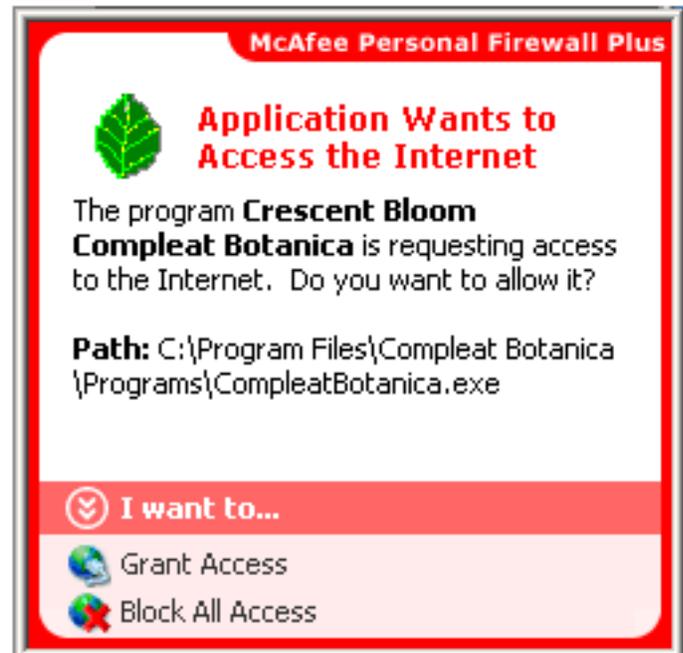
Symbol	Description
	This indicates a link to a table of contents document.
	This indicates a link to a summary page with links to related topics.
	This indicates a link to an introductory page for a group of related topics.
	This indicates a link to a document with specific information.
	This indicates a link to a World Wide Web site. This link will only work if you are connected to the Internet.

Compleat Botanica - Pathfinder behind firewalls

 Using the software  Pathfinder

If you have firewall software on your computer which restricts access to the Internet, you'll need to decide whether grant or deny this access to Pathfinder. Pathfinder uses an embedded copy of Microsoft Internet Explorer to display these documents. If you allow Internet Explorer to access the Internet, you'll also want to allow Pathfinder to have this access. On the other hand, if you're running a tightly secured computer, you'll want to deny access.

Here's what one software firewall product looks like the first time Pathfinder tries to use the Internet.



Each firewall product uses its own methods for granting and denying Internet access. Follow the manufacturer's instructions for granting or denying access to the Compleat Botanica and Pathfinder. The executable file for the software is typically located at C:\Program Files\Compleat Botanica\Programs\CompleatBotanica.exe.

Index to filtering topics

 The Filter View

The Filter View is where you specify which columns and rows to include or exclude from the Specimen List.

 All about filters

Filters allow you to see only the data you're interested in. You can use filters to include or exclude records based on many different criteria.

 Specifying what data to include and exclude

Each column uses a different method for specifying what to include and what to exclude. Here are some examples.

 Choosing which columns to show

The list of specimen can display any combination of columns. Choose which columns to include using the Filter View.



The **Filter view** is where you specify which columns and rows to include or exclude from the Specimen List.

Filters

← →
↶ ↷

Deciduous trees

Filter Description:

Item	Filter
Botanica...	
Life cycle	D
Height	At least10'

Item	Filter
Botanica...	
Life cycle	D
Height	At least10'

- Specimen**
- Botanical Name
- Genus
- Species
- Variety
- Cultivar
- Common Name
- Family
- Uncertain taxonomy
- Specimen Number
- Tag needs printing
- Acquisition**
- Nursery
- Date
- Compost

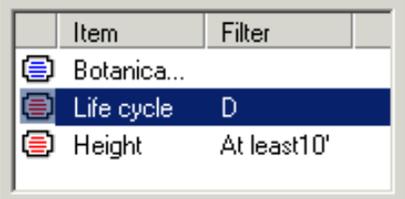
Include all Life cycle

Include selected items

- Biennial
- Cactus or succulent
- Deciduous
- Evergreen



Here's a table describing some of the general features of this view:

Item	Description
<p>Filter description</p> 	<p>Type any name here that describes the purpose of the filter.</p>
<p>Item</p> 	<p>This is the list of column names to show in the Specimen List.</p>
<p>Filter (Adjacent to "Item")</p>	<p>This is an abbreviation of the type of records to include or exclude.</p>
<p>Icons (to the left of "Item")</p>	<p>Blue icons are unfiltered columns. Red icons are filtered columns.</p>

Add column



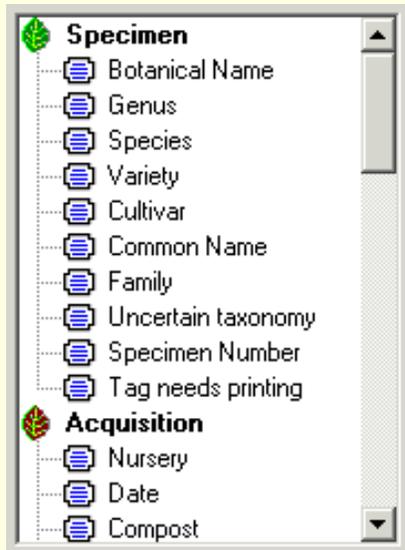
Remove column



Add columns to the filter by selecting the column name in the right-hand list.

Remove columns from the filter by selecting the column name in the left-hand list.

All columns in the database:

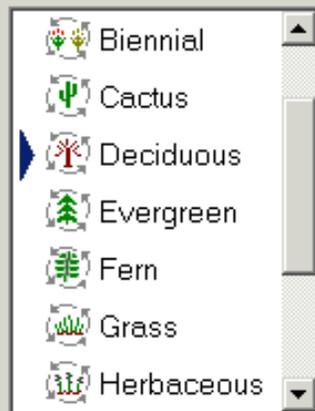


Select columns here and press the "Add column" button to add it to the filter.

Double-click an item to add it quickly.

Include all Life cycle

Include selected items



Specify what data to include or exclude in the lower portion of the view.

Each column displays a different set of possible filtering criteria here.

Compleat Botanica - All about filters

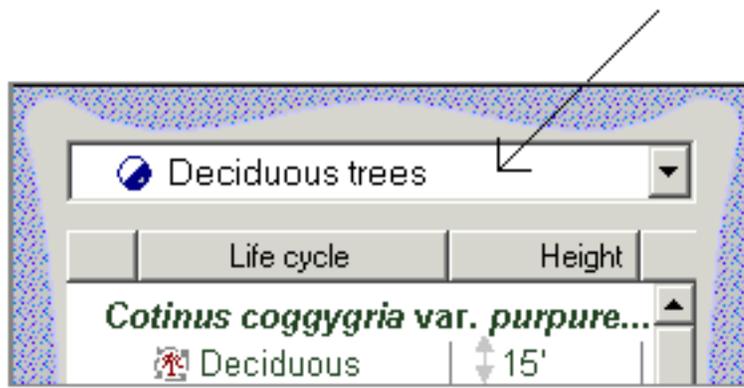
Filters allow you to see only the data you're interested in. You can use filters to include or exclude records based on many different criteria. Each column type uses its own simple and intuitive method for including/excluding records. See the [Specifying what data to include and exclude](#) topic.

Filters are also the way to choose which columns to view in the Specimen List. See the [Choosing which columns to show](#) topic.

You can have as many customized filters as you want:



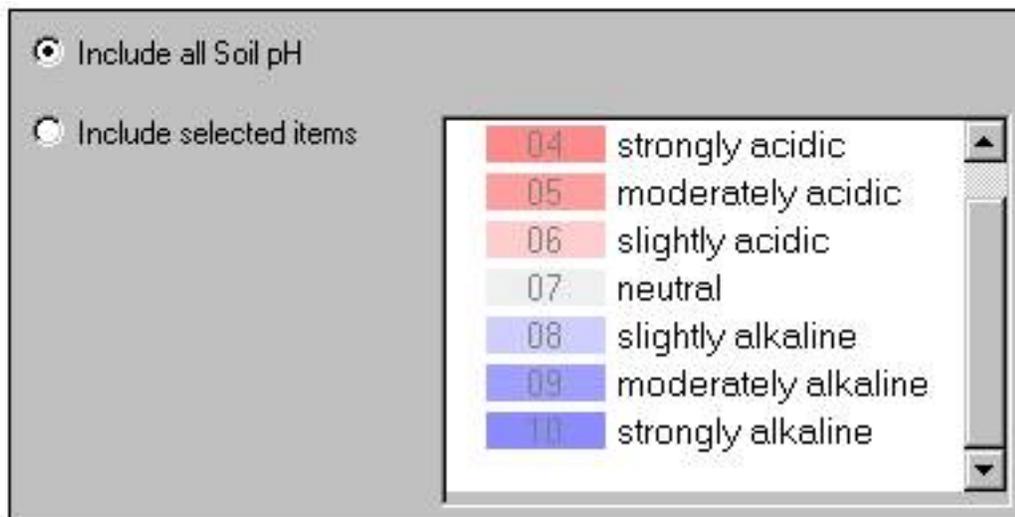
The "current filter" is defined as the filter selected in the Specimen List. In addition to determining which records are shown in the Specimen List, the current filter determines which records and which columns are included when you print reports, when you export data, and when you publish.



Compleat Botanica - Specifying what data to include and exclude

Each column uses a different method for specifying what to include and what to exclude. Here are some examples.

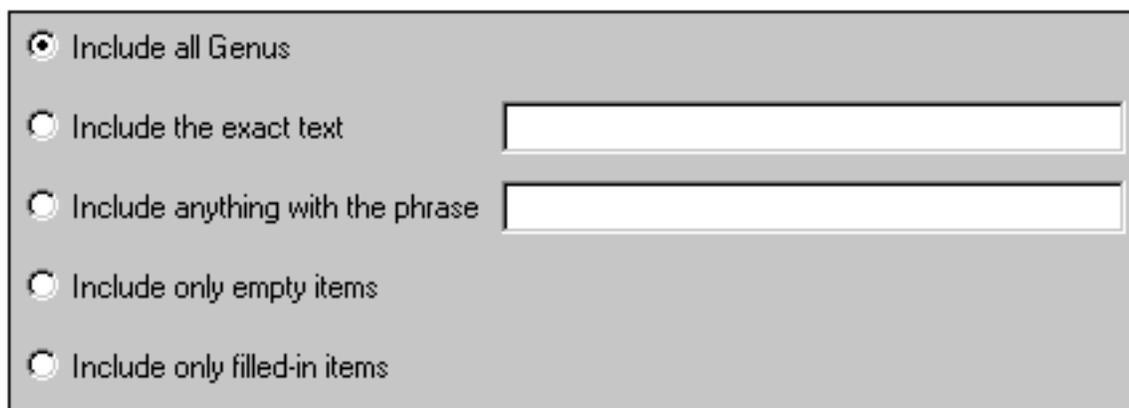
Categories allow you to pick from a customized list:



A screenshot of a filter dialog box for 'Soil pH'. It features two radio buttons: 'Include all Soil pH' (selected) and 'Include selected items'. To the right is a list box containing seven items, each with a colored background and a corresponding pH value:

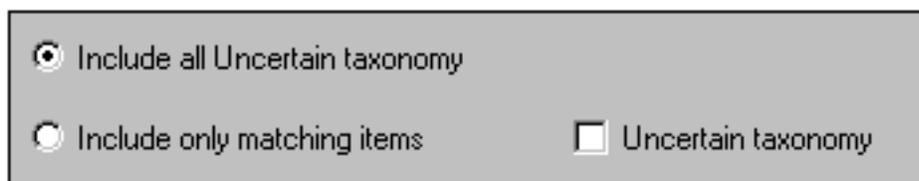
04	strongly acidic
05	moderately acidic
06	slightly acidic
07	neutral
08	slightly alkaline
09	moderately alkaline
10	strongly alkaline

Text columns are filtered with either exact or inexact matches:



A screenshot of a filter dialog box for text columns. It features five radio buttons: 'Include all Genus' (selected), 'Include the exact text', 'Include anything with the phrase', 'Include only empty items', and 'Include only filled-in items'. The 'Include the exact text' and 'Include anything with the phrase' options have associated text input fields.

Checkbox columns are either checked or not-checked:



A screenshot of a filter dialog box for checkbox columns. It features two radio buttons: 'Include all Uncertain taxonomy' (selected) and 'Include only matching items'. The 'Include only matching items' option has an associated checkbox labeled 'Uncertain taxonomy'.

Numeric columns are filtered using typical arithmetic comparison operators:

A dialog box for filtering numeric columns. It features three radio buttons: "Include all Height" (selected), "Range from", and "Expression". The "Range from" option has two empty text input fields separated by the word "To". The "Expression" option has a dropdown menu with the following operators: "<", "<=", "<>", "=", ">", and ">=". To the right of the dropdown is a large empty text input field for the expression.

Date columns use special relational operators:

A dialog box for filtering date columns. It features three radio buttons: "Include all Date" (selected), "Range from", and "Expression". The "Range from" option has two empty text input fields separated by the word "To". The "Expression" option has a dropdown menu with the following operators: "Before", "After", "On", and "Not on". To the right of the dropdown is a large empty text input field for the expression.

Date-range columns can be specified using the special date-range control:

A dialog box for filtering date-range columns. It features two radio buttons: "Include all Harvest season" (selected) and "Any dates including". The "Any dates including" option is associated with a date-range control consisting of a horizontal bar with the letters J, F, M, A, M, J, J, A, S, O, N, D above it, and a ruler-like scale below it.

Color columns are specified by color ranges:

Include all Leaf color
 Include Leaf colors belonging to color group
 Include specific Leaf colors

<input type="checkbox"/> <all possible values>	<input type="checkbox"/> <unspecified>
<input type="checkbox"/> <unspecified>	<input type="checkbox"/> <all possible values>
<input checked="" type="checkbox"/> Black	<input type="checkbox"/> tea-rose
<input checked="" type="checkbox"/> Blue	<input type="checkbox"/> carnation
<input checked="" type="checkbox"/> Blue-Green	<input type="checkbox"/> ash
<input type="checkbox"/> Brown	<input type="checkbox"/> platinum
<input type="checkbox"/> Green	<input type="checkbox"/> silver
<input type="checkbox"/> Grey	<input type="checkbox"/> coral
<input type="checkbox"/> Grey-Brown	<input type="checkbox"/> mauve
<input type="checkbox"/> Greyed-Green	<input type="checkbox"/> blush

Height and spread are specified with the special dimension control:

Include all Overall height
 Expression

<input checked="" type="radio"/> At least <input type="radio"/> No more than <input type="radio"/> Within range <input type="radio"/> Approximately <input type="radio"/> Unspecified	<input type="text" value="0"/> <input type="text" value="10"/> cm
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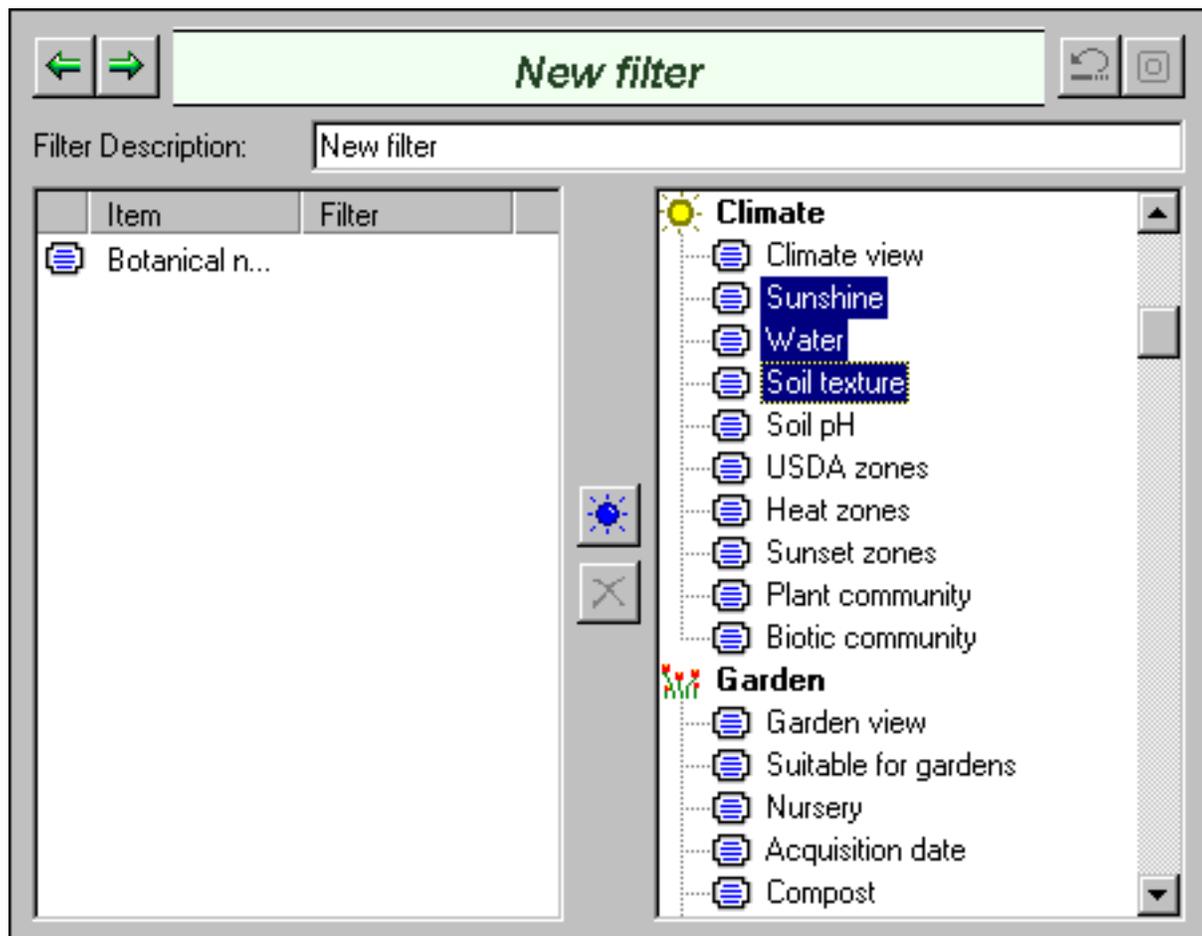
All columns without filtering criteria are shown in the list with a blue symbol. Any columns used for filtering are shown with a red symbol. In this example, the “Water” column is set to include only specimen with watering needs equal to *Dry, Moist, Wet, or Well drained*.

Item	Filter
 Botanical name	
 Overall spread	
 Uncertain taxonomy	
 Harvest season	
 Leaf color	
 Water	{Dry, Moist, Wet, Well drained}

Compleat Botanica - Choosing which columns to show

➤ Using the software ➤ Filters

The list of specimen can display any combination of columns. Choose which columns to include using the Filter View.



Use the right-hand side to choose which columns to include, then press the "Add" button to add those columns to the filter.

Index to custom category topics

 The Category View

The Category View is where you'll add and remove lookup values for each of the custom categories. The entries in these lists will be available in the combo-boxes of the five Specimen Views.

 Customizing your categories

As you organize your specimen, you'll want to create special categories for the things most important to you. All of the drop-down combo-boxes can be customized to show exactly the list of categories you want.

 Setting default values for new specimen records

If you'll be creating several new specimen records and each of them have some common characteristics, it's convenient to have the common values automatically filled in for you.

 Using codes as shortcuts in the category fields

As you're filling in the fields for a new specimen, you can type less and save time by using category codes as shortcuts.

 Categories that allow free-form data entry

All of the drop-down combo-boxes have their editing areas enabled to allow for free-form data entry when the standard list of categories just doesn't fit.

 How do I specify more than one best use, desirable quality or adverse quality for a specimen?

Sometimes a single category doesn't fully describe the attributes of a specimen.



Specifying climate zone ranges

Plant hardiness and heat tolerance span a range of zones and are thus specified with a description like "Zones 06a-09b" or "AHS 06-09". The drop-down combo-boxes used to specify and display climate zones allow you to enter descriptions just like this.

Compleat Botanica - The Category View

➤ Using the software ➤ Categories



The **Category view** is where you add and remove special values for each of the custom categories.

Annual cycle

	C	Depends on climate
	D	Deciduous
	E	Evergreen
	NA	Not applicable
	S	Semi-evergreen

New category Delete category

Color/Icon

Code:

Full text:

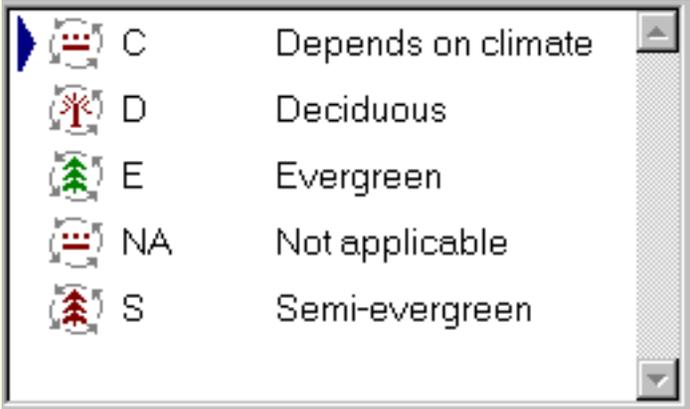
Default category for new specimen

Group:

Translation:

Definition:

More ...

Item	Description
	<p>"The selected item"</p> <p>Choose an existing entry from this list to modify its name, description, code, and icon/color.</p>
	<p>Add a new category to the list.</p>
	<p>Remove an existing category from the list.</p>
<p>Full text <input data-bbox="310 932 954 1003" type="text" value="Depends on climate"/></p>	<p>Type the full name of the item here.</p>
<p>Code <input data-bbox="513 1087 937 1159" type="text" value="C"/></p>	<p>Enter a unique code here (from 1 to 6 characters) that will be used for fast data-entry.</p>
<p><input data-bbox="456 1251 496 1293" type="checkbox"/> Default category for new specimen</p>	<p>Check this box and new specimen will automatically be assigned this value.</p>
<p>Group <input data-bbox="513 1451 937 1522" type="text"/></p>	<p>A group of items with similar concepts can be sorted in the category listings by assigning the same group name here. See for example the pre-installed items under plant parts, plant uses, and medicinal properties.</p>
<p>Translation <input data-bbox="310 1703 954 1774" type="text"/></p>	<p>The Latin name for this English word, or the English name for this Latin word. This field is used mostly for leaves and flower categories.</p>

Definition

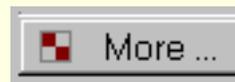
The definition of the item. Obscure botanical Latin terms are explained here.

Color/Icon



Select the icon to be associated with this item.

For color-coded categories, select a color here.

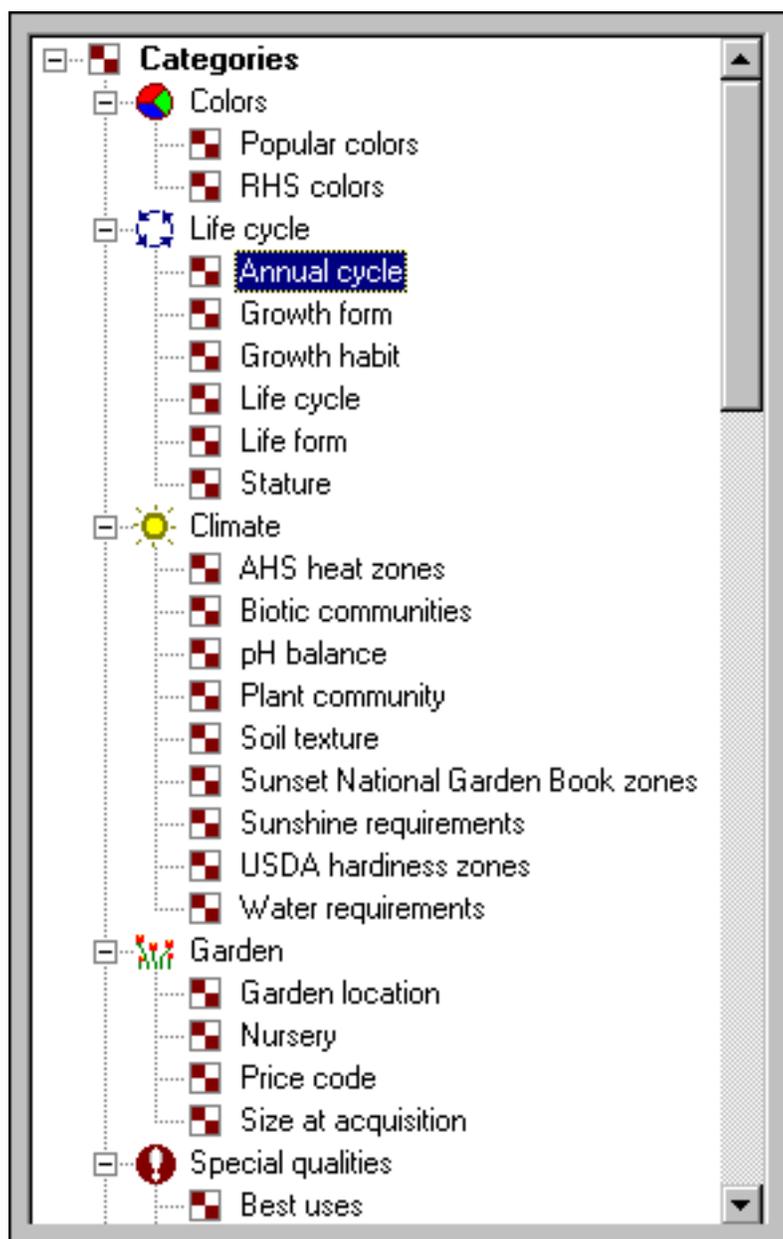


Use this button to see a full list of possible icons to assign to this category.

Compleat Botanica - Customizing your categories

The nurseries you buy from and the layout of your gardens is unique to you. As you organize your specimen, you'll want to create special categories for the things most important to you. All of the drop-down combo-boxes can be customized to show exactly the list of categories you want. Here's how.

From the Category View, select the type of category you want to customize:



Use the **New category** and **Remove category** buttons to get just the right combination that's important to you.

The screenshot shows a software interface for managing categories. At the top, there is a title bar with navigation arrows and a refresh button, and a header area with the text "Annual cycle". Below this is a list of categories, each with an icon, a code, and a full text description:

Icon	Code	Full text
	C	Depends on climate
	D	Deciduous
	E	Evergreen
	NA	Not applicable
	S	Semi-evergreen

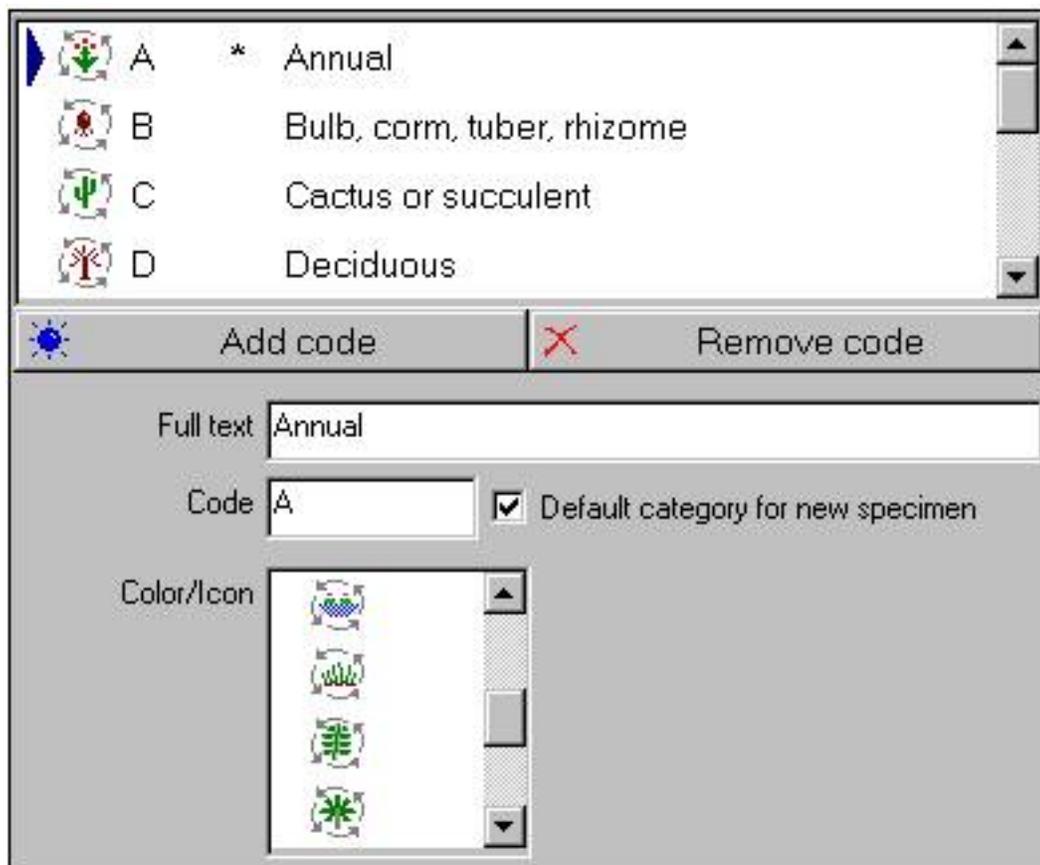
Below the list are two buttons: "New category" (with a sun icon) and "Delete category" (with a red X icon). At the bottom, there is a detailed view of the "C" category. It includes a "Color/Icon" selection area with a list of icons and a "More ..." button. The "Code" field contains "C", the "Full text" field contains "Depends on climate", and there is a checkbox for "Default category for new specimen". The "Group", "Translation", and "Definition" fields are empty.

The "Full text" field is what you'll see in the combo-box. The "Code" is a shortcut that can be used to quickly select the category without typing the full text. The "Color/Icon" is the picture you'll see whenever the category is selected.

Compleat Botanica - Setting default values for new specimen records

 Using the software  Categories

If you'll be creating several new specimen records and each of them have some common characteristics, it's convenient to have the common values automatically filled in for you. This can be done by checking the box labeled "Default category for new specimen".

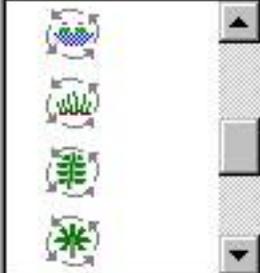


	A	* Annual
	B	Bulb, corm, tuber, rhizome
	C	Cactus or succulent
	D	Deciduous

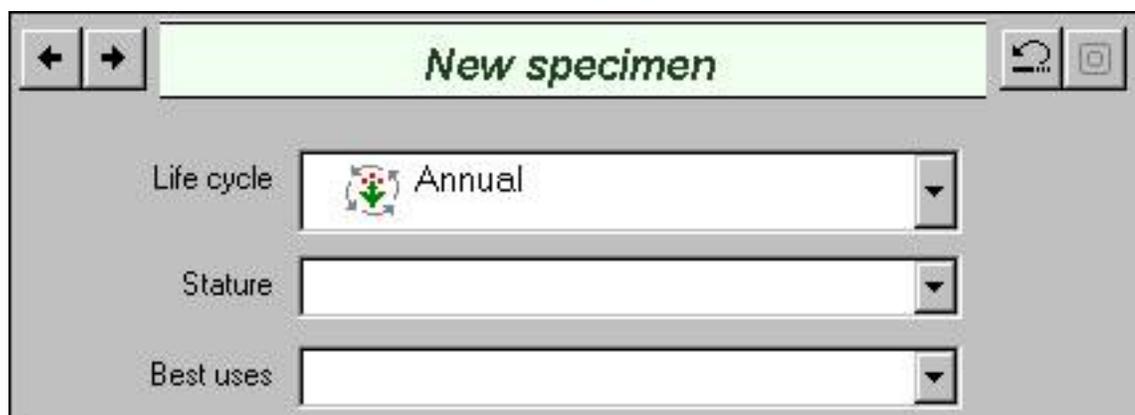
Add code Remove code

Full text: Annual

Code: A Default category for new specimen

Color/Icon: 

As shown in this example, all new specimen will automatically have their Life cycle set to "Annual".



New specimen

Life cycle:  Annual

Stature:

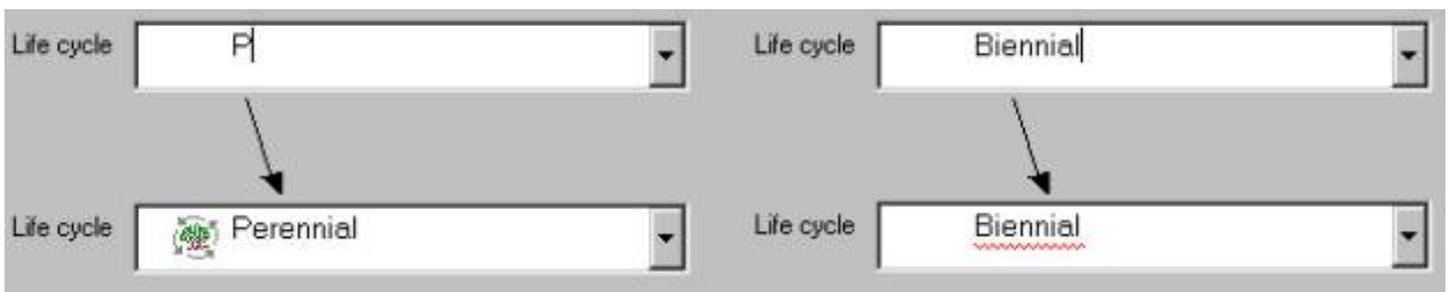
Best uses:

Compleat Botanica - Using codes as shortcuts in the category fields

 Using the software  Categories

As you're filling in the fields for a new specimen, you can type less and save time by using category codes as shortcuts. Most codes are a single letter or number, although some codes can be up to 6 characters in length.

To use a code instead of typing the full text, simply type the code followed by the <Tab> key to advance to the next field. Leaving the field causes the spell-checker to be triggered which looks for the code in the list of possible categories. If found, the full text is placed in the field. If not found, the text is considered to be "free-form" text rather than a code and is left alone. The spell-checker places a red line under the free-form text to alert you -- this can be ignored if your intention was to use the free-form feature.

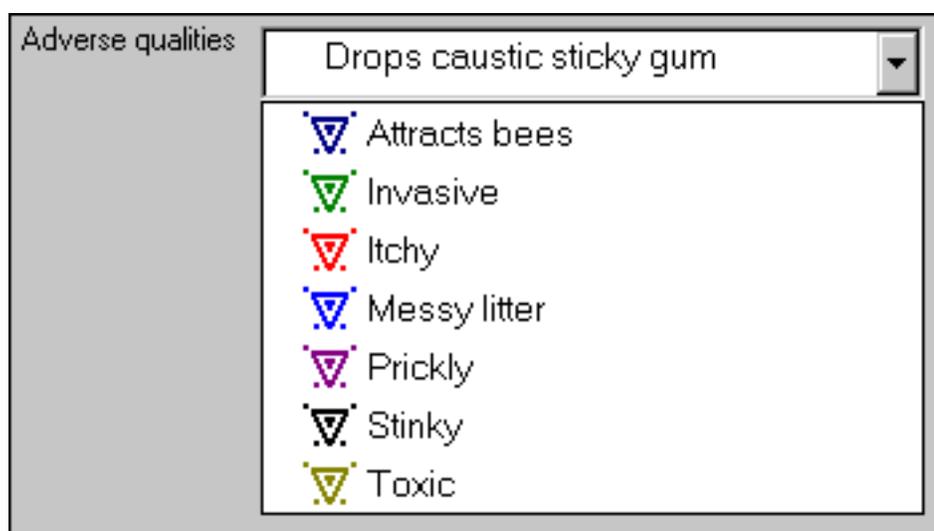


Compleat Botanica - Categories that allow free-form data entry

[Using the software](#) [Categories](#)

All of the drop-down combo-boxes have their editing areas enabled to allow for free-form data entry when the standard list of categories just doesn't fit. This flexibility allows you to use the category to store any text description, and at the same time allows you to quickly choose from a standard list when appropriate.

Here is what the **adverse qualities** category looks like when the free-form feature has been used to store a description which is not in the standard list.



Compleat Botanica - How do I specify more than one best use, desirable quality or adverse quality for a specimen?

 Using the software  Categories

Sometimes a single category doesn't fully describe the attributes of a specimen. For example a plant may be good as *cut flowers* and as *dried arrangements*.



To categorize this, use the free-form feature and type in both attributes, ignoring the spell-checker redline (it will go away the next time you view this record.)

Best uses

Cut flowers, Dried arrangements



Between pavers



Borders and beds



Cut flowers



Dried arrangements



Fences and trellises



Hanging baskets



Hedges and screens



Poolside



Rock gardens



Wall cover

Compleat Botanica - Specifying climate zone ranges

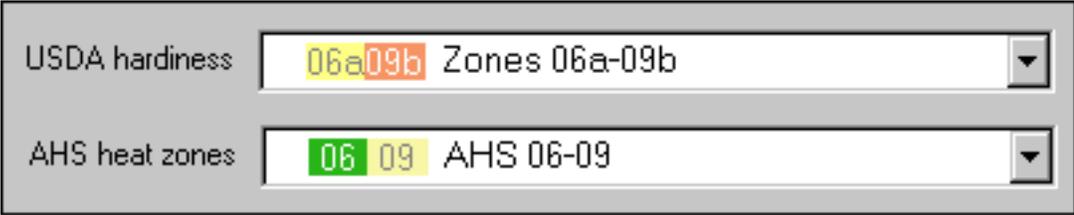
 Using the software  Categories

Plant hardiness and heat tolerance span a range of zones and are thus specified with a description like "Zones 06a-09b" or "AHS 06-09". The drop-down combo-boxes used to specify and display climate zones allow you to enter descriptions just like this.

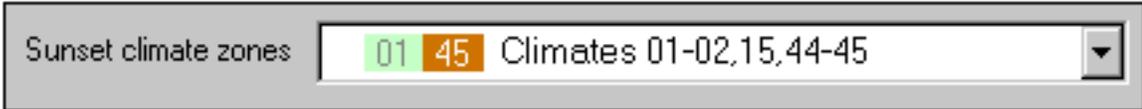
Because the drop-down list only shows the individual zones, you'll have to specify zonal ranges by typing the codes in the text-entry portion of the combo-box. The color-patches are automatically assigned when you press the <TAB> key and go to the next field.



Here's what the results will look like:



The Sunset climate zones that an individual species is adapted to are frequently discontinuous ranges. For example, the coldest climate zones would include zones 01-02, zone 15, and zones 44-45. Here's how multiple zonal ranges will look:



There are six climate fields that allow multiple codes:

 Climate field

1	Plant community
2	USDA Hardiness
3	Sunset climate zones
4	AHS heat zones
5	Acceptable soil pH
6	Optimal soil texture