# Orchid Manager

*Your digital solution for tracking your orchid collection*

**Database Base Australia**

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Orchid Manager requires Android 11.0 or higher and is suitable for phones, tablets and chromebooks running the Android operating system. Most included data is based on RHS data current at the time of publication.

## Table of Contents

# Main Features

## Home Screen

The Home screen is the first screen you see when opening the app. From here you can navigate to all major sections of Orchid Manager.

The following buttons are available on the Home screen:

- Collection Records
- Reference Records
- Contacts Records
- General Links
- Create Tasks
- Check All Tasks
- Bulk Update Tasks
- Instruction Manual

A gear icon is also available to open the Settings screen. Tapping the Database Base Australia icon will open the Database Base Australia website in your default browser.

## Collection Records

Collection records are used to record details of each plant in your collection. Key features include:

- **Sophisticated botanical name assembly** from individual fields following most botanical naming rules. Complex hybrids, species names combining italic and normal text, and abbreviated genus names are all supported. A Build feature assists with building complex hybrid parent names for applicable fields.
- **Dropdown fields** where applicable, populated from your existing record data and included data. Dropdown data can be imported from or exported to external .txt or .csv files. At the time of publication all known genus, species, subspecies, variety and form names based on RHS World Checklist of Vascular Plants (WCVP) data are included. Subfamily, tribe, subtribe, awards, sections and groups data is also included. A lookup table auto-fills the Subfamily, Tribe and Subtribe fields when a genus is entered, and an optional Use Abbreviations Lookup dialog helps you select the correct abbreviated genus name.
- **Date pickers** for all date fields, with automatic age calculation from the entered age date.

- **Maintenance tasks** created using the Create Tasks screen and activated per plant record. Each task shows the next due date, date last done, record interval and a colour-coded star indicator. Tasks can be marked as done, with due dates updating automatically. A method to update bulk same tasks for multiple plants in one go is also included on another screen (Bulk Update Tasks Screen) and all tasks for all plant records can be easily viewed using the Check All Tasks Screen where the user can make the same changes as the record maintenance tab.
- **Push notifications** for tasks due today or overdue, delivered at a user-set time. Tapping a notification opens the Check All Tasks or Bulk Update screen filtered to that task which facilitates updating tasks once they are done.
- **Tabs for Images and Growth** for unlimited photos, videos and audio notes per record. Media can be viewed full-screen with captions. Sharing and export of all images, videos, audio and file links is available. Export of images, videos and files includes the caption data in the exported file name.
- **Links tab** for unlimited file or web URL links per plant record. Very handy if you want to create a link to the specific web pages such as an Orchid Roots webpage specific to the plant or similar webpage.
- **Acquisition details** including source, dates, prices and running totals.
- **Archiving** to retire a record from active use while keeping all data intact.
- **Procedures Done** tab as an audit trail of all maintenance and manual procedures per plant.
- **Powerful filtering and sorting** with the ability to save and reload filter configurations.
- **Record duplication** with optional automatic propagation data entry for the source and duplicated records.
- **Monthly Indicators** for propagation, repotting, rest and flowering months.
- **PDF reports** that can be filtered, sorted, shared and exported.

See Collection Records Screen for full details.

## Reference Records

Reference records are used to create records for plants not in your collection — for example plants seen in the wild or at a show, or plants belonging to someone else.

Reference records are almost identical to collection records but do not include archiving, maintenance tasks, the Growth tab, acquisition data, lineage or age tracking. Reference records do include fields for Wanted, Record Source and Source Date.

### Copy to Collection

The Reference detail screen includes a **Copy to Collection** option in the three dot menu. This allows you to create a template reference record for example a record with care notes for a particular genus or section, then copy the record to a collection record and fill in the remaining fields. Only fields common to both record types are copied. When copying, including all Image tab media is optional. Once a record is copied you can navigate to it directly from the success dialog. You will need to activate any relevant maintenance tasks in the copied record and set the due dates and intervals. If the new collection record has collection records for its parents then also assign parent records using the Choose Parent Records function. See Choose Parent Records.

Usage of the Reference Records screen is otherwise identical to the Collection Records screen and will not be explained separately in this manual.

## Contacts Records

Contacts records are used to record contact persons or businesses associated with your collecting. Fields include name, business name, address, contact type, specialty, email, website and two phone number fields.

The Email field includes a Send button to open your default email app. The Website field has an Open button to launch your default browser. Each phone number field has a Call button to open your phone app ready to dial.

Records can be marked as favourites. Favourite records are grouped at the top of the list and shown with a blue star.

A PDF report is available. See Reports for further details.

See Contacts Records Screen for further details.

# Understanding Orchid Naming Basics

Orchid names can look intimidating at first glance, but once you understand the building blocks they become much easier to read. This section explains each part of an orchid name in plain language, with real examples throughout. Not every orchid will have all of these elements in its name — most will only have a few — but knowing what each part means will help you make sense of any name you encounter.

## Classification Levels

All orchids belong to the family *Orchidaceae*. Below the family level, orchids are grouped into subfamilies, tribes and subtribes, which are the botanical categories used to organise related genera together. Tribes and subtribes do not always apply. For example, the genus *Cattleya* belongs to the subfamily Epidendroideae, the tribe Epidendreae and the subtribe Laeliinae. Within a genus there may be further subdivisions called subgenera, sections and subsections. These classification levels are used by botanists to group related species but they do not normally appear as part of a plant's written name — with the exception of subgenus, which applies in some cases and is explained below.

## Genus, Subgenus and Abbreviations

The genus is the first and most important part of any orchid name. It is always capitalised and written in italics. The genus groups together species that share close characteristics. For example, *Cattleya*, *Phalaenopsis* and *Cymbidium* are all genera (plural of genus).

When a genus is divided into subgenera, the subgenus name may appear in parentheses immediately after the genus name. The subgenus name is capitalised and italicised.

*Cattleya* (*Cattleya*) *luteola*

Genus (Subgenus) species — Cattleya luteola placed in subgenus Cattleya

In practice, genus names are often abbreviated to save space, especially on plant labels. Only genera that have been used in registered hybrids have official RHS-approved abbreviations. The abbreviation uses the first letter or a short form of the genus name followed by a full stop.

*Phal.* = *Phalaenopsis*     *Cym.* = *Cymbidium*     *Rlc.* = *Rhyncholaeliocattleya*

## Species

A species is a naturally occurring orchid. Its name consists of two parts — the genus followed by the species epithet. This two-part naming system is called binomial nomenclature. The species epithet is always written in lowercase and in italics.

*Cattleya labiata*

Genus + species epithet

It is worth noting that the capital first letter of the second name is a quick way to identify a hybrid — a name like *Cymbidium* Cricket has a capital C on Cricket, indicating it is a hybrid grex name, not a species.

You may occasionally see one of three short abbreviations inserted between a genus name and a species name. These are used informally to indicate a degree of uncertainty in the identification of a species, most commonly when a plant closely resembles a known species but has not been formally confirmed or described.

**cf.** (short for the Latin *confer*, meaning "compare with") indicates that a plant resembles a known species but its exact identity is uncertain. **aff.** (short for the Latin *affinis*, meaning "having affinity to") indicates that a plant is similar to but likely distinct from the named species — possibly an undescribed new species. **nr.** (short for "near") is used in the same way as **aff.** and indicates the plant is close to but not the same as the named species.

*Dendrobium* cf. *lawesii*

"Compare with Dendrobium lawesii" — identity uncertain, resembles lawesii but not confirmed

These abbreviations are not part of the official registered name and will not appear on formally named plants. They are used informally by growers, collectors and botanists when a plant cannot yet be confidently assigned to a known species. These abbreviations can be included in the name within Orchid Manager see [Species Field].

## Subspecies, Variety and Form

Below the species level there are three further ranks that describe naturally occurring variations within a species.

### Subspecies

A subspecies (abbreviated **subsp.**) is a geographically distinct population of a species that differs consistently from the typical form. The subspecies name is italicised and lowercase.

*Cattleya dowiana* subsp. *dowiana*

The Costa Rican subspecies of Cattleya dowiana

### Variety

A variety (abbreviated **var.**) is a naturally occurring variant within a species that differs in some consistent way — such as flower colour or size — but is not geographically isolated enough to be a subspecies. The variety name is italicised and lowercase.

*Cattleya dowiana* var. *aurea*

The Colombian gold-lipped variety of Cattleya dowiana

### Form

A form (abbreviated **f.** or **fma.**) is the lowest infraspecific rank, used for minor variations such as flower colour differences — for example an albino or semi-alba form. The form name is italicised and lowercase. Note that **f.** is used as the form abbreviation in Orchid Manager.

*Cattleya dowiana* subsp. *dowiana* f. *rosita*

A naturally occurring pink-tipped form of Cattleya dowiana subsp. Dowiana

In rare cases, natural hybrids may occur not just between two species but between two subspecies, two varieties or two forms. The resulting hybrids at these infraspecific ranks are called nothosubspecies, nothovariety and nothoform respectively. These terms are used almost exclusively in botanical research involving wild populations and are very rarely encountered in horticulture. They follow the same × notation as a nothospecies, applied at the relevant infraspecific rank. You are unlikely to encounter these terms in everyday orchid growing but may occasionally see them in scientific literature.

## Natural Hybrids

Occasionally two species hybridise naturally in the wild where their habitats overlap. These natural hybrids are given a nothospecies name — written with × (the multiplication symbol and not an X or x) between the genus name and the species epithet. The × is not italicised. The nothospecies name itself is lowercase and italicised.

*Cattleya* × *hardyana*

A natural hybrid of Cattleya dowiana var. aurea and Cattleya warscewiczii, found in Colombia

## Hybrid Genus Names

When a hybrid is made between two plants of the same genus it keeps that genus name. When the parents come from different genera a new hybrid genus name — called a nothogenus — is created.

**Same genus parents** — the original genus name is retained:

*Cymbidium* Rosefieldense

Both parents are Cymbidium species, so the genus name Cymbidium is retained

**Different genera — two or three genera** — the genus names are combined into a single portmanteau name, italicised and preceded by ×:

× *Rhyncholaeliocattleya*

A nothogenus combining Rhyncholaelia and Cattleya — abbreviated Rlc.

**Different genera — four or more genera** — when four or more genera are involved the nothogenus is named after a person with the suffix **-ara**:

*Colmanara*

Named after Sir Jeremiah Colman — a hybrid of Miltonia, Odontoglossum and Oncidium

## Grex Names

When a breeder creates a hybrid cross and registers it with the Royal Horticultural Society (RHS) — the international authority for orchid hybrid registration — the cross is given a grex name provided that combination is new and not been previously registered. The grex name covers all offspring produced from that specific cross, no matter when or where it is made or which plant was the seed or pollen parent.

The grex name is capitalised, not italicised, written in a living language (not Latin) and may consist of more than one word. It follows the genus or nothogenus name.

*Rhyncholaeliocattleya* Golden Empress

Golden Empress is the registered grex name — all offspring of this cross carry it

If a cross has not been registered it is referred to by its hybrid formula — the two parent names separated by ×, with the seed parent listed first:

*Cattleya* (*dowiana* × *warscewiczii*)

An unregistered cross shown as a hybrid formula

## Cultivar and Clonal Names

Within any grex, individual seedlings vary in quality. When a grower selects a particularly outstanding plant and wishes to identify it specifically, they give it a cultivar name. The cultivar name is written in a living language, capitalised, not italicised and enclosed in single quotation marks. It follows the grex name or species name.

A cultivar name can be applied to any orchid — species or hybrid, registered or unregistered.

*Rhyncholaeliocattleya* Golden Empress 'Magnificat'

A specific outstanding plant from the Golden Empress grex

*Paphiopedilum insigne* 'Harefield Hall'

A cultivar name on a species — not a hybrid

The terms **cultivar name** and **clonal name** are often used interchangeably. Strictly speaking, the cultivar name is the registered name given to the selected plant, while the clonal name refers to that same plant and all its vegetatively propagated divisions, which are genetically identical. In practice they refer to the same thing.

A cultivar name is required for a plant to receive a quality award from a judging organisation.

## Cross Notation

When a label describes how a cross was made rather than naming a registered grex, the following notations are used after the plant name:

**× self** — the plant was pollinated with its own pollen

> *Cattleya trianae* × self

**× sib** — two plants from the same seed pod were crossed with each other

> *Phalaenopsis violacea* × sib

**× bc** — a backcross, where a hybrid is crossed back to one of its parent species or grexes to strengthen certain traits

**× oc** — an outcross, where a plant is crossed with an unrelated plant to introduce new genetics

## Ploidy

Ploidy refers to the number of complete sets of chromosomes a plant carries. Most orchid species are diploid (2n) — they carry two sets of chromosomes, which is the normal state in nature.

A tetraploid (4n) plant has four sets of chromosomes — double the normal number. Tetraploids occur naturally through cell division errors or can be induced artificially using colchicine. They typically produce larger, heavier-substanced flowers with greater breeding influence, and when crossed with a diploid produce a triploid (3n) which is usually sterile.

Ploidy is not normally written as part of the plant name but may be noted on a label or in a catalogue description, for example *Cymbidium* Fanfare 'St. Francis' (4n), indicating this is the tetraploid clone of that cultivar. Orchid Manager will include ploidy in the orchid name see Plant Type and Ploidy.

## Awards

Outstanding orchids may be exhibited at shows and judged by accredited organisations. If a plant receives an award the abbreviation is permanently appended to the end of the plant name, after the cultivar name. The award abbreviation is followed by a slash and the initials of the awarding organisation.

> *Rhyncholaeliocattleya* Golden Empress 'Magnificat' AM/AOS
>
> Award of Merit from the American Orchid Society

Common award abbreviations from the American Orchid Society (AOS) include HCC (Highly Commended Certificate), AM (Award of Merit) and FCC (First Class Certificate) for flower quality, and CCM (Certificate of Cultural Merit) and CCE (Certificate of Cultural Excellence) for plant culture. Other organisations use similar systems — for example FCC/RHS indicates a First Class Certificate from the Royal Horticultural Society.

## Putting It All Together

The following examples show how the different naming elements combine. No single real orchid name includes every element — these examples illustrate the correct order and format for each scenario.

**Example 1 — Species with infraspecific rank and cultivar name**

*Cattleya dowiana* var. *aurea* 'Princess'

Reading left to right: *Cattleya* is the genus; *dowiana* is the species; **var.** *aurea* is the naturally occurring variety; and 'Princess' is the cultivar name of this specific outstanding plant.

**Example 2 — Registered intergeneric hybrid with cultivar name and award**

× *Rhyncholaeliocattleya* Golden Empress 'Magnificat' AM/AOS

Reading left to right: × *Rhyncholaeliocattleya* is the nothogenus (hybrid genus combining *Rhyncholaelia* and *Cattleya*); Golden Empress is the registered grex name; 'Magnificat' is the cultivar name of this specific plant; and AM/AOS indicates it received an Award of Merit from the American Orchid Society.

**Example 3 — Unregistered hybrid shown as hybrid formula**

*Cattleya* (*dowiana* × *warscewiczii*) × self

This cross has not been registered with the RHS so no grex name exists. The hybrid formula in parentheses shows the two parent species. The × self-notation indicates this plant was self-pollinated to produce the next generation.

# Collection Records Screens

Collection records are used to record details of each plant in your collection. The screen has two views: the List screen and the Detail screen.

## List Screen

The List screen opens when you tap Collection Records from the Home screen. It shows a scrollable list of cards, one per record, each displaying the primary image, Plant Number, My Reference, the assembled plant name and a star indicator if the plant has any active maintenance tasks. The star indicator shows for the most urgent task if more than one task is active or not at all if no tasks are active.

Tapping the image area on a card takes you directly to the Images tab for that record. Tapping the star indicator takes you directly to the Maintenance tab.

At the top right of the List screen are sort and filter icons and a three dot menu. The three dot menu provides the following options:

Archive filter options (a tick shows beside the selected option) See Archive Filter:

- Active Only — displays all active plant records. This is the default when the app opens.
- Archived Only — displays only archived records.
- All Records — displays all records, both active and archived.

Other options

- Filter Genus and Species — opens a dedicated filter dialog for filtering by genus and species.
- Save Filter/Sort — saves the current filter and/or sort. See Saving and Loading Filter and Sort.
- Load Filter/Sort — loads a previously saved filter/sort.
- Clear Filter/Sort — clears any active filter and/or sort.
- Scroll to Record – Allows you to scroll to a record in the list screen based on selecting a Plant Number or My Reference. See Scroll to Record.

To add a new plant record tap the + button at the bottom right of the screen. A confirmation dialog will be displayed where you can confirm you wish to add a new record. Tapping yes to the confirmation dialog will then open the detail screen with a new blank record ready for you to enter your plant details, add media and activate any tasks already created.

## Detail Screen

The Detail screen shows one plant record at a time. Tap a card in the List screen to open it. Navigate between records using the arrow icons at the top right of the Detail screen.

The three dot menu at the top right of the Detail screen provides the following options:

- Duplicate Current Record — copies the currently viewed record to a new record. See Duplicate Current Record.
- Archive Record — archives the currently viewed record. See Archiving Records.
- Unarchive Record — unarchives the currently viewed record.
- Edit Archive Info — allows editing of the archived record note.
- Delete Current Record — deletes the currently viewed record. See Delete Current Record.
- Find/Replace — only available on the Identification, Care and Acquisition tabs. Opens a dialog with find and find/replace options. See Find/Replace.
- Manage Procedure Records — only available on the Procedures Done tab. Allows bulk deletion of procedure records. See Bulk Deleting Procedure Records.
- Choose Parent Records – only available on the Identification tab. Allows breeders to add existing collection records as parents of another record. See Choose Parent Records.
- View Lineage – Only available for plant records who have been assigned parent records using the Choose Parent Records method. See Lineage Feature.
- Share Lineage - Only available for plant records who have been assigned parent records using the Choose Parent Records method. See Share Lineage.
- Navigate to Record - Allows you to navigate to a record in the detail screen based on selecting a Plant Number or My Reference. See Navigate to Record.

Fields can accept unlimited data length. Date fields only accept complete dates and use a date picker accessed by tapping the calendar icon at the end of the field.

Fields marked with ***** are dropdown fields with a user list. Fields marked with # are dropdown fields with fixed data and no user list. Fields marked with **^** can use the name builder.

See Using Dropdown User Lists and Using the Name Builder for further details.

## Identification Tab

Fields in the Identification tab are as follows:

- *** Subfamily** — plain text, autofilled after entering a genus.
- *** Tribe** — plain text, autofilled after entering a genus.
- *** Subtribe** — plain text, autofilled after entering a genus.
- *** Genus** — italic text. Can have a × prefix or a subgenus name in parentheses following the genus name.
- *** Section** — italic text. Can include a subsection using the subsect. prefix.
- *** Species** — italic text. Can have ×, cf., aff., nr. prefixes or NOID, sp. as stand-alone entries. These are not italicised.
- *** Grex** — plain text.
- *** Subspecies** — italic text. Can have a nothosubsp. prefix (not italicised).
- *** Variety** — italic text. Can have a nothovar. prefix (not italicised).
- *** Form** — italic text. Can have a nothof. prefix (not italicised).
- *** Cultivar/Clonal Name** — plain text, enclosed in single quotes.
- *** Group** — plain text.
- *** Awards** — plain text.
- *** Trade Name** — plain text. Can also accommodate italic and bold text.
- *** Common Name** — plain text.
- *** Originator** — plain text.
- *** Author/Registrant/Year** — plain text.
- *** Plant Type** — plain text. Can include a ploidy designation.
- *** Colour** — plain text.
- *** Fragrance** — plain text.
- **# Cross Method** — plain text. Fixed dropdown. See Cross Method for details.
- *** Hybrid Type** — plain text.
- **^ Seed Parent** — combination text.
- **^ Seed Grandparents** — combination text.
- **^ Pollen Parent** — combination text.
- **^ Pollen Grandparents** — combination text.
- **^ Ancestors** — combination text.
- **^ Synonyms** — combination text.
- *** Record Type** — plain text.
- *** Category** — plain text.
- *** Geographic Origin** — plain text.
- **My Reference** — plain text.
- **Age Date** — date field. Age is calculated from this date.

- **Age** — auto-calculated in years, months and days.

## Care Tab

All fields in the Care tab are plain text and are as follows:

- * Plant Status
- * Garden Zone
- * Location
- * Potting Media
- * Container Type
- * Mount Type
- * Propagation
- Propagation Notes
- Propagated From
- Propagated To
- Conditions Required
- Lighting Notes
- Flowering Notes
- Watering Notes
- Fertilizing Notes
- Repotting Notes
- Health Care Notes
- Remarks

## Acquisition Tab

All fields in the Acquisition tab are plain text and are as follows:

- * Acquired From
- Acquisition Date
- * Acquired Stage
- * Acquired Type
- * Acquired As
- * Sold To
- Sale Date
- Purchase Price
- Sale Price
- Current Value

Pricing totals reflect the currently selected archive filter. To see totals for all records including archived ones, set the archive filter to All Records. Applying a list screen filter will limit the totals to the filtered records and the totals background turns red. Without a screen filter the totals background is green. When entering pricing data the totals update when you tap out of a pricing field into another field. Acquired From and Sold To dropdown data includes entries from the Contacts Records Name and Business Name fields.

## Links Tab

The Links tab contains no record fields — only links can be added here. See General Links Screen and Links Tabs for further details.

## Images Tab

The Images tab contains no record fields. It allows unlimited photos, videos and audio notes for general recording of media for the plant record. See Adding Media to Collection and Reference Records for details.

## Growth Tab

The Growth tab contains no record fields. It allows photos, videos and audio notes specifically for recording the growth of the plant over time. See Adding Media to Collection and Reference Records for details.

## Maintenance Tab

The Maintenance tab contains no record fields. It shows cards for each maintenance task created using the Create Tasks Screen. Here you can activate or deactivate any tasks by ticking or unticking the checkbox for each task and making other task adjustments as required. See Maintenance Tasks for full details.

## Procedures Done Tab

The Procedures Done tab contains no main record fields. Procedure records are stored in a separate table linked to the plant record. Each procedure record contains a Date Done and a Procedure field. Procedure records are created automatically when maintenance tasks are performed or updated, propagation done or parent records assigned and can also be added manually. See Procedures Done Records for full details.

## Monthly Indicators Tab

The Monthly Indicators tab contains four rows of checkboxes for Propagation, Repotting, Rest and Flowering. Tick the months that apply for each activity as a guide only. Records can be filtered by these checkboxes using the main filter on the Collection List Screen, Check All Tasks Screen or Bulk Update Screen. See Collection Screen Filtering. Monthly indicators are a guide only and do not affect due dates of any related maintenance tasks so such related tasks must be manually adjusted accordingly. See Maintenance Tasks.

## Reports Tab

The Reports tab contains buttons to launch the various reports available for collection records. Reports are created as PDF files and require a PDF viewing app to be installed. Options to share or export report PDF files are also available. See Reports for further details.

# Information Specific to Field Operations

**Important:** When creating collection or reference records be consistent about whether you include the × prefix on genus and species fields where applicable. Do not include any prefixes when adding new names to user lists — the option to add × and other prefixes is available via a checkbox in the dropdown dialog when selecting data to add to a plant record field.

The Subfamily, Tribe, Subtribe, Genus, Section, Species, Grex, Subspecies, Variety, Form and Cultivar/Clonal Name fields auto-correct capitalisation as you type. For example:

- Typing a genus name in lowercase will capitalise the first letter automatically, as genus names require an uppercase first letter.
- Typing a species name with an uppercase first letter will correct it to lowercase, as species names require a lowercase first letter.
- Grex and Cultivar/Clonal Name entries will have all words capitalised.

Avoid using keyboard autocomplete suggestions directly in these fields as some devices may double up the first letter. If this happens simply correct the entry. It is recommended to add new entries which do not appear in the dropdown lists via the dropdown dialog search box and Use button, as entries are caps corrected when passed to the plant record fields and are automatically added to the user lists.

Further explanation for some of the fields and their usage is listed below.

## Genus Field

Adding a genus name or abbreviation to the Genus field automatically populates the **Subfamily**, **Tribe** and **Subtribe** fields if a matching record exists in the lookup table. See Lookup Table for further details.

A genus name or abbreviation can be added in three ways:

1. Using the Genus field dropdown — search for your desired genus or abbreviation and tap it to add it to the field. To add the × nothogenus prefix, tick the checkbox at the top of the Genus dropdown dialog before making your selection. Do not add the × prefix when selecting an abbreviation. If your desired entry is not in the list, type it fully into the search box then tap the Use button to add it to both the field and the user list.
2. Using the Use Abbreviations Lookup — tap the Use Abbreviations Lookup text button below the search box in the Genus dropdown dialog. This displays genus names alongside their abbreviations from the lookup table, making it easy to select the correct abbreviation. Tap your desired entry to copy only the abbreviation to the Genus field.

3. Typing directly into the Genus field — enter the genus name or abbreviation directly. Tap out of the field into another field and the Subfamily, Tribe and Subtribe fields will populate if a matching lookup table entry exists.

When adding a new genus or abbreviation ensure it begins with a capital letter and abbreviations end with a period where applicable. Correct spelling is essential for the lookup table match to succeed.

*Note: Adding a new entry to the genus list does not update the lookup table. Adding new records to the lookup table does update the genus list with any new genus names and abbreviations.*

### Entering a Subgenus

A subgenus name in parentheses can be added to the genus field after the genus name. For example: *Vanilla* (*Xanata*). This can be typed directly into the field or added using the Genus dropdown dialog in two steps:

1. Open the Genus dropdown dialog and choose or add your genus name. It will appear in the Genus field.
2. Open the Genus dropdown dialog again, tick the Add as Subgenus checkbox, then select or add the subgenus name. The genus field will update to show the genus followed by the subgenus in parentheses. If you select the wrong subgenus simply repeat this step to replace it.

*Note: The Add as Subgenus checkbox is greyed out if the Genus field does not already contain a genus name. The Add as Subgenus and Add × checkboxes cannot both be ticked at the same time — only one can be selected.*

Both parentheses will not be italicised. The genus name and subgenus name will be italicised. For example, Vanilla (Xanata) in the Genus field will display as *Vanilla* (*Xanata*) once you tap out of the field, and in the complete assembled name throughout the app it will display as for example *Vanilla* (*Xanata*) *planifolia*.

The Genus user list includes some genus and subgenus names combined in the one list and this list will grow as you add new entries to it. Not all genus and subgenus names are supplied with the app. If you see a combined **Genus + Subgenus** entry in the dropdown list (sourced from record data) that already matches what you need, you can tap it directly without ticking the Add as Subgenus checkbox to add it in a single operation.

### Genus Prefix — × (Multiplication Symbol)

The multiplication sign placed before a genus name (e.g. ×*Brassolaeliocattleya*) indicates a nothogenus — an intergeneric hybrid involving parent species from two or more different genera. The hybrid is given a constructed genus name preceded by × to mark its hybrid origin.

Most nothogenera in orchids are artificial hybrids registered with the Royal Horticultural Society (RHS), the International Cultivar Registration Authority for orchids. For hybrids involving two or three parent genera the name is often condensed from parts of the parent genus names. For hybrids involving four or more parent genera the name is typically formed from a person's name with the suffix -ara.

The × is placed directly before the genus name with no space (per ICN Article H.3A.1). While it is part of the formal name it is sometimes omitted in everyday horticultural usage. Try to be consistent as to which naming style you use within the app.

To add the × prefix when using the Genus dropdown, tick the checkbox at the top of the dialog before choosing from the list or using the Use button. Do not add the prefix when using a genus abbreviation instead of a full genus name.

## Species Field

### Prefixes and Stand-Alone Entries

The following prefixes and stand-alone entries can be entered into the Species field. Prefixes are entered before the species name followed by a space and will not be italicised in the field or assembled name. Only one prefix or stand-alone entry should be added to the field.

- **cf. (confer — compare with):** Used when the identifier thinks the orchid is likely a specific species but is not 100% certain. Available as a prefix via a checkbox in the species dropdown dialog.
- **aff. (affinis — having affinity for):** Used when the plant is similar to a known species but the identifier is certain it is distinct. Available as a prefix via a checkbox in the species dropdown dialog.
- **nr. (near):** Similar to aff. — indicates the plant is very close to but distinct from a named species. Available as a prefix via a checkbox in the species dropdown dialog.
- **sp. (species):** Used when the genus is known but the exact species has not been identified. Available in the species user list.
- **NOID (No ID):** A widely used hobbyist term for an unidentified orchid where the tag has been lost. Available in the species user list. Will be converted to uppercase if entered in lowercase.
- **× (Multiplication symbol):** Placed before the species epithet (e.g. *Phalaenopsis ×intermedia*) to indicate a nothospecies — a formally described interspecific hybrid. Available as a prefix via a checkbox in the species dropdown dialog.

See Grex Field regarding when Species, Subspecies, Variety and Form fields are disabled.

## Grex Field

A Grex name is the name assigned by the Royal Horticultural Society when a hybrid is registered. It is capitalised plain text — for example in the name *Rlc.* California Girl, the Grex name is California Girl.

The (Species, Subspecies, Variety and Form fields) and Grex fields are mutually exclusive. Entering data in Species, Subspecies, Variety or Form fields will grey out the Grex field. Entering data in the Grex field will then grey out the Species, Subspecies, Variety and Form fields as a plant cannot have a grex name and names in the Species, Subspecies, Variety and Form fields. The Cultivar/Clonal Name can apply to a species or a grex name.

## Subspecies, Variety and Form Fields

### Prefixes

The following prefixes can be added before the subspecies, variety or form name. These prefixes will not be italicised in the field or assembled name:

- **nothosubsp.** — placed before a subspecies name to indicate a hybrid subspecies (e.g. *Anacamptis nicodemi* nothosubsp. *kusadasiensis*).
- **nothovar.** — placed before a variety name to indicate a hybrid variety.
- **nothof.** — placed before a form name to indicate a hybrid form.
- **subvar.** — placed before a variety name (e.g. *Cattleya labiata* subvar. *Coerulea*). Note: subvariety rank is not currently recognised in modern orchid taxonomy — names at this rank are synonyms of accepted names at other ranks.
- **subf.** — placed before a form name. Note: subform rank is not currently recognised in modern orchid taxonomy — names at this rank are synonyms of accepted names at other ranks.

To add a notho prefix when using the dropdown dialog for these fields, tick the checkbox at the top of the dialog before choosing from the list or using the Use button. The notho prefixes replace the standard subsp., var. and f. prefixes in the assembled name. The subvar. and subf. prefixes replace var. and f. respectively.

See Grex Field regarding when Species, Subspecies, Variety and Form fields are disabled.

## Section Field

The included data does not cover all sections or subsections as this data is difficult to obtain. You can add new sections to the user list via the section dropdown dialog search box and Use button. The section name is **not** included in the assembled plant name.

The Section dropdown dialog allows only a single section name (with or without a subsection). To enter two or more section names use the Optional Section Builder Dialog by tapping the Use Builder text button in the section dropdown dialog.

The Section user list includes some section and subsection names combined in the one list and this list will grow as you add new entries. If you see a combined **section + subsection** entry in the dropdown list (sourced from record data) that matches what you need, you can tap it directly without ticking the Add Suffix subsect. checkbox to add it in a single operation.

### Entering a Subsection

You can add a subsection to the Section field manually by typing the section name, a space, then subsect. followed by a space and the subsection name. For example, entering Aporum subsect. Strongyle will display in the field as:

*Aporum* subsect. *Strongyle*

Alternatively use the Section dropdown dialog in two steps:

1. Open the Section dropdown dialog, tick the Add Suffix subsect. checkbox, then choose or add your section name. The section name and subsect. suffix will appear in the Section field.
2. Open the Section dropdown dialog again and select or add your subsection name. The complete section and subsection entry will appear in the field.

*Note: When using the Section dropdown, a selection is appended to existing field data only if the Section field ends in subsect. Otherwise a selection always replaces the entire field contents.*

An alternative method to add one or multiple section names (with or without subsection names) is by using the Optional Section Builder Dialog. See Optional Section Builder Dialog for further details.

## Seed and Pollen Parent Fields

The Seed and Pollen Parent fields can use the name builder to assemble parent names. See Using the Name Builder for full details.

These fields can also be populated using the Choose Parent Records feature if you are a breeder and have records in Orchid Manager for the parent plants see Choose Parent Records.

When either parent field contains data, an **Include parents in assembled name** checkbox appears above the Seed Parent field, ticked by default. Untick this if you do not want parent names to appear in the assembled plant name throughout the app.

## Hybrid Type

If you know what type of hybrid plant you have you can enter it into the Hybrid Type field. Below is a list of the dropdown included data and an explanation of what the available hybrid types are:

- **Backcross Hybrid:** A cross where a hybrid plant is bred back to one of its original pure species parents.
- **Complex Hybrid:** A multi-generation cross involving three or more distinct species or ancestor hybrids.
- **Intergeneric Hybrid:** A cross between parent plants belonging to completely different genera.
- **Intersectional Hybrid:** Belonging to different sections.
- **Intrasectional Hybrid:** Belonging to the same section.
- **Intraspecific Hybrid (Line-bred species):** A cross between two different plants of the exact same wild species, selected for better colour, shape or vigour.
- **Natural Hybrid:** A cross that occurs naturally in the wild without human intervention, resulting in offspring that behave and look like a distinct wild population.
- **Outcross Hybrid:** Two completely unrelated individual plants of the exact same species crossed together.
- **Primary Hybrid:** A first-generation cross between exactly two different pure wild species parents.

## Cross Method

Select your desired cross method from the Cross Method field dropdown if it applies to the plant, or leave the field blank. The selected abbreviation with a × prefix will be appended to the assembled name after the Cultivar/Clonal Name position and any naming fields before this whether they contain data or not.

If you inadvertently add a cross method and wish to remove it, tap into the field at the end of the data and use the keyboard backspace until it has been removed.

The available cross method options are shown below using *Phalaenopsis bellina* as the example genus and species:

### *Self Cross (× self)*

- **Definition:** A plant is crossed with itself (its own pollen).
- **Purpose:** To "lock in" specific traits of an elite individual.
- **Cultivar/Clonal Name:** 'Krull's Perfection'
- **Awards:** FCC/AOS
- **Cross Method:** Self Cross (× self)

- **Example assembled name:** *Phalaenopsis bellina* 'Krull's Perfection' × self FCC/AOS

### *Sibling Cross (× sib)*

- **Definition:** Two different plants grown from the same seed pod are crossed together.
- **Purpose:** To increase genetic diversity while maintaining the "line" quality.
- **Cross Method:** Sibling Cross (× sib)
- **Seed Parent:** 'Star'
- **Pollen Parent:** 'Joy'
- **Example assembled name:** *Phalaenopsis bellina* × sib ('Star' × 'Joy')

### *Backcross (× bc)*

- **Definition:** An offspring plant from a previous cross is bred back to one of its original elite parent plants.
- **Purpose:** To reinforce and "pull forward" specific traits of a preferred parent while introducing or retaining a selective trait from the offspring.
- **Cross Method:** Backcross (× bc)
- **Seed Parent:** 'Star Joy #1' (an elite seedling from the original 'Star' × 'Joy' sibling cross)
- **Pollen Parent:** 'Star'
- **Example assembled name:** *Phalaenopsis bellina* × bc ('Star Joy #1' × 'Star')

### *Outcross (× oc)*

- **Definition:** Two completely unrelated individual plants of the exact same species are crossed together.
- **Purpose:** To introduce entirely fresh genetics, maximise genetic diversity, and restore "hybrid vigour" to a heavily inbred lineage.
- **Cross Method:** Outcross (× oc)
- **Seed Parent:** 'Star' (a heavily line-bred greenhouse clone)
- **Pollen Parent:** 'Borneo Jungle' (a distinct, unrelated wild-collected plant)
- **Example assembled name:** *Phalaenopsis bellina* × oc ('Star' × 'Borneo Jungle')

You can optionally append generation data to the Cross Method field selection — for example Self Cross (× self) S1. This data will not appear in the assembled name. Examples of the generation designations are:

- **F1 (Filial 1):** The first generation of a cross between two different parents.
- **S1 (Selfed 1):** The first generation produced by selfing a single plant.
- **F2 / S2:** The second generation (crossing two F1s together, or selfing an S1).

## Cultivar/Clonal Name

**Cultivar name:** Identifies a plant selectively bred for specific characteristics, maintained through controlled propagation. Cultivar names are enclosed in single quotes — e.g. *Cymbidium* 'Red Beauty'.

**Clonal name:** Identifies a specific individual plant and all vegetative copies made from it. In orchids this is often an award-winning plant that has been tissue-cultured or divided. Clonal names are also enclosed in single quotes.

In orchid registration the two terms are often used interchangeably. For example *Cymbidium* Alexanderi 'Westonbirt' — where Alexanderi is the grex and 'Westonbirt' is the clonal name. This is why Orchid Manager combines them in a single field.

The Cultivar/Clonal Name field displays in single quotes in the assembled name whether or not you include quotes in the field. The dropdown dialog includes an Add quotes checkbox. Tick the checkbox prior to your selection or addition if you desire quotes to be added in the field. Some dropdown selections in the list may already have quotes as these entries are based on record data — if you select such an entry with the checkbox ticked, extra quotes will not be added. Selecting an item from the list which already has quotes does not require the checkbox to be ticked for the quotes to be included.

## Trade Name and Common Name

**Trade name:** A commercial name given to a plant for marketing purposes. Not an officially registered name. The same plant may be sold under different trade names in different markets. Only enter a Trade Name if the botanical name is unknown.

A trade name can have part of its text italicised or bolded using markers: enclose text with asterisks for italics (***italics***), with hashes for bold (**#bold#**), or with both for italic-bold (***#italicsbold#***). The formatting will not display while the field has focus — tap into another field to see it applied.

**Common name:** A non-scientific name used in everyday language. Informal and not regulated — the same plant may have multiple common names and the same common name may refer to different plants.

Trade Name and Common Name appear at the end of the assembled plant name. If both contain data they show as Trade Name (Common Name). If only Trade Name contains data it shows on its own. If only Common Name contains data it shows as (Common Name) on its own enclosed in parentheses. Either or both will show in the assembled name even if no other naming fields contain data.

## Plant Type and Ploidy

The Plant Type field allows you to select the type of plant the record represents. You can choose from the dropdown or enter your own description.

To add a ploidy designation to the assembled name, include 2N, 3N, 4N, 5N, 6N or 8N anywhere in the Plant Type field. The N can be uppercase or lowercase. The ploidy designation will be appended to the assembled name in square brackets (always uppercase) before the award designation position. For example, entering Epiphytic Sympodial 4N will show [4N] in the assembled name.

Available plant types (lifestyle and growth habit). Entries available in the dropdown include simple names and simple names with an explanation of what they are:

- **Epiphytic Sympodial:** Grows on trees; spreads horizontally along a rhizome, typically with pseudobulbs.
- **Epiphytic Monopodial:** Grows on trees; grows vertically from a single stem without pseudobulbs.
- **Terrestrial Sympodial:** Grows in soil; spreads horizontally with underground tubers or pseudobulbs.
- **Terrestrial Monopodial:** Grows in soil; grows continuously upward from a single point.
- **Lithophytic Sympodial:** Grows on rock surfaces; spreads horizontally with pseudobulbs.
- **Lithophytic Monopodial:** Grows on rock surfaces; grows vertically from a single point.
- **Semi-Terrestrial:** Grows in loose organic leaf litter and soil; shares characteristics of both ground and air dwellers.
- **Mycoheterotrophic:** Leafless and non-photosynthetic; relies entirely on a symbiotic relationship with soil fungi.

Some combinations of the above are available for selections for plants which fit more than one criteria.

## Awards

A list of most orchid awards and organisation names (such as FCC/AOS) is preloaded into the app.

The Awards field dropdown allows selection of multiple entries and a year of the award can be optionally included by typing the year into the Year box if desired. If you do not want a year included leave the year box empty. The year box is limited to entry of 4 numbers only.

To enter more than one award with or without a year first make your initial award selection with or without a year using the Awards field dropdown so that initial selection shows in the Awards field. Next use the dropdown again and tick the

Append Selection box, enter year if desired then tap on your selected item in the list or if your desired item is not in the list type it into the Search box and tap the Use button. Your second selection will now appear beside your first selection separated by a comma and space.

If the awards are from different judging systems or organizations, they are separated by a comma and a space.

When an individual orchid receives multiple awards from the same organization (like the American Orchid Society), the award abbreviations are hyphenated and share a single society suffix at the end (for example, AM-CCM/AOS). Should this be the case you will need to enter such a combination directly into the field or into the dropdown dialog search box and tap the Use button.

Awards data entered into the field form part of the assembled plant name.

## Plant Status

The Plant Status field can be used to record the state of each plant. Here you can enter such items as Healthy, Needs Attention, Quarantined etc. You can add your frequently used desired entries to the dropdown for future use by a long press on the dropdown arrow for the field which opens the Manage Plant Status List into which you enter your frequently used data. See Using Dropdown User Lists.

## Age Date and Age

The Age field will display the age of a plant in years, months and days based on a "date of birth" entered into the Age Date field.

## My Reference

The My Reference field is intended for the user to enter any numbering method they may already use for plants in their collection. If this field has data it will be included throughout the app wherever Plant Number (Collection records) or Reference Number (Reference records) are shown.

## Assembled Name

The assembled plant name displayed at the top of the collection and reference detail screens, on list screen cards, on Check All Tasks cards, Bulk Update cards and reports is assembled automatically from all fields that contribute to the name. Any contributing field that contains no data is excluded from the assembled name.

When the Seed or Pollen Parent fields contain data, the **Include parents in assembled name** checkbox appears above the Seed Parent field (ticked by default). Untick this to exclude parent names from the assembled plant name throughout the app for the current record only.

# Using the Name Builder

The name builder assists you in constructing complex botanical names for the Seed Parent, Seed Grandparents, Pollen Parent, Pollen Grandparents, Ancestors and Synonyms fields. Tap the build icon to the right of these fields to open the name builder dialog.

The app is preloaded with names for Subfamily, Tribe, Subtribe, Genus, Section, Species, Subspecies, Variety, Form and Awards to give you selections in the name builder and dropdown lists. Grex and Cultivar/Clonal names are not supplied due to the nature of the data — add these as needed via the Build From List dialog.

When you tap into a field that uses the name builder and it already contains built data, the italic and bold formatting markers will be visible. You can edit the data directly, taking care not to remove just one of a pair of formatting markers.

## Building a Name

Tap the build icon to open the name builder dialog. All dialogs displaying a list are scrollable. Make selections by tapping your desired item — the dialog dismisses and the entry appears in the Preview box.

Buttons are available to add:

- Opening and closing parentheses
- × symbol (as a joiner, not as a notho prefix)
- % button for use in the Ancestors field only and only shows when using the builder for the Ancestors field. To assign a percentage to each ancestor entry.
- subsp., var. and f. abbreviations
- New Line button (for fields that support multiple entries such as Grandparents, Ancestors and Synonyms — each entry must be on a new line for the Record Data feature to function correctly). An orange static cursor will show at the beginning of a new line to confirm selection and will vanish when data added to the new line or if the new line is undone.
- Build From List - to be able to select names from a combined list of Genus, Species, Grex, Subspecies, Variety, Form, Cultivar/Clonal Name and Awards sourced from preloaded and record data.
- Other Prefix+ - to allow other prefixes, cross methods and ploidy types to be selected.

*Note: The New Line button is greyed out when building Seed or Pollen Parent fields as these fields use only a single line. A single line may wrap visually in the Preview box. The Preview box is scrollable if multiple entries exceed its height.*

## Other Prefix+ Button

The Other Prefix+ button provides access to additional prefixes, cross methods and ploidy types:

- **Nothogenus, Nothospecies, Nothosubspecies, Nothovariety, Nothoform, Section, sect. and subsect. prefixes:** Tap Other Prefix+ and choose the desired prefix before adding the associated name. There is no space between the × prefix and the selected name for nothogenus and nothospecies. The × button (used as a joiner) does include a trailing space and is different from the nothogenus/nothospecies prefix. The nothosubsp., nothovar., nothof., section, sect., subsect., subvar. and subf. prefixes are bolded and not italicised and include a trailing space. The section, sect., subsect. Prefixes are intended for use with the Ancestors field if you wish to include a section with each ancestor entry.
- **Cross method designations:** Tap Other Prefix+ to choose × self, × sib, × bc or × oc. Selections include the × prefix and a trailing space.
- **Ploidy designations:** Tap Other Prefix+ to choose your desired ploidy. An optional checkbox adds a trailing space. Leave the checkbox unticked if no award follows the ploidy. Tick it if an award designation is to follow.

## Build From List Button

The Build From List button opens a dialog with a search box. Start typing your desired name and tap it when it appears in the list. The list combines all user lists for Genus, Species, Grex, Section, Subspecies, Variety, Form, Cultivar/Clonal Name, Awards and the Build user list. Record data is not included. See Using Dropdown User Lists.

If your desired name does not appear in the list, type it in full, capitalise it correctly and tap Use. The Add to Which List dialog will appear — select the appropriate user list (e.g. Genus list for a genus name) and tap Add. The new name is added to the user list, to the Preview box, and will be available for future use.

If a desired name selected from the list gives unexpected results for example it gives you a Cultivar/Clonal Name without single quotes then tap the Undo button to remove the incorrectly formatted name from the Preview box then tap the Build From List button and type the complete desired name into the search box, tap the Use button and add your desired name to the correct list (being Cultivar/Clonal Name list using the above example) and your desired name will then be formatted correctly in the Preview box. Alternatively if your desired name appears twice or more times in the Build From List dialog list try using each entry as one of them will likely be already formatted correctly just be sure to undo the incorrect entry first.

**Important:** The list you add a new name to determines how it is formatted in the Preview box. For example adding a name to the Genus list formats it in italics in the Preview box.

The Add to Which List dialog also includes a Don't Add to List option. This allows you to add an entry to the Preview box without adding it to any user list. When using this option you must also choose a text format — Plain Text, Bold Text or Italic Text — before the Add button is enabled.

*Note: Nothogenus, nothospecies, nothosubspecies, nothovariety and nothoform names (not their prefixes) should be added to the Genus, Species, Subspecies, Variety and Form user lists respectively. Subvariety and subform names should be added to the Variety and Form user lists.*

## Ancestors Field

The Ancestors field will show a percentage button in the build dialog. This is used to optionally assign what percentage an ancestor contributes to the plant record. Use this to add the percentage to the end of an ancestor entry. Just tap on the % button and enter your percentage without the % symbol up to two decimal places with no need to enter trailing zeroes (entering 12.5 will display as 12.50%) and no need to enter decimals for whole numbers (entering 25 will display as 25.00%).

An ancestor entry can also be optionally assigned with a section and subsection if desired. The prefixes **section**, **sect**. and **subsect**. are included in the Other Prefixes+ button and bolded when used. Section names from the section user list are included in the main list of selections when using the Build From List dialog.

Using the **sect.** or **section** prefix is up to you just choose which you prefer.

For example an entered ancestor will display as:

- *Paphiopedilum acmodontum* (*Sigmatopetalum)* **sect.** *Barbata* **subsect.** *Chloroneura* 12.50%
- *Paphiopedilum barbatum* **sect.** *Barbata* **subsect.** *Chloroneura* 25.00%
- *Dendrobium speciosum* **section** *Dendrocoryne* 62.50%
- *Dendrobium speciosum* **sect.** *Dendrocoryne* 62.50%
- *Dendrobium speciosum* 62.50%

## Use Abbreviations Lookup Dialog

The Use Abbreviations Lookup dialog is accessible via the Use Abbreviations Lookup text button below the search box in both the Genus dropdown dialog and the Build From List dialog. It displays only lookup table records that contain an abbreviation, showing the genus name alongside its abbreviation. Tapping an entry passes only the abbreviation to the Preview box when used in the Build From List dialog or if used in the Genus dropdown dialog the selection is passed to the Genus field. Use the search box to search by genus name or abbreviation. See Lookup Table for further details.

## Record Data Button

The Record Data button sources data from what is already entered in existing collection and reference records for the fields that use the name builder. The search box uses a contains search (not starts with) making it easier to find entries beginning with a parenthesis or prefix.

Field data is grouped as follows:

- Seed Parent and Pollen Parent each source their record data from both those fields across all collection and reference records.
- Seed Grandparents and Pollen Grandparents each source from both those fields. Multiple selections can be made one at a time, each appearing on a new line in the Preview box.
- Ancestors sources only from the Ancestors field. Multiple selections can be made, each on a new line.
- Synonyms sources only from the Synonyms field. Multiple selections can be made, each on a new line.

## Undo and Clear Buttons

Use the Undo text button to remove the last entry in the preview box — this also removes any associated entry added to a user list during this build session. Undo can be applied in succession. Tap the Clear text button to clear the entire Preview box but note this does not remove any entries added to user lists.

## Completing the Build

As you build the name it appears in the Preview box. When the completed name appears in the Preview box, tap Apply to transfer it to the field. Tapping Cancel closes the dialog and removes any entries from the Preview box.

Automatic capitalisation correction is applied when adding a new entry to a user list — genus names are corrected to begin with an uppercase letter, species names to begin with lowercase, and grex and cultivar/clonal names have all words capitalised.

**Example build:**

To build the Seed Parent (*Cattleya dowiana* **var.** *aurea* × *Rhyncholaelia digbyana* **f.** *fimbripetala*)

1. Tap the build icon to the right of the Seed Parent field to open the build dialog.
2. Tap the opening parenthesis button (

3. Tap the Build From List button and begin to type cattleya in the search box until Cattleya appears in the list then tap Cattleya in the list.
4. Tap the Build From List button and begin to type dowiana in the search box until dowiana appears in the list then tap dowiana in the list.
5. Tap the var. button
6. Tap the Build From List button and begin to type aurea in the search box until aurea appears in the list then tap aurea in the list.
7. Tap the × button
8. Tap the Build From List button and begin to type rhyncholaelia in the search box until Rhyncholaelia appears in the list then tap Rhyncholaelia in the list.
9. Tap the Build From List button and begin to type digbyana in the search box until digbyana appears in the list then tap digbyana in the list.
10. Tap the f. button
11. Tap the Build From List button and begin to type fimbripetala in the search box until fimbripetala appears in the list then tap fimbripetala in the list.
12. Tap the closing parenthesis button )
13. Tap the Apply button at the bottom right of the dialog to apply the name to the Seed Parent field.

## Optional Section Builder Dialog

The Section Builder dialog is accessed via the Use Builder text button in the Section dropdown dialog. It sources data from the Section user list only and works similarly to the Name Builder with some differences.

- The dialog shows a Preview box with Undo and Clear buttons, and buttons for subsect., New Line, Build From List, Cancel and Apply.

To use the dialog:

1. Tap Build From List and select or add your section name. It appears in the Preview box in italics and is added to the section user list.
2. To add an optional subsection, tap the subsect. button to add the prefix, then repeat the procedure to select or add the subsection name.
3. You can optionally add a percentage for each line where you want to add multiple section lines in the case where you want to assign what percentage of each section applies to the current plant record. One you are at the end of an entered line tap the % button and a dialog will show then enter your percentage (without the % symbol) with up to two decimal places then tap the Add button. No need to enter trailing zeroes (entering 12.5 will display as

12.50%) and no need to enter decimals for whole numbers (entering 25 will display as 25.00%). Your percentage will now show at the end of the line. Repeat this for each section line you add.

4. To add further entries, tap New Line first, then repeat the above steps for each additional section name. An orange static cursor will show at the beginning of a new line to confirm selection and will vanish when data added to the new line or if the new line is undone.
5. Tap Apply to copy the content to the Section field.

*Note: The subsect. and New Line buttons are greyed out when the Preview box is empty or at the beginning of a new line. The percentage button is also greyed out if the Preview box or a new line is empty or if a percentage has already been added to a line. A section name must be entered per line before these buttons are enabled.*

# Choose Parent Records

The Choose Parent Records feature is designed specifically for orchid breeders who maintain records of their parent plants in Orchid Manager. It allows you to select two existing collection records — one as the Seed Parent and one as the Pollen Parent — and automatically transfer their assembled names into the Seed Parent and Pollen Parent fields of the currently viewed target plant record. The transferred names include correct italic and bold formatting and, where the Include Parents checkbox is ticked in the picker dialog, include the source plant's own parent names in parentheses.

Adding parent records to a plant using Choose Parent Records is mandatory for the purposes of constructing the lineage tree. See Lineage Feature.

For breeders it is recommended though not essential when adding plant records for your collection to the app collection records to enter your plants starting with the oldest plants in your collection to the newest. This helps to keep the flow of plant numbers from lowest to highest also being from oldest to newest.

## Who This Feature Is For

This feature is intended for breeders who have records for their parent plants already entered in their Orchid Manager collection. It is not suitable for entering parent names from external sources or from memory — for those situations, use the Name Builder (the build icon to the right of the Seed Parent and Pollen Parent fields) or type directly into the fields using * markers to surround **italic* text and # markers to surround #**bold**# text.

The feature is particularly powerful when crossing complex hybrids, as the lineage of each parent — including their own parent names — is carried through automatically into the target record's parent fields. This means the grandparent information is implicitly captured within the parentheses of the parent names, without needing to be entered separately.

## Recording Externally Sourced Seeds or Pollen

When seeds or pollen have been obtained from an external source such as another breeder or collector, the parent plant that produced them is not part of your active collection. To record it as a parent, create a collection record representing that parent plant with whatever information is known — genus, species or grex name, cultivar name, source breeder name in the acquisition notes, and any other relevant details. Also note in the Record Type field as External Seed/Pollen parent. Archive the record immediately after creating it since the plant itself is not physically in your collection.

The Choose Parent Records feature includes archived records for selection in both the Seed Parent and Pollen Parent picker lists, so the externally sourced parent plant can be selected and assigned in the normal way. The Seed Parent and Pollen Parent fields of the current plant will then contain the correctly formatted botanical name of the external parent, and a Choose Parent Records procedure entry will be created as normal.

As an added benefit, the external parent plant will appear as a node in the lineage tree with an amber ARCHIVED badge, clearly indicating that the plant is recorded but not part of your active collection.

## Recording Parents Plants No Longer in your Possession

If a parent plant is no longer in your possession due to it dying or being sold etc. and you do not have a collection record entered and archived then add a collection record for that plant and archive it. The plant can now be selected as a parent.

## Why Grandparent Fields Are Not Populated

The Grandparent fields (Seed Grandparents and Pollen Grandparents) are not populated by this feature. This is intentional. The Grandparent fields are intended to hold data entered manually using the Name Builder, and their content is expected to be complete and consistently formatted.

When breeders enter parent names into their collection records, the Seed Parent and Pollen Parent fields sometimes contain only partial names — for example just a grex name without the full genus, or a cultivar name without a parent lineage. Using incomplete source parent field data as grandparent entries in the target record would produce inaccurate or misleading grandparent information.

Instead, when the Include Parents checkbox is ticked in the picker dialog, the full assembled name of each source record — including that record's own parent names where they exist — is transferred to the target's parent fields. This means the grandparent lineage is naturally embedded within the parentheses of the target's parent names. For example:

*Rlc.* California Girl (*C.* Horace × *Rlc.* Nacouchee)

In this example if the above is selected as a parent the names within the parentheses — C. Horace and Rlc. Nacouchee — effectively serve as the grandparents of the new cross, captured implicitly within the parent name itself. No separate grandparent field entry is required.

## Accessing the Feature

Choose Parent Records is available from the three dot menu at the top right of the Collection detail screen, but **only when the Identification tab is the currently**

**selected tab**. It is not available on any other tab. It is not available on Reference records.

The feature is available regardless of whether the target record is active or archived — you can add parent records to an archived plant record if needed or choose an archived record as a parent.

## The Choose Parent Records Procedure

### Step 1 — Opening Dialog

Tapping Choose Parent Records from the three dot menu opens an initial confirmation dialog asking:

**"Do the seed and pollen parents for this plant have their own records in your Orchid Manager collection?"**

This dialog also advises that the feature searches all collection records including archived records, so you can select a parent plant that is no longer in your active collection.

Three options are available:

- **Yes** — proceeds to the Seed Parent picker.
- **No** — closes the dialog with no changes made.
- **Cancel** — closes the dialog with no changes made.

### Step 2 — Choose the Seed Parent Record

The Seed Parent picker dialog opens showing a scrollable list of all collection records — both active and archived — except the target record itself. Each entry in the list shows the Plant # and the assembled name of that record with correct italic and bold formatting.

Two options are available to help locate the desired record:

- **Scrollable list** — browse the full list of records. Tap any entry to select it.
- **Plant # entry field** — type a Plant # directly into the field at the top of the dialog. The list filters to show only the matching record, which you can then tap to select.

An <u>Include Parents</u> checkbox appears below the Plant # entry field, ticked by default. This checkbox controls whether the assembled names shown in the list include or exclude parent names. As you tick or untick the checkbox the entire list updates live so you can see exactly how each name will appear in the target field before making your selection.

- **Ticked** — the assembled name shown for each record includes that record's own parent names in parentheses where they exist.

- **Unticked** — the assembled name shown excludes parent names. For a hybrid with a grex name this shows just the genus and grex. For a species this shows just the genus, species and other associated ranks.

A Cancel button is available at the bottom of the dialog. Tapping Cancel at any point during the procedure closes the feature with no changes made to the target record.

### Step 3 — Confirm the Seed Parent Selection

After tapping a record in the Seed Parent picker a confirmation dialog appears showing:

- "Use this record as the Seed Parent?"
- The Plant # of the selected record
- The assembled name as it will be written to the Seed Parent field, rendered with correct italics and bold, reflecting the current Include Parents checkbox state

Three buttons are available:

- **Confirm** — accepts the selection and proceeds to the Pollen Parent picker.
- **Back** — returns to the Seed Parent picker list so you can make a different selection.
- **Cancel** — closes the entire feature with no changes made.

### Step 4 — Choose the Pollen Parent Record

After tapping Confirm for the Seed Parent the Pollen Parent picker dialog opens and works identically to the Seed Parent picker with one difference — the record chosen as the Seed Parent is included in the list. This allows a self-cross to be recorded if desired, where the same plant is used as both the seed and pollen parent.

The Pollen Parent picker has its own independent Include Parents checkbox defaulting to ticked. This means you can choose to include parents from the Seed Parent source but exclude them from the Pollen Parent source, or vice versa, depending on what is most appropriate for the cross being recorded.

### Step 5 — Confirm the Pollen Parent Selection

After tapping a record in the Pollen Parent picker a confirmation dialog appears showing the same information as the Seed Parent confirmation — the Plant # and rendered assembled name as it will appear in the field.

- **Confirm** — accepts the selection and proceeds.
- **Back** — returns to the Pollen Parent picker.
- **Cancel** — closes the entire feature with no changes made.

### Step 6 — Overwrite Warning (if applicable)

If either the Seed Parent or Pollen Parent field of the target record already contains data, a warning dialog appears before any changes are made:

**"The Seed Parent and/or Pollen Parent fields already contain data. Do you want to overwrite them?"**

- **Overwrite** — proceeds to write the new parent names to the fields, replacing any existing data.
- **Cancel** — closes the feature with no changes made. The existing field data is preserved.

If both parent fields are empty this step is skipped and the feature proceeds directly to writing the results.

### Step 7 — Results

Once confirmed, the following actions occur automatically:

1. The assembled name of the chosen Seed Parent source record is written to the Seed Parent field of the target record, with correct italic and bold markers applied.
2. The assembled name of the chosen Pollen Parent source record is written to the Pollen Parent field of the target record.
3. A "Parents added" confirmation message briefly appears on screen.
4. A procedure record is automatically created for the target record with today's date and the description: "Choose Parent Records: Plant #X assigned as Seed Parent and Plant #Y assigned as Pollen Parent" — where X and Y are the plant numbers of the chosen source parent records. This gives the breeder a permanent dated audit trail of exactly which source plants were used.
5. A "Procedure Added" confirmation message briefly appears on screen.

*Tip: To find the procedure record for which parents were added use the procedures filter on the Procedures Done tab – tick the Contains text checkbox and enter either seed or choose into the Enter text to match box and tap the Apply filter button.*

## Examples

In all examples below the target assembled name shown assumes the Include parents in assembled name checkbox on the target record is ticked. *Note the Include parents in assembled name checkbox only shows above the Seed Parent field after the field contains data and defaults to ticked.*

### Example 1 — Species Cross

Scenario: You are creating a new record for a cross between two pure species plants. Both parent plants have their own collection records.

Source records:

- **Plant #5 (Seed Parent source):** Genus: *Cattleya*. Species: *labiata*. No parent data entered. Assembled name: *Cattleya labiata*

- **Plant #9 (Pollen Parent source):** Genus: *Cattleya*. Species: *dowiana*. No parent data entered. Assembled name: *Cattleya dowiana*

With the Include Parents checkbox ticked for both pickers, the target record receives:

- **Seed Parent field:** *Cattleya labiata*
- **Pollen Parent field:** *Cattleya dowiana*

Because neither source record has any parent data, no parentheses are added — the name appears as a clean species name. The Include Parents checkbox in this case makes no difference.

Target assembled name (assuming a New Grex name has not yet been assigned and Genus is Cattleya):

*Cattleya* (*Cattleya labiata* × *Cattleya dowiana*)

### Example 2 — Complex Hybrid Cross with Parents Included

Scenario: You are creating a new record for a cross between two complex hybrid plants, both of which have their own collection records with parent data entered.

Source records:

- **Plant #2 (Seed Parent source):** Genus: *Rlc.*. Grex: California Girl. Seed Parent field: *C.* Horace. Pollen Parent field: *Rlc.* Nacouchee. Assembled name: *Rlc.* California Girl (*C.* Horace × *Rlc.* Nacouchee)
- **Plant #8 (Pollen Parent source):** Genus: *Rhyncholaeliocattleya*. No grex. Seed Parent field: (*Rlc.* Samantha Duncan × *C.* Chief Gem). Pollen Parent field: *C.* Dal's Good One 'Janelle' AM/AOC. Assembled name: *Rhyncholaeliocattleya* ((*Rlc.* Samantha Duncan × *C.* Chief Gem) × *C.* Dal's Good One 'Janelle' AM/AOC)

With the Include Parents checkbox ticked for both pickers, the target record receives:

- **Seed Parent field:** *Rlc.* California Girl (*C.* Horace × *Rlc.* Nacouchee)
- **Pollen Parent field:** *Rhyncholaeliocattleya* ((*Rlc.* Samantha Duncan × *C.* Chief Gem) × *C.* Dal's Good One 'Janelle' AM/AOC)

Target assembled name:

*Rlc.* New Grex (*Rlc.* California Girl (*C.* Horace × *Rlc.* Nacouchee) × *Rhyncholaeliocattleya* ((*Rlc.* Samantha Duncan × *C.* Chief Gem) × *C.* Dal's Good One 'Janelle' AM/AOC))

The grandparent lineage of both parents is captured implicitly within the parentheses of each parent name — no separate grandparent field entry is needed. New Grex is optional in this example.

### Example 3 — Include Parents Unticked for Seed Parent

Using the same source records as Example 2, but with the Include Parents checkbox unticked for the Seed Parent picker and ticked for the Pollen Parent picker:

- **Seed Parent field receives:** *Rlc.* California Girl
- **Pollen Parent field receives:** *Rhyncholaeliocattleya* ((*Rlc.* Samantha Duncan × *C.* Chief Gem) × *C.* Dal's Good One 'Janelle' AM/AOC)

Target assembled name:

*Rlc.* New Grex (*Rlc.* California Girl × *Rhyncholaeliocattleya* ((*Rlc.* Samantha Duncan × *C.* Chief Gem) × *C.* Dal's Good One 'Janelle' AM/AOC))

New Grex is optional in this example.

## Further Notes

- The feature transfers whatever is stored in the source record's parent fields as-is, including any parentheses already present in those fields. It does not validate or correct the source data.
- Archived records are included in both picker lists. This means you can select a parent plant that has since died, been sold or been archived for any other reason.
- The Grandparent fields of the target record are never touched by this feature regardless of what data the source records contain.
- The feature can be used on an archived target record — the target record does not need to be active. A source record can also be an archived record.
- Initial and subsequent use of this feature will overwrite whatever is currently in the Seed Parent and Pollen Parent fields of the target record, after showing the overwrite warning if data is already present. If you wish to retain existing field data, tap Cancel at the overwrite warning step.
- The procedure record is created at completion. If your initial use of Choose Parent Records was entered in error such as if you chose the wrong parents or you did not make the correct include parents choice then do the Choose Parent Records again with the correct selections and the initial procedure record will be replaced with a new procedure record.

# Lineage Feature

The Lineage feature allows orchid breeders to view a visual family tree showing the complete ancestry of any plant in their collection. The tree traces the breeding history of a plant backwards through as many generations as have been recorded, displaying each ancestor as a card with its plant number, primary image and full botanical name.

## Who This Feature Is For

The Lineage feature is designed for breeders who use Orchid Manager to record both the plants they breed and the parent plants used to create them. It is most useful when a breeder has a collection that spans multiple generations of crosses, allowing them to see at a glance exactly which plants contributed to creating any particular plant in their collection.

The feature requires that parent plants have their own collection records in Orchid Manager, and that parents have been assigned using the Choose Parent Records feature. Parents entered directly into the Seed Parent or Pollen Parent fields by typing, or assigned using the Name Builder, will not appear in the lineage tree. Only parents assigned through the Choose Parent Records procedure are used to build the tree. Grandparents will also appear in the tree if the parent plants were also assigned parents using the Choose Parent Records feature and the same goes for plants further back in the lineage which each have a collection record. The tree branch will stop when it reaches a plant that has no parent assigned using the Choose Parent Records feature and will include that plant but will go no further.

## Requirements

- **Collection records required** — both the plant being viewed and its ancestors where possible must have their own records in the Orchid Manager collection. A plant record must have parent records assigned using the Choose Parent Records feature as a minimum.
- **Choose Parent Records procedure required** — parents must be assigned using the Choose Parent Records feature accessed from the three dot menu on the Identification tab. Parents assigned any other way will not appear in the tree.
- **Available on collection records only** — the Lineage feature is not available on Reference records.

## Accessing the Lineage Feature

The Lineage feature is accessed from the **three dot menu** at the top right of a collection plant's detail screen. It is only visible when the **Identification tab** is the currently selected tab. It is not shown on any other tab.

The menu item **View Lineage** will be **greyed out and not tappable** if the currently viewed plant does not have a Choose Parent Records procedure entry which is created automatically when using the Choose Parent Records feature. When the View Lineage is greyed out it means the plant has no parents recorded via the Choose Parent Records feature and therefore has no lineage tree to display. The menu item becomes active as soon as a Choose Parent Records procedure entry exists for the plant.

The Choose Parent Records procedure entry is added to the Procedures Done records which can be found in the Procedures Done tab for the plant. This is automatically added when completing the Choose Parent Records feature. A procedure record will display the date it was added and show the following in the procedure box: "Choose Parent Records: Plant #X assigned as Seed Parent and Plant #Y assigned as Pollen Parent" — where X and Y are the plant numbers of the chosen source parent records.

The Lineage feature is available on both active and archived plant records.

## The Lineage Tree

### Tree Structure

The tree is displayed as a top-down diagram. The plant you are currently viewing appears at the top of the tree in a blue card. Its parents appear below it, connected by lines. Their parents appear below them, and so on going back through the generations.

The left branch at each level always shows the Seed Parent and the right branch always shows the Pollen Parent.

### How the Tree is Built

The tree works by looking at the Choose Parent Records history for each plant in the procedure records. When a plant has a Choose Parent Records procedure entry, the tree looks up the two parent plants and shows them above it, then checks if those parent plants also have a Choose Parent Records entry, and so on going back through the generations. The tree stops going further back when it reaches a plant that has no Choose Parent Records entry — but that plant is still shown in the tree. Think of it like climbing a family tree — you keep going back through the generations until you reach someone whose own parents are not recorded.

There is no limit to the number of generations the tree can display. The tree will go back as many generations as Choose Parent Records entries exist in the chain.

### Node Cards

Each plant in the tree is displayed as a rectangular card which can grow taller to fit long names. If a card needs to grow in height then the whole row of cards for a generation will also grow to the same height to maintain a balance. Each card contains the following information:

- **Plant number** — shown at the top left of the card. The current plant shows "Plant #X (current)".
- **Primary image** — the plant's primary image thumbnail is shown on the left side of the card where one exists. If no primary image has been assigned to the plant the image area is left blank.
- **Full botanical name** — the complete assembled name of the plant is shown to the right of the image, including genus, species or grex, cultivar name, awards and parent names where applicable. The name is rendered with correct italic and bold formatting. If the name is too long to fit in the card it is truncated with an ellipsis (…).
- **ARCHIVED badge** — if the plant is archived an amber coloured ARCHIVED badge is shown at the top of the card so the user is immediately aware of the plant's archived status.
- **The Include parents in assembled name** checkbox which appears above the Seed Parent field in a plant record also controls whether parents are included in a plant name in a node card.

### Current Plant Card

The card for the plant currently being viewed is displayed in blue to distinguish it from all other cards in the tree. It appears at the top of the tree and is not tappable since you are already viewing that plant's record.

### Ancestor Cards

All other cards in the tree represent ancestor plants. These cards have a neutral background colour and are tappable. Tapping any ancestor card navigates directly to that plant's detail screen so you can view its full record. After viewing the record tap the device back button or the back arrow at the top of the detail screen to return to the lineage tree.

## Archived Plants in the Tree

Archived plants are fully supported in the lineage tree. An archived plant can appear as an ancestor node in the tree and will be shown with an amber ARCHIVED badge on its card. Tapping an archived ancestor card navigates to that plant's detail screen in the same way as an active plant.

An archived plant can also display its own lineage tree. If an archived plant has a Choose Parent Records procedure entry the View Lineage option will be available in its three dot menu on the Identification tab, and its lineage tree will be displayed in exactly the same way as for an active plant.

When the lineage screen opens the archive filter is automatically set to show all records — both active and archived — so that all ancestor plants are accessible for navigation regardless of their archive status. When you exit the lineage screen the archive filter is automatically restored to whatever setting was active before you opened the lineage screen. For example if you were viewing active records only before opening the tree you will return to active records only when you close it.

*Note: The archive filter is restored when you exit the lineage screen using either the back arrow at the top left of the screen or the device back button. If you tap an ancestor card and navigate to that plant's detail screen the archive filter remains set to all records until you eventually exit the lineage screen itself.*

## Navigating the Tree

### Scrolling and Zooming

The lineage tree supports both panning and zooming so you can navigate large trees with many generations:

- **Pan** — drag one finger across the screen to move around the tree in any direction.
- **Zoom in** — pinch outwards with two fingers to zoom in to the tree for a closer view of individual cards. Text in the cards gets larger as you zoom in.
- **Zoom out** — pinch inwards with two fingers to zoom out to see more of the tree at once.

The tree when opened displays the full tree which will look small so zoom in as required to view details. If using a phone or tablet rotate the device to landscape to best display the tree. It also has a dynamic minimum zoom limit that automatically adjusts to the size of the tree — you can always zoom out enough to see the complete tree but no further. The maximum zoom limit allows you to zoom in for a closer look at individual cards. Panning is also limited so the tree cannot be dragged completely off screen but note some areas where no cards or connectors are visible will still display as blank.

### Navigating to a Plant Record

Tapping any ancestor card in the tree navigates directly to that plant's detail screen. This works for both active and archived plants. After viewing the plant's record tap the device back button or the back arrow at the top of the detail screen to return to the lineage tree. The current plant (top of the tree) is not navigable as you are already at that plant record when opening the tree.

### Exiting the Lineage Screen

Tap the back arrow at the top left of the lineage screen or the device back button to exit the lineage screen and return to the detail screen of the plant whose lineage you were viewing. The archive filter is restored to its previous setting at this point.

## Share Lineage

The Share Lineage feature generates a high quality image of the complete lineage tree for the currently viewed plant and provides options to save to folder, share or open it. The image includes a header showing the report title, plant number, My Reference (if recorded) and the full botanical name of the plant, the complete lineage tree with all ancestor cards, images and formatting.

Share Lineage is accessed from the **three dot menu (⋮ )** at the top right of the collection records detail screen when the **Identification tab** is selected. It appears alongside Choose Parent Records and View Lineage and is greyed out when no Choose Parent Records procedure entry exists for the plant — the same condition that greys out View Lineage.

### Generating the Lineage Image Report

When Share Lineage is tapped a dialog immediately appears showing "Generating lineage image, please wait..." while the image is being prepared. The image is generated in the background and the dialog updates automatically when generation is complete. Generation time depends on the size of the tree and the number of ancestor records — small trees of a few generations are near-instant while large trees spanning five or more generations may take a few seconds.

The generated image is a high quality JPEG file. The image size scales automatically to fit the complete tree — a small tree produces a compact image while a large tree with many generations produces a larger image. The image is always sharp and clear regardless of tree size.

### Image Options Dialog

Once the image has been generated a dialog appears with the following options:

- **Save to Folder** — saves the image to a folder on your device. Tapping this option opens the recent folders dialog showing previously used folders. Select a recent folder or tap Choose a Folder to browse to a new location. The image is saved as a JPEG file named Lineage_Plant_#X_[timestamp].jpg.
- **Share** — opens the Android share sheet allowing you to send the image via email, messaging apps, cloud storage or any other app installed on your device that supports image sharing. This is the recommended way to send the lineage image to another person or to yourself for viewing on a computer.
- **Open Image** — opens the image in your device's default image viewer app. or you can choose which app when you first open the image and select Just Once or Always for your choice of app. Since the lineage image can be very large for trees with many generations, an external image viewer is used rather than an internal viewer — this allows the image to be viewed at full resolution with smooth zooming and panning regardless of image size. The first time you tap Open Image you will be asked which app to use and given the option to set it as the default for future use.

- **Close** — closes the dialog. The generated image file remains in the app's cache and can be regenerated at any time by tapping Share Lineage again.

The dialog remains open after tapping Save to Folder, Share or Open Image so you can use multiple options in the same session — for example save to a folder and then also share via email before closing. The dialog must be closed when you are done before you can exit the screen.

### Image Content

The generated image contains:

- **Header** — "Lineage Image Report — Created on [date]" in bold, followed by the plant number and My Reference value if recorded, followed by the full botanical name of the current plant in dark green with correct italic and bold formatting.
- **Lineage tree** — the complete tree showing all ancestor plants with their plant numbers, primary image thumbnails, full botanical names and ARCHIVED badges where applicable. The layout and appearance matches the on-screen lineage tree.

*Note: The Share Lineage feature is only available on Collection records Identification tab. It is not available on Reference records. The image is generated from the same Choose Parent Records procedure chain that drives the on-screen lineage tree — only parents assigned using the Choose Parent Records feature appear in the image.*

## Device and Orientation Support

- **Phone** — the lineage screen supports both portrait and landscape orientations on phones. The rest of the app except full screen media viewing remains locked to portrait on phones but the lineage screen unlocks orientation so the wider tree can be viewed more comfortably in landscape. Orientation returns to portrait automatically when you exit the lineage screen.
- **Tablet** — portrait and landscape are both available on tablets throughout the app including the lineage screen.
- **Chromebook** — the app runs in a resizable window on Chromebooks and the lineage screen behaves the same as on tablets.

## Performance Notes

The lineage tree loads all relevant plant records and their primary images when it first opens. For small trees of a few generations this is near-instant. For large trees spanning five or more generations with many ancestor plants the tree may take a moment to load fully. Images are loaded as small thumbnails to keep memory usage low.

Very large trees with many visible nodes may show slight hesitation when panning at maximum zoom-out. Zooming in slightly improves panning smoothness by reducing the number of cards drawn at once.

*Note: The lineage tree is built entirely from Choose Parent Records procedure entries. If you reassign the parents of a plant using Choose Parent Records a second time the previous procedure record is automatically replaced with the new one and the tree will reflect the updated parents the next time it is opened.*

*Also note: A Choose Parent Records procedure record cannot be deleted by the normal deletion means of the trashcan icon on the procedure records. If you inadvertently add parents to the incorrect source record and really need to delete the incorrectly added Choose Parent Records procedure record from the source plant record just long press on the procedure record and a dialog will appear allowing you to delete that procedure record.*

# Adding a Plant New Record

New collection, reference and contacts records are added from the relevant List screen. For example to add a new record to the collection or reference screens:

1. Tap the + button at the bottom right of the List screen.
2. A dialog will appear asking you to confirm. Tap Yes to proceed.
3. You are taken to a new blank record in the Detail screen, ready to fill in. This screen where you see the individual fields and tabs is known as the Collection Detail Screen.

The Detail screen opens on the Identification tab, showing a scrollable list of fields. Tap into any field to enter data using the dropdown or keyboard. Not all fields require data. Not all dropdowns are preloaded with data — those that have none will accumulate record data as you enter more records. You can also pre-enter data into the user lists a dropdown uses see Using Dropdown User Lists. Tabs can be accessed by swiping left or right or tapping a tab title. Most tabs are scrollable.

Each new record is automatically assigned a Plant Number starting at Plant #1. Once two or more records exist you can navigate between them using the left and right arrow buttons at the top of the Detail screen.

As you enter data in the naming fields the assembled name begins to appear at the top of the screen.

**Warning: When filling in a field you must tap out of the field into another field, change tabs, or navigate elsewhere in the app, for the field contents to be automatically saved. Do not close the app immediately after entering or updating a field or your entries or changes will not be saved.**

## Entering a Species Record

Fill in the applicable Genus, Section, Species, Subspecies, Variety, Form and Cultivar/Clonal Name fields as applicable. Subfamily, Tribe and Subtribe fields will auto-populate (N/A will show if not applicable) once a genus is entered if a matching entry is found in the Lookup Table see Lookup Table. The assembled name is progressively built as you enter these fields. Italics will be used in the assembled name and fields where applicable. Subspecies (**subsp.**), Variety (**var.**) and Form (**f.**) prefixes will show as abbreviations in bold in the assembled name for data used in those fields. Cultivar/Clonal Name will be displayed in single quotes in the assembled name — you can optionally include single quotes in the field but they will appear in the assembled name regardless.

For example, entering:

- *Dendrobium* in the Genus field
- *bigibbum* in the Species field

- *compactum* in the Variety field
- White Knight in the Cultivar/Clonal Name field

The assembled name at the top of the screen and throughout the app will appear as: *Dendrobium bigibbum* **var.** *compactum* 'White Knight'

## Entering a Hybrid Record

Enter fields in the following order for a hybrid:

1. Fill in the **Genus** field. Subfamily, Tribe and Subtribe fields will auto-populate. If the genus is a nothogenus, add the × prefix using the checkbox in the Genus dropdown dialog. Do not add the × prefix when using a genus abbreviation.
2. Fill in the **Section** field if desired. A subsection name can also be included. See Section Field and Optional Section Builder Dialog for details.
3. Fill in the **Species** field if applicable. Add a × prefix for a nothospecies using the checkbox in the species dropdown dialog.
4. Fill in **Subspecies**, **Variety** and **Form** fields if applicable, with notho prefixes as needed.
5. Enter a **Grex** name if applicable.
6. Enter **Seed Parent** and **Pollen Parent** using the build feature (tap the build icon to the right of the field). If you do not wish to use the build feature you can enter data directly into the field — surround any text to be italicised with asterisks ***italics*** or surround text to be bolded with hashes **#bold#**. When you tap into a field the formatting symbols will be visible while the field has focus; tap out of the field to see the formatting applied. Note that the Trade Name field can also use these bold and italic markers but does not include a build icon. See Using the Name Builder for further details. Seed Parent and Pollen Parent fields can also be added using the Choose Parent Records feature but only if you have already entered collection records for the parent plants.

It is your choice whether to use complete genus names or their abbreviations in the Parent fields — both are available in the genus dropdown list and the name builder. It is recommended to not use the × nothogenus prefix if using an abbreviated genus name.

When the Seed Parent and/or Pollen Parent fields contain data, the **Include parents in assembled name** checkbox appears above the Seed Parent field, ticked by default. The following examples assume this checkbox is ticked.

The following examples show the entered field data and assembled names produced for different hybrid types. You can also select the hybrid type in the Hybrid Type field if desired:

**Example — Primary Hybrid**

- *Dendrobium* (Genus)
- Pink Glow (Grex)
- *D. glomeratum* (Seed Parent - built using the Name Builder)
- *D. lawsii* (Pollen Parent - built using the Name Builder)

**Assembled name:** *Dendrobium* Pink Glow (*D. glomeratum* × *D. lawsii*)

**Example — Complex Hybrid**

- *Vandachostylis* (Genus)
- Five Friendships (Grex)
- *Vandachostylis* Seng (Seed Parent - built using the Name Builder)
- *Vandachostylis* Prapin (Pollen Parent - built using the Name Builder)

**Assembled name:** *Vandachostylis* Five Friendships (*Vandachostylis* Seng × *Vandachostylis* Prapin)

**Example — Natural Hybrid**

- *Cattleya* (Genus)
- ×*hardyana* (Species — use the × checkbox in the species dropdown prior to name selection)

**Assembled name:** *Cattleya* ×*hardyana*

**Example — Intraspecific Hybrid (Line-bred Species)**

- *Phalaenopsis* (Genus)
- *bellina* (Species)
- Sibling Cross (× sib) (Cross Method)
- 'Krull's Perfection' AOS/FCC (Seed Parent — built using the Name Builder)
- 'Krull's Green Prince' AOS/HCC (Pollen Parent — built using the Name Builder)

**Assembled name:** *Phalaenopsis bellina* × sib ('Krull's Perfection' AOS/FCC × 'Krull's Green Prince' AOS/HCC)

**Example — Intersectional Natural Hybrid**

- *Dendrobium* (Genus)
- ×*superbiens* (Species — use the × checkbox in the species dropdown prior to name selection)
- *Den. bigibbum* (Seed Parent - built using the Name Builder)
- *Den. discolor* (Pollen Parent - built using the Name Builder)

**Assembled name:** *Dendrobium* ×*superbiens* (*Den. bigibbum* × *Den. discolor*)

**Example — Intrasectional Hybrid**

- *Dendrobium* (Genus)

- Bardo Rose (Grex)
- *Den. falcorostrum* (Seed Parent - built using the Name Builder)
- *Den. kingianum* (Pollen Parent - built using the Name Builder)

**Assembled name:** *Dendrobium* Bardo Rose (*Den. falcorostrum* × *Den. kingianum*)

#### Example — Intersectional Hybrid

- *Dendrobium* (Genus)
- Roy Tokunaga (Grex)
- *Den. atroviolaceum* (Seed Parent - built using the Name Builder)
- *Den.* Caesar (Pollen Parent — built using the Name Builder - Caesar is a grex name not in the app data; type it into Build From List dialog, tap Use, add to Grex list)

**Assembled name:** *Dendrobium* Roy Tokunaga (*Den. atroviolaceum* × *Den.* Caesar)

#### Example — Complex Hybrid

- *Rhyncholaeliocattleya* (Genus)
- (*Cattleya dowiana* **var.** *aurea* × *Rhyncholaelia digbyana* **f.** *fimbripetala*) (Seed Parent — built using the Name Builder)
- (*Cattleya loddigesii* **subsp.** *loddigesii* 'Pink Lace' × *Cattleya labiata* **var.** *amoena*) (Pollen Parent — built using the Name Builder)

**Assembled name:** *Rhyncholaeliocattleya* ((*Cattleya dowiana* **var.** *aurea* × *Rhyncholaelia digbyana* **f.** *fimbripetala*) × (*Cattleya loddigesii* **subsp.** *loddigesii* 'Pink Lace' × *Cattleya labiata* **var.** *amoena*))

#### Example — Intergeneric Hybrid

- *Brassocattleya* (Genus)
- *Brassavola nodosa* **var.** *grandiflora* (Seed Parent - built using the Name Builder)
- *Cattleya dowiana* 'Gold Dragon' (Pollen Parent - built using the Name Builder - Gold Dragon is a cultivar/clonal name name not in the app data; type it into Build From List dialog without quotes, tap Use, add to Cultivar/Clonal Name list)

**Assembled name:** *Brassocattleya* (*Brassavola nodosa* **var.** *grandiflora* × *Cattleya dowiana* 'Gold Dragon')

#### Example — Backcross Hybrid

- *Rhynchonopsis* (Genus)
- Backcross (× bc) (Cross Method)
- *Rhynchonopsis* Dragon Charmy (Seed Parent - built using the Name Builder)
- *Rhynchostylis gigantea* (Pollen Parent - built using the Name Builder)

**Assembled name:** *Rhynchonopsis* × bc (*Rhynchonopsis* Dragon Charmy × *Rhynchostylis gigantea*)

**Example — Outcross Hybrid**

- *Phalaenopsis* (Genus)
- *bellina* (Species)
- Outcross (× oc) (Cross Method)
- 'Star' (Seed Parent — built using the Name Builder - if not in list add via Build From List dialog Use button into Cultivar/Clonal Name list)
- 'Borneo Jungle' (Pollen Parent — built using the Name Builder - same procedure as above)
- Outcross Hybrid (Hybrid Type — optional)

**Assembled name:** *Phalaenopsis bellina* × oc ('Star' × 'Borneo Jungle')

For some hybrids you need to await a new nothogenus and/or grex name so leave the Genus and Grex fields blank until such time those names are assigned if seeking registration else just leave them blank if unknown or unassigned and only the parents will then show in the assembled name. Once a hybrid is registered and assigned a Grex name and/or nothogenus, enter these into the relevant fields. You can then untick the **Include parents in assembled name** checkbox if you no longer wish to show the parent names in the assembled name.

# Procedures Done Records

In the Collection detail screen the Procedures Done tab maintains an audit trail of all maintenance tasks performed and changes and other data assigned to a plant record. Procedure records are created automatically when:

- Maintenance tasks are completed or edited
- Duplicate Record - Propagated Plant option
- Choosing parent records

Each automatically created procedure record for a maintenance task is prefixed with the task name followed by a colon.

A record count of procedure records for the current plant shows beside the heading as Procedures Done (Record count). This count changes when a procedures filter is applied to reflect the filtered record count.

## Adding a Manual Procedure Record

A procedure record can also be manually added if required to record a procedure that falls outside anything already covered by the app.

1. Tap the Add button at the top of the Procedures Done tab.
2. Tap Yes in the confirmation dialog.
3. In the next dialog, select whether the new procedure record is associated with an existing task title. If it is, tick the checkbox for that title. Otherwise leave the default Not associated checkbox ticked.
4. Enter a brief description of the procedure. If a task title is selected the description is automatically prefixed with that title — this prefix is required for the procedures filter to group records by task.
5. Tap the Add button. The new record appears at the top of the procedures list.

You can change the default date and add or edit the description in the procedure box. Records are saved automatically. Editing existing automatically created procedure records is not recommended as the app relies on specific formats for these records.

## Deleting a Single Procedure Record

Tap the trashcan icon beside the procedure record. A confirmation dialog will appear. Tap to confirm deletion.

## Bulk Deleting Procedure Records

Tap the three dot menu while on the Procedures Done tab and select Manage Procedure Records.

In the dialog that opens:

1. Choose whether the deletion applies only to the currently viewed record or to all collection records.
2. Select the procedure records to delete by ticking the appropriate task checkboxes, or tick All Tasks to include all task-related procedures. All current maintenance tasks have a checkbox whether they are currently active or not.
3. Non-maintenance-related procedures (such as propagation records and other manually entered procedures) cannot be bulk deleted, preventing inadvertent deletion of important records.
4. Select a cut-off from the Records older than dropdown — options include 6, 12, 18, 24, 36 or 48 months, or a custom date.
5. Tap Delete and review the confirmation dialog. Tap Delete again to proceed.

**Warning: Deleted procedure records cannot be restored. Create a backup of the app before performing bulk deletions as a precaution against deletion in error.**

The purpose of the bulk delete feature is to manage the accumulation of procedure records for frequently performed tasks such as watering or fertilising, which will generate many records over time. Deleting excessive records is optional — you may retain as many records as desired.

To see how many procedure records exist for a particular task, apply the procedures filter for that task. The record count in the header will show the filtered count. See Procedures Done — Filtering for details.

*Note: A Choose Parent Records procedure record cannot be deleted by the normal deletion means of the trashcan icon on the procedure records. If you inadvertently add parents to the incorrect source record and really need to delete the incorrectly added Choose Parent Records procedure record from the source record just long press on the procedure record and a dialog will appear allowing you to delete that procedure record.*

# Maintenance Tasks

In the Collection detail screen the Maintenance tab shows cards for each maintenance task you have created using the Create Tasks Screen. If a task is activated (checkbox ticked at the top right of the card) the card shows:

- Task name
- Star indicator
- Next due date
- Date last done
- Record interval

The following text button options are available on each activated task card:

### Edit Due Date

Allows you to edit the next due date for the task for this plant record.

### Edit Record Interval

Allows you to edit the record interval for this plant record. The record interval controls how far into the future the due date is set when the task is marked as done. Note this does not change the current due date.

### Edit Date Last Done

Allows you to edit the date last done for this plant record.

### Mark as Done

Marks the task as done and allows you to add optional supplementary notes which are saved in the associated procedure record. Once marked as done the due date is updated according to the record interval for that plant.

When marking a task as done or updating any task information a procedure record is automatically added to the Procedures Done tab.

See Star Indicators for details on what each star colour and state means.

To deactivate an active task, untick the checkbox for that task card. A confirmation dialog will appear. Note that when a task is deactivated all task data except the date last done is reset to default for that card if it is later reactivated. Any existing procedure records for the plant are not deleted by deactivation.

Changes made on this tab apply only to the current plant record. Maintenance tasks can also be updated:

- Individually in the Check All Tasks Screen which lists all maintenance tasks for all plant records and can also be filtered see Check All Tasks Screen - Filtering.
- Across multiple records at once in the Bulk Update Tasks Screen which lists maintenance tasks for all plant records on a per task basis and can also be filtered see Bulk Update Screen – Filtering.

## Create Tasks Screen

The Create Tasks screen is where you create all maintenance tasks for your plants. Tasks created here appear on the Maintenance tab of every collection record and must be activated individually per record (or for all records at creation time).

### Adding a New Task

1. Tap the + button on the Create Tasks screen.
2. Enter a brief task name (e.g. Watering, Light Watering, Misting, Fertilising, Repotting, Cleaning, Pest Control, Fungicide etc.) and the default interval in days. The default interval is 7 days and can be changed here to suit.
3. Tap Save. A confirmation dialog will show the task name and advise that the task name cannot be edited after creation — this ensures data consistency across the app.
4. If any collection records have already been created a second dialog asks whether to activate the task for all existing collection records. Choose Yes to activate for all, or No to activate manually per record. If the task you add is only applicable to a few plants it is best to choose No then go to the collection detail screen maintenance tab for those records you want the task to be active on and tick the checkbox for that task there to be activated for the desired plant and adjust due dates and record intervals as required.

*Note: After adding tasks, any new collection records created subsequently will not have any tasks activated. You must go to the Maintenance tab for each new plant record and activate the desired tasks there.*

### Editing and Deleting Tasks

An existing task can have its default interval edited but not its name, to ensure data consistency. If you want a different name for a task, add a new task with the correct name and delete the old one then activate for all plant records or per plant as applicable.

To delete a task tap the trashcan icon beside it. Deleting a task removes it from all plant records. Any procedure records related to the task are not deleted.

### Record Intervals

The default task interval becomes the record interval for each plant when the task is activated. The record interval can later be changed individually per plant:

- Via the **Edit Record Interval** text button on the Maintenance tab of the plant record.
- Via the **Edit Record Interval** text button on the Check All Tasks screen.
- For multiple records at once via the **Change Record Interval** option in the Bulk Update Tasks screen.

Note that the initial due date for a newly activated task will be today plus the default interval.

# Check All Tasks Screen

The Check All Tasks screen combines all maintenance tasks for all collection records, shown as cards in due date order. Each card displays the Plant Number, My Reference, plant name, primary image thumbnail and the same task options as the Maintenance tab — Edit Due Date, Edit Record Interval, Edit Date Last Done and Mark as Done.

A star indicator appears to the right of the task name on each card. See Star Indicators for details. A star also shows on the Check All Tasks button on the home screen to indicate the most urgent task/s due across all collection records so you can see at a glance what may be due.

When an operation changes the due date for a task (such as Edit Due Date or Mark as Done), you are returned to the top of the card list upon completion. This helps you work through tasks from the top down in due date order as each card moves to its new position after being updated.

See Check All Tasks Screen — Filtering for details on how filtering works on this screen.

See Push Notifications for details on what happens when tapping a notification where you get the option to open a tapped notification to the check all tasks screen.

# Bulk Update Tasks Screen

The Bulk Update Tasks screen allows you to mark a task as done, or change the record interval or due date, for multiple plant records in one operation. A procedure record is created for each plant updated.

## Setting Up a Bulk Update

On the opening screen make the following selections:

- **Task:** Select the task to bulk update from the options created in the Create Tasks screen.
- **Due Date Range:** Defaults to All Dates. Narrow to a specific range if desired — options include Today and Overdue, Overdue, Today, Tomorrow, Next 3 Days, Next 7 Days, This Week, This Month, Single Date and Custom Date Range.
- **Record Interval:** Defaults to Any Record Interval. Limit to a specific interval if desired.

Tap the Find Tasks button. A list of matching plant record cards appears. Each card has a checkbox (ticked by default). Use the Select All or Deselect All text buttons above the cards as needed. The Expand text button enlarges the card list to full screen; tap Collapse to return.

You can further narrow the selection by applying a filter or sort. See Bulk Update Screen – Filtering for details.

## Applying the Bulk Update

Tap the Apply Bulk Update button. A dialog will ask which update type to perform:

- **Mark Task as Done:** Tap Proceed. Enter the date the task was done (defaults to today) and optional notes to add to each automatically created procedure record. Tap Continue then confirm with Yes, I'm Sure. All selected plant records will have their task due dates updated according to each plant's record interval.
- **Change Record Interval:** Tap Proceed. Enter the new interval. Confirm with Yes, I'm Sure. Note that the new interval takes effect from the next update — the current due date remains unchanged.
- **Change Due Date:** Tap Proceed. Enter a new due date (tomorrow or later only). Confirm with Yes, I'm Sure. All selected plant records will have their due date updated to the new date.

A confirmation message appears when the update is complete. The screen returns to the initial state with no records selected.

## Practical Uses for the Bulk Update Screen

The Bulk Update screen is particularly useful for seasonal adjustments. For example, to change the watering due date for all your Cattleyas and Dendrobiums during winter:

1. Select the Watering task for All Dates and Any Record Interval, then tap Find Tasks.
2. Tap the filter funnel icon and add a condition: Field: Genus, Operator: EQUALS, Value: Cattleya.
3. Tap Add OR Condition and add a second condition: Field: Genus, Operator: EQUALS, Value: Dendrobium.
4. Tap Apply. Only Cattleyas and Dendrobiums will show in the card list.
5. Review the list and untick any exceptions, then tap Apply Bulk Update and select Change Due Date to a date when you think the weather will be warmer.

*Tip: Save the filter using Save Filter/Sort in the three dot menu so you can reload it next season. Note the saved filter is based <u>only on the selected task if the filter is saved within the bulk update screen</u> and if loaded it is locked to that task. If you save the same filter in the collection list screen <u>it will not be task specific</u> and can then also be loaded in the bulk update screen for any currently loaded task.*

See Push Notifications for details on what happens when tapping a notification where you get the option to open a tapped notification to the bulk update screen.

# Filtering, Sorting and Archiving

Orchid Manager provides powerful filtering, sorting and archiving tools to help you find and work with exactly the records you need. Filters narrow the list to records matching your chosen criteria. Sorting controls the order in which records appear. Archiving lets you retire a record from active use while keeping its data intact. All three can be used together where applicable, and filters and sorts can be saved for future use.

Filtering is available on: Collection, Reference, Contacts, Bulk Update, Check All Tasks and the Procedures Done tab within a collection record.

Sorting is available on: Collection, Reference, Contacts and Bulk Update screens.

## Collection Screen — Filtering

The Collection screen filter allows you to narrow your collection list to records matching one or more conditions. Any active filter applied on the Collection list screen also applies when navigating records in the Collection detail screen and when generating reports from that screen.

### Opening the Filter

Tap the funnel icon at the top right of the Collection screen to open the Filter Options dialog. When a filter is active the funnel icon changes colour and filter chips appear at the top of the list showing your active conditions. Each chip has an X button to remove that condition individually.

### Filter Types

Each filter condition begins with a Filter Type selection. There are four filter types available on the Collection screen:

#### *1. Plant Field*

Use this to filter by any field on the plant record such as Genus, Species, Colour, Location and many others. Not all fields are available for filtering.

To set up a Plant Field filter condition:

1. Select Plant Field from the Filter Type dropdown.
2. Select the field you wish to filter on from the Field dropdown.
3. Select an operator from the Operator dropdown.
4. Enter or select a value.

The available operators are:

- **EQUALS** — the field must exactly match the value.
- **NOT_EQUALS** — the field must not match the value.

- **GREATER_THAN** — the field value must be greater than the entered value (useful for numeric and date fields).
- **LESS_THAN** — the field value must be less than the entered value.
- **CONTAINS** — the field must contain the entered text anywhere within it.
- **DOES_NOT_CONTAIN** — the field must not contain the entered text.
- **IS_BLANK** — the field must be empty. No value entry is required.
- **IS_NOT_BLANK** — the field must contain any value. No value entry is required.

For the value entry you have two options:

- **Value dropdown:** Populated with actual values from your records for the selected field.
- **Text box (Or enter one or multiple values):** Enter one value or multiple values separated by commas. For example entering 3, 6, 9 for the Plant Number field with the EQUALS operator will show plant numbers 3, 6 and 9 when the filter is applied.

### *Special Field Behaviour*

Some field types behave differently in the filter:

- **Notes fields** — the following fields are locked to the CONTAINS operator and only allow text entry: Remarks, Conditions Required, Lighting Notes, Watering Notes, Fertilizing Notes, Propagation Notes, Repotting Notes, Health Care Notes, Seed Grandparents, Pollen Grandparents, Ancestors and Synonyms.
- **Date fields** — fields such as Acquisition Date and Age Date show a calendar icon in the value field. Tap the calendar icon to open a date picker. All operators are available for date fields.
- **Month fields** — when Propagation Months, Repotting Months, Rest Months or Flowering Months is selected, the Operator and Value fields are replaced with a month selector showing All Months and individual month checkboxes (Jan through Dec) in a grid.
- **Seed and Pollen Parent fields** – the entries in the value dropdown will include any bold and italic markers which are used by the field.

### *Example — Plant Field Filter*

**Example — Goal:** Show all plants where Genus is Cattleya or Dendrobium.

Method 1:

1. Tap the funnel icon to open Filter Options.
2. Filter Type: Plant Field. Field: Genus. Operator: EQUALS.
3. In the multiples text box type: Cattleya, Dendrobium.
4. Tap Apply.

Method 2:

1. Tap the funnel icon to open Filter Options.
2. Filter Type: Plant Field. Field: Genus. Operator: EQUALS.
3. Select Cattleya from the Value dropdown.
4. Tap Add OR Condition. In the new condition select Genus in the Field dropdown and Dendrobium in the Value dropdown.
5. Tap Apply.

To filter to a specific plant number or numbers:

1. Filter Type: Plant Field. Field: Plant Number. Operator: EQUALS.
2. In the multiples text box type your desired plant number(s) separated by commas — e.g. 127, 133, 151.
3. Tap Apply.

### *2. Maintenance Task (Due Date)*

Use this filter type to find plants that have a specific maintenance task due within a chosen date range.

1. Select Maintenance Task (Due Date) from the Filter Type dropdown.
2. Under Select Maintenance Tasks tick All Tasks or tick individual tasks. Only your active maintenance tasks are listed.
3. Select a Due Date Range from the dropdown.
4. Tap Apply.

Available date range options: Today and Overdue, Overdue, Today, Tomorrow, Next 3 Days, Next 7 Days, This Week, This Month, Single Date, All Dates and Custom Date Range. Selecting Single Date shows a date picker. Selecting Custom Date Range shows Start Date and End Date pickers.

**Example — Goal:** Find all plants that have a Watering or Fertilising task due in the next 7 days.

1. Filter Type: Maintenance Task (Due Date).
2. Tick Watering and Fertilising.
3. Due Date Range: Next 7 Days.
4. Tap Apply.

### *3. Has Active Maintenance Task*

Use this filter type to find plants that have a specific maintenance task currently activated, regardless of due dates.

1. Select Has Active Maintenance Task from the Filter Type dropdown.
2. Tick All Tasks or tick individual tasks from your active maintenance task list.

3. Tap Apply.

**Example — Goal:** Show all plants that have the Repotting task activated.

1. Filter Type: Has Active Maintenance Task.
2. Tick Repotting.
3. Tap Apply.

If selecting multiple tasks in the dialog the results will return collection records that have any of the selected tasks activated.

### *4. Has Inactive Maintenance Task*

Use this filter type to find plants that have a specific maintenance task currently deactivated, regardless of due dates.

1. Select Has Inactive Maintenance Task from the Filter Type dropdown.
2. Tick All Tasks or tick individual tasks from your active maintenance task list.
3. Tap Apply.

**Example — Goal:** Show all plants that have the Repotting task deactivated.

1. Filter Type: Has Inactive Maintenance Task.
2. Tick Repotting.
3. Tap Apply.

If selecting multiple tasks in the dialog the results will return collection records that have any of the selected tasks deactivated.

### Adding Multiple Conditions

At the bottom of the Filter Options dialog there are two buttons for adding further conditions:

- **Add AND Condition** — adds a condition that must also be true. Use this to narrow results further.
- **Add OR Condition** — adds a condition where either condition can be true. Use this to broaden results.

Each additional condition appears below the previous one and shows AND or OR at the top to indicate how it connects. Each condition has its own trash icon to delete it individually. There is no limit to the number of conditions you can add.

*Note: When using Maintenance Task filter types it is recommended to combine them using AND conditions only. Combining maintenance task conditions with OR may produce unexpected results.*

**Example — Goal:** Show all Cattleya plants located in the Greenhouse.

1. First condition — Filter Type: Plant Field. Field: Genus. Operator: EQUALS. Value: *Cattleya*.
2. Tap Add AND Condition.
3. Second condition — Filter Type: Plant Field. Field: Location. Operator: EQUALS. Value: Greenhouse.
4. Tap Apply.

### Locating a Specific Genus and Species

Because Genus and Species are stored in separate fields, Find/Replace cannot search for a specific genus and species combination in a single search. Three approaches are available:

**Option 1 — Filter only:** Apply a filter with two AND conditions — one for Genus and one for Species.

**Example:** To find all *Dendrobium speciosum* plants:

1. First condition — Field: Genus. Operator: EQUALS. Value: *Dendrobium*.
2. Tap Add AND Condition.
3. Second condition — Field: Species. Operator: EQUALS. Value: *speciosum*.
4. Tap Apply.

**Option 2 — Filter then Find:** Apply a genus filter first to narrow the list, then use Find/Replace to search for the species within the filtered results. See Find/Replace.

**Option 3 — Filter Genus & Species dedicated filter (recommended for inexperienced users):** Use the dedicated Filter Genus & Species option from the three dot menu. See Filter Genus & Species Using Dedicated Filter for full details.

### Archive Filter

The Archive Filter controls whether active records, archived records or all records are shown in the collection screens. It is separate from the Filter Options dialog and is accessed via the three dot menu at the top right of the Collection list screen by simply tapping your desired option to change it from the default setting.

The three options are:

- **Active Only** — only non-archived records are shown. This is the default when the app opens.
- **Archived Only** — only archived records are shown.
- **All Records** — both active and archived records are shown.

The Archive Filter setting is retained while you use the app but resets to Active Only when the app is closed and reopened. It also applies when viewing records in the Collection detail screen and when generating reports. When navigating through records in the detail screen only records matching the current archive filter setting are accessible via the previous and next navigation arrows.

### Saving and Loading Filter and Sort

You can save your current filter and sort settings for reuse. The Save, Load and Clear options are in the three dot menu at the top right of the Collection, Reference and Bulk Update screens. The Archive filter is not included with any saved filter.

- **Save Filter/Sort** — saves the current filter, sort or both. Greyed out if no filter or sort is active.
- **Load Filter/Sort** — opens a list of your saved filter and sort combinations.
- **Clear Filter/Sort** — removes the active filter and sort. Greyed out if nothing is active.

*Note: Some saved filter and sort settings from the Collection screen are also available on the Bulk Update screen, with the exception of any saved filters that include a Has Active Maintenance Task condition — these are not shown on the Bulk Update load list as they are not applicable there. Filters saved on the Check All Tasks screen become available to load on the Collection screen and on the Bulk Update screen provided they select no more than one maintenance task. The reverse is not true — filters saved on the Collection or Bulk Update screens are not available to load on the Check All Tasks screen, since those saves typically carry a sort setting which does not apply there.*

## Reference Screen — Filtering

The Reference screen filter works the same way as the Collection screen filter with the following differences:

- The Filter Type dropdown is not applicable here and is not displayed. Conditions available are Field, Operator, Value and a Value multiples box. There are no maintenance task filter types on the Reference screen.
- The fields available for filtering are the Reference record fields rather than Collection record fields.
- There is no Archive Filter. Reference records cannot be archived.
- Save and Load Filter/Sort is available but is separate from the Collection screen — Reference saved filters and sorts only appear when loading on the Reference screen.

Any active filter and sort applied on the Reference list screen also applies when navigating records in the Reference detail screen and when generating reports from that screen.

For a quicker one-step way to filter by a specific Genus and Species combination, see Filter Genus & Species Using Dedicated Filter.

## Contacts Screen — Filtering

The Contacts screen filter works similarly to the Collection screen Plant Field filter with the following differences:

- Conditions available are Field, Operator, Value and a Value multiples box.
- The fields available for filtering are the Contact record fields.
- Only the Remarks field is locked to the CONTAINS operator. All other text fields use the full set of operators.
- There is no Archive Filter on the Contacts screen.
- Save and Load Filter/Sort is available and is independent from both the Collection and Reference screens.

## Bulk Update Screen — Filtering

The Bulk Update screen filter is only available after you have selected a maintenance task and tapped the Find Tasks button to display the matching plant cards. Once the cards are showing the filter icon becomes available.

The Bulk Update filter works the same as the Collection screen Plant Field filter with the following differences:

- There is no Filter Type dropdown — only Plant Field conditions are available, since a maintenance task has already been selected.
- There is no Archive Filter. Archived records never appear in Bulk Update since archiving a record deactivates all its maintenance tasks.
- Save and Load Filter/Sort is shared with the Collection screen. However any saved filter that includes a Has Active Maintenance Task condition will not appear in the load list on the Bulk Update screen.

### Example 1 — Bulk Update Filter

**Goal:** Perform a bulk watering update for plants in the Greenhouse only.

1. On the Bulk Update screen select the Watering task and set your options. Due Date Range and Record Interval should be left at their default setting if all plants are to be included. If you only want plants that are due for watering today or overdue then select “Today and Overdue” in the Due Date selector.
2. Tap Find Tasks. All plants with an active Watering task that match your other selected options (Due Date Range and Record Interval) if any are shown.
3. Tap the filter icon and add a condition: Field: Location. Operator: EQUALS. Value: Greenhouse.
4. Tap Apply. The cards now show only Greenhouse plants with an active Watering task matching your other selected options. If “Today and Overdue” was selected in the Due Date selector in step 1 then the star indicators for each plant card should now show as red (due today) or flashing red (overdue).

5. Tap the Apply Bulk Update button then select Mark Task as Done and tap Proceed.
6. The next dialog shows today's date as the procedure done date — change this if the task was not done today.
7. Optionally enter notes into the notes field. These notes are added to each procedure record which is automatically added to the Procedures Done tab for each selected plant.
8. Tap Continue. A final confirmation dialog will appear showing details of the pending update. Tap Yes, I'm Sure to complete the update. All the selected plants watering task has now been updated and the next due date has also been updated and incremented based on each plant's record interval for the watering task.

### Example 2 — Bulk Update Filter

**Goal:** Perform a Change Due Date update for plants that contain the text 'No winter watering' in the Care tab - Watering Notes field.

1. On the Bulk Update screen select the Watering task.
2. Tap Find Tasks. All plants with an active Watering task are shown assuming no other options set.
3. Tap the filter icon and add a condition: Field: Watering Notes. Value: Type "No winter watering" into the value box without the quotes and no trailing space.
4. Tap Apply. Only records containing the text 'No winter watering' in the Watering Notes field are shown.
5. Tap Apply Bulk Update, select Change Due Date, then tap Proceed.
6. Enter the date you think watering will resume using the date picker, then tap Continue.
7. Confirm with Yes, I'm Sure. The due date for all selected plants is updated.

An alternative filter criteria in Step 3 is to filter by the Section field for plants belonging to a particular section. Consider any unidentified plants marked as NOID or sp. in the Species field which may need separate attention. See Bulk Update Tasks Screen for further details. Choose whichever option suits your needs best or use a similar option to those described above.

### Saving and Loading a Filter in the Bulk Update Screen

Save a currently loaded filter using Save Filter/Sort in the three dot menu. The filter can then be reloaded using Load Filter/Sort.

*Note: A filter saved within the Bulk Update screen is based only on the selected task at the time of saving and will be locked to that task when loaded. If you save the same filter on the Collection list screen it will not be task-specific and can be loaded in the Bulk Update screen for any currently loaded task.*

## Filter Genus & Species Using Dedicated Filter

The Filter Genus & Species feature is a dedicated quick filter that lets you apply a Genus and Species pair as a single action. It is available on the Collection, Reference, Bulk Update and Check All Tasks screens and is accessed by tapping the three dot menu and choosing Filter Genus & Species.

### How It Works

When the dialog opens you see two dropdowns — Genus and Species. The Genus dropdown is active first; the Species dropdown remains greyed out until a Genus is selected. Both dropdowns are sourced only from your existing records – Collection records for Collection, Bulk Update and Check All Tasks screens – Reference records for the Reference screen - and listed alphabetically.

After selecting a Genus the Species dropdown becomes active and shows only species that exist in your records for the selected Genus. Changing the Genus selection resets the Species selection and refreshes the Species list.

The Apply button remains greyed out until both a Genus and a Species are selected. Tap Apply to apply the filter or Cancel to exit without applying.

When applied, two filter chips appear at the top of the list — one for Genus and one for Species. A toast message confirms the filter has been applied. Each chip has its own X button to remove it independently. If desired you can close the species filter chip to only filter by genus or close the genus chip to only filter by species.

### Behaviour with Existing Filters

The two conditions created by the Filter Genus & Species dialog combine with any existing filter conditions using AND logic. This means if you already have a Location: Greenhouse filter active, the result will show only records matching the chosen Genus, chosen Species and the existing Location condition.

If your existing filter already includes a Genus or Species condition that conflicts with your new selection, the previous condition is overwritten by the new one. If the combination produces no matching records the list will be empty — close one or more chips to broaden the result.

Subsequent use of the Filter Genus & Species dialog overwrites any previous use of it — you will not accumulate multiple genus/species chip pairs.

### Visibility in the Standard Filter Options Dialog

The two conditions created by the Filter Genus & Species dialog are stored as standard filter conditions and appear in the Filter Options dialog (funnel icon) alongside any other conditions. You can add further conditions via Add AND Condition after applying a Genus and Species filter.

### Saving, Loading and Reports

Because the dedicated filter creates standard filter conditions, all the usual Save, Load and Clear options work normally. A filter applied via Filter Genus & Species can be saved, loaded and cleared from the three dot menu. The active filter also passes through to reports generated from the relevant detail screen.

### Screen-Specific Notes

- **Collection screen:** The dropdown lists respect the current Archive Filter setting.
- **Reference screen:** The dropdown lists are sourced from Reference records only. There is no Archive Filter on the Reference screen.
- **Bulk Update screen:** The dropdown lists are sourced from active Collection records only. Filter Genus & Species is only available after Find Tasks has been tapped.
- **Check All Tasks screen:** The dropdown lists are sourced from active Collection records only.

### Example — Filter Genus & Species

**Goal:** Show all *Cattleya labiata* plants in the Collection screen.

1. Tap the three dot menu at the top right of the Collection screen.
2. Tap Filter Genus & Species.
3. Genus dropdown: select *Cattleya*.
4. Species dropdown: select *labiata*.
5. Tap Apply.

Two filter chips appear — Genus = *Cattleya* and Species = *labiata*. The list now shows only *Cattleya labiata* plants. To remove the filter close one or both chips or use Clear Filter/Sort from the three dot menu.

## Check All Tasks Screen — Filtering

The Check All Tasks screen uses the same Filter Options dialog as the Collection screen, accessed by tapping the funnel icon at the top right. The cards on this screen are always sorted by due date so there is no Sort option.

### Filter Types on Check All Tasks

Two filter types are available:

- **Plant Field** — filter by any field on the plant record such as Genus, Species, Colour or Location. Works exactly the same as the Plant Field filter on the Collection screen.
- **Maintenance Task (Due Date)** — filter to plants that have one or more chosen maintenance tasks due within a chosen date range. Tick All Tasks or individual tasks, then select a Due Date Range.

*Note: The Has Active Maintenance Task filter type available on the Collection screen is not offered here, since this screen already shows maintenance task records exclusively.*

### Example — Filtering to One or More Tasks

**Goal:** Show only Watering and Light Watering task records, regardless of due date.

- Tap the funnel icon on the Check All Tasks screen.
- Filter Type: Maintenance Task (Due Date).
- Untick All Tasks, then tick Watering and Light Watering.
- Due Date Range: Change Due Date Range from Next 7 Days to All Dates.
- Tap Apply.

A single chip appears showing Watering, Light Watering: All Dates.

### Example — Adding Extra Conditions

**Goal:** Show only Watering tasks due in the next 7 days for *Cattleya labiata* plants.

- Tap the funnel icon on the Check All Tasks screen.
- First condition — Filter Type: Maintenance Task (Due Date). Tick Watering only. Due Date Range: Next 7 Days.
- Tap Add AND Condition.
- Second condition — Filter Type: Plant Field. Field: Genus. Operator: EQUALS. Value: *Cattleya*.
- Tap Add AND Condition again.
- Third condition — Filter Type: Plant Field. Field: Species. Operator: EQUALS. Value: *labiata*.
- Tap Apply.

Alternatively the second and third condition can be done using the Filter Genus & Species in the 3 dot menu. Apply the first condition first followed by the Filter Genus & Species.

Three chips appear — one combined chip for Watering: Next 7 Days, one for Genus: *Cattleya* and one for Species: *labiata*.

### Active Filter Chips on Check All Tasks

When a filter is active on the Check All Tasks screen a chip appears for each condition. A Maintenance Task (Due Date) condition appears as a single combined chip showing the selected tasks and date range together — for example Watering: Today and Overdue. Plant Field conditions appear as their own chips. Each chip has its own X button to remove it independently.

### Filter Genus & Species and Saving, Loading and Clearing Filters

The three dot menu on the Check All Tasks screen offers the Filter Genus & Species quick filter plus Save Filter, Load Filter and Clear Filter options.

- **Save Filter** — saves the current filter. Greyed out if no filter is active.
- **Load Filter** — opens a list of your saved filters. Greyed out if no filters have been saved.
- **Clear Filter** — removes the active filter. Greyed out if no filter is active.

Unlike other screens there is no sort component to save here since the Check All Tasks card list is always ordered by due date.

*Note: A filter saved on the Check All Tasks screen automatically becomes available to load on the Collection screen, and also on the Bulk Update screen provided it selects no more than one maintenance task. The reverse is also possible for a filter saved in the Collection screen it can be loaded in the Check All Tasks screen. A filter saved in the Bulk Update screen can be loaded in the Check All Tasks screen but it is tied to a specific task.*

### Tapping a Task Notification

When you tap a task notification and choose to open Check All Tasks, the screen opens with the filter already applied — the Filter Type is set to Maintenance Task (Due Date), the relevant task is ticked and the appropriate Due Date Range is selected. Tapping the funnel icon will show these selections already in place so you can adjust or add to them as needed. See Settings - Push Notifications.

## Procedures Done — Filtering

The Procedures Done tab within the Collection detail screen has its own dedicated filter, accessed by tapping the funnel icon on the Procedures Done tab header. This filter applies to the procedure records for all plant records. The filter is also applied to the Procedures Done report.

While navigating plant records with a Procedures Done filter active, if a plant has no procedure records matching the filter the procedures list will be empty and will display: "No procedures have been recorded yet or a filter has been applied and no procedures match the filter."

The Procedures Done filter is cleared automatically if you exit the detail screen and return to the list screen or if you close the filter chip/s.

### Filter Options

- **Task selection** — tick All Tasks or individual tasks to filter procedures by the task they belong to. The task list includes every maintenance task type in the app regardless of whether it is currently active on the plant record being viewed. Selecting a task unticks Other Procedures and Contains Text if either was selected.
- **Other Procedures** — tick this to show procedure records not associated with any task — for example records from a task that was later deleted, or other manually created procedures. Selecting this option unticks any task selections.

- **Contains Text** — tick this to show a text entry box and filter procedures whose notes contain the entered text. Not case sensitive. Selecting this option unticks any task selections and Other Procedures.
- **Date Range** — select a date range to filter by the date the procedure was done. Options: All Dates, Today, Last 30 Days, Last 90 Days, Last 1 Year, Last 2 Years, Last 3 Years, Last 4 Years, Last 5 Years, Single Date and Custom Date Range.

The task list and checkboxes are scrollable if the number of tasks exceeds the allotted space. On phone screens the entire dialog is also scrollable when Contains Text is selected together with custom date options.

The Apply Filter button is greyed out until at least one selection is made. Tap Cancel to exit without applying.

### Active Filter Chips — Procedures Done

When a filter is active on the Procedures Done tab, separate chips appear above the procedures list — one for the task/s, Other Procedures or text selection, and one for the date range. Closing the task/text chip closes both chips and removes all procedure filtering. The date range chip can be closed independently and only resets the date range to All Dates. There is no Save or Load option for the Procedures Done filter.

### Example — Procedures Done Filter

**Goal:** Show only Fertilising procedures done in the last 90 days.

1. Tap the funnel icon on the Procedures Done tab.
2. Tick Fertilising.
3. Date Range: Last 90 Days.
4. Tap Apply Filter.

The procedures list now shows only Fertilising records from the last 90 days for all plant records viewable in the detail screen.

## View Propagated Plants Filtering

When using the **View Propagated Plants** text button in the Care tab, a dialog appears where you can view individual divided plants propagated from the source record. An **Apply as Filter** button within that dialog applies a filter to the detail screen to show only the divided plants highlighted in the dialog (except entries marked as deleted). Archived plants are included in the list and will also appear in the filter results.

This filter is intended for navigation between related source and divided records only and is not passed to any reports. The View Divided Plants filter is cleared automatically if you exit the detail screen and return to the list screen or if you close the filter chip which also results in you being returned to the source record.

See Viewing Propagated Plants and Source Plant.

## Sorting

Sorting controls the order in which records appear in the list. Sorting is available on the Collection, Reference, Contacts and Bulk Update screens and is accessed by tapping the sort icon (the lines icon) at the top right of the screen.

### Setting Up a Sort

1. Tap the Sort icon. The Sort dialog will open.
2. Select the field to sort by from the Sort By dropdown. Not all fields are available for sorting.
3. Select the order from the Order dropdown — ASC (ascending, A to Z or lowest to highest) or DESC (descending, Z to A or highest to lowest).
4. Tap Apply.

### Multiple Sort Levels

With the sort dialog open tap the Add Sort Level button to add a second sort level. Any field already used in a previous level is excluded from the field selection for that level. Each sort level has its own trash icon to remove it. There is no limit to the number of sort levels you can add.

**Example — Goal:** Sort the collection list alphabetically by Genus then by Species within each genus.

1. Tap the sort icon.
2. Sort By: Genus. Order: ASC.
3. Tap Add Sort Level.
4. Sort By: Species. Order: ASC. (Genus will not appear in this dropdown as it is already used.)
5. Tap Apply.

*Tip: You can reopen the sort dialog to add more sort levels after applying the initial sort level/s.*

### Active Sort Chips

When a sort is active, sort chips appear at the top of the list showing the active sort fields and direction. Each chip has an X button to remove that sort level individually.

### Saving and Loading Sort Settings

Sort settings are saved and loaded using the same Save Filter/Sort, Load Filter/Sort and Clear Filter/Sort options in the three dot menu. You can save a sort on its own without a filter, or save both together.

## Filters, Sort and Reports

Any filter (except a View Divided Plants filter) and sort that is active on the Collection list screen also applies to reports generated from the Collection detail screen. Similarly any filter and sort active on the Reference list screen applies to Reference reports. The Contacts screen report also respects the active filter and sort.

The Archive Filter setting also applies to collection reports. If set to Active Only the report will only include active records. If set to All Records both active and archived records will be included. If set to Archived Only then only archived records will be included.

*Tip: Use this feature to generate targeted reports — for example apply a filter for a specific genus or location before generating a report to produce a report for just that subset of your collection.*

# Archiving Records

Archiving allows you to retain a collection record for a plant that is no longer in your possession — for example a plant that has died, been sold or given away. Archiving a record can also be used for the purpose of recording a parent plant which was used for breeding where you obtained pollen and/or seeds elsewhere such as from a friend and you wish to include the record as a parent and for inclusion in the lineage tree see Choose Parent Records and Lineage Feature. Archiving keeps all record data intact for historical reference while removing the plant from your active collection view. When a record is archived all maintenance tasks associated with that plant are automatically deactivated.

*Note: Archiving is available for Collection records only. Reference records cannot be archived.*

## How to Archive a Record

1. Open the Collection detail screen for the plant you wish to archive.
2. Tap the three dot menu at the top right of the screen.
3. Tap Archive Record.
4. A dialog will appear with a default archive date of today. You can change this date if needed.
5. Optionally enter a reason for archiving (for example Sold, Deceased or Given away).
6. Tap the Archive button to complete the process.

The record is now archived and will not appear when you return to the list screen if the list screen archive filter is set to Active Only. All maintenance tasks for this plant are deactivated. The record will no longer appear in the collection list when the Archive Filter is set to Active Only.

## What Happens When a Record is Archived

- The record is removed from the active collection list view.
- All maintenance tasks associated with the plant are deactivated. The plant will no longer appear in Bulk Update or Check All Tasks screens.
- All record data is preserved in full and remains viewable and editable.
- An archived date and optional reason are stored with the record.
- The archived date is displayed in bold green text at the top of the detail screen when viewing the record and is tappable to reveal options to edit the archive info or unarchive the record.

## Viewing Archived Records

To view archived records tap the three dot menu on the Collection list screen and change the Archive Filter to Archived Only or All Records. Archived records display the word Archived on the list card and show the archived date prominently at the top of the detail screen.

Tapping the archived date text at the top of the detail screen opens the Archive Information dialog which shows the archived date, the reason for archiving and buttons to Close, Edit Info or Unarchive the record.

## Editing Archive Information

1. Open the archived record in the detail screen.
2. Either tap the archived date text at the top of the screen, or tap the three dot menu and select Edit Archive Info.
3. The Archive Information dialog opens showing the archived date and reason.
4. Tap Edit Info to make changes, then save.

## Unarchiving a Record

1. On the Collection list screen tap the three dot menu and set the Archive Filter to Archived Only.
2. Find and tap the record you wish to unarchive to open it in the detail screen.
3. Either tap the archived date text at the top of the screen and tap Unarchive, or tap the three dot menu and select Unarchive Record.
4. A confirmation dialog will appear. Tap Unarchive to proceed.
5. The record is now unarchived. When you return to the collection list screen set the archive filter back to Active Only and your unarchived record will now appear in the list screen.

*Note: Maintenance tasks are not automatically reactivated when a record is unarchived. You will need to reactivate any desired tasks manually from the Maintenance tab and set appropriate due dates and record intervals.*

### Example — Archiving a Plant That Has Been Sold

**Scenario:** Plant #42 (*Cattleya warscewiczii*) has been sold. You want to keep the record for reference but remove it from your active collection.

1. Open Plant #42 in the Collection detail screen.
2. Tap the three dot menu and select Archive Record.
3. The archive date defaults to today. Enter the reason: Sold.
4. Tap Archive.

Plant #42 is now archived. It disappears from the active collection list screen. All its maintenance tasks are deactivated. The record remains accessible by changing the Archive Filter to Archived Only or All Records.

### Example — Accidentally Archived a Record

**Scenario:** You accidentally archived the wrong plant and need to restore it.

1. Tap the three dot menu on the Collection list screen.
2. Set the Archive Filter to Archived Only.
3. Find the accidentally archived plant and tap it to open it in the detail screen.
4. Tap the archived date text at the top of the screen to open the Archive Information dialog, or tap the three dot menu.
5. Tap Unarchive or Unarchive Record, then tap Unarchive in the confirmation dialog.
6. The record is now unarchived. When you return to the collection list screen set the archive filter back to Active Only and your unarchived record will now appear in the list screen. Remember to reactivate any maintenance tasks from the Maintenance tab and set appropriate due dates and record intervals.

# Viewing Propagated Plants and Source Plant

If a collection record was duplicated as a propagated plant, the **Propagated To** field in the Care tab will contain data for all records duplicated from that source record. A **View Propagated Plants** text button with a count will appear below the field only if the field contains the text "Propagated to Plant Number".

Tapping this button opens a dialog where you can:

- **View individual records** — tap the View text button beside each entry to navigate to that propagated plant record. A chip appears in the upper screen. Tap the close cross on the chip to return to the dialog. To exit this mode navigate to another record using the < or > navigation buttons, tap Close in the dialog, or exit the screen.
- **Apply as Filter** — tap this text button to close the dialog and apply a filter to the detail screen showing only the divided propagated plant records. A chip appears to indicate the filter is active. Tapping the close cross on the chip removes the filter and returns you to the source record.

When viewing a record where the **Propagated From** field in the Care tab contains the text "Propagated from Plant Number", a **View Source Plant** text button appears below the field. Tapping it navigates you to the source plant record and shows a chip at the top of the screen. Closing the chip navigates you back to the propagated plant record.

If desired you can manually add propagation data to either field as follows and the buttons will then show.

For example:

- For Plant Number 6 being the source plant record type into the Propagated To field “Propagated to Plant Number 27” (plus optional date and propagation method) “Propagated to Plant Number 27 on 30 August 2026 as a Division” if Plant Number 27 was propagated from Plant Number 6 being the source record.

- For Plant Number 27 being the propagated plant record type into the Propagated From field “Propagated from Plant Number 6” (plus optional date and propagation method) “Propagated from Plant Number 6 on 30 August 2026 as a Division” if Plant Number 27 was propagated from Plant Number 6.

*Note: Tapping the View Source Plant button or navigating to another record while viewing individual propagated records will reset and cancel the viewing propagated records mode.*

# Scroll to Record and Navigate to Record

## Scroll to Record

In the Collection and Reference list screens 3 dot menu an option to Scroll to Record is available. This is intended to jump to any point in the list which is useful if you have many records instead of scrolling a long list of record cards.

## Navigate to Record

In the Collection and Reference detail screens 3 dot menu an option to Navigate to Record is available. This is intended to navigate to a record which is useful if you have many records instead of navigating by other means. Navigate to Record is available on all tabs in the detail screens.

Both Scroll to Record and Navigate to Record are limited to records which have been filtered by the normal filter and the archive filter (i.e. all records visible in the list and detail screens). For all records to be accessible do not apply a normal filter and set the archive filter to All Records.

When tapping on these in the 3 dot menu a dialog will appear where you can type in a **Plant Number** OR **My Reference** (in the Collection records screens) or a **Reference Number** OR **My Reference** (in the Reference records screens).

**Plant Number** (Collection records screens) and **Reference Number** (Reference records screens) have a dropdown available with a search box and a list of available Plant/Reference record numbers where you can search for a Plant/Reference number or narrow down the selection list and tap on your desired entry in the list. If your desired Plant/Reference number does not show in the list it is due to an active normal filter or an archive filter not set to All Records. The same applies to the **My Reference** dropdown.

If you do not wish to use the dropdowns you can just type in your Plant/Reference Number OR your My Reference.

Once you have entered your Plant/Reference Number OR your My Reference tap the Scroll or Navigate text button. In the list screens you will be scrolled to your desired record. In the detail screens you will be navigated to your desired record. If you type in any invalid data due to filtering making it not applicable or the record does not exist then a not found message will show in the dialog when you tap the Scroll or Navigate button.

Dropdown lists for Plant/Reference number are sorted in numeric order and dropdown lists for My Reference are sorted in alphanumeric order.

# Adding Media to Collection and Reference Records

On the Images and Growth tabs in the Collection detail screen, and on the Images tab in the Reference detail screen, you can add photos, videos and audio notes.

It is recommended to use the Growth tab to record the growth and flowering of a plant over time, keeping the Images tab for general record media.

## Adding Media

Tap the + Add Media or + Add Growth Media button. A dialog presents the following options:

- **Take a Photo** — takes a photo using the device camera.
- **Record Video** — records a video using the device camera.
- **Record Audio Note** — records an audio note using the device microphone.
- **From Gallery** — adds an existing image or video from the device gallery.

The app will request permissions to use the camera and/or microphone the first time you use these features. Select While Using the App. If you do not grant permission when requested by the app you will need to do so via the Android app settings before the feature will work.

When taking a photo or recording a video, tap OK (or the circled tick) to save it to the record, or tap Retry to try again. A video can be reviewed before saving.

When recording an audio note, tap Start Recording to begin and Stop and Save when finished.

To insert from the gallery, tap From Gallery then navigate to and tap your desired image or video.

Each added media item displays as a thumbnail in the tab with a date caption in the lower portion. Captions can be edited when viewing or playing the media. Try to retain the date in the caption when editing it especially for growth tab media — just append any extra information after the date.

## Viewing Media and Editing Captions

Tap any thumbnail to view it at full screen (images and videos) or to open the audio playback dialog (audio notes). You can swipe between images and videos when viewing at full screen.

When viewing media at full screen or in the audio dialog you can:

- Edit the caption by tapping into the caption box. Captions longer than the thumbnail width scroll automatically as a ticker.
- Double-tap an image or video to hide or show the caption.

- Loop audio playback by ticking the Loop Playback box.

## Primary Image

The first image added to the Images tab is automatically set as the primary image — the image displayed alongside record cards throughout the app. The primary image is indicated by a yellow star at the top left of its thumbnail.

To change the primary image, long-tap on the thumbnail you want to set as the new primary image. A dialog will appear where you can make the change. Only photo media can be set as a primary image.

*Note: On some devices, videos recorded using the system camera within the app may not play back within the app due to the device using a non-standard encoder. If this occurs, go to Settings — Video Recording and switch from System Camera to Custom Camera then recorded videos will play within the app. Alternatively, videos recorded with the system camera can be opened with the system media player when you attempt to play them within the app.*

# Contacts Records Screens

## List Screen

The Contacts list screen opens when you tap Contacts Records from the Home screen. Each record appears as a card showing the Contact Number, Name, Business Name, Specialty and Favourites star. Favourite contacts are grouped at the top of the list. A record can be added to or removed from favourites by tapping the star on its card — a blue star indicates an active favourite.

The three dot menu at the top right provides Save Filter/Sort, Load Filter/Sort and Clear Filter/Sort options.

## Detail Screen

The three dot menu in the Contacts detail screen provides Delete Current Record and Find/Replace options. Find/Replace is only available on the Details tab. Note that the Email, Website and both phone number fields are locked out from the Replace function to prevent inadvertent changes.

## Details Tab

Fields in the Details tab (all plain text, * indicates dropdown fields):

- Name
- Business Name
- Address
- * Contact Type
- * Specialty
- Email — includes a Send button to open your default email app.
- Website — includes an Open button to launch your default browser.
- Phone Number 1 — includes a Call button to open your phone app.
- Phone Number 2 — includes a Call button to open your phone app.
- Remarks

## Reports Tab

A contact complete report is available on the Reports tab. The report is created as a PDF file. Options to share or export the PDF are available after generation. See [Reports](#) for further details.

# General Links Screen and Links Tabs

The General Links screen allows you to add links to files on your device or to web page URLs that are not specific to a particular plant record. The Links tabs on the Collection and Reference detail screens provide the same functionality for links specific to a plant record.

## Adding File Links

Files such as PDFs or other file types that have an associated app installed on your device can be added as file links.

1. Tap the + Add Link button. A blank link entry appears above any existing links.
2. Tap the File text button in the blank link. A file picker dialog appears — navigate to your file and tap it.
3. A dialog shows with the file name as the default description. Edit the description if desired, then tap Save.
4. Tap the Open text button on the active link to open the file. If multiple apps can open the file, choose your preferred app.

A file added to a link is copied to the app's internal storage — if the source file is later deleted the linked file will continue to work. You can export the file from the app back to your device storage if needed see Sharing and Exporting File Links.

## Adding URL Links

1. Tap the + Add Link button. A blank link entry appears.
2. Copy the URL from your browser or app. In Chrome for example, tap the address bar then tap the copy icon.
3. Return to the app and tap the URL text button in the blank link. The Enter URL dialog appears.
4. Long-tap in the URL box, tap Paste to paste your URL, then tap Save. A URL is mandatory and must be entered before you can proceed to save the link.
5. A description dialog appears — enter a description of the link (e.g. "Orchid Roots") then tap Save. A description is mandatory and must be entered before you can save the link.
6. Tap the Open text button on the active link to open the URL in your default browser.

See How to Copy and Paste Text on Android for copy and paste instructions.

When a blank link has had a file or URL applied, the File and URL text buttons are greyed out. To replace the content of a link, tap the Clear text button first to clear the link then add your desired new content.

## Deleting Links

Tap the Delete Links button. A dialog shows checkboxes for each link. Tick the links to delete and tap Delete Selected. A confirmation dialog appears — confirm or cancel.

## Editing Link Descriptions

Tap on the description box in a link. An Edit Description dialog opens where you can edit and save the description. The description cannot be empty.

## Sharing and Exporting File Links

Only file links can be directly shared or exported. To share a URL, open it via its Open button then share from the browser.

To share or export files, tap the Share File icon at the top right of the General Links screen (or in the links tab of the collection or reference detail screens, tap the three dot menu and select Share Files). Checkboxes appear beside each file link. Tick the desired files and tap Share.

A dialog will ask whether you want to Export to Folder or Share Sheet:

- **Export to Folder** — choose a previously used folder or tap Choose a Folder to navigate to and select a destination. Grant permission when prompted. The export completes and a confirmation message appears.
- **Share Sheet** — the Android share sheet appears with options to share via email, messages and other apps. Email and messages options work reliably. Attachments that exceed email size limits will be sent as download links.

# Using Dropdown User Lists

Fields that have a dropdown display an arrow at the far right of the field. Tapping the arrow opens the dropdown dialog showing a combined list of user list data and existing record data for that field, along with a search box.

To add a value to a field:

- Type in the search box until your desired entry appears, then tap it to add it to the field.
- If no match appears after typing your complete entry, tap the Use button. The entry is added to both the field and the user list simultaneously.

Using the Use button is preferred to typing directly into the field, as the new entry is added to the user list at the same time. Capitalisation is autocorrected when using the Use button.

*Note: Do not include(type in) any prefixes (×, cf., aff., nothosubsp. etc.) when adding new names to user lists. Prefix options are available via checkboxes in the dropdown dialog and are applied to the field when selecting the name or adding it to the list via the Use button.*

## Accessing and Managing User Lists

To access the user list for a field, long-tap on the dropdown arrow at the far right of the field. A dialog opens showing the list entries. You can:

- Search using the search box.
- Delete unwanted entries by tapping the cross beside each entry.
- Add a new entry by tapping the Add New Entry button.
- Import entries from a single-column .txt or .csv file.
- Export the current list to a .txt or .csv file.

To access the Build user list, long-tap on the build icon to the right of the relevant field. This list is similar to a dropdown user list but lacks import and export. It is intended for miscellaneous entries not covered by the other lists. When adding to the Build user list you must also choose a text format — Plain Text, Bold Text or Italic Text.

*Note: The Cross Method dropdown is fixed and has no user list — its data cannot be changed to ensure correct application in the assembled name.*

## Importing Data to Field User Lists

To bulk import names to a field user list:

1. Create a .txt or .csv file with your entries in a single column.
2. Transfer the file to your device.

3. Long-tap on the dropdown arrow for the relevant field to open the Manage [Field] List dialog.
4. Tap Import, then tap Select File and navigate to your file.
5. Confirm the file is correct for the field you are importing to — this cannot be undone. If you import to the wrong field you will need to remove incorrect entries individually.
6. Tap Import. A completion dialog confirms how many entries were imported and how many duplicates were skipped.

Once imported, new entries become available in the field dropdown and in the Name Builder Build From List dialog.

# Find/Replace

Find/Replace is available in the Collection, Reference and Contacts detail screens via the three dot menu at the top right. On the Contacts detail screen it is only available on the Details tab. On the Reference detail screen it is only available on the Identification and Care tabs. On the Collection detail screen it is only available on the Identification, Care and Acquisition tabs.

Any active user filter, sort or archive filter is applied to Find/Replace. The Replace All function is limited to filtered records. Filters must be applied on the list screen before opening Find/Replace.

The following fields are excluded from the Replace function:

- **Contacts:** Contact Number, Email, Website, Phone Number 1, Phone Number 2.
- **Collection:** Plant Number, Cross Method, Synonyms, Ancestors, Age Date, Age, Acquisition Date, Purchase Price, Sale Price, Current Value.
- **Reference:** Reference Number, Cross Method, Synonyms, Ancestors, Source Date.

### Using Find

1. Select Find/Replace from the three dot menu. The dialog defaults to Find Only.
2. Enter your search text in the Find box. Tick Case Sensitive if required.
3. Tap Search. A list of matches appears showing the Plant Number, My Reference, plant name, field name and field contents.
4. Tap the View button beside any match to navigate to that record and field. A chip appears above the matched field. Close the chip to return to the matches list.

### Using Replace

1. Select Find/Replace from the three dot menu and change the Mode to Find & Replace.
2. Enter the text to replace in the Find box and the replacement text in the Replace with box.
3. Tick Case Sensitive if required, then tap Search.
4. The matches list appears. Tap the Replace button beside an individual match to replace that occurrence only, or tap Replace All X Matches to replace all at once. A confirmation dialog will appear for Replace All.

The Find/Replace dialog remains active if you exit to the list screen while viewing a record via the dialog, but not if you exit to the Home screen. To prevent it remaining active, close the dialog or navigate back using the device back button after your operation is complete.

**Review the list of matches carefully before using Replace All**. If unexpected matches appear (for example searching for 'alba' and matching 'candidoalba') use the individual Replace buttons rather than Replace All.

# Duplicate Current Record

The Duplicate Current Record option is available in the three dot menu of the Collection and Reference detail screens. It creates an identical copy of the currently viewed record. For Collection records procedure records are not duplicated except for when the Propagated Plant option is selected then the Choose Parent Records procedure record only is duplicated.

1. Tap Duplicate Current Record. A dialog appears with options.
2. For Collection records: tick Include Images Media and/or Include Growth Media if desired. A further checkbox allows you to duplicate only the primary image rather than all media. For Reference records: only an Images Media checkbox is available.
3. For Collection records only: tick the **Propagated Plant** checkbox if the duplication represents a propagated plant. When ticked, a dropdown appears to select the propagation method (or type it in). The propagation method must be entered before you can proceed. This checkbox automatically adds data to the source record's Propagated To field and the duplicated record's Propagated From field, and adds procedure records to both records. Also note for a propagated plant if the source record has a Choose Parent Records procedure record this is automatically copied to the duplicate as the Choose Parent Records procedure record is required for the operation of the view lineage and share lineage feature on the duplicate record and in most cases the duplicate will have the same parentage.
4. Tap Next. A confirmation dialog shows details for the duplication.
5. Tap Duplicate to proceed or Cancel to exit. A completion dialog will confirm the duplication and show the new record number, with options to navigate to the new record, create another duplicate or close.

*Note: If duplicating a Collection record, any maintenance tasks activated in the source record will also be activated in the duplicate. Adjust the due dates and record intervals for the duplicated record as applicable.*

If parent assignment is not applicable to the duplicate you can:

1. If you used the Propagated Plant option go to the duplicated record procedures done tab and long press on the Choose Parent Records procedure record to see an option to delete it.

   OR

2. If different parents apply to the duplicate and you have collection records for those parents use the Choose Parent Records feature which will reassign seed and pollen parents and overwrite any existing seed and pollen parent fields and reassign a new Choose Parent Records procedure record see Choose Parent Records.

Seed and pollen parents and all other fields are always copied from the source to the duplicate and for those fields which may not be accurate in your duplicated record you can just delete or replace the field data. Be sure to examine all field data for accuracy in the duplicated record.

# Reports

Reports are available on the Collection, Reference and Contacts detail screens via the Reports tab. Reports are generated as PDF files and require a PDF viewing app to be installed on your device. Only fields which are not empty are displayed in the reports.

Reports respect any active sort, filter and archive filter applied in the corresponding list screen. The Procedures Done report also applies the active Procedures Done filter.

Collection and Reference reports include the primary image for each record if one exists. Report images will have a lower resolution to keep report sizes acceptable.

## Generating a Report

1. First if you wish to filter/sort records for a report apply a filter and/or sort in the list screen. See Filtering, Sorting and Archiving. For collection records you can also apply a procedures done filter which is then applied to only the procedures done report. See Procedures Done – Filtering.
2. Navigate to the Reports tab for any record of the desired detail screen.
3. Tap the desired report. A Generate PDF Report dialog will open.
4. Select any applicable options (e.g. whether to include pricing and/or acquisition data in collection reports). The dialog shows any active sort and filter conditions that will be applied.
5. Tap Proceed. The PDF Report Created dialog appears with the following options:

- **Save to Folder** — saves the report to a folder you select.
- **Share** — opens sharing options. See Sharing and Exporting Files.
- **Open the Report** — opens the PDF in your preferred PDF app.
- **Close** — closes the dialog.

The PDF Report Created dialog remains displayed until closed, allowing you to select more than one option. The dialog must be closed when you are done before you can exit the screen.

A share lineage report is also available which is not a pdf file but is a jpg image file of the lineage tree. It also has Save to Folder, Share, Open Image and Close options in its dialog. See Share Lineage. This report only displays the lineage tree for the current record where applicable. Only available in the Collection detail screen Identification tab 3 dot menu for records which have a Choose Parent Records procedure record.

## Saving Record Data

A new record is saved when created. When filling in a field you must tap out of the field into another field, change tabs or navigate elsewhere in the app, for the new field contents to be automatically saved. Do not close the app immediately after entering or updating a field or your entries or changes will not be saved.

## Delete Current Record

The Delete Current Record option is available in the three dot menu of the Collection, Reference and Contacts detail screens. This function will delete the entire Collection, Reference or Contacts record and anything associated such as all media. Tapping it displays a confirmation dialog to proceed to delete or cancel. Deletion of a record cannot be undone so use this with care. Also consider archiving a collection record before deleting it see Archiving Records.

*Note: The record number (Plant #, Reference # or Contact #) will not be reused for another record if a record is deleted.*

## Star Indicators

Star indicators are associated with maintenance task due dates and provide an at-a-glance status for each task.

- **Solid green star:** Task is due more than 7 days from today.
- **Solid amber star:** Task is due in the next 4 to 7 days.
- **Flashing amber star:** Task is due in the next 2 to 3 days.
- **Solid red star:** Task is due today.
- **Flashing red star:** Task is overdue by 1 or more days.

Star indicators appear on the Maintenance tab for all activated tasks in the Collection detail screen, on Collection list screen cards, on the Check All Tasks screen and on the Bulk Update screen. On the Collection list screen the star represents the most urgent active task for that plant.

Tapping the star on a Collection list screen card takes you directly to the Maintenance tab for that record.

A single star indicator on the Check All Tasks button on the Home screen indicates the most urgent task across all collection records.

*Note: A different star indicator is used on the Contacts records list screen — a blue star indicates a favourite record and is toggled by tapping it.*

# Sharing and Exporting Files

Files such as linked files in the General Links screen, Links tab, Images tab and Growth tab media, and generated reports and lineage trees can be shared or exported.

To share or export items in the Links, Images or Growth tabs, tap the three dot menu in the relevant tab and select Share Files or Share Media. In the General Links screen tap the share icon at the top right. To share a lineage tree tap the three dot menu while on the Identification tab of a Collection record then tap the Share Lineage option.

Tick the items you wish to share or export, then tap the Share button. A dialog will ask whether you want to Export to Folder or Share Sheet.

- **Export to Folder** — choose a previously used folder or tap Choose a Folder to navigate to and select a destination. Grant permission when prompted. A confirmation message appears when the export is complete. Note that export of images, videos and files includes the caption data in the exported file name.
- **Share Sheet** — the Android share sheet appears. Email and messages options work reliably. Options that work may change over time. Attachments exceeding email size limits will be sent as download links.

For sharing and exporting reports, use the Save to Folder or Share options in the PDF Report Created dialog when a report is generated.

# Settings

Settings are available by tapping the gear icon on the Home screen. The settings screen contains the following options, in the order they appear on screen:

## 1. Push Notifications

The app includes a push notifications feature. Any plant tasks due today or overdue will trigger a reminder notification even when the app is closed.

Notifications can be enabled or disabled, set to silent mode and configured to be delivered at an approximate predetermined time. The delay between the set time and delivery varies between devices and is also affected by whether battery optimisation is enabled or disabled.

Notifications in the notification drawer are persistent after tapping — to remove a notification, swipe it to the right.

To configure notifications, tap Push Notifications in the Settings screen. Set your desired options and tap Close.

When a notification appears for tasks due today, overdue or today and overdue, tapping it presents two options as to which app screen to open:

- **Check All Tasks screen** — takes you to the Check All Tasks screen with a filter already applied showing the relevant tasks. You can mark tasks as done, adjust due dates or make other changes from there. To see all different tasks that are due today and overdue at once, open the filter on the Check All Tasks screen, set Filter Type to Maintenance Task (Due Date), tick All Tasks and set Due Date Range to Today and Overdue, then tap Apply Filter. Else repeat for each task that requires updating by tapping on the relevant notification.

  See Check All Tasks Screen for further details.
- **Bulk Update Tasks screen** — takes you to the Bulk Update screen with the selected task and due date range already applied. Use this option when there are many records to update at once. Tap Deselect All then tick each record as you complete its maintenance task. Once all items are ticked tap Apply Bulk Update, select Mark Task as Done, enter the date and any notes which go into procedure records, then confirm. Repeat for each task that requires updating by tapping on the relevant notification.

  See Bulk Update Tasks Screen for further details.

If any Orchid Manager notification remains in the notification tray it will be automatically cleared at midnight or soon after depending on the device so that no notifications remain displayed beyond the day they were issued for.

If your device is switched off when notifications are due to be delivered they will be delivered when you restart your device regardless of scheduled time. This will happen with each restart so you don't miss a thing.

*For notifications to arrive reliably, keep Orchid Manager's battery optimization exemption enabled (you'll be prompted for this when first turning notifications on). Some phones also offer extra settings worth checking under Settings → Battery — look for "Never sleeping apps" and add Orchid Manager to it if available, or check "Background usage limits" and make sure Orchid Manager isn't restricted there. Also worth opening the app occasionally — if it goes unused for an extended period, Android may automatically disable notification permissions, which the app will detect and prompt you to re-enable the next time you open it.*

## 2. Battery Optimisation

On some devices, battery optimisation and background-app restrictions can delay notification delivery. The Settings screen includes a Battery Optimisation option showing guidance on where to check these settings for Orchid Manager, along with a live status check for Alarms & Reminders access (with a direct link to fix it if needed).

Since exact menu names and locations for battery settings vary significantly by device manufacturer, this screen doesn't attempt to link directly to every device's specific battery settings — instead, it points you to check your device's own Settings app for two things: setting Orchid Manager's battery usage to "Unrestricted" or "Not optimized" (wording varies by device), and confirming Alarms & Reminders access is allowed under Special App Access. If notifications still aren't arriving on time after checking both, search online for your specific device model together with "background app restrictions" for further guidance, as some manufacturers (e.g. Xiaomi, Huawei, Oppo, Realme) have additional device-specific settings covered within the device Settings screen itself.

## 3. Video Recording

On some devices, videos recorded using the system camera within the app cannot be played back within the app due to the device using a non-standard encoder. If this occurs, use this setting to switch video recording from System Camera to Custom Camera. Videos recorded with the custom camera should then be playable within the app.

If you choose to continue using the system camera and the app cannot play the video internally, an option will appear when you try to play the video to open it using the system media player.

## 4. Theme

The app supports a light theme, a dark theme or automatic theme matching based on the system setting. Tap the desired theme name to apply it immediately. The currently applied theme will show a tick beside the theme name in the theme dialog. One you select your desired theme tap the close button in the theme dialog.

## 5. Backup and Restore

The Backup and Restore feature allows you to save a complete copy of your Orchid Manager data and transfer it to another device. This section covers all the steps and options available.

### Before You Begin

- **Ensure your device battery is fully charged** before starting a backup or restore. Both operations can take considerable time depending on the size of your data, and an interruption could result in data loss.
- **Do not close the app** during a backup or restore. Keep the app in the foreground until the operation completes.
- **Ensure the destination storage has enough free space.** The app will estimate the backup size before you choose a folder and will warn you if there is insufficient space.
- **Be aware of the 4 GB file size limit on FAT32-formatted storage.** If your backup is likely to exceed 4 GB, use storage formatted as exFAT. See the Storage Options section below for details.

### Creating a Backup

1. Go to Settings — Backup and Restore.
2. Tap the Create Backup button.
3. The app will calculate the estimated backup size and display it. If the required space exceeds what is available on your chosen destination, cancel and use a different storage option.
4. Tap Choose Folder to open the folder picker and navigate to your chosen destination folder.
5. The backup will begin. Do not close the app. A progress indicator will show the current stage.
6. A confirmation dialog will appear when the backup is complete, showing the filename and size. The app will restart when the dialog is closed.

**Warning: Some cheaper USB thumb drives may become locked as read-only when filled to capacity. Use a quality drive and ensure it has ample free space beyond the backup size.**

### Restoring a Backup

**Warning: Restoring replaces all current data with the contents of the backup file. This cannot be undone.**

1. Install Orchid Manager on your target device if it is not already installed.

2. Transfer the backup file to your target device. See Transferring Your Backup File below for the available methods.
3. Ensure your device battery is fully charged.
4. Go to Settings — Backup and Restore and tap the Restore Backup button.
5. Navigate to the location of your backup file and tap it to select it.
6. A confirmation dialog will appear showing details of the backup. Tap Restore to proceed or Cancel to exit.
7. Do not close the app during the restore. A progress indicator will show the current stage.
8. A confirmation dialog will appear when the restore is complete. The app will restart when the dialog is closed.

### Storage Options

You can save your backup to several types of storage. Each has considerations regarding capacity, compatibility and file size limits.

#### *Internal Device Storage*

The simplest option. Internal storage uses the ext4 filesystem which has no practical file size limit, so backups of any size are supported. The limitation is that the backup remains on the same device — if the device is lost or damaged the backup may be lost with it. Use this option as a quick local backup only and transfer the file elsewhere for safekeeping.

#### *SD Memory Card*

An SD card is a convenient option if both your source and target devices have an SD card slot. Beware that some SD cards sold on sites such as eBay are fake and do not have the stated capacity so purchase your SD cards from a reputable source.

- SD cards 32 GB or smaller are often formatted as FAT32, which has a maximum file size of 4 GB. If your backup is likely to exceed 4 GB, use an SD card formatted as exFAT, or reformat your existing card as exFAT on a computer. Reformatting will erase all data on the card. Best option is to use a new SD card with a minimum of 64GB capacity.
- SD cards 64 GB and larger are typically formatted as exFAT by default and do not have the 4 GB file size limitation.
- Not all devices have an SD card slot. Check your device specifications before relying on this method.

#### *USB Thumb Drive (via OTG Cable or Direct Connection)*

A USB thumb drive connected via an OTG (On-The-Go) cable or a drive with a direct connection to suit your device's port works regardless of whether your device has an SD card slot.

- Use a thumb drive formatted as exFAT to avoid the 4 GB file size limit. Many thumb drives are already formatted as exFAT, but older or cheaper drives may be FAT32. Check before use and reformat as exFAT on a computer if necessary. Beware that some thumb drives sold on sites such as eBay are fake and do not have the stated capacity so purchase your thumb drives from a reputable source.

- You will need an OTG cable matching your device's USB port type — either USB-C or Micro USB.
- Some thumb drives have a USB-C or Micro USB connector on one end and a standard USB-A connector on the other, eliminating the need for a separate OTG cable.
- Enable OTG: ensure your smartphone or tablet USB OTG feature is activated, usually found in your device main settings. On most modern devices this is automatic.
- Once the drive is connected, wait for the device to recognise it before proceeding.
- Be sure whatever method you use allows connection to the source and target devices.

**Warning: Some cheaper USB thumb drives may become locked as read-only when filled to capacity. Use a quality drive and do not fill it completely.**

### Understanding the 4 GB File Size Limit

The FAT32 filesystem, common on older and smaller storage devices, cannot store a single file larger than 4 GB. If your backup exceeds this size and you attempt to save it to FAT32 storage, the backup will fail.

The exFAT filesystem removes this limitation and is the recommended format for any external storage used with Orchid Manager. To check or change the filesystem of a USB drive or SD card, connect it to a Windows or Mac computer and check its properties, reformatting to exFAT if necessary. Reformatting erases all data on the storage device.

As a general guide:

- SD cards and USB drives 32 GB or smaller: likely FAT32 — check and reformat as exFAT if needed.
- SD cards and USB drives 64 GB or larger: typically already formatted as exFAT, or can be formatted as exFAT via file manager options when plugged into your device.
- Internal device storage: uses ext4 — no file size limit.

*Note: Formatting a USB drive or memory card will erase any existing data. It is recommended to use a new drive or SD card with ample space for the format and backup operations.*

### Transferring Your Backup File to Another Device

When moving to a new device you will need to transfer the backup file from your source device to your target device. Several methods are available.

### *Method 1 — SD Card*

If both devices have an SD card slot this is the simplest transfer method.

1. Create the backup on your source device, saving it to the SD card.
2. Remove the SD card from the source device.
3. Insert the SD card into the target device.
4. Open Orchid Manager on the target device and restore from the backup file on the SD card.

### *Method 2 — USB Thumb Drive with OTG Cable(s)*

This method works regardless of whether your devices have SD card slots. The cables required depend on the USB port types on your devices.

**If both devices have the same USB port type (both USB-C or both Micro USB):**

1. Connect the USB thumb drive to your source device using an OTG cable matching your port type, or use an OTG thumb drive.
2. Create the backup, saving it to the thumb drive.
3. Disconnect the drive and connect it to your target device using the same type of OTG cable.
4. Restore from the backup file on the thumb drive.

**If your devices have different USB port types (one USB-C, one Micro USB):**

- You will need two different OTG cables — one for each port type.
- Follow the same steps as above, using the appropriate cable for each device.

**If both devices have USB-C ports:**

- You can use a USB-C thumb drive that plugs directly into both devices without needing a separate OTG cable.

### *Method 3 — Via Computer*

This method works with any combination of device types and does not require OTG cables or SD cards.

1. Create the backup on your source device, saving it to internal storage.
2. Connect your source device to a computer using a USB cable and copy the backup file from the device to the computer.
3. Disconnect the source device and connect the target device to the computer.
4. Copy the backup file from the computer to the target device.
5. On the target device, open Orchid Manager and restore from the backup file.

*Note: The steps for connecting a device to a computer and accessing its files vary depending on the computer's operating system and device manufacturer. Refer to your computer's documentation or the device manufacturer's support pages for specific instructions.*

### Space Requirements

Creating a backup requires free space at the destination equal to at least the estimated backup size shown before you choose a folder.

Restoring a backup requires free space on the device's internal storage to temporarily hold the extracted files during the restore process, in addition to the space required for the restored data itself. The app calculates this requirement automatically and will warn you if there is insufficient space before the restore begins.

**As a practical guide, ensure your device has at least 2.5 times the backup file size available in free internal storage before attempting a restore**, as the backup file needs to be extracted prior to being loaded back into the app.

## 6. Lookup Table

Each lookup table record contains the following fields: Genus name, Genus abbreviation, Subfamily, Tribe and Subtribe.

The lookup table provides two key functions:

- **Auto-fill:** When a genus or abbreviation is entered into the Genus field in a collection or reference record, the Subfamily, Tribe and Subtribe fields are automatically populated if a matching lookup table entry exists.
- **Use Abbreviations Lookup dialog:** An optional dialog in the Genus dropdown and the Build From List dialog that displays genus names and their abbreviations from the lookup table. Tapping an entry inserts only the abbreviation into the field or name builder preview.

The Lookup Table setting allows you to:

- Edit an existing entry (Abbreviation, Subfamily, Tribe or Subtribe can be changed; the Genus name cannot be edited — delete and recreate if the genus name needs changing).
- Delete an existing entry.
- Add a new entry.
- Import new entries from a .txt or .csv file.
- Export the complete list as a .txt or .csv file.

The dialog includes a search box. Type the start of a genus name or abbreviation to narrow the list.

### Adding a New Lookup Table Entry

1. Tap the + button at the bottom right of the Lookup Table screen.
2. Enter the genus name and optional abbreviation.

3. Use the dropdowns to select the Subfamily, Tribe and Subtribe. Select N/A where not applicable — for example where a nothogenus belongs to more than one tribe, or where a tribe or subtribe is unknown or not assigned.
4. All four boxes (Genus, Subfamily, Tribe, Subtribe) must contain data for the Save button to become enabled. Tap Save.

*Note: Adding new records to the lookup table automatically updates the Genus user list with any new genus names and abbreviations. The reverse is not true — adding entries directly to the Genus user list does not update the lookup table.*

### Importing into the Lookup Table

The import file must be a .txt or .csv file with 5 entries per line in this order: Genus, Abbreviation, Subfamily, Tribe, Subtribe. For example:

Cattleya,C.,Epidendroideae,Epidendreae,Laeliinae

If a Subfamily, Tribe or Subtribe does not apply, use N/A:

Cattlassia,Cas.,Epidendroideae,N/A,N/A

If a record has no abbreviation, leave that position blank (two commas in a row after the genus name):

Aborchis,,Orchidoideae,Orchidae,Orchidinae

Duplicate genus names or abbreviations in the import file will cause the entire import to be rejected until the duplication is corrected.

*Note: Adding new entries to the lookup table uses uppercase autocorrect for each word. Avoid using keyboard suggestions as some devices may double up the first letter — correct any such entries manually.*

### Genus User List

The Genus user list is a separate list used by the Genus dropdown and Build From List dialog. Adding a new record to the lookup table automatically adds the genus and abbreviation to the Genus user list if not already present.

If you add a new genus or abbreviation directly to the Genus user list (via the Use button in the genus dropdown dialog, via Manage Genus List, or via import), there will be no corresponding lookup table entry. It is recommended to also add the entry to the lookup table so that the Subfamily, Tribe and Subtribe fields auto-populate correctly and the entry appears in the Use Abbreviations Lookup dialog for records containing abbreviations.

## 7. About

Some basic information such as credits, version number and links for App Page, Support / Feedback, Privacy Policy and Terms of Service and End User Licence

Agreement. Tapping on the DbB logo also links to the Database Base Australia website home page. An active Internet connection is required for links to work.

## 8. Send Error Log

This setting lets you send a diagnostic report if the app ever experiences a major crash. It is intended purely as a safety net — in normal use you should never need it — but if a problem does occur, it gives Joe the technical detail needed to track down and fix it.

The app automatically records the details of the most recent crash only — not a running history of every crash that has ever occurred. Recording starts fresh each time, so only one error is ever stored at a time.

### What Counts as an Error

Not every problem in the app causes a crash. A soft error is a smaller issue that the app is able to recover from on its own, without closing — for example, if a photo fails to load into a report because the image file is missing or corrupted, the app simply skips that image and continues, rather than stopping altogether.

Send Error Log only records a major app crash — where the app closes unexpectedly. It does not record soft errors of this kind, since these do not stop the app from working. Should you experience any soft errors and require support go to Settings – About Orchid Manager and tap the Support / Feedback link and you will be taken to the support page of the website where you can send a detailed description of the problem you have encountered and you shall receive a response as soon as practical. An active Internet connection is required for the link to work.

### Sending an Error Report

1. From Settings, quick tap Send Error Log. Do not long tap as this will show a dialog to clear the error log.
2. If no error has been logged, a message will confirm this and no further action is needed as a major crash did not occur.
3. Check the displayed timestamp against when the problem actually occurred, to confirm the logged error matches what you experienced.
4. Enter a brief description of what you were doing at the time, your name, and a valid email address for a reply.
5. Tap Next, then check the email address shown is correct on the following screen.
6. Tap Send. You will need a working email app (such as Gmail) and an active internet connection to send the report. Connect the device to the Internet via Wi-Fi if the device has no direct Internet connection.

*Note: If a problem happens more than once, you can long-press Send Error Log to clear the previously logged error before reproducing the problem again. A dialog will show to confirm you want to clear the error log. This ensures the report you send reflects the most recent occurrence, rather than an older, potentially unrelated one.*

### 9. Purchase Orchid Manager

Option to purchase Orchid Manager.

## Android App Settings

**Warning: In the Android app settings for Orchid Manager, NEVER select the Clear Data option as this will delete all your records and reset the app to its initial state. Do not uninstall and reinstall the app as this will also delete all your records.**

If you are having any problem with the app and need assistance, contact us before taking any action at https://www.databasebase.com.au/contact-us/ and provide as much detail about the problem as possible.

Be sure to create frequent backups using the backup feature built into Settings. See Backup and Restore for details.

Also see Battery Optimisation for further details.

## Use of Phones Tablets and Chromebooks

Most phones are locked to portrait display except when viewing images and videos at full screen and for the lineage tree. Tablets can use portrait or landscape display by rotation. Landscape orientation is available only on devices with a smallest screen width of 600 dp or greater. On Chromebooks the app runs in a resizable window and supports both portrait and landscape orientations. When run at full screen on a Chromebook the app will display in landscape, which is the natural orientation of the ChromeOS desktop. The window can be freely resized by dragging the window borders — the minimum supported window size is 400 × 500 dp. Resizing the window below this minimum is not supported. For the best experience on a Chromebook it is recommended to run the app maximised or at a large window size.

## Taxonomic Data Credits

Species and infraspecific names are sourced from the World Checklist of Vascular Plants (or Plants of the World Online), Royal Botanic Gardens, Kew, used under CC BY 4.0.

Hybrid genus names and abbreviations follow publications of the Royal Horticultural Society (International Cultivar Registration Authority for Orchidaceae) with permission to use this data obtained.

Subfamily, tribe, and subtribe placements follow Chase et al. (2015), Botanical Journal of the Linnean Society 177: 151–174.

# Trial Period Limits

Orchid Manager includes a free trial so you can explore the app with your own data before deciding to purchase. The trial ends after 60 days or 300 hours of app use, whichever comes first.

### How the Trial is Measured

Two separate limits apply, and the trial ends as soon as either one is reached:

- 60 days — counted from the day you first open the app, regardless of how often you use it.
- 300 hours of app use — counted only while the app is actually open even in the background so close the app while you are not using it to preserve the limit.

A heavy user may reach the 300-hour limit before 60 days have passed; an occasional user is more likely to reach the 60-day limit first. Either way, the trial ends the moment the first limit is reached.

### What You Can Do During the Trial

Everything in Orchid Manager works normally during the trial, with two exceptions that are reserved for purchased use for the entire trial period, not just once it ends:

- Restore — you can create backups at any time during the trial, but restoring from a backup is not available until purchase is made.
- Export — exporting a list (such as from the Lookup Table or other manage user lists screens) is not available until purchase is made.

### What Happens When the Trial Ends

Once the trial ends, your existing records remain fully intact and viewable, but the following become locked until purchase is made:

- Adding, editing, or deleting Collection, Reference, and Contact records, along with their attached photos, videos, audio, procedures, and links. Adding to or editing fields may seem to work while viewing the screens but will not be saved on screen exit.
- Adding, editing, or deleting maintenance task assignments — due dates, record intervals, marking a task as done, and date last done. Existing maintenance task type definitions remain editable.
- Creating new maintenance task types.
- Copying a Reference record to the Collection.
- Adding, editing, or deleting General Links.
- Notifications — if notifications were switched on, they are automatically switched off when the trial ends and cannot be switched back on until purchase is made.

Attempting any of the above once the trial has ended will show a message explaining that purchase is required to continue.

### Purchasing

Purchasing Orchid Manager removes all trial limits permanently and restores full access to every feature, including restore, export, and notifications. Purchase options are available at any time during the trial, and remain available after the trial ends.

# Troubleshooting

## My plant has died — how do I treat its collection record?

While viewing the plant record in the detail screen, tap the three dot menu and select Archive Record. In the dialog that appears, enter why the plant is being archived and change the default date if desired. See Archiving Records for full details.

## I accidentally added a new name to the wrong list in the name builder.

Tap the **Undo** text button to remove it from the Preview box. The entry is also removed from the list it was added to. You can now add the name again to the correct list.

## A desired name cannot be found in the dropdown lists or name builder.

User list data is only current as of the RHS WCVP data and other sources at the time of publication. You can update user lists manually or via an import from a file. See Accessing and Managing User Lists and Importing Data to Field User Lists for details.

Grex and Cultivar/Clonal names are not included in the app due to the nature of the data. These can be typed directly into the relevant fields or added via the dropdown dialog or the name builder. See Using Dropdown User Lists and Using the Name Builder — Build From List Button for details.

## I get a "Subfamily, Tribe and Subtribe — no match" message after entering a genus.

There is no matching lookup table entry for the entered genus. See Lookup Table for how to add the missing entry for future use.

## I cannot delete a Choose Parent Records procedure record as it has no trashcan icon.

A Choose Parent Records procedure record has no trashcan icon intentionally to prevent this procedure record from being accidentally deleted as it is vital for building the lineage tree via the View Lineage and Share Lineage options in the three dot menu in the Identification tab on collection records. If such a procedure record was entered in error you can delete it by long press on the procedure record and you will be then shown a dialog to delete it.

## How to Copy and Paste Text on Android

1. Tap and hold on the word you want to copy to highlight it. Selection handles will appear.
2. Drag the handles to expand or contract your selection to cover the desired text.
3. Lift your finger. A toolbar will appear with options including Cut, Copy and Select All. Tap Copy to copy the selected text, or tap Select All then Copy to copy all text.
4. Navigate to where you want to paste the text — this can be in the same app or a different one.
5. Press and hold on the screen where you want the text to appear. The paste option will appear.
6. Tap Paste. The text will appear. The paste option may also display as a clipboard icon or two rectangles — tap the icon to paste.

## How to Remove Data from a Field

To remove all data from a field, tap into the field, tap and hold the text to select it, tap Select All, then tap Cut.

To remove only some data, tap into the field at the right of the unwanted text and use the keyboard backspace to remove it character by character. Alternatively tap and hold to select the unwanted text and tap Cut.

## Moving the Cursor Precisely

For precise cursor control, tap and hold on the spacebar on your keyboard to engage cursor control mode. Once engaged you can swipe the cursor left, right, up and down over the entire keyboard area.

# Quick Start Guide

Welcome to Orchid Manager. This guide will get you up and running quickly if you have never used the app before. Follow these steps in order.

## Step 1 — Set Up Your Maintenance Tasks

Before adding any plant records, set up the maintenance tasks you want to track. Tap **Create Tasks** from the Home screen.

1. Tap the + button to add a new task.
2. Enter a task name (e.g. Watering, Fertilising, Repotting etc.) and the default interval in days for how often that tasks needs to be done.
3. Tap Save and confirm the task name.
4. Should you have already created any collection records in advance to creating any maintenance tasks you will be asked whether to activate the task for all existing collection records. This dialog will not appear if no collection records yet exist.
5. Repeat for each task you want to track.
6. Alternatively you can create all your plant records first then at step 4 above activate each task for all existing plants if the task is applicable to most plants. You can also deactivate tasks if necessary in the maintenance tab for each plant record.

Note that the initial due date for a newly activated task will be today plus the default interval.

## Step 2 — Add Your First Plant Record

Tap **Collection Records** from the Home screen.

1. Tap the + button at the bottom right of the list screen.
2. Tap Yes in the confirmation dialog. A blank record opens in the Detail screen.
3. Tap into the Genus field and type or select your plant's genus name. The Subfamily, Tribe and Subtribe fields will populate automatically if the genus is in the lookup table.
4. Fill in the Species, Grex or other naming fields as applicable. The assembled name builds at the top of the screen as you enter data.
5. Fill in the Care tab fields (Location, Potting Media etc.) as desired.
6. Add acquisition details in the Acquisition tab if desired.
7. Tap into any field and then tap out of it into another field or another tab or exit the screen to trigger autosave. **Do not close the app immediately after entering a field.** Always tap into another field. tab or navigate away first.

## Step 3 — Add a Photo

1. Tap the Images tab in the Detail screen.

2. Tap the + Add Media button.
3. Choose Take a Photo or From Gallery.
4. Grant camera permission if prompted (select While Using the App).
5. Take or select your photo. The photo appears as a thumbnail in the tab and is set as the primary image for the record automatically.

## Step 4 — Activate Maintenance Tasks

1. Tap the Maintenance tab in the Detail screen.
2. For each task you want to track for this plant, tick the checkbox at the top right of that task's card for any tasks that are not activated.
3. Tap Edit Due Date to set when the task is next due.
4. Tap Edit Record Interval to set how often the task recurs for this plant (defaults to the interval you set in Create Tasks screen).
5. Tap Edit Date Last Done if you wish to enter the initial date the task was last done outside of the app.

## Step 5 — Set Up Push Notifications

Tap the gear icon on the Home screen to open Settings, then tap **Push Notifications**.

1. Enable notifications.
2. Set your preferred delivery time.
3. Choose whether to enable silent mode.
4. Tap Close.

You will now receive a notification each day at your chosen time if any tasks are due today or overdue. You can tap on a notification for a given task and you will then see a dialog asking which screen to open either the Check All Tasks Screen or Bulk Update Screen.

## Step 6 — Mark a Task as Done

When a task is due, you will receive a notification if push notifications are enabled. You can mark it as done in one of three ways:

- **From the Maintenance tab:** Open the plant record, go to the Maintenance tab and tap Mark as Done on the relevant task card.
- **From Check All Tasks:** Tap Check All Tasks on the Home screen to see all due tasks across all plants. Tap Mark as Done on the relevant card.
- **From Bulk Update:** Tap Bulk Update Tasks on the Home screen. Select the task, set your date range to Today and Overdue if applicable, tap Find Tasks, review the list and tap Apply Bulk Update — Mark Task as Done.

When marking a task as done you will be prompted to select the date the task was done and to optionally enter any notes. A record of marking the task as done along with any entered notes will be saved as a procedure record (Under Procedures Done tab) for that collection record.

## Step 7 — Create a Backup

Once you have entered some records, create a backup. Tap the gear icon on the Home screen, then tap **Backup and Restore**.

1. Ensure your device battery is fully charged.
2. Tap Create Backup.
3. Review the estimated backup size.
4. Tap Choose Folder and navigate to your desired destination (internal storage, SD card or USB drive).
5. Wait for the backup to complete — do not close the app.

**Make backups regularly.** This is the only way to protect your data if your device is lost, damaged or reset.

## Tips for New Users

- **Be consistent with naming:** Decide whether to use full genus names or abbreviations and stick with one approach across your records.
- **Use the dropdown lists:** Tapping the arrow at the right of a field opens the dropdown with preloaded data. Use the search box to find your desired entry quickly or to also add new data not in the list. A long tap on the dropdown arrow opens a different dialog where you can also edit the list used by the field or add new entries individually or via an import from an external file.
- **Use the filter to find records:** On the Collection list screen tap the funnel icon to filter by any field. If you have many collection records filter by plant numbers (to show a range use greater than and less than conditions). For a quick genus and species search use Filter Genus & Species from the three dot menu.
- **Star indicators tell you what's due:** A flashing red star means overdue. A solid red star means due today. Check the Home screen Check All Tasks button for a quick overview.
- **The Procedures Done tab is your audit trail:** Every task you mark as done is automatically recorded there. You can also add manual entries for any other procedures performed if desired.
- **Reports are filtered and sorted automatically:** Any filter active on the Collection list screen is applied to reports generated from the detail screen. Filter first, then generate your report for a targeted result. Same applied to a sort.
- **Do a test run first** to get a feel of the program by creating some mock-up records. Once you are satisfied that you can use the features correctly then if desired just reset the app by first closing the app then going into Android settings – Apps and tap on Orchid Manager in the app list – Storage and tap the Clear cache and Clear data buttons. The Clear data button will delete all

records you entered and reset the app to how it was when first installed. **Never** use Clear data once you have entered your proper records or you will lose all your records.

- **It is recommended** that you spend some time to read this entire instruction manual to best understand operation of the app.
- For further information visit: https://www.databasebase.com.au/orchid-manager/

## Nomenclature & Labelling Best Practices

**Orchid Manager** adheres strictly to formal botanical naming standards to maintain data integrity and prevent confusion within your collection.

When recording seedlings from a cross between two pure species parents (such as *Dendrobium speciosum* 'Daylight Moon' × *D. speciosum* 'Windermere'), you should always enter the full parental cross in the designated fields rather than using collective terms like "Moonmere".

Using informal "breeding group" names on primary plant tags can cause significant confusion. It mistakenly implies that every seedling from that batch is a single identical cultivar when in reality every seedling is a genetically unique clone.

**Best Practice Workflow:**

- Always record the exact parentage: **Genus species (Seed Parent × Pollen Parent)**.
- Reserve the **Cultivar/Clonal Name** field strictly for officially recognized, awarded, or distinct cloned divisions (e.g., 'Moonmere' AM/AOC).
- By keeping your records precise, you safeguard the true genetic history of your plants and ensure your database remains completely accurate as your collection matures.