

User Manual

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When asking questions, please quote the version number shown at the top of the application header, next to the **ORDNA** wordmark.

Why ORDNA?

Every household collects documents: invoices, contracts, bank statements, official notices — as paper piles in a cupboard and as file heaps on the computer. The real problem is not keeping them but **finding them again**: when it matters, that one receipt is nowhere to be found. And merely scanning does not help — a hundred files named Scan_0001.pdf are just as mute as the paper pile.

ORDNA solves this problem. The program **reads every document, recognises what it is**, names it consistently by date and sender, sorts it into the right folder and makes file names **and content** searchable. That way you answer in seconds questions that would otherwise cost you hours of leafing through folders — for the tax return, for example: *"Which childcare receipts did I receive in 2026?"* A search word and the period are enough; ORDNA shows every hit with the matching passage, and the accompanying Excel overview provides the amounts for adding up.

And your data remains your data: ORDNA works entirely on your own computer and functions without the internet. Nothing is uploaded, there is no user account and no cloud. Nobody but you can see your documents.

1 About this manual

This manual describes how to use ORDNA. It is written for users **without any special computer knowledge**; all it assumes is everyday familiarity with Windows.

Conventions:

- **Bold** marks elements of the interface, exactly as they are named there (buttons, menus, tick boxes).
- Text like this marks folder and file names. Folder locations are given relative to your Windows user folder (for example Documents\ORDNA\Archiv) or to the program folder.
- Header symbols: ⚙ settings · 🔍 search · 📄 log · 📁 recently filed documents · 🔄 refresh · ? help.
- Safety and warning notices appear in a box with the signal word **NOTICE** — please read them before carrying out the step they refer to.

Related document: How ORDNA recognises, names and files documents (document categories, recognition features, borderline cases, duplicates) is explained in detail in the reference guide **"How ORDNA recognises and sorts your documents"** ([RECOGNITION_en.pdf](#)). You can open it from the ? menu of the application, right below the user manual.

2 Safety

Intended use: ORDNA is an offline archiving program for private documents on a single Windows computer. It reads documents from a folder or a mailbox, indexes them, names them and files them into your target folders.

Reasonably foreseeable misuse:

- ORDNA is **not a backup** (see the notice below).
- ORDNA is **not legal advice**: whether an archived document satisfies statutory retention requirements is a question for a qualified professional.
- The built-in viewing service is reachable on this computer only. Do **not** expose it to other devices via network shares or forwarding — it has no login.

Privacy: All processing steps — text recognition, document recognition, filing, search — run on your computer only. ORDNA transfers no documents and no content to third parties. The program uses the internet only when you trigger it yourself: when fetching your own mailbox and when downloading additional languages for text recognition. If ORDNA checks for a new program version, it also asks zuentec.de — **this check is switched off by default** and transmits nothing about you or your documents (chapter 5.7). If you report a problem (chapter 5.13), **ORDNA does not send it itself**: it opens your own e-mail program with a finished text that you see in full beforehand — it is sent only by you.

Your originals stay where they are. ORDNA files copies in the archive and leaves source folders and mailbox untouched. If you want the program to tidy up behind itself, two ticks are available — neither is set by default:

Tick	Effect once you set it
Delete source file after archiving (<i>Search a folder</i> card)	ORDNA removes the source file as soon as the document is demonstrably in the target folder.
Move mail to trash once its attachments are fully archived (<i>Search mailbox</i> card)	ORDNA moves the mail to the trash of your mailbox once all of its attachments are archived.

NOTICE

With the tick **Delete source file after archiving** set, ORDNA removes the originals from the source folder. If you read in a collection folder whose content should stay intact, the originals there are gone afterwards. Remove the tick before processing such a folder.

NOTICE

ORDNA does not create backup copies of your archive. If the drive fails, the archive would be lost. Back up the archive folder regularly with the backup method of your choice (external drive, backup program).

NOTICE

For fetching the mailbox, your mail password is stored on this computer. With your main password, another user of the computer would gain full mailbox access. Use an **app password** (a secondary password just for ORDNA, which you can revoke at your provider at any time) — the hint below the password field names the place to get one.

3 Product description

3.1 Feature overview

- **Two sources:** a folder of your choice (where your scanner saves, or the cloud app of your phone, chapter 5.1) and your mailbox (attachments).

- **Automatic recognition:** ORDNA reads the text of every document and recognises the document type, the sender and the date — with a recognition model that runs locally on your computer.
- **Correcting details:** If the recognition read something wrongly, you put it right on the search hit via ; ORDNA then renames the file accordingly (chapter 5.12).
- **Consistent naming and filing** into fourteen document classes, each with its own target folder:

Document class	File name
 Tax document	TaxYear_TaxType_TaxOffice
 Payslip	YYYY-MM_Employer
 Bank documents	YYYY-MM_Institution_Account
 Invoice / receipt	YYYY-MM-DD_Issuer
 Official notice	YYYY-MM-DD_Authority_Subject
 Insurance policy	YYYY-MM-DD_Insurer_Branch
 Contract	YYYY-MM-DD_Party_Kind
 Health	YYYY-MM-DD_Issuer_Kind
 Education & qualification	YYYY-MM-DD_Issuer_Kind
 Certificate & record	YYYY-MM-DD_Issuer_Kind
 Correspondence	YYYY-MM-DD_Issuer_Subject
 Other documents	YYYY-MM-DD_Issuer (catch-all stage)
 Encrypted	original file, unchanged (password-protected)
 Not archived	original file, unchanged (last resort)

The classes are listed in the order in which ORDNA checks them — whatever is higher up wins when a document could fit several classes. The archive overview in the application and the reference guide on document recognition (chapter 1) show the same order and the same symbols.

For health, education & qualification, certificate & record and correspondence the final part of the name is a mandatory detail: if no description can be verified in the text, the document is not filed in that class but passed to the next stage — ORDNA invents nothing.

- **One sender, one spelling:** If the target folder already holds documents from the same sender, ORDNA adopts their spelling, provided the new one differs only in punctuation, capitalisation or spaces. Related documents therefore stay together even when text recognition reads a comma instead of a full stop. If the names differ by a **word**, they count as different senders and stay apart.
- **Day and month swapped:** If the document's date appears in the text and day and month were swapped while transferring it, ORDNA puts it right — but only if exactly one of the two readings appears in the document. If neither can be verified, the value found is kept; here, too, nothing is guessed.

The folder names on disk follow the language you chose when installing (for example *Invoices* for an English installation, see chapter 4.1); you can change every folder in the settings.

- **A format that stays readable:** archived documents are stored as **PDF/A** — a standardised long-term PDF format — and receive a searchable text layer.
- **Search** across all classes: in the file name and in the document content.
- **Excel overview** of the whole archive; for invoices with amounts and categories.
- **Duplicate protection:** documents read in twice are never deleted but placed in the *Duplicate* (duplicates) subfolder.
- **Nothing is guessed:** if ORDNA cannot reliably establish a feature from the document itself, the document stays in a catch-all stage instead of disappearing into the archive under a wrong name.

File types: By default ORDNA processes PDF files only. In the  settings you can additionally allow image files (JPG, PNG, HEIC, TIFF, BMP, GIF, WEBP — including phone photos) and Word documents (DOCX/DOC); they are converted to PDF before processing.

Wherever this manual says "invoice", till receipts and proofs of payment are always included — they go through the same process.

3.2 System requirements

- A Windows computer. ORDNA brings its own window; the Windows component required for it is already present on current machines.
- Two free helper programs that you install once yourself (chapter 4.2): **Ghostscript** (PDF/A conversion) and **Ollama** (runs the recognition model; the model itself, about 4.6 GB, is downloaded by ORDNA on the first run).
- Administrator rights are **not** required for ORDNA itself. Windows only asks for them when you have Ghostscript installed (chapter 4.1, step 4 and chapter 4.2) or when you choose a protected installation folder for ORDNA.

3.3 The interface at a glance

ORDNA runs in a window of its own. The main page is laid out from left to right, following the path your documents take:

- **On the left, where the documents come from:** the two source cards **Search a folder** (top) and **Search the mailbox** (bottom). The word **or** sits between them — you pick one of the two sources, not both at once.
- **An arrow** leads to the right, to the result.
- **On the right, where the documents end up:** the **Archive** overview with all document classes, their count, size and the **new** column. Clicking a name opens the folder in Windows Explorer.

Below, spanning the full width, is the **Search & edit documents** card .

The **new** column counts what has been added since you last reset the counter — as long as you have never reset it, it counts from the start of today. The  button in the column heading sets the counter back to zero — counting then starts from that moment, across midnight as well. **Nothing about your documents changes**, only the display starts over. At the same time the **Search & edit documents** card is cleared — just as with its  button — so no hits remain there for a count that no longer exists. The button sits permanently in the column heading — even when there is nothing to count.

Both number columns are links, and an arrow shows where they lead — down into the **Search & edit documents** card:

Clicking ...	shows in the search
the number under Count	all documents of that class
the bold number under new	only the new arrivals counted there — the new tick is set for you

Both clear all the other search filters first, so that no leftover filter quietly narrows the result.

At the top right of the card, **Open Excel workbook** opens the document overview `Document Overview.xlsx` in whichever program is set for Excel files on your computer (chapter 5.5). If no workbook has ever been written, ORDNA says so.

In the header on the right:  (settings),  (help: this **User manual**, **Document recognition**, the **Change log** and **Report a problem**),  (processing log),  (recently filed documents),  (**Refresh document overview (Excel) and search**) and the flag menu for the interface language (English, German, Spanish, French).

The first three entries in the  menu are PDF files. They open in whichever program is set on your computer for PDF files. **Report a problem** opens a window instead (chapter 5.13).

4 Installation and first steps

4.1 Installing ORDNA

Goal: ORDNA is installed and starts from a desktop shortcut.

1. Double-click `ORDNA-0.36.0-Setup.exe` to start it. If Windows warns about an "unknown publisher", choose **More info** → **Run anyway** — the warning appears because the setup does not yet carry a paid publisher signature.
2. Choose the **language** of the installation. The interface will later start in that same language (switchable in the flag menu), and ORDNA names the folders of your archive in that language too — for example *Invoices* with an English installation, *Rechnungen* with a German one. **The folder names stay as they are afterwards**, even if you switch the interface later: a filled archive should not be renamed with every change of language. If the chosen archive folder **already holds an ORDNA archive**, ORDNA keeps its folder names — even if you pick a different language this time. Which folder ORDNA uses for a document class can be changed at any time in the  settings.
3. Follow the wizard. It asks for the **installation folder** and for the **root folder of your document archive** (suggested: `Documents\ORDNA\Archiv`). Below that root, ORDNA creates the fourteen class folders on first start. If the chosen installation folder requires administrator rights, the setup offers to continue with those rights (Windows asks for confirmation) — or you pick a different folder.
4. The **Additional Programs** page shows whether the two helper programs (chapter 4.2) are already present. If one is missing, leave the **download and install now** box ticked — the setup then takes care of both itself. For Ghostscript, Windows asks for administrator rights; after that, Ghostscript's own installation window opens — click through it and complete it with **Finish**. Without an internet connection, untick the boxes and install later as described in chapter 4.2.
5. Leave the suggested **desktop shortcut** ticked — this is how you will start ORDNA from now on.

Result: The **ORDNA** shortcut is on the desktop. At the end the setup checks whether the two helper programs (chapter 4.2) are present and otherwise names the download source.

4.2 Installing the two helper programs

Goal: Ghostscript and Ollama are present; ORDNA finds both by itself.

The easiest way is to leave this to the setup: on its **Additional Programs** page (chapter 4.1, step 4) it downloads and installs both on request. The table below describes the manual way — for instance if there was no internet connection during installation.

Program	What for	Note
Ghostscript	converts documents into the long-term PDF/A format	please install version 10.07.1 (direct download , 64-bit) — versions 10.6.x degrade the image quality of scanned documents
Ollama	runs the recognition model	install from ollama.com ; ORDNA downloads the recognition model (about 4.6 GB) by itself on the first run — progress appears in the log  , then start the run again

ORDNA checks by itself before every run that everything is ready. If something is missing or the recognition model does not respond, a message appears right at the start button — no documents are lost.

4.3 First start

1. Open the **ORDNA** desktop shortcut. The window appears after a few seconds. A second click does not open a second window; it brings the existing one to the front.

Result: The main page is open. As a first try, place a PDF invoice into the folder entered on the **Search a folder** card and follow chapter 5.1. You can switch that folder to one of your own there at any time.

4.4 Uninstalling

Windows Settings → **Apps** → ORDNA → **Uninstall**. The program is removed. **Your document archive is kept in any case** — it is not touched.

At the end you are asked whether your settings and data should be removed as well:

Answer	Effect
No (default)	Settings, mailbox access, search index and analysis data are kept. A later reinstallation finds everything in place.
Yes	These data are removed; ORDNA leaves nothing behind except the archive. After a reinstallation, ORDNA rebuilds the search index and the analysis data — the first refresh then takes a while.

The filing journal is kept either way: it also resides in the archive and is picked up from there on the next start.

5 Operation

5.1 Reading in an existing folder once

Goal: An existing collection of files (for example an old scan folder) is taken into the archive.

Your collection stays intact: the tick **Delete source file after archiving** is not set by default.

NOTICE

If you set the tick **Delete source file after archiving**, ORDNA removes the originals from the source folder after successful filing. If your collection there should stay intact, leave the tick empty.

1. On the **Search a folder** card, enter the **Source folder** (type it or use ... for the folder dialog).
2. If needed, set the tick **Include subfolders**.
3. Set the tick **Delete source file after archiving** if ORDNA should clear out the source folder.
4. Click **Process folder**.

Result: Progress appears below the button, details in the log . Archived documents appear on the right in the Archive overview and in the  window. If the run filed at least one document, **search and Excel overview update by themselves** — no click on  is needed.

Reading in the same folder again and again. The source folder you entered stays saved. You can therefore use it permanently as a collection point and read it in whenever it suits you — ORDNA recognises documents that are already archived as duplicates and does not file them a second time. Three common collection points:

- **Scanner:** Your scanner or its scan app saves into a fixed folder. Which manufacturer's program does the scanning is irrelevant.
- **Phone:** You photograph a receipt while out, and your cloud provider's app uploads the picture to this computer. Release the image formats beforehand (chapter 5.7, **Accepted file types**): by default ORDNA only processes PDF, so a photo would otherwise be left untouched.
- **Your own collection folder:** You put documents there yourself as they come up — invoices downloaded from a customer portal, for instance.

5.2 Setting up and fetching the mailbox

Goal: Invoices that arrive by mail land in the archive without printing.

Setting up the mailbox (once):

1. Open  → **Mailbox (IMAP)** — IMAP is the usual retrieval method; your provider almost certainly supports it.
2. Choose the **Provider** (Gmail, Outlook/Microsoft 365, GMX, WEB.DE, Yahoo, iCloud, T-Online, IONOS or "Other provider") — ORDNA fills in the connection details itself.
3. Enter **Email address** and **password** — please use an **app password**, see the safety notice in chapter 2; the hint below the field leads you to the right page of your provider.
4. Click **Test sign-in**, then **OK**.

Fetching:

1. On the mail card, set the **period** ("mails from the last ... days").
2. Click **Fetch mailbox**.

Result: ORDNA processes all attachments of the accepted file types. **Your mailbox stays unchanged.** Mails already handled are skipped on the next fetch — even if they remain in the inbox. If the fetch filed at least one document, **search and Excel overview update by themselves** — the new documents sit right behind the numbers of the **new** column in the archive overview.

If ORDNA should tidy up the mailbox as well, set the tick **Move mail to trash once its attachments are fully archived**. A mail then moves to the trash of your mailbox (recoverable) once **all** of its attachments are archived.

5.3 Switching on the daily automatic fetch

Goal: The mailbox is fetched every day at a fixed time.

1. On the mail card, set the tick **Fetch automatically every day at** and choose the time.

Result: A green ✓ briefly confirms that the setting is saved, and below it you see when the next run is due. The fetch runs daily in the background — ORDNA does not have to be open; the computer only has to be switched on with your Windows user signed in. The card shows the result and log of the last automatic run.

To switch it off, clear the tick again; that takes effect immediately as well. With the tick set, a changed time is likewise applied at once.

5.4 Finding a document again

Goal: Find a specific document — or all receipts on a topic — in seconds.

1. In the **Search & edit documents** card , enter a search term and/or set filters: **document type**, **period**, **amount range**, **category**, **receipt type** (the last three apply to invoices only) — or the **new** tick at the far right of the search row, which restricts the search to the documents counted in the **new** column of the archive overview. It sits vertically below the arrow of that column, because both mean the same thing.
2. The hit list appears by itself — it follows your typing and every filter change; there is no separate search button.

The **new** tick is also set by clicking a number in the **new** column of the archive overview — the search then shows exactly the documents counted there for the clicked class. Clicking the number under **Count**, by contrast, shows the whole class and leaves the tick alone (chapter 3.3).

Result: Clicking a hit opens the document in whichever program is set for it on your computer. If the search term appears only in the document content, the hit additionally shows the **passage** — that is how you find a contract by a clause that appears in no file name. With no filter set, the search deliberately shows nothing; at most 300 hits are displayed, and the total count is always named. × resets everything.

Tax-return example: search term `childcare`, period 2026-01-01 to 2026-12-31 → every document of the year in which the word occurs. The matching amounts are in the Excel overview (chapter 5.5) for filtering and adding up.

After a mailbox fetch or a folder run that filed at least one document, the search updates by itself — newly filed documents can be found at once. **An open hit list follows as well:** whenever the archive overview changes — for instance while a run is filing documents — the search runs again with the filters you set, without you clicking anything. Only files you moved or renamed by hand appear after a click on  (or on the next start).

5.5 Evaluating expenses: the Excel overview

Goal: Filter, sort and add up amounts.

In the root folder of the archive, ORDNA maintains the workbook `Document Overview.xlsx` — **one sheet per document class**, with the features of that class. The **Invoices sheet** carries, per invoice, date, issuer, invoice number, gross/net amount, VAT, category, receipt type, the currency and a clickable link to the file.

The **Currency column** names the currency printed on the invoice itself — CHF on a Swiss invoice, for example. The amount next to it is then labelled the same way. If the column stays empty, the currency could not be read

off the document; the amount then carries the symbol you chose in the settings (section 5.7).

1. After a mailbox fetch or a folder run the workbook is already up to date; if you moved files by hand, click  first.
2. Click **Open Excel workbook** at the top right of the **Archive** card — or open `Document Overview.xlsx` yourself in the root folder of the archive.
3. Filter with the built-in autofilter (for example category or period) and sum the amount column.

Result: The evaluation you wanted — say, all childcare expenses of a year — sits in front of you as an Excel selection. If the workbook is currently open in Excel, ORDNA cannot update it: close Excel and click  again.

5.6 Checking the filing: recently filed documents and log

-  opens a freely movable window with the 15 most recently filed documents of all classes; every entry is a link. The  in its title bar re-reads the list immediately.
-  opens the processing log: what is running, what was filed, what stayed behind and why. (The log lines are always German, regardless of the interface language.)

5.7 Adjusting the settings ()

The  window saves all changes together via the **OK** button at the top right and then closes. If something cannot be saved (for example a folder path that does not exist), the window stays open and the section concerned names the reason.

When it opens, the window shows only the headings of the eight sections. Clicking a heading expands that section, clicking it again collapses it; several may be open at the same time. The next time you open the window, it starts from the overview again.

- **Appearance: Light, Dark or System (automatic)** — takes effect immediately.
- **Currency:** the symbol used to label amounts — in the search, in the  window and in the Excel overview. It starts out as the symbol of your Windows region setting; you may enter any other (up to five characters, for example CHF or c\$). It is a label and nothing more: the recorded amounts and the documents already filed stay as they are, and ORDNA does not convert between currencies. **If an invoice states a different currency**, ORDNA recognises it and labels that amount accordingly **in the Excel overview** (section 5.5) — your symbol remains the default for all the others. Search and  window keep showing your symbol throughout.
- **Document types and target folders:** per class a tick box (archive yes/no), the target folder and ... for the folder dialog (it appears on the desktop). Deselected types keep their path and are active again with one click; at least one type must stay active. Changed folders apply from the next run — documents already filed stay where they are.
- **Accepted file types:** allow or block additional formats (images, Word); PDF always stays active.
- **Blank pages:** if your scanner scans both sides, sheets printed on one side only produce a blank back page. The tick box **Remove blank pages when filing** makes ORDNA leave them out. It is switched off by default. A page counts as blank only if it carries **neither readable text nor visible content**; a border strip of 16 millimetres is ignored so that filing holes and folded corners are not mistaken for content. At least one page always remains, and single-page documents are never touched. **Nothing is lost:** ORDNA places the complete version with all pages into the `Duplikate` (duplicates) subfolder of the respective target folder, under the same name prefixed with `Org_`. Should you want to see a removed page after all, you find it there.
- **OCR languages** (languages of the text recognition): initially only your installation language is ticked. Every additional language slows recognition down a little — at most three at once, at least one. Via **Add language** about 115 further languages are available (short download).
- **Mailbox (IMAP):** see chapter 5.2.
- **Updates:** ORDNA can check `zuentec.de` for a newer version. **This is switched off by default** — it is the only feature that uses an internet connection at all. **Check now** looks once without switching anything on. If ORDNA finds a new version it asks you; only after you agree does it download the installer, verify that it is

genuine, close itself, install and start again. A window then confirms that it worked. **No update is carried out while a folder or mailbox run is working.**

5.8 Checking the archive (maintenance)

Goal: Confidence that the archive is complete and intact — recommended after larger clean-ups or manual moves.

1. Open  → **Maintenance** and click **Check archive**.

Result: ORDNA walks through all target folders (including Duplikate) and reports empty files, unreadable files and files that have changed since they were filed — the latter by comparison with the **filing journal** (see box). It also reports a subfolder named _Duplikate left over from an earlier version: its contents are checked as usual, but ORDNA no longer files anything there. Move them into Duplikate and delete the empty folder — otherwise parked files sit in two places. The check takes about half a minute and **changes nothing**; the interface remains usable.

The findings appear in the hit list of *Search documents*, with the reason under each line ("The file is empty (0 bytes)", "The content differs from the recorded state" ...). Use  to look at the document right away and, if need be, take it out of the archive with **Remove** — the way to deal with an empty or unreadable file. Lines without  are not directly in a class folder but in the Duplikate subfolder, or they concern a whole folder; look there in File Explorer.

ORDNA also writes a log file listing every finding, which opens in a spreadsheet program — button **Open log** next to *Check archive*.

The filing journal (called "provenance journal" in the interface): for every act of archiving, ORDNA records the time, the origin (mail or folder), the original name, the document class and a **digital fingerprint** of the file — a check value that changes as soon as the file changes. This makes it possible to prove at any time where a document came from and that it has been unchanged since. ORDNA records the same when you correct a document with , move it to another class or take it out of the archive — so documents you have edited by hand stay fully traceable as well.

5.9 Checking the naming (maintenance)

Purpose: To find documents whose file name does not follow the pattern of its class — because you filed or renamed them by hand, for instance.

1. Open  → **Maintenance** and click **Check naming**.

Result: The findings appear in the hit list of **Search documents**, with the reason under each line: the name does not start with a date, the date is in the wrong form, it cannot be a date, or an entry is missing. **A name that is too long, or that contains a character Windows does not allow in file names, is reported as well** — such names come from renaming by hand or from another computer. Use  to put the name straight right away. The check only reads and **changes nothing**; names that are too long are reported, never shortened on their own.

"Encrypted" and "Not archived" are left out: there the original name is intended.

The list stays while you work through it. After each correction ORDNA checks again and removes only the line you have dealt with — the remaining findings stay, and so does the count above them.

5.10 Deleting all duplicates (maintenance)

Purpose: To clear the Duplikate subfolders of all classes in one go, once you have looked through them.

1. Open  → **Maintenance** and click **Delete all duplicates**.
2. ORDNA first tells you how many files that is and how much space they take.
3. Confirm with **To the recycle bin**.

Result: The entire contents of those subfolders go to the **Windows recycle bin**. You can restore them from there as long as you have not emptied it; they are no longer in the archive. If ORDNA cannot establish that the drive really recycles, **nothing** is touched and the message says so — a deletion with no way back does not happen.

What is in there: documents read in twice, everything you removed from the archive yourself via  → **Remove**, and — if you switched on the removal of blank pages — the complete versions of those documents. Look through the folder first.

5.11 Reviewing duplicates

ORDNA never deletes documents that were read in twice: they move to the Duplikate (duplicates) subfolder of the respective target folder and stay there for visual inspection. Have a look inside now and then; what you delete or bring back there is your decision. If ORDNA cannot reliably establish a feature, the file does **not** count as a duplicate — it is filed with a name suffix (`_2.pdf`). Better one copy too many than one receipt too few.

Identical subscription invoices (same day and amount, but a new invoice number) are explicitly **not** treated as duplicates.

For payslips, every version is kept. One month often comes with two documents: the payslip itself and a later correction, which frequently shows only a partial amount. ORDNA files both side by side and tells them apart by the appended number — `2021-01_Employer.pdf` and `2021-01_Employer_2.pdf`. Neither of the two displaces the other.

5.12 Correcting details and putting things right

Goal: Put right a detail that was read incorrectly — a misread issuer, a swapped date, a wrong amount.

Via the search (recommended):

1. Find the document (chapter 5.4).
2. Click  on the hit.
3. Correct the details. Under **File name** you see continuously what the file will be called once you apply.
4. Click **Apply**.

If the name would not be allowed: Windows limits how long file names and paths may be, and forbids some characters. If your entries would produce a name that cannot exist, ORDNA shows it under **File name** in red, states underneath what is wrong and by how many characters, and **Apply** stays greyed out. **ORDNA shortens nothing on its own here** — you decide which entry gets shorter. Usually it is the last one, such as the subject or the kind of document; the date and the issuer then stay complete. As soon as the name fits, the message disappears and **Apply** can be clicked again.

Result: ORDNA renames the file and brings search and Excel overview up to date. **The window stays open and moves straight on to the next document in your list** — so you can work through a list of results in one go, without having to call it up again. Only after the last entry does the window close. **The refresh of the Excel overview then starts on its own**; you do not need to click  yourself. While it runs, the symbol in the header turns. **Take out of archive** behaves the same way: it, too, moves on to the next document.

Correcting several hits one after another: The arrow buttons ◀ and ▶ in the window header jump to the previous or next document of the hit list; between them you see your position (say "3 / 17"). At the start of the list ◀ is greyed out, at the end ▶. If you changed something and have not applied it yet, ORDNA asks before the jump what should happen to the changes: **Apply and continue**, **Discard and continue** or **Stay here** — so no change is lost by accident.

Undoing a change: The button **Undo** resets all fields to the state in which you opened the document — including a document class chosen by mistake. The window stays open, so you can carry on right away. As long as nothing has changed, the button is greyed out. It does not bring back corrections you have already applied; for those, enter the previous value again.

Closing the window: Use **Close** at the top right. If changes are still open, ORDNA asks first — **Apply and close**, **Discard and close** or **Stay here**.

The document is shown next to the fields. That way you can check the details against the original without leaving the window. The button **Open in default program** shows it in your usual PDF viewer as well.

Is the document in the wrong class? Choose the right one at the top under **Document class**. ORDNA then shows the fields of that class — for an invoice also gross amount, category and receipt kind. **Details that exist in both classes stay as they are** — you do not type date and issuer again; only what the new class additionally needs is empty. Once you apply, the file moves into the folder of the new class and takes its name. **This is where most mistakes sit:** whatever ORDNA could not assign with confidence lies in "Other documents" or "Not archived" — both can be put right this way.

Document class, category and receipt kind are chosen from a list, you do not have to type them.

Filing a password-protected document later: the list also contains **Encrypted**. That class keeps files under their original name — no details are needed, the file name stays as it is, and the file is only moved into the *Encrypted* folder. ORDNA checks that the file really does ask for a password and refuses it otherwise: that folder is meant to remain the complete list of what still needs unlocking. This is useful for documents that ended up in a subject folder before the class existed.

"Not archived", by contrast, **cannot** be chosen: that stage is meant for files ORDNA was unable to read.

Taking a document out of the archive: the button **Remove from archive** moves it into the Duplikate subfolder of its target folder — where duplicates go as well. **Nothing is deleted:** you can bring the file back from there by hand at any time. ORDNA asks first.

The window shows two groups:

Group	Effect
Upper fields (date, issuer, kind ...)	They form the file name. A change renames the file.
Further details (invoices only: amount, VAT rate, invoice number, category, document kind)	They appear only in the Excel overview and in the search; the file name is untouched.

NOTICE

If a mandatory detail is missing, the window says so and the file is **not** renamed — ORDNA does not create a file without a name. Add the missing detail and the renaming takes effect.

Corrected values stay corrected. What you enter here by hand is not overwritten again by a result of the automatic recognition — not even on a later refresh.

If a file name does not follow the scheme of its class (a password-protected PDF that kept its original name, for instance), the window says so and leaves the name untouched; the further details can still be corrected.

By hand in Explorer:

- **Wrong name?** You can also rename the file in the target folder — then keep to the scheme of the class (chapter 3.1) so the search can still assign the features. Then click . Going through  takes care of the scheme for you.
- **Wrong folder?** The easiest way is to choose the right class under **Document class** in the  window (earlier in this chapter). If you move the file into the correct class folder by hand instead, click  afterwards.
- **"Other documents"** collects readable documents without a matching class; **"Not archived"** receives everything else as an unchanged original (photos without text, undated papers, password-protected PDFs). Both folders are worth an occasional review.
- **Password-protected PDFs** cannot be read by ORDNA. They therefore go into the **"Encrypted"** class unopened — all of them, whatever they are called. They keep their existing name, because without readable content there is neither a date nor an issuer for the usual scheme. That folder is your to-do list: remove the password, feed the file in again, and ORDNA files it as usual.

5.13 Reporting a problem

Goal: To tell the manufacturer that something does not work — with the technical details needed to narrow it down.

1. Click  → **Report a problem**.
2. In the text box, describe what you did and what happened instead.
3. Under **This is what goes to the manufacturer — nothing else** you see the complete text of the message. Read it through.
4. Click **Open e-mail program**.

Result: Your usual e-mail program opens with a finished message addressed to `report@zuentec.de`. **It is sent only when you click Send there** — ORDNA never sends anything itself and needs no internet connection for this.

What the message contains: the program version, your Windows version, the interface language, the name of the recognition model, the text-recognition languages you have set, and the number of your documents and active classes — plus your own text. **File names, folder paths, your e-mail address and the contents of your documents are not included.** You see all of it before anything happens.

If no e-mail program is set up on your computer, ORDNA says so and leaves the window open. Click **Copy text** and paste it into a message to `report@zuentec.de` — through your mail provider's website, for instance.

Note: ORDNA shortens very long descriptions, because a prepared e-mail can only carry a limited amount of text. This is shown, and the shortened place is marked with [...].

6 Troubleshooting

Symptom	Possible cause	Remedy
The message at the start button names Ghostscript	helper program missing	install Ghostscript 10.07.1 (chapter 4.2)
The message names Ollama	Ollama is not installed or does not start	install Ollama from ollama.com and start it once
"The recognition model is being downloaded"	one-time model download (several GB) in progress	wait for the progress in the log  , then start the run again
"The recognition model is installed but does not respond"	often an outdated graphics driver	update the graphics driver; details are in the Ollama log (<code>server.log</code>)
A document sits unchanged in Not archived	no readable text, no date/issuer in the text, or a password-protected PDF whose file name says nothing about its content	password PDFs: open the file, save it without a password, read it in again — or give it a telling file name before reading it in (chapter 5.12). Others: file by hand
A file stays in the source folder	ORDNA could not assign it reliably, or recognition was disrupted	read the log  ; after a disruption the file runs through again automatically on the next run
The window Target folder not found appears	a filing folder was renamed, moved or deleted — or the drive is not connected	Find folder ... and select the moved folder; or Create new if it is really gone. While the window is open nothing is archived and no folder is created automatically , so that no second filing structure appears. If all folders are missing, the drive is usually just disconnected — check the connection first; "Create new" is disabled in that case
Apply in the  window is greyed out and a message sits under the file name	the entries would produce a name Windows cannot create — usually too long	shorten the last entry (subject, kind, branch); the message names the character count and the limit (chapter 5.12)

Symptom	Possible cause	Remedy
A filed file name ends in the middle of a word	the full path would have exceeded the Windows limit	not a fault: ORDNA shortens the last entry when filing. A shorter archive path makes room again (🔗 → target folders)
The Excel workbook does not update	Document Overview.xlsx is open in Excel	close Excel, click 🔄 again
The search does not find a new document	search data not yet refreshed	click 🔄
The desktop shortcut does not start ORDNA	launch mechanism separated from the installation folder (e.g. folder moved by hand)	reinstall ORDNA — archive and settings are preserved
Windows warns about an "unknown publisher" during setup	setup not yet carrying a publisher signature	More info → Run anyway

For detail questions: the processing log 📄 names the reason for every rejected file; technical details are in the log files under `logs\` in the program folder. When asking questions, please quote the version number from the header.

7 Reference

- **Limits:** at most 3 OCR languages at once; the search displays at most 300 hits (the total count is named); the 📄 list shows the last 15 filings.
- **File names:** at most 255 characters; the full path of folder plus file name at most 259 characters. These are limits of Windows, not of ORDNA. When filing, ORDNA shortens the **last** entry of the name if it has to; the date and the issuer always stay complete. When you correct by hand, you are asked instead (chapter 5.12).
- **File types:** PDF (always active); switchable JPG, JPEG, PNG, HEIC, HEIF, TIF, TIFF, BMP, GIF, WEBP, DOCX, DOC.
- **Operation on this computer only:** ORDNA communicates with your own computer alone; nothing is reachable from outside. Start it from the **ORDNA** desktop shortcut.
- **Interface languages:** English, German, Spanish, French — switchable in the flag menu; the choice is remembered.

8 Glossary

Term	Meaning
App password	secondary password for a single program; created and revocable at your mail provider
Catch-all stage	"Other documents" and "Not archived" — where documents go that cannot be filed with certainty
Digital fingerprint	check value of a file; if the file changes, the fingerprint changes
Duplicate	document read in twice; moves to the Duplikate subfolder
Filing journal (provenance journal)	ORDNA's record book: one line per archiving with time, origin, name and digital fingerprint
IMAP	the usual method by which programs fetch mail from a provider
OCR / text recognition	turns the image of a document into readable, searchable text
Ollama	helper program that runs the recognition model on your computer
PDF/A	standardised PDF format for long-term archiving
Recognition model	locally running language model that determines document type, issuer and date from the text
Source folder	folder from which ORDNA reads documents in

9 Legal notices

ORDNA uses open-source third-party components; the complete overview with licence texts is included in the installation (THIRD-PARTY.txt in the Documentation folder of the program folder, in four languages). Ghostscript and Ollama are not shipped but installed by you; their licence terms apply. All product names mentioned are trademarks of their respective owners.

Privacy: ORDNA creates no user accounts and transfers no content to the manufacturer or third parties on its own. The only message to the manufacturer is the problem report that you write yourself and send yourself (chapter 5.13); details in chapter 2.

10 Revision history

The revision history of this manual — which document version changed which chapters, and when — is supplied as a document of its own: **"User Manual — Revision History"** ([MANUAL CHANGES en.pdf](#), in the Documentation folder of the program folder). It is kept **in English only** and applies to all four language editions of the manual. The document version you are reading is shown in the title block above.

Standard chapters not included: "Administration" is omitted (ORDNA has no user roles), an index is omitted (fewer than 30 pages), figures are omitted (all controls are named by their visible label and symbol).