



# orGenta User Guide

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Software version 2.2.1

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<b>Why orGenta</b>	<b>3</b>
<b>Use Case</b>	<b>3</b>
<b>Installation</b>	<b>4</b>
<b>Main Screen</b>	<b>5</b>
<b>An orGenta Glossary</b>	<b>6</b>
<b>Creating Your First Category Node</b>	<b>8</b>
<b>Adding Item Content to a Category</b>	<b>10</b>
<b>Adding a Child Node</b>	<b>12</b>
<b>More about the Category Window</b>	<b>14</b>
<b>More about the Items Window</b>	<b>16</b>
<b>Jumping windows with the Sidebar</b>	<b>19</b>
<b>Creating Links between Categories and Items</b>	<b>19</b>
<b>Manually Assigning Items to Categories</b>	<b>21</b>
<b>Trayed Mode</b>	<b>22</b>
<b>Importing</b>	<b>23</b>
<b>Exporting</b>	<b>25</b>
<b>Multiple Knowledge Bases</b>	<b>25</b>
<b>Cross Database Copy</b>	<b>28</b>
<b>Printing Items</b>	<b>28</b>
<b>Backing Up Your Knowledge</b>	<b>29</b>
<b>Advanced Settings</b>	<b>30</b>
<b>Contact Us</b>	<b>31</b>

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## Welcome

### **Why orGenta**

orGenta is knowledge management software built for a specific task: categorizing tidbits of information about people, processes, and things. In our modern world, information is at our fingertips, but when you're inundated with information, all that data loses value quickly. When you're organized, you learn faster, can recall faster, and use your energy toward applying your knowledge. We developed orGenta to help you organize your thoughts across multiple knowledge sources. With orGenta, you can note anything from little insights from a conversation with your coworkers, to links to major research available online, and tie them all together in multiple dynamic Categories.

### **Use Case**

Once upon a time, you might have found yourself browsing the aisles of your local library. Nowadays, you might be online browsing the collections of libraries around the world. Whether in person or virtually, you've likely experienced the serendipity of searching for a title and then discovering new knowledge or rediscovering old interests along the way. orGenta makes these similar connections for you. The more data and knowledge you add to orGenta, the smarter it becomes, making clear connections for you across your data.

orGenta also provides low-profile rapid entry of this information ("Items") into a database. The software then matches the Item information to hierarchical Categories, according to their content, forming Relationships between the two.

## The Basics

### **Installation**

orGenta is available for download from our home page at [www.izard-llc.com](http://www.izard-llc.com).

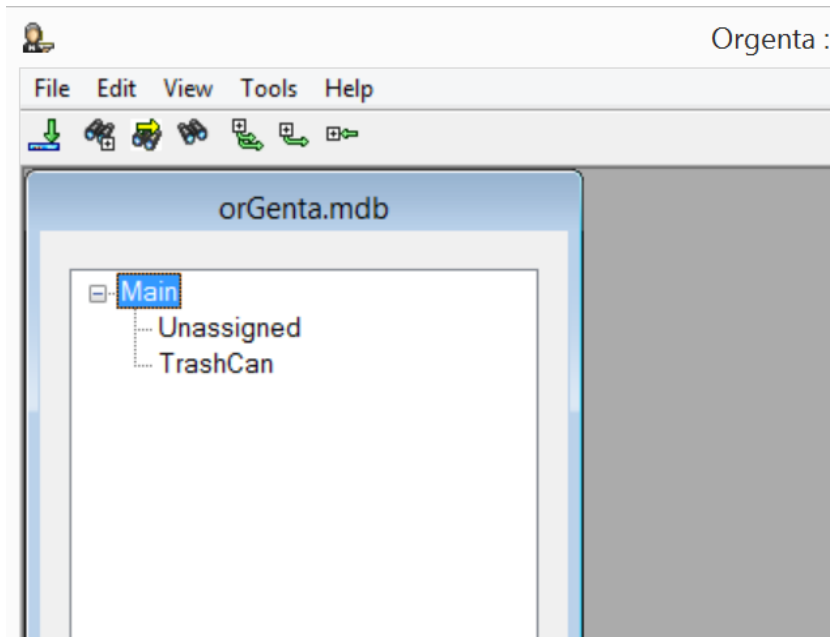
orGenta runs with Microsoft .Net runtime version 4. Although this comes standard with Windows 8 and later, if your PC runs an earlier version of Windows you may need to get the runtime from Microsoft:

<https://www.microsoft.com/en-US/Download/confirmation.aspx?id=17718>

Once you've downloaded the orGenta file, the automatic installer will create a folder on your desktop with everything required to run. Open the folder and double-click orGenta\_NNv.exe to run the program.

## **Main Screen**

Welcome to orGenta! When you first open orGenta, you will find a blank slate ready for you to fill with your ideas and connections. Let's get started!



The main screen has a menu and toolbar, as well as the basis of your Category tree. The menu bar has File, Edit, View, Tools, and Help drop-down menus.

**File:** opening another Knowledge Base, closing a Knowledge base, printing, switching to Trayed Mode (more about this in sections below), and exiting orGenta

**Edit:** finding information within a Knowledge Base and manually assigning an Item to a Category

**View:** zooming into an Item and managing the layout and visibility of the Category hierarchy

**Tools:** importing Items, exporting Items and Notes to a .csv file, auto-assigning Items, and adjusting system settings (more on this on page 27)

**Help:** getting help online, viewing the runtime version information, sharing orGenta and sending feedback

Buttons on the Main screen toolbar are for: switching into Trayed Mode (more on this on page 21), finding saved information, and managing the layout and visibility of the Category hierarchy.

### **An orGenta Glossary**

orGenta organizes your information with some simple vocabulary:

**Category:** orGenta's main unit of organization. On the main screen, you see all your Categories displayed in an outline, displayed as a tree with *nodes*. Underneath each Category, you can indent other "child" Categories.

**Node:** the representation of a Category in the outline, preceded with a "+" or a "-" if it has children.

**Item:** An Item contains usually a single sentence or two of the information you wish to store. The Items get assigned to Categories.

**Note:** A note is more detailed information of any length, attached to an individual Item.

When you add a new Node to a Category, you add it as either a:

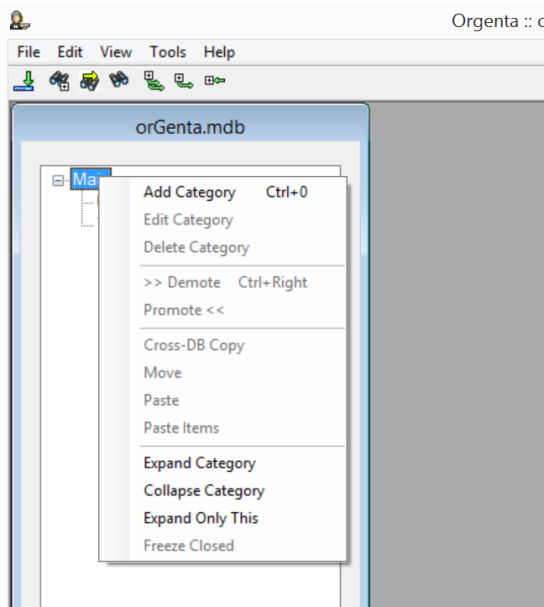
**Sister:** Node at the same level in the outline as the Node you've selected; or

**Child:** Node indented beneath the Node you've selected (hence, one level deeper into the outline). When you move a Node from one Category to another, all its Children go along too.

**TIP:** You'll be right-clicking a lot: you can access most of orGenta's category functionality by right clicking on a category. Keyboard shortcuts are listed in dropdown menus when you right click.

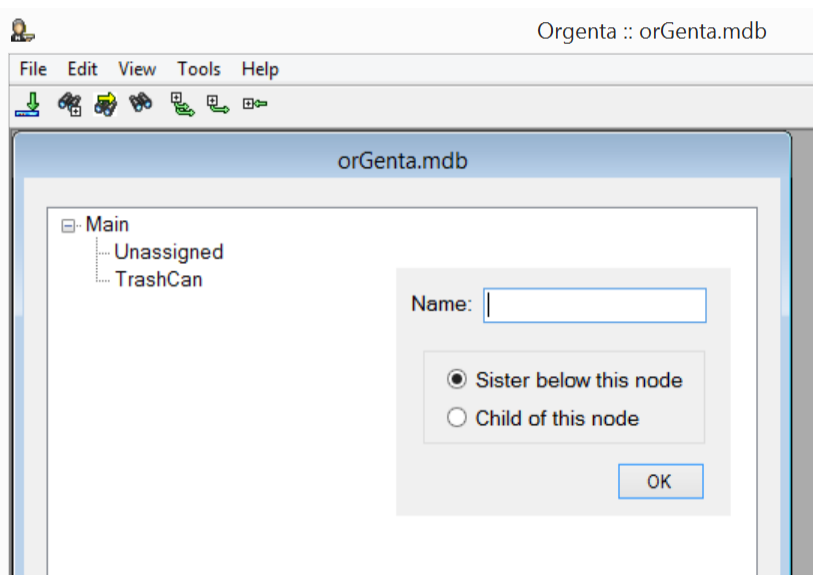
## Creating Your First Category Node

When you first open orGenta, you'll find it contains two Category Nodes under Main: Unassigned and TrashCan. Let's create a new Node under Main. Right-click on "Main" to get the drop-down menu.



Click "Add Category". Now you'll have a dialog box asking you to enter the name of your new Category, and how you want it nested.



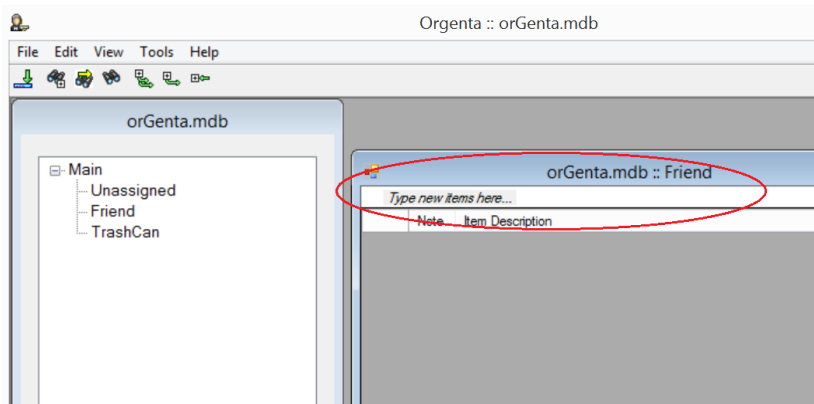


Type in the Node name. Your nesting options are “Sister below this node”, which means it will be a new Category under “Main”, and “Child of this node”, which means it will nest below the Category you selected. For practice, choose “Sister of this node”. Once you press “OK”, you’ll see your new Node in the Main list.

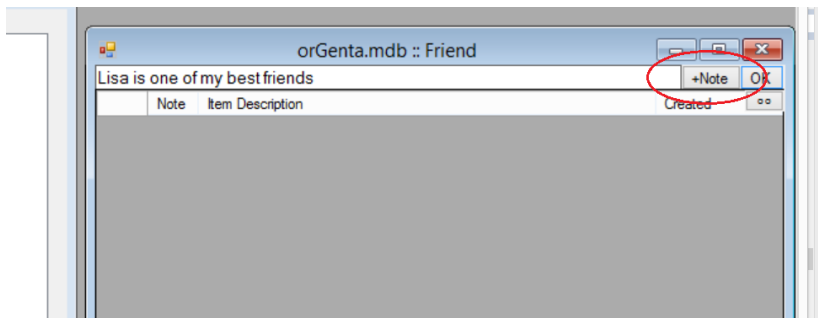
**TIP:** Use single words to name your Category Nodes—it makes them easier to see at a glance and allows the Category to be broad enough to hold a range of Items. Think big, like: Cook, Buy, Visit, Household. Follow a standard when you type in names—if you work for a small company a person’s first name may suffice, but to avoid duplicate Categories in a large company it is best to use first name and last initial, for example JeffC. Use this same convention for names when entering the Items.

## Adding Item Content to a Category

When you left click on a Category node, you open the edit window to add Items. An Item is usually a sentence or two describing a tidbit of information you would like to categorize. Simply write the title of your Item in the text box called “Type new items here...”



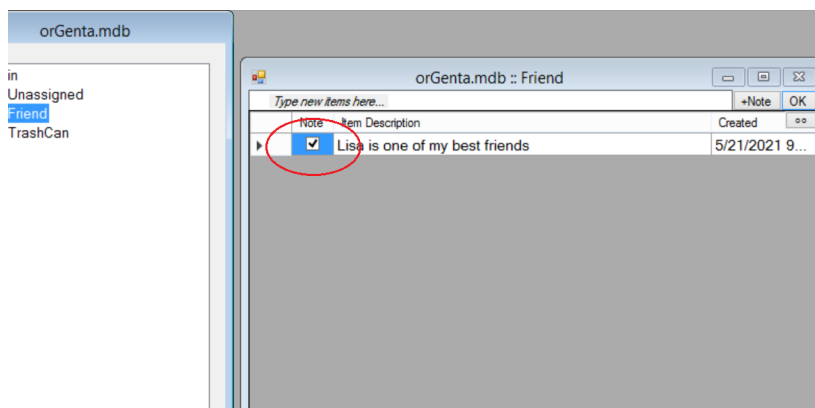
To add an informative note to your Item, hit “+Note”.



This opens the note box, where you can add in text and paste internet links (hold ctrl when you click links to access them online). Once you’ve completed your note, hit “enter” on your keyboard or press “OK” and then “OK” again in the Node’s main window. If you start editing a Note and change your mind, press Esc to exit without making changes.

**TIP:** The humble “Unassigned” Category is quite powerful. It is a great place to add new Items when you’re not sure how to categorize them. When you add new Items to Unassigned, orGenta will automatically assign them for you based on matches with other Categories you already have and move them out of Unassigned. You can also manually reassign them to different categories if orGenta doesn’t find a match (see page 20).

Ta da! Now your Item and note are associated with the Category. You can view your Item by left-clicking the Category. orGenta will sort your Items for you in descending order of date entered (most recently added items appear on top). To view and edit your note, click the check box in the “Note” column that precedes the grid of Items.



**Try this:** Paste formatted, rich text into the Note box and *orGenta* will retain the **formatting**.

Every time you add a new Item, orGenta automatically and discretely searches the text for any relationship between the new Item and any matching Categories and then automatically includes these Items. Imagine you have one Category called “Kristin” and another called “July”. You might add an Item to

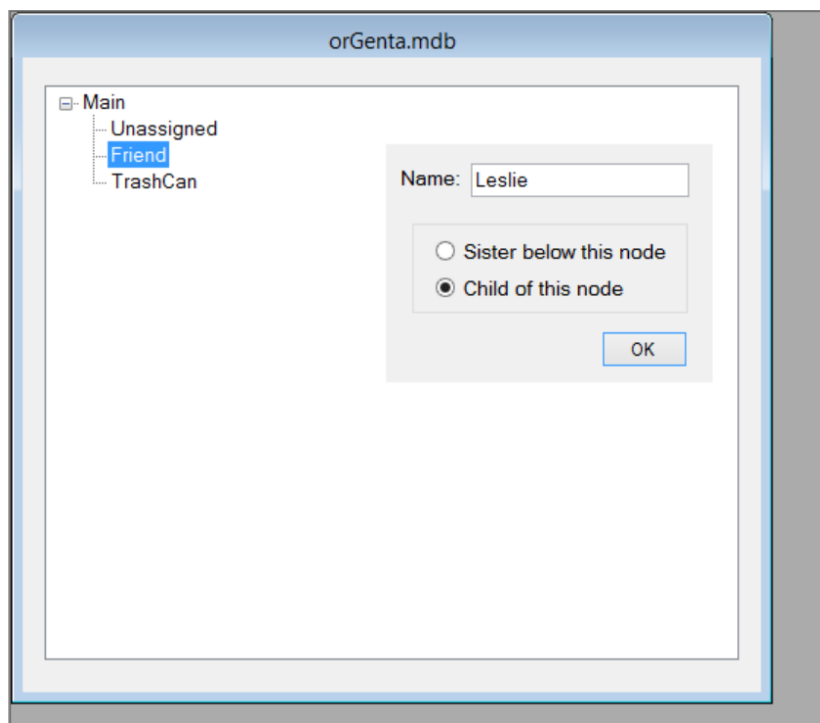
Kristin saying “Birthday: July 11”. orGenta will spot “July” in the Item and assign it to the July Category too.

**NOTE**: orGenta will not match your note text to other Categories—what happens in a Note, stays in a Note.

## **Adding a Child Node**

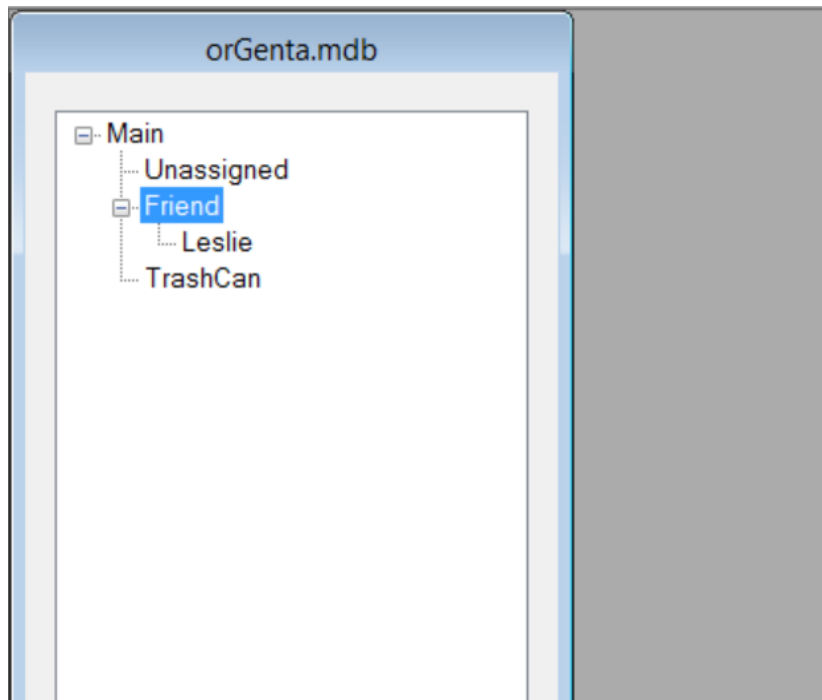
Now that you’ve created your first Category, Item and a little Note to go with them, let’s create a sub-category or “Child node”.

In the main orGenta window, right click your new Category and chose “Add Category”. Type in the name and select “Child of this node”.



Now you’ll see a + symbol next to your category name. Click it and the node will expand to show your newly created

sub-category. Congratulations! You are now the proud parent of a child Node!



Now you can add notes and content to this sub-node in the same way you did under “Adding Content to a Node” above.

With orGenta, you can nest items to any depth. So go ahead! Nest away.

## **More about the Category Window**

Your main window shows you the hierarchical treeview of your entire Knowledge Base. This is where you can traverse your outline structure and explore various Item views. Right-click one of your Nodes to display the dropdown Context Menu. Here are the options for adding, editing, and deleting Nodes (see above on page 7); promoting or demoting a Node within the hierarchy; copying, pasting and moving Categories and Items; and manage the layout and visibility of the Category hierarchy.

### *Promoting and Demoting a Node*

When you promote a Node, it moves up one level in the outline hierarchy. When you demote a Node, it becomes a child Node of the Category Node directly above.

### *Copying, Pasting and Moving Categories and Items*

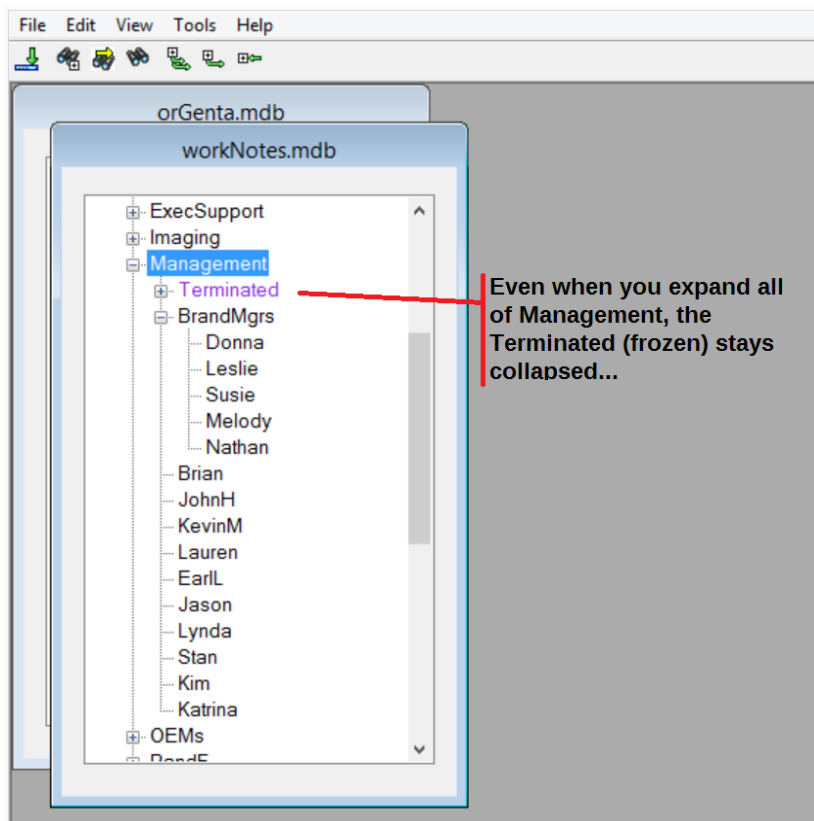
To move a Category, select “Move” from the dropdown menu. You can now paste this into any other Category Node you want by selecting the destination, right-clicking, and choosing “Paste”. The Category, its child nodes, and all of their Items will now move to your destination Category.

Cross database (DB) copy, is for when you wish to copy Categories and Items across different Knowledge bases (You must have both Knowledge Bases open for this option to be available, see page 23).

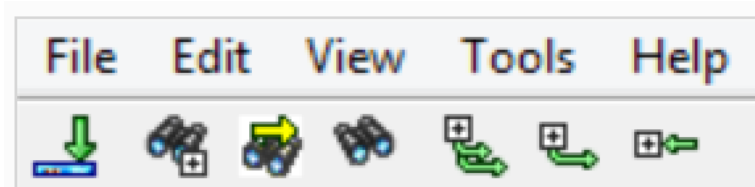
### *Expanding, Collapsing and Freezing a Node*

To collapse all subcategories of an Item, choose “Collapse Node” from the dropdown menu; conversely, when you “Expand Node”, all the sub-Items and Nodes will become visible again.

You can keep a Category collapsed even after expanding its parent. Choose "Freeze Closed" in the drop down menu. After collapsing and expanding the parent, the frozen Category name will be purple. You can unfreeze it by clicking "Unfreeze".



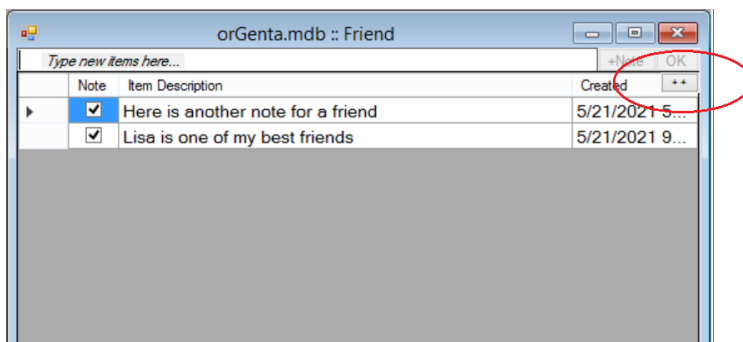
Finally, when you choose "Expand Only This", orGenta will collapse all the Categories in your outline except the one you've selected.



**TIP:** See the little icons with binoculars and arrows at the top of your main screen? These buttons have the same functionality as the dropdown menu described above. Hover your mouse over them and you'll see: Find Category, Find Next, Find Item, Expand, Expand Only This, and Collapse Node.

## More about the Items Window

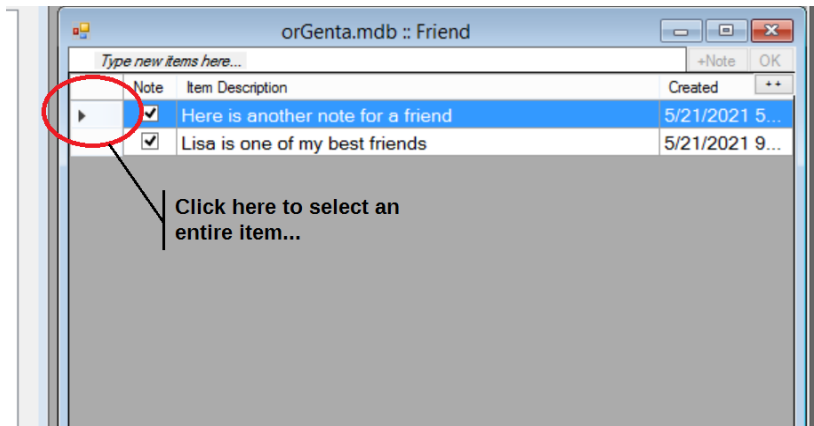
The Items window shows all the Items assigned to a particular Category. You can edit an Item's information by clicking its cell and typing directly. orGenta saves your changes as soon as you leave the cell. If your Item content is longer than the window can handle, you can right click the Item, and choose "Zoom" (or simply choose the Item and press F8) to view and edit the entire content in a new window.



When viewing Items for a Category that has child nodes, you can change the view to include all your "child" Items in the category's



Item window. See the little box marked with ++ at the far righthand side of the top of the grid? Hover over and you'll see this is the "Include Child Items" button. Press this to show all Items associated with this Node and all its sub-nodes.



To delete an Item, highlight it by clicking the leftmost box in the row, and then press your "Del" key (or right click and choose "Delete"). You can delete all items by clicking the uppermost left box to highlight every item, then right clicking and choosing "Delete". You can also hold "ctrl" to select individual items to delete, or "shift" to select a range. When you opt to delete, orGenta will ask you if you want to:

**Remove the item from the category:** Choose this to remove the association between this item and this Category—your item may still be visible in other Category nodes; or

**Discard the item entirely from the database:** Choose this to move the Item to the TrashCan; you won't find this item anywhere else in your database anymore.

If you delete an Item from its last (or only) Category, it moves to the TrashCan. You can recover items from the TrashCan by right clicking the Item, choosing “Assign to” and then finding the Category you want for this Item. When you delete an Item in the TrashCan, *you’re deleting it irretrievably* (although it still lives on as an inaccessible “ghost” in the backing database).

Once you’ve entered a lot of data into orGenta, your Items windows may get crowded. You can organize how you view your Items.

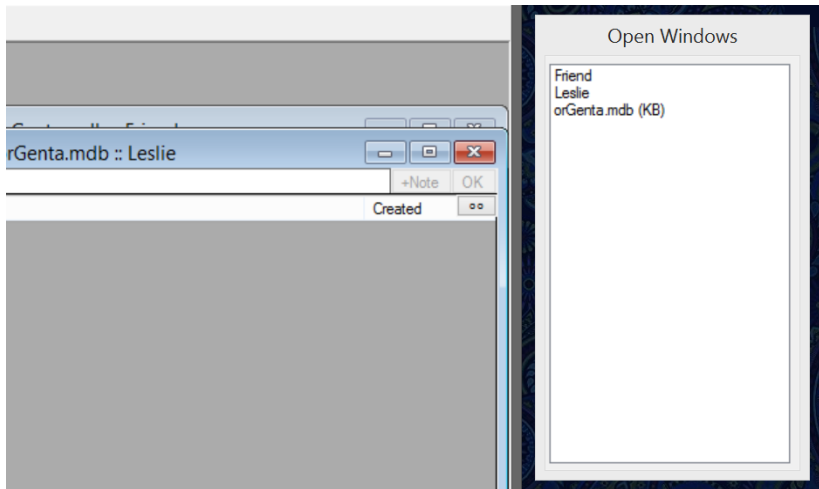
With an Item window open, you can:

- Edit the “Created” date;

- Sort by name by clicking the “Item Description” bar; sort by creation date by clicking the “Created” bar;

- Change column width by hovering your mouse over the line separating column headings and then clicking and dragging.

## Jumping windows with the Sidebar



**TIP:** When you really get into orGenta, you might find yourself with a lot of Item windows open. That's when the "Open Windows" sidebar comes in handy. This little window displays a list of all your open windows. Simply click the name of the window you want, and orGenta will bring it to the top.

## Creating Links between Categories and Items

orGenta will start to show-off its power as your content grows and connections deepen. You can let orGenta assign categories for you or you can manually assign them.

Take a look at your main window, with the Nodes you've added. Pick a node, any node. Right click and choose "Edit Node". Aside from changing the name of the Node, you'll now have the ability to set options for:

"Manual Assign Only", which tells orGenta to avoid automatically assigning Items to that Category—you will only be assigning Items to this Categories by hand,

"Re-Assign New Matches" to automatically rescan your database to check for updated Item-to-Category matches. When orGenta finds new matches, the Items will appear in the selected Category.

**TIP**: Category matching is not case sensitive, but orGenta is sensitive to singulars and plurals. It can be helpful to include the plural of a Category as a subcategory when necessary. orGenta does however ignore possessives—if an Items says "All Jeff's stuff belongs to me" it will properly get assigned to a Category named Jeff.

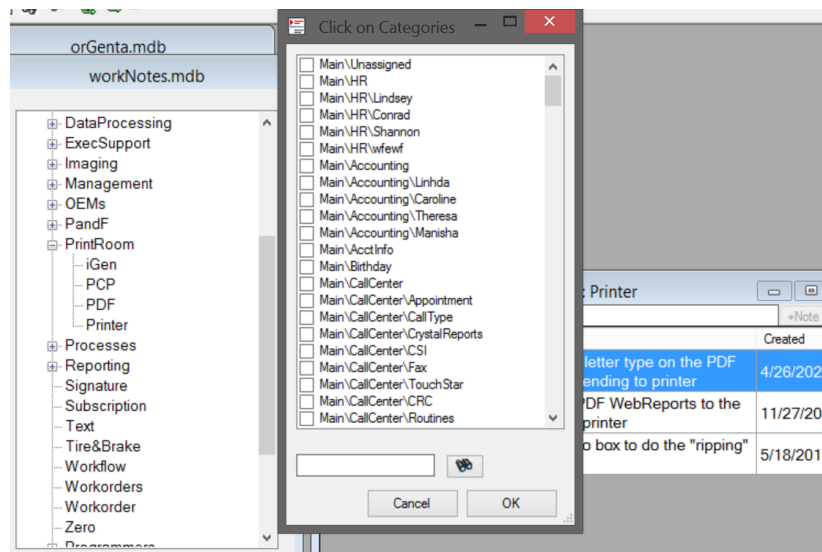
**TIP**: When you edit an Item and change its text, you are changing it in every Category that Item appears. If you start to Edit an Item and change your mind, press Esc.

**TIP**: When you add an Item, orGenta automatically assigns it to other relevant Categories. When you edit an Item, orGenta will also automatically rescan to match Categories against any new words that you may have added or changed.

## Manually Assigning Items to Categories

You can manually assign an Item to a Category even when the Item doesn't share a common word.

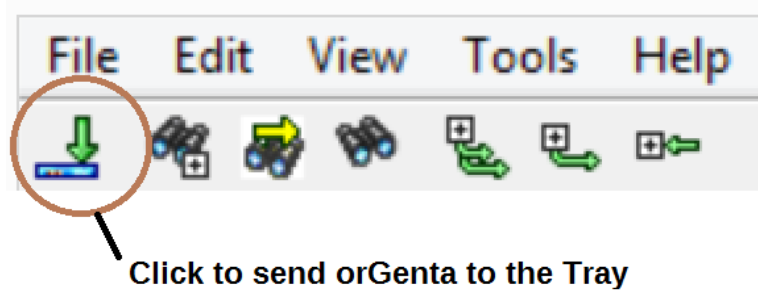
Left-click a Category to open the Item box for that Category. Click on the gray box to the left of an Item row to select an entire row. (You can choose multiple rows by holding their "ctrl" to grab individual rows or "shift" to grab a range). Right click and press "Assign to", and you'll get a list of all your Categories.



Choose where you want to assign these Items by clicking the check boxes to the left of each Category. If you can't find where to put the Items, you can search for your Category by name. Once you've selected the Item's destination, hit "OK" and orGenta will assign the selected Item(s) to the checked destination.

## Trayed Mode

orGenta can function in windows mode or in the more discrete Trayed Mode.



When you click on the Tray Mode icon in the toolbar or choose “Trayed Mode” from the File menu, orGenta reduces to an icon in your system tray. See that little butler holding a tray with a yellow note in your system tray? That’s orGenta! Click once and you’ll open an orGenta textbox, where you can do two things:

**Enter one word.** This triggers orGenta to run a search and then highlight the first matching category. If no matching categories are found, orGenta starts searching your Items and Notes. When orGenta finds a match, the main window opens, with the matching Category highlighted, or a search results page for Items.

**Enter more than one word.** orGenta will make this a new Item in the Unassigned category, and then automatically assign the Item to any relevant matching Categories.

Exit Trayed Mode by clicking the up arrow in the orGenta tray box or by double-clicking the orGenta systems tray icon.

**Optional Category Creation.** If you turn on Auto Create Categories in trayed mode (from the Settings menu display), then orGenta will highlight words that it thinks might make good categories for the item you are typing. When you hit your enter key to save the item orGenta will then add those words it highlighted to the categories window. (Your item will also get automatically assigned to any existing categories that it matches).

If you see words highlighted that you don't want created you may right-click them, and then deselect them from the list that is shown.

## **Importing**

You can import text and .csv files into orGenta.

You must have an Items window open to run an import. Then go to Tools → Import to select the file for import. orGenta imports the Items and assigns them to whatever Category you have opened that shows its Items in the foreground.

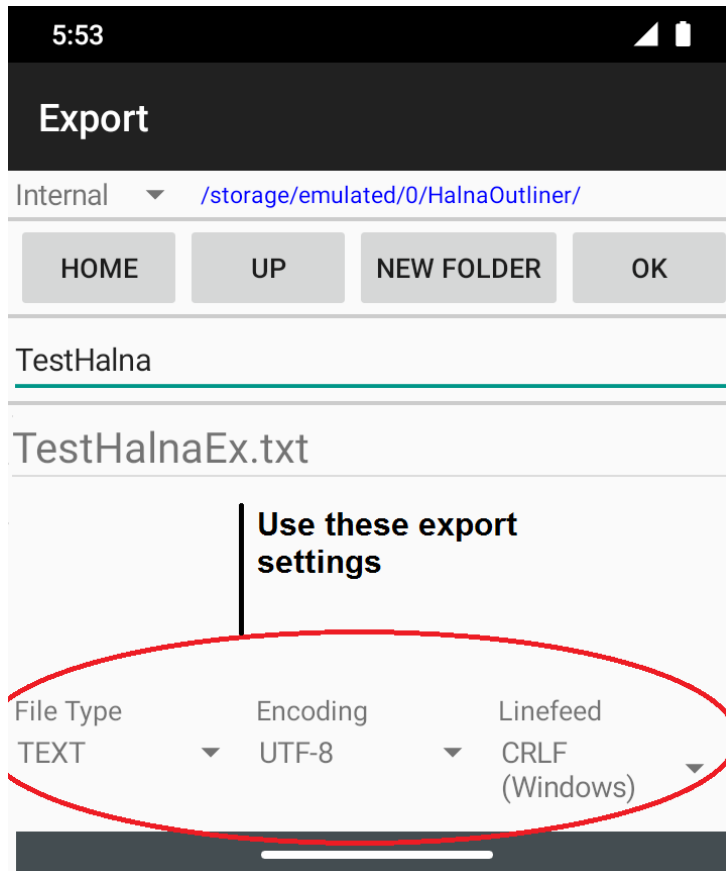
Unlike normally entering an Item, imported Items don't go through automatic Category assignment. This is on purpose, as often a user may make a mistake during the import and it's easier to clean up everything in one window, in one place.

If you would like to though, after you check the import go up to the main menu and select Tools, Auto-Assign Items, and then orGenta will run through the automatic Category assignment procedures for every Item in the topmost open Item window.

If you choose the option to import Everything however, then after you select your file to import you will get another selection box where you can choose if orGenta should follow the category

assignments that are already present in the import file. This is useful if you want to bring a complete outline tree structure into your Knowledge Base from another user or from other software.

If you plan to import a file from the popular Android outliner Halna, please be sure that the export from Halna is set to use Windows linefeed CRLF:





## **Exporting**

When you have a Category's Items window open, or the Items from a Search displayed, you can use Tools → Export CSV to send the contents of that window to a comma separated text file. The export consists of two sections, the first consisting of Items and their Categories, the second consisting of any Notes associated with those Items. Exporting is useful when you wish to examine what you have saved in orGenta with different software, say for example Microsoft Excel.

The first row of each section in the export contains a row header, with titles for the various columns. The column labeled ItemID in the first section has an integer that ties it to the ItemID column in the subsequent Note section.

The export is also quite useful should you wish to share a portion of your orGenta information with somebody else who has the software installed, who can then use the Tools → Import to bring this csv file back into their version of orGenta.

## **Multiple Knowledge Bases**

As your data in orGenta expands, you might find that you need to organize even further. You can create separate knowledge bases for certain classifications of information. For example, you might have separate bases for coworkers than for general task notekeeping. That way, you keep your more confidential coworkers data in its own base, not to be cross-categorized with anything about the tasks in your other knowledge base.

In a corporate environment, a department might host a confidential database on a network that they share only with

members of that department. Please note that although we expect to supply this in the future, at the moment orGenta does not provide a way to password protect Knowledge Bases. Until that gets incorporated into the product, anybody who has physical access to your computer will be able to read the information in your Knowledge Bases.

orGenta defaults to open the “orGenta.mdb” database. Let’s add a new knowledge base to expand orGenta’s functionality.

In the Tools menu, choose New Knowledge DB. Click the checkbox to acknowledge the warning, and then press the Next button. Click on the “...” button to the right of the Database field, and then navigate to a folder where you want your new database. In the Filename of the Open Dialog type in a new database name and then click Open. Confirm the selection by clicking on “Next” and a new empty Knowledge base will now appear with the default “Unassigned” and “TrashCan” categories. Now you can start populating this database with relevant information.

**NOTE:** Now that you have two separate databases, the content you enter in one will not jump to the other.

## **Using a newer version of MS Access**

Although orGenta is automatically set up to work with the old version of MS Access from 2000, we do provide a “seed” database in the newer (.accdb) version of Access. If you want to use the newer version, you will first need to download and install the 32-bit version of MDAC from Microsoft, available here:

<https://www.microsoft.com/en-us/download/details.aspx?id=13255>

Next, go into the folder where your orGenta software is located and rename (or delete) the file called orSeed.mdb. Now when you create a new Knowledge Base from the software's menuing system (under Tools) orGenta will use the new version of MS Access from orgSeed.accdb.

It is perfectly fine to have both an old and a new version of MS Access Knowledge Bases open at the same time in different Category windows. You may also copy data across the different database types.

## **Using SQLite**

This version of orGenta will support using a SQLite database to host your Knowledge Base, however it requires quite a bit more manual setup. To use a SQLite database you first have to manually copy orgSeed.sqlite to the name of the database you will be using (keep the extension as sqlite), and then remove the Read-only flag.

Then you have to download and install a SQLite 32-bit ODBC driver. After you install it you need to go to the windows ODBC administrator (from Control Panel) and add it as a System DSN. Name the DSN Sqlite; you will also need to specify the name of the database you will be using here to match what you copied from above.

After this you can open it from the user interface (File, Open Knowledge DB).

## Cross Database Copy

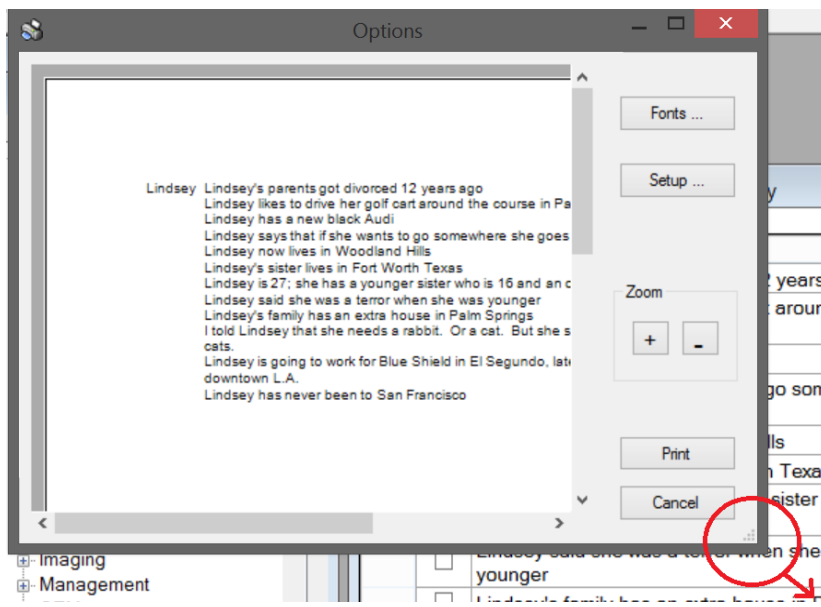
Once you have opened more than a single Knowledge Base, it is possible to copy Items and Categories from one Knowledge Base to another. Right-click on the Category you wish to copy, and then from the dropdown Context Menu choose Cross-DB copy. Now right-click on the target Category in your other Knowledge Base, and choose either Paste, or Paste Items.

When you choose Paste, the Category you are copying and all of its child categories, along with all of their Items and Notes, will get copied into your target Category. If you choose Paste Items, only the Items and their Notes—from your copying Category and all its children—will copy over to the target Category.

## Printing Items

**TIP:** You can print a handy hardcopy version of your orGenta content. orGenta prints the topmost Items window you have open.

If you would like to print the Items shown in an open Window, you first have to click File → Printer Setup... Choose whether you would like Portrait or Landscape printing, and if you'd like adjust the margins. Next select File → Print Preview



Click and drag the bottom right corner of the preview display window down and to your right, so you can see enough of your print document. If necessary you can change the print fonts here, or click on Setup... to go back to the Printer setup options.

## **Backing Up Your Knowledge**

It makes imminent sense to back up your data: cyberthreats seem to always be evolving, a system could suffer a power crash or the hard drive could fail. Since your knowledge is valuable and can take years to accumulate, please follow some best practices to preserve it.

Generally, future releases of orGenta should be compatible with your current Knowledge Base(s), so whereas it isn't as important to backup the software (that you can always download and reinstall) it is critical to back up the Knowledge Bases themselves. The local Knowledge Bases are Microsoft Access databases ending in ".mdb". If you have installed a SQL Server Knowledge Base it will likely end in ".mdf". You can drag-and-drop to copy ".mdb" files for an Access backup, but ".mdf" files should be backed up using the backup procedures inside SQL Server itself.

Since it's so important, we recommend keeping two separate backups, one locally available and one on the internet. Files stored online are safe from damage to your computer, and if something goes wrong with your machine you will still have remote access to your information from any computer with internet access.

The best practice when keeping a backup on physical devices, such as thumb drives or external disks, is to keep your backup device in a different location than your computer—to avoid falling victim to say, fire damage or theft.

## **Advanced Settings**

You can change orGenta's default system settings from Tools → Settings. These settings are:

### **Log Longer Error Message Detail**

At times you may encounter something such as a database access error, that orGenta will long into the file named ErrorLog.txt. Sometimes our support personnel may ask you to turn off Longer Messages if this text file is becoming large too quickly.

### **Wrap Text Shown on Items**

When you enter text for an Item that is longer than the display box, it automatically wraps to additional lines. If you prefer you may uncheck this option, and you will then see only that portion of text that fits (to see all of it, choose View → Zoom Item, or press the F8 key).

### **Adjust Items to Fit Main Window**

When you click on a Category, the Item window that appears is sized so that its width fits completely inside the main window. On some displays this may seem too large; uncheck this box and then the Item windows will all revert to the same standard width.

### **Auto Create Categories in Tray Mode**

When checked this allows orGenta to highlight and then create categories as you type an Item in the trayed entry box.

### **Highlight Categories in Tray Mode**

When checked orGenta will highlight existing matching categories as you type an Item in the trayed entry box.

## Category Initial Update

orGenta applies the first change you make to Categories asynchronously in the background, every ten seconds. You may change this value as appropriate.

## Secondary Category Update

orGenta applies any subsequent changes or deletions you make to Categories asynchronously in the background, every thirty seconds. You may change this value as appropriate.

## **Contact Us**

If you have ideas to improve orGenta you may contact us directly from within the software. Your main screen “Help” drop down menu has an option to shoot us an email. We’d love to hear from you! For issues, questions or assistance, or to report bugs with our software, please email us at [custserv@izard-llc.com](mailto:custserv@izard-llc.com). Also be sure to check our FAQ page for answers to frequently asked questions, at <https://izardsoftware.wordpress.com/faqs/>.

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