

Classification

Mark tasks, documents, notes, blog articles and notices as internal, classified, secret or top secret. Who may see them is decided on top of the sharing settings - in lists, in search and in the AI assistant alike.

Overview

Every element has a **classification**. It never gives anyone more access: the sharing settings ("shared with", team, project) decide first, the classification only takes people away. Every element starts as **open**, so nothing changes until somebody classifies something, and the picker is small and quiet on purpose.

It exists on **tasks, documents, notes and wiki pages, blog articles, blackboard notices, projects, solutions, services, meetings (with agenda and protocol) and group chats.**

1. The levels

Level	Who can see it
Open	Everybody the element is shared with. The default.
Internal	Staff only. External contractors never see it.
Classified	People with the role <i>Classified</i> , <i>Secret</i> or <i>Top Secret</i> .
Secret	People with the role <i>Secret</i> or <i>Top Secret</i> .
Top secret	People with the role <i>Top Secret</i> .

A higher level includes the lower ones: whoever may see secret elements also sees classified, internal and open ones.

2. Who is cleared

A person's **clearance** is the highest level they hold:

- **Staff** are cleared for *internal* without anything else.
- **External contractors** are flagged on their user (Organisation Management > Users > edit, checkbox **Contractor**) and are cleared for *open* only.
- The three roles **Classified**, **Secret** and **Top Secret** raise the clearance to their level – for contractors too, if you give it to them.

An inactive account is cleared for nothing but open elements.

3. Classify an element

Look for the small **Classification** select. It saves when you change it.

Element	Where
Task	In the task editor, in the line under the title. Also in the Quick Insert Task window, so a task is classified the moment it is created.
Note or wiki page	In the settings of the note; in the New note window for a new one.
Document	In the dialog Edit document of the Documents page.
Blog article, blackboard notice	In the editor.
Project	On New project and in the project's edit page.
Solution, service	In their edit pages.
Meeting	In the Plan meeting window, and under the title of the meeting page for the organizer. The agenda, protocol, documents and calendar entries follow the meeting.
Group chat	When you start the chat, and in Edit chat for its manager. Raising the level removes members who are not cleared for it.

You can classify up to **your own clearance**: somebody without extra roles chooses between open and internal; only a person with the role *Secret* can mark something secret. You can only change an element you can see yourself. A contractor has no choice, so no select is shown.

4. Projects, solutions and services

- A **new task** starts with the highest level of its project, solution and service. Tasks in a secret project are secret by default.
 - **Raising** the level of a project, solution or service raises the tasks already in it (and their documents). **Lowering** it does not lower the tasks – lower those you want to open up, one by one.
 - A **document** is at least as classified as its task, its project and the version it replaces.
-

5. Assign the clearance

An RC Admin opens **Admin > Classification**. The page lists the levels and, for *Classified*, *Secret* and *Top Secret*, a list of the people who hold the role. Add or remove people there; it saves at once. The change shows in the audit log like any role change, and takes effect the next time the person loads a page.

6. What people see

An element above somebody's clearance is simply not there for them:

- It is missing from **task lists, boards, search and reports**; opening its address is refused. This holds for the person it is assigned to and for its creator, too.
- Its **comments, time bookings and documents** are hidden with it.
- The **AI assistant** never reads it for them and does not quote it in answers.
- The **REST API and MCP** return the same: the element does not exist for the token's user. Tasks carry a `classification` field (0-4) that you can read and set with `POST` and `PUT /tasks` (up to the token user's clearance; also on the MCP tools `create_task` and `update_task`).

- The public company blog shows open articles only.
-

Rules and limits

- Classification is an extra restriction. It does not replace sharing: a secret document is still only visible to people it is shared with.
- Private tasks stay private; classification applies on top.
- A classified project, solution or service is hidden in the main lists and pick lists (task editor, Quick Insert, projects, reports). A few rarely used lists may still show its name; its pages, tasks, documents and API are closed.
- A **comment** has no level of its own: it is as classified as the task, project or meeting it belongs to, and hidden with it.
- A **direct chat** and a **team chat** are never classified. Classify a chat by making it a group chat with a level.
- Through the REST API and MCP only tasks can be classified; other elements are classified in the web pages.