

Notes & Docs

Your company's documentation in one place: private notes, notes shared with colleagues, and wiki pages in spaces with a page tree, versions, templates and a review cycle.

Overview

Everything is written in a visual editor (Markdown underneath: headings, lists, tables, task lists, code, pictures and draw.io diagrams). Notes save themselves a few seconds after you stop typing. **Ctrl/Cmd+S** saves at once, **Ctrl/Cmd+E** switches between reading and editing, **Ctrl/Cmd+.** opens the note's settings.

The one question that matters is: **who can read this, and who can change it?** The answer depends on where the note lives.

1. Where a note lives

	Personal note	Page in a space
What it is	A note you wrote, in your list.	A wiki page in a space (for example one per team, project or topic), arranged in a tree.
Who decides who reads	The owner, per note.	The space's access list , not the page.
Who writes	The owner, and people the owner named as editors.	Everybody with edit or admin level in the space.
Starts as	Private.	A draft only its author sees, until published.

The **owner** is the person who made the note (or a person it was handed over to). The owner can always read and edit it.

2. Personal notes: who reads, who writes

In the note's settings (or in the **New note** dialog, or the right-click **Share**), the owner sets **Who can read it**:

Setting	Who can read	Who can write
Private	only you	you
Teams	the members of the teams you choose	you
Projects	the members of the teams that belong to the projects you choose	you
People	the people you name under can read	you, and the people you name under can read and edit
Everybody	every user of the instance	you

- People you share a note with get a message in their inbox, once.
- An **editor** changes the title and the text, adds pictures and can restore an older version. An editor **cannot** change who reads the note, its tags, its encryption, its review settings, hand it over or delete it: those stay with the owner.
- Teams and projects can read, never edit. If a group should write together, use a **space**.
- An **encrypted** note can be shared for reading only; nobody but the owner, with the password, can write it.
- When you share a note you are asked how long it stays valid (see 5).

3. Spaces and pages

A **space** has a short key (such as **ENG**), a name and an **access list**. The list names users, teams or *everybody*, each at one level:

Level	Can do
Read	read pages and their history

Edit	read; create, write, move and publish pages; add pictures; use and save templates; restore versions
Admin	everything an editor can, plus delete and archive pages, change the access list and the space's settings, see the space health

- A space always has at least one administrator that is a person or a team (not "everybody").
- **Who may start a space:** the RC Admin (for anything), a team lead (for their team) and a project manager or owner (for their project). Spaces are never made automatically with a team or project.
- A space made for a team or project starts with that team (or the project's teams) as editors and its maker as administrator.
- A page can sit under another page; **New page** and **New page below** (right-click) make one. A page's path is shown under its title. **Move** takes a page with everything below it to another place or space (you need edit rights in both).
- Pages are **not shared one by one**, and a page cannot be encrypted: several people write it.
- The **RC Admin** can manage every space's access list, but reads only what the list allows, like everybody else.

4. Who may do what

You do not have to work this out yourself: the **Access** button (shield icon) in the toolbar of every note shows where it lives, who can read it, who can write it, and what *you* may do with it and why.

	Personal: owner	Personal: named editor	Personal: reader	Page: space reader	Page: space editor	Page: space admin
Read, view history and versions	yes	yes	yes	yes	yes	yes
Change title and text, add pictures	yes	yes	-	-	yes	yes

Restore an older version	yes	yes	-	-	yes	yes
Change who reads it	yes	-	-	space admin only (the access list)	-	yes
Set tags	yes	-	-	-	yes	yes
Review, set validity, hand over	yes	-	-	the page's owner		
Archive a page	-	-	-	-	the page's owner	yes
Delete	yes	-	-	-	the page's owner	yes

Two things never change the picture: a note's **folders** are each person's own bookmarks and give nobody any access, and an **archived** page is read-only for everybody.

5. Keeping content current

Documentation rots. Notes & Docs keeps stale content out of the way instead of letting it pile up.

- **Review cycle.** A note shared with others is valid for a period you choose when you share it (12 months by default). When it is due, the owner gets a task. **Mark as reviewed** (only once it is due) starts the period again. If the owner does nothing for 14 days, their manager gets a task of its own.
- **Outdated.** A shared note overdue by more than 180 days disappears from lists, search and the AI assistant until it is reviewed. The owner's own list, bookmark folders and "Due for review" still show it.
- **Drafts.** A new page is a draft: only its author reads it, it has no review date, and it is not in search. **Publish** makes it visible and starts the cycle.

- **Archive.** An archived page is read-only, out of trees and lists and out of the assistant, but links to it still work. It can be brought back.
 - **Space health** (administrators): overdue pages, pages whose owner has left, pages nobody has opened or changed for a year, forgotten drafts. Archive them in bulk, or take over pages whose owner is gone.
 - **Finding things.** Pinned and recently used spaces are listed; **Browse all spaces** searches the rest; you can hide spaces you do not care about (only for you). While you type a page's title, similar existing pages are pointed out, by words and, where an embedding service is set up, by meaning.
 - **When an account is deleted:** its private notes and personal folders go; shared notes pass to the person's manager with a task to find a new owner or delete them.
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6. Templates

For pages that should look the same everywhere (project pages, system documentation, meeting notes): write one page, right-click it and choose **Save as template**. Choose whether it is for one space (its editors use it) or for everybody (the RC Admin's choice). In the title and text, `{{date}}`, `{{author}}` and `{{space}}` are filled in when a page is made.

- **New note** and **New page** ask for a title and offer a blank start or a template. In the New note dialog you can also choose where to put it (a space or your own notes), tags, folders and who reads it.
 - The **Templates** button lists the templates you can use. The pen opens one to change its name, purpose, title and text (with a preview); delete asks twice.
 - Pictures are not copied into a template. Saving under an existing name replaces that template.
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7. History and versions

Everybody who can read a note sees its **activity** (created, edited, shared, handed over, reviewed, archived...) and its **versions** with a line-by-line comparison, as in a wiki. Saves by one person within 15 minutes are one version. Restoring an old version (editors and owners) is itself a new version, so nothing is lost. Deleting a note deletes its history.

8. Folders, tags, pictures, encryption

- **Folders** are your private bookmarks. Drag any note you can read - a page, a note shared with you - into your folder. Nobody else sees your folders and they change nothing about the note.
- **Table of contents:** type `/` in the editor and choose **Table of contents**. The note view then shows a linked list of the note's headings, nested by level, at that place. In the editor itself it is a plain `[TOC]` line.
- **Tags** belong to the note; the owner (or an editor of a page) sets them. Click a tag to filter.
- **Pictures** by drag and drop, paste or file picker; right-click a picture for its size (10-100 %) and position. **Diagrams** are drawn in the built-in draw.io editor, which runs on your own server and sends nothing out.
- **Encryption** (personal notes only): the text is encrypted in your browser with a password only you know. **A lost password cannot be recovered.** An encrypted note cannot hold pictures.
- **AI assistant:** it finds notes with the same rule as the list - it never sees what you cannot read, never encrypted notes, and not drafts, archived or outdated ones.

Rules and limits

- Pictures: PNG, JPG, GIF, WebP, SVG up to 10 MB. Notes are Markdown; there is no underline or text alignment.
- At most 200 templates per space.
- At most 200 versions are kept per note (the first stays).
- Access is always decided on the server; hiding a button is only convenience.