Notes in RCIC Drive

Write your working notes on a matter in the folder the matter already lives in. Internal by default, exportable as Word, PDF or plain text, and shareable through a controlled link when you decide to.

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What a note is

A note is a rich-text page you write inside any RCIC Drive folder. Headings, bold and italic, colours, links, bulleted and numbered lists, and simple tables. Use **New note** in the folder toolbar; the note then sits in that folder's listing with its own icon, alongside the files.

Notes are internal by default. They never appear in the client portal, and nothing sends one to a client on its own. You can deliberately share one, which is covered below. They are the firm's own working notes, which is also why they are part of the client file: they get audit events and recycle-bin custody like everything else in the Drive.

The title and the body are both encrypted at rest under your firm's own key, the same treatment a filename gets. That is deliberate: a note title like "Novak - misrepresentation concern" says as much as the note does.

Writing one

It saves as you type. There is no Save-or-lose-it moment: the note is written a couple of seconds after you stop typing, and never leaves more than ten seconds of work unsaved. The indicator at the top tells you where you stand. The Save button is there for when you want to be certain before closing the tab.

Pasting from Word or a web page works. The text and its formatting come across. Images do not: they are removed, and the editor tells you it removed them rather than letting you discover it later. If you need a picture in the file, upload it to the folder as a file.

One editor at a time

Only one person edits a note at a time. If a colleague opens a note you are in, they see it read-only with a banner naming you. Nothing they type can overwrite you, because there is nothing they can type.

If you stepped away, they can take over. The banner has a Take over button, which becomes available once your session has gone quiet for a couple of minutes. Taking over is recorded in the audit trail, so it is always answerable later who had the note when.

A tab left open overnight cannot silently overwrite the day's work. If the note moved on while your tab sat idle, the next save is refused rather than accepted, and you are shown what is on the server with the option to reload it or copy your own text out first. This is the one case where the app deliberately does not just do what you asked: accepting that save would erase whatever your colleague wrote in between.

Getting a note out

Three ways, and they do different things. The first two take a copy away; the third leaves one behind.

Download. The menu at the top of the note offers Word (.docx) if you plan to keep editing it, PDF if you plan to send or file it, and plain text. Nothing is stored: the file is built at the moment you click, from the note as it stands.

Inside a folder download. When you download a folder as a ZIP, the notes in it come along as Word files sitting beside the real files, all the way down through subfolders. If a note has the same name as a file already there, the

second one gets a numbered suffix rather than replacing the first. If anything in a download could not be included, the ZIP contains a short report naming it, so a partial download never looks like a complete one.

Save PDF to RCIC Drive. The button beside Save. This one files a PDF of the note as a normal file in the same RCIC Drive folder, which means it counts toward your storage and follows the same retention and recycle rules as any file. It stays in RCIC Drive: it is not copied to a connected Google Drive or OneDrive. If you need it there, download the PDF and put it where you want it, or share the note directly. The note itself is not moved or changed. Saving twice gives you two copies rather than overwriting the first, because a note keeps changing while a PDF is the record of one moment.

Sharing a note

A note can be shared with someone outside your firm, through exactly the same machinery a file uses. Open the note and click Share. You get a link, and the same controls you get on any shared document: an optional access code, an expiry date, a cap on how many times it can be downloaded, an optional watermark, and a Stop sharing button that kills the link immediately.

The recipient gets a PDF. Not the editable Word version, and not plain text. PDF is the format the watermark can actually be applied to, so offering the others would mean offering a watermark control that quietly did nothing on two of the three.

A shared note is a live window, not a snapshot. The PDF is made at the moment the recipient downloads it, so if you edit the note afterwards, the next person to open that link sees the newer text. This is the same way a shared folder already behaves, and the portal tells the recipient so. If you want to hand someone a fixed copy instead, use Save PDF to RCIC Drive and share that file.

Recycling a note also switches off any link on it, so a note you delete stops being reachable even if someone still has the URL.

Change history

Open a note and click History to see every saved version, newest first, with the date and who saved it. Open any of them to read the note exactly as it stood at that moment.

A version is kept the first time you save in a session and periodically while you keep working, so the list is a record of the note's life rather than of every keystroke.

There is no restore button, on purpose. Rolling a note back is a change like any other, and doing it from a history viewer would let someone reading the past overwrite a colleague editing the present. Copy what you need out of the old version and paste it into the note.

Notes on a file

Separately from the notes above, every FILE in RCIC Drive can carry short notes of its own. Click the note icon on a file row. Each entry is plain text, records who wrote it and when, and reads as a short thread, which is what you want when two people are working the same document over a week.

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These never leave, and that is the point. They are not downloadable, they are not included when you download a folder as a ZIP, and they cannot be shared. Your client never sees them, and neither does anyone you share the file with. That is deliberate: you should be able to write frankly about a document without weighing who might read it later.

You can edit your own entries. You, or an Owner, can remove any of them; the text goes, but the fact that a note was removed and by whom stays in the audit trail. Deleting the file takes its notes with it, and restoring the file from the recycle bin brings them back.

Deleting and restoring

Deleting a note sends it to the recycle bin, exactly like a file, and you can restore it from there during the retention window. Deleting a folder takes its notes with it, and restoring the folder brings them back.

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