Platform I Complement document

🕐 Tempo aproximado para leitura: 3 minutos

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Speaking of complement document...

This feature allows you to annotate documents, include arrows and other shapes, highlight content, insert content lock stripes on document pages, among other functions.

To include add-ons, you need to use the Internal viewer, therefore the "Use internal viewer" option must be checked in the document properties.
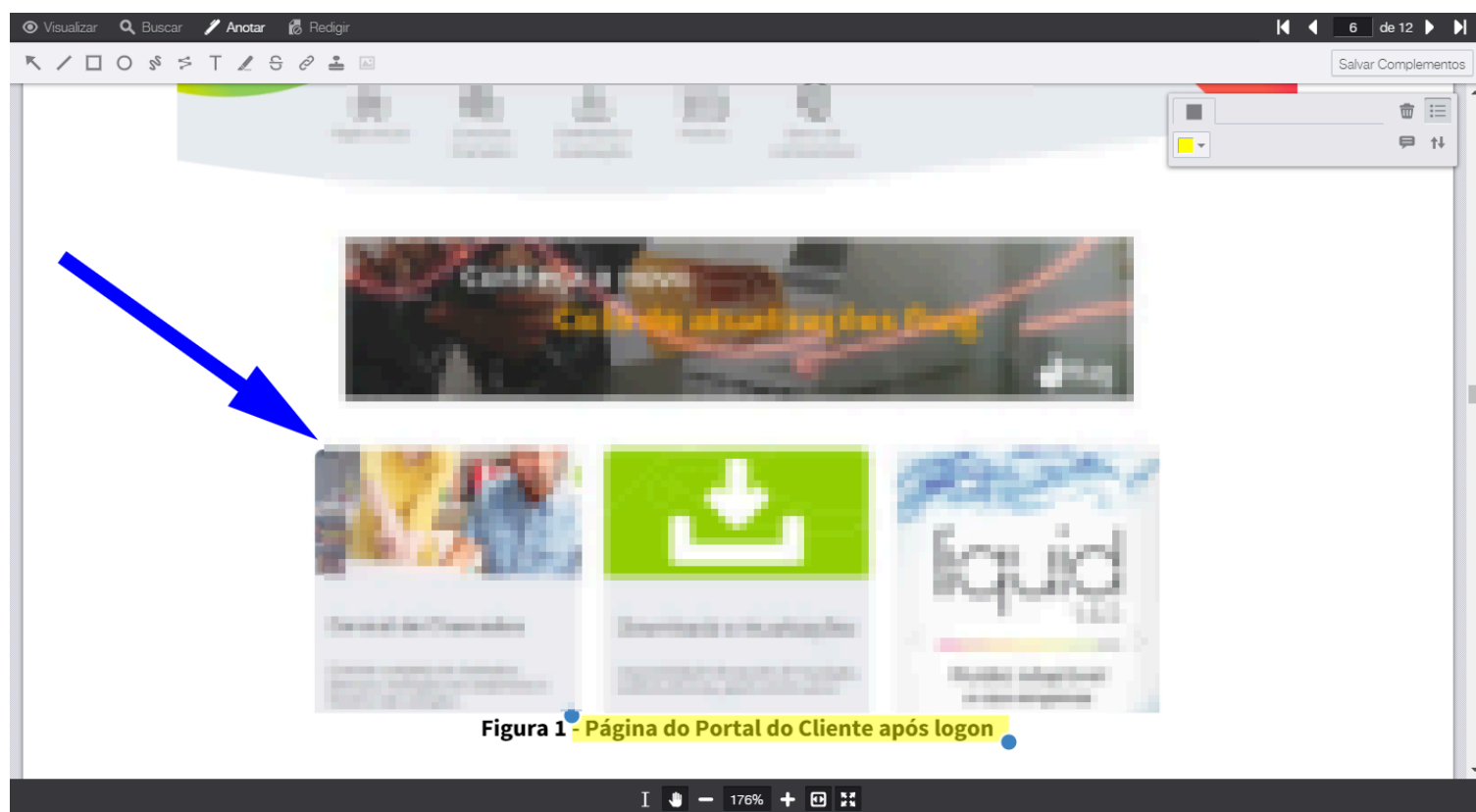
Take note   Redact

Figura 1 - Página do Portal do Cliente após logon

Include add-on

To perform this action, the user must have change permission in the chosen document. The Complement option will not be avaixable to all users if the document is checked out, only for the user who checked it out.

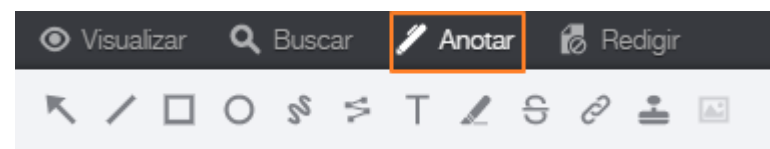**01.** In document browsing, find the document you wish to complement.

02. Click the ≡· **More options** icon and select the **Complement** option.

This will open the Internal viewer, allowing you to include add-ons in the viewed document. When including add-ons, you can use the viewer's **Note** and **Redact** features.

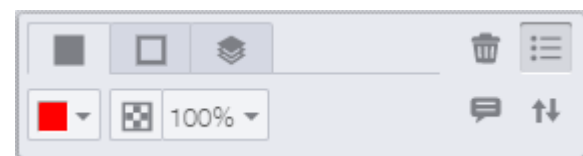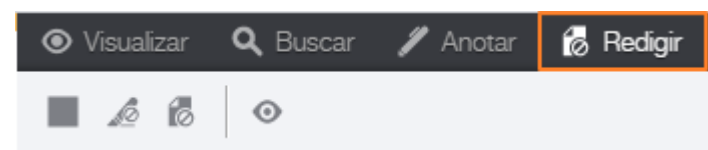### Annotate

Watch the video

Using these tools, you can add various shapes, highlight text, create links to websites, and more. To add a note, press the button of the mark you wish to add. Depending on the tool you choose, you need to press and drag to add a shape anywhere in the document and in the desired size, or select a text block to add a strikethrough.

After adding a note, a context menu appears in the right side of the viewer, allowing you to change the settings for that mark, depending on the type of note you select:
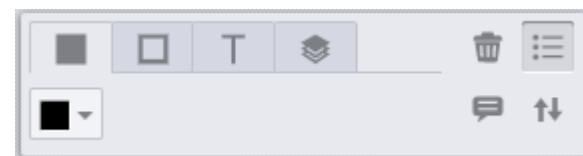

Redact

Watch the video

This feature is very interesting for documents containing sensitive content. More than simply hiding the content visually, the redacted content is safely deleted from the resulting document. The Redact tab offers two different methods: you can draw lock stripes of any size or create lock stripes from the selected text.

Like notes, lock stripes have a context menu that gives you access to settings such as fill color, border color, and the possibility to add text explaining why the content was redacted.

03. To save the included add-ons, click **Save add-ons** in the upper-right corner of the viewer.

After clicking this option, you will see a confirmation message, allowing you to save the included add-ons, or cancel to stay in the viewer.

When the add-ons are saved, a PDF file is generated to be presented in the view, download, print, indexation (search) actions. It is important to note that the contents that were hidden by stripes in the document will not be shown in the general search.

The document without add-ons will continue to be available for content editing and downloading the original version, for users with document change permission.

Delete add-ons

01. Find the document from which you wish to delete add-ons.

02. Click the ≡ **More options** icon and select the **Properties** option.

03. Click **Save**.

When saving document properties, the platform will check if the document has add-ons and ask whether the user wants to keep or discard the add-ons.

04. To delete the add-ons, click **Discard**.

ⓘ **Please note!**
This documentation is valid as of the **Lake (1.7.0) update**. If you use a previous update, it may contain information different from what you see on your platform.

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