Cloud Fax and Document Automation
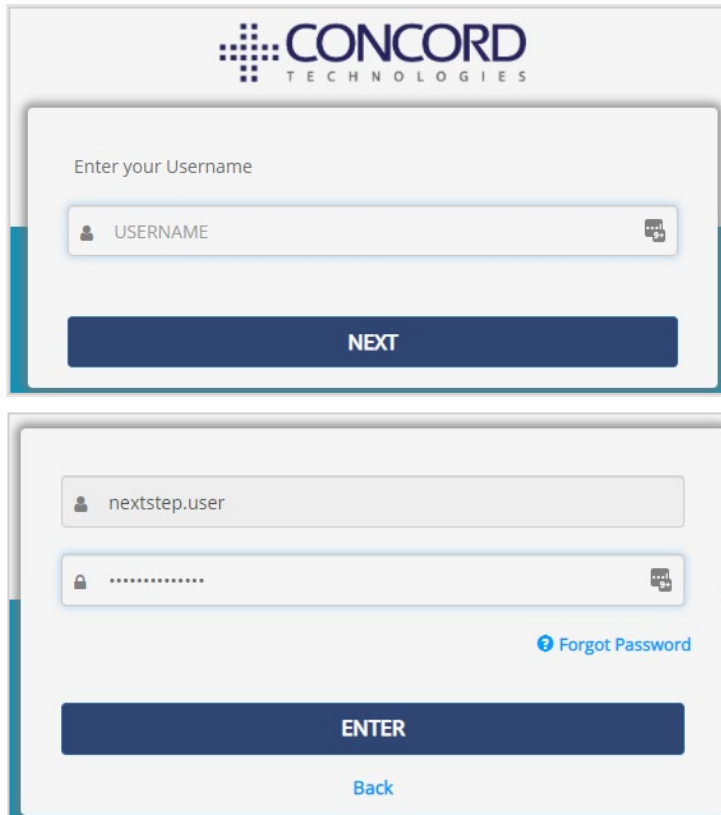
NEXTSTEP User Guide

Contents

Introduction

Concord Technologies' NEXTSTEP platform offers customers a web portal to view and manage incoming faxes and other image-based documents. Whether your business is in healthcare or another highly regulated industry, managing documents can play a critical role in your operations. NEXTSTEP lets you bring those documents together and create faster and more efficient workflows that are easy to use, secure and auditable. NEXTSTEP is a document management solution allowing users to view, edit, and manage documents via an "inbox" on the Concord Web Portal, all within a customizable folder-based structure that can be shared amongst multiple users within your organization.

Every authorized user can access and manage documents in the queues they are assigned to. Administrative functions, such as creating and adding new users, creating tags, and adding new shared workflow queues and subfolders, can only be performed by designated NEXTSTEP Administrators within a customer's organization.

This guide describes the basic user experience within NEXTSTEP. Additional features are available to automate processes with workflow rules, track additional information about documents using custom fields, perform barcode recognition, automatically classify documents by their type, and extract patient and other demographic information from incoming documents. For more information on these features and to discuss how they relate to your use case, please contact your Concord account manager.

NEXTSTEP Login

To access the NEXTSTEP portal, navigate to https://nextstep.concord.net. You will first be prompted to enter your **Username**. Click **NEXT** to proceed to enter your **Password**.
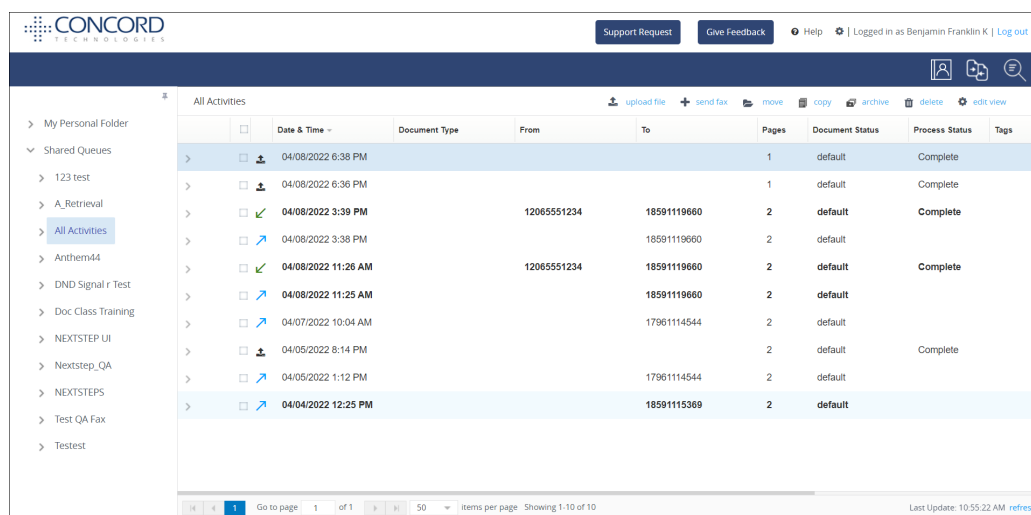

After entering your password, click **ENTER** to complete the login process**.** If you do not know, or have forgotten your password, click on **Forgot Password** and follow the ensuing prompts.

Note that Concord also supports the use of Federation for portal-based services such as NEXTSTEP, which allows a customer to leverage their existing Identity Provider when accessing NEXTSTEP (and/or other Concord services). Via Federation, a user's process to log into NEXTSTEP will be different from one whose account is not Federated with Concord and the process will vary according to a customer's Identity Provider. For more information on Federation, please contact your Concord account manager.

Grid View

Upon logging in to **NEXTSTEP**, you will land in the Grid View with a view of your **Personal Folder** and any **Shared Queues** to which you have access. Personal Folders are only accessible to the Personal Folder owner, and no one but that user can view the contents of a Personal Folder at any time. Access to Shared Queues can be granted to multiple users to allow them to share responsibilities for triaging incoming documents and collaborating on processing them. Any sub-folders that are associated with your Shared Queues will also be listed.
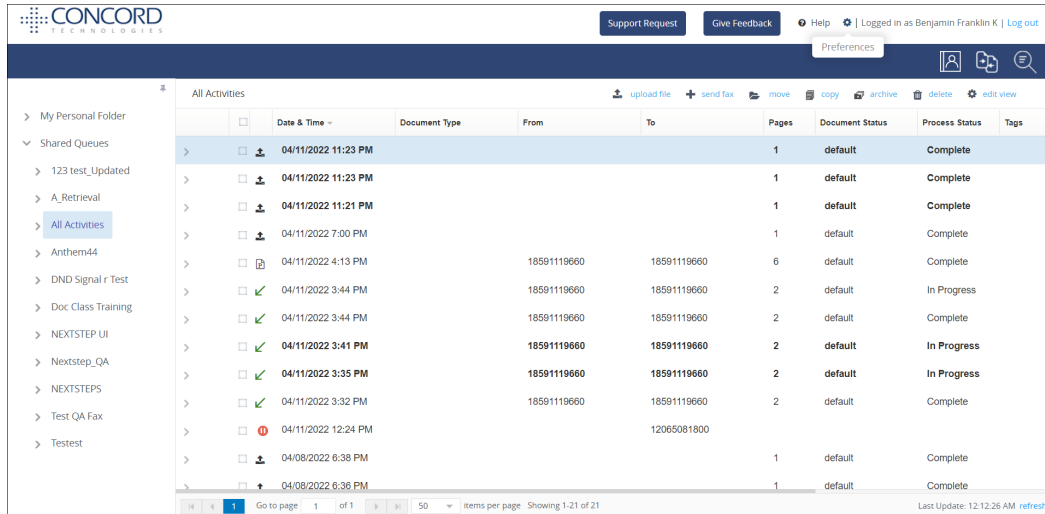
Click on your desired Shared Queue to view and manage faxes and uploaded documents via the Grid View:

Preferences

The **Preferences** menu can be accessed by clicking on the gear symbol just to the right of the Help option and to the left of your username on the top banner as shown in the image below:

Once you open the **Preferences** menu, you have a few options to configure, which are defined below:

Preferences Definitions

Auto-Refresh Interval: This setting controls how often your screen refreshes to show new updates in the Grid View. Note that a new message arriving in NEXTSTEP will force an update regardless of settings and the Insert/Update Notifications preferences may also play a role in updating the view.

Activity Timeout: This controls how long you will remain logged into NEXTSTEP following a period of inactivity.

Default Shared Queue: This setting dictates which Shared Queue will open when you first log in to NEXTSTEP. You may also choose your Personal Folder as your default.

Audible Alerts: This setting controls whether to play a sound when a new message is received and what specific sound to play. You can preview each sound and choose which, if any, you want to hear.

Enable Email Notification: Enabling this setting will trigger an email notification back to the user's email address when an outbound fax transmission is sent (success or failure).

Document Preview: This allows you to select what version of the Document Preview you want to see when previewing a document; thumbnail, expanded or full.

Enable Warning Popups: This setting enables warning notices when an error or potential for error occurs.

Show Tooltips: This enables tooltips when hovering over elements in the NEXTSTEP interface.

Show Toast Notification: This setting enables "pop-up" notifications when new messages are received.

Insert/Update Notifications: Allows for updates made to document properties to be displayed in the Grid View, independent from the refresh interval. This may also apply to new messages depending on Refresh Interval settings.
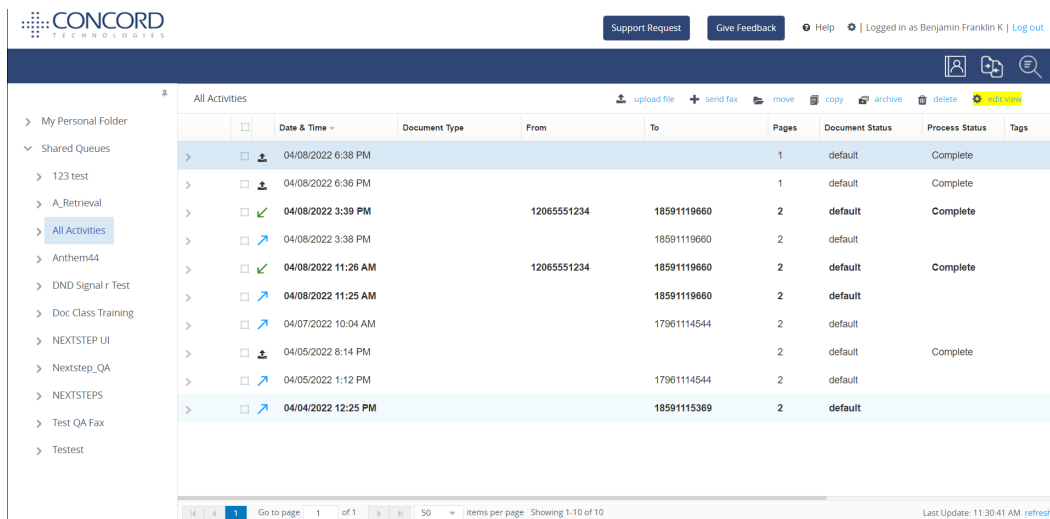
Toolbar Options

The options in the toolbar can be used to upload a JPG, PNG, TIF or PDF document, send an outbound fax, move or copy one or more document to another queue or folder inside NEXTSTEP, move one or more documents to the built-in archive or delete folders and edit your column view. Note that options may vary according to what permissions are set for your organization, queue or user account.

upload file   send fax   move   copy   archive   delete   edit view

Edit View

The Grid View displays a column-view listing of messages and associated data in a given Queue or Folder. This will initially be displayed with a default set of columns. You can modify the columns using the Edit View button to display the most relevant data, in the order preferred.

To begin, click on the **Edit View** button in the top right of the Grid View screen:
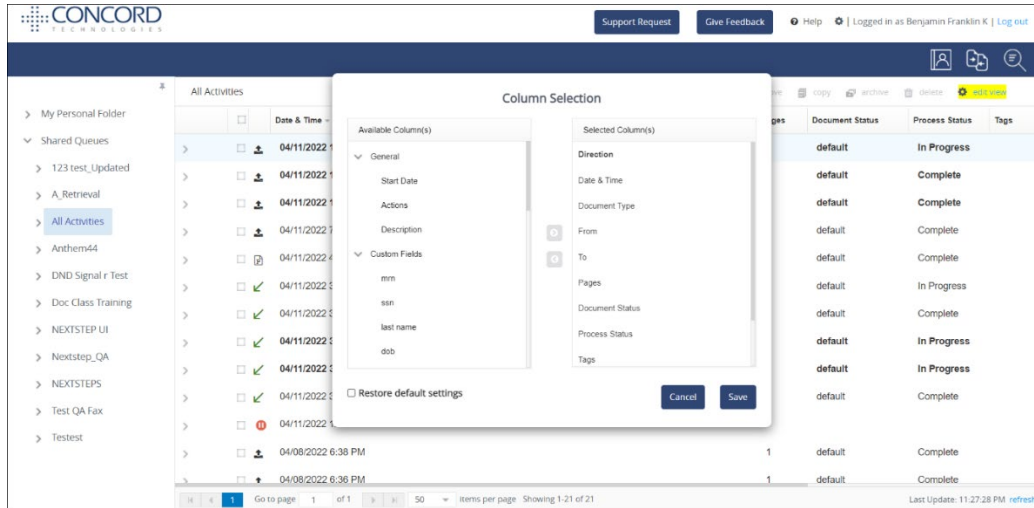

This will open the **Column Selection** window. Here you will see the Available Columns and Selected Columns separated in two frames. By selecting items in the Available Columns list and clicking the right arrow, you can add these columns to your Selected Columns, so they appear in the Grid View:

Selection Arrows will be highlighted depending on whether you will be adding or deleting columns from you Selected Columns. You can remove Selected Columns from the Grid View by selecting what you no longer want displayed and using the left arrow to return these to Available Columns.
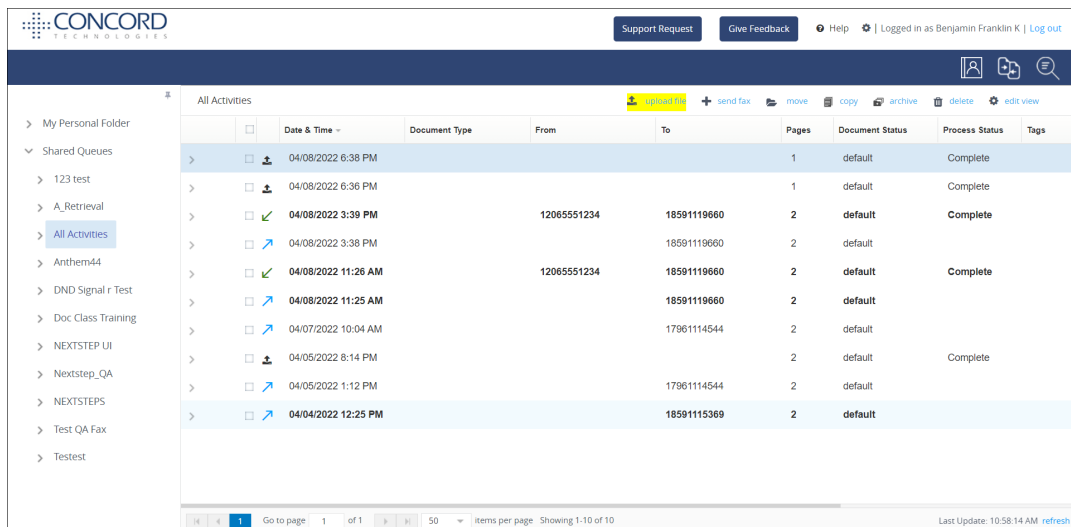
Also, by selecting items in the Selected Columns, you can move these up and down in the Selected Columns list to reorder your columns as needed.

Upon saving, you will see an updated version of the Grid View showing selected columns in the requested order.

Upload File

You can upload a variety of file types to collaborate on documents and/or allow NEXTSTEP to process the document for added services such as document classification or data extraction.

Upon clicking **Upload File,** NEXTSTEP will request that you choose a document from your local PC or shared drive:
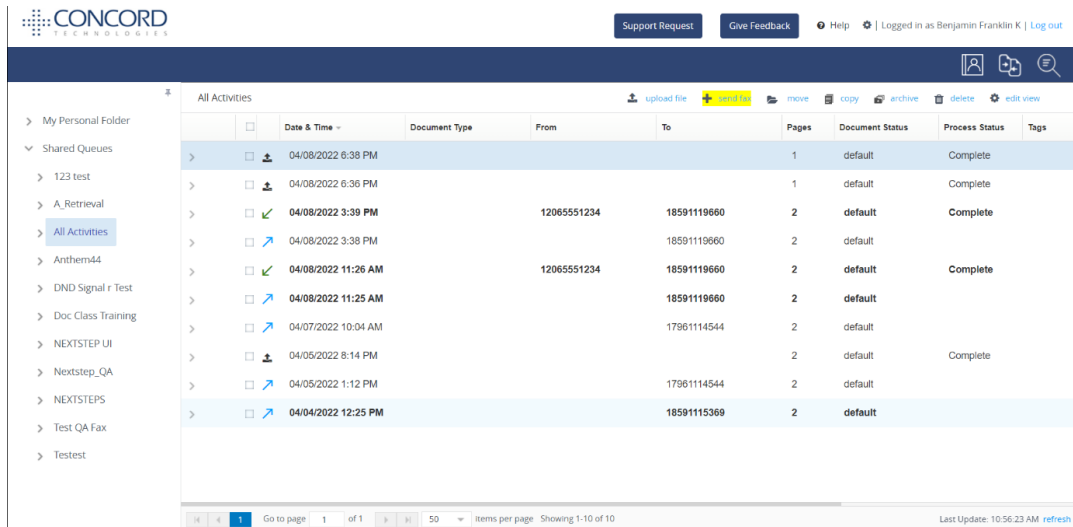

Currently supported file extensions are: **jpeg, .jpg, .png, .pdf, .tif, .tiff**

The uploaded document is pictured as shown below with an upload indicator icon to differentiate this document from documents sent or received via fax:

Send fax

To send a fax, click the **Send Fax** button in the Grid View:

Upon clicking the Send Fax button, a **Create Fax** window will be displayed.

Here, you must enter a fax number at minimum. Other fields, such as Recipient Name and Company, as well as Subject and Body may be populated for inclusion on a fax coversheet if this is being added to your transmission.

Note that it is **HIGHLY RECOMMENDED** that you **DO NOT** include any Personal Health Information (PHI) or Personally Identifiable Information (PII) in any of the fields pertaining to the fax coversheet as this creates a separate record of this data apart from the content of the fax message.

Including at least one document to fax is also mandatory. Multiple documents may be included to build the full set of pages you want to fax.

You can preview the coversheet by clicking Preview.

When ready, click **Send.**

Upon sending the fax, the status of the fax message will be displayed in the Grid View.

☐		Date & Time ⌄	To	Pages	Recipient Name	Status Description
☐	↗	08/26/2022 2:35 PM	17328538542	3	John McFadden	Success

Note that outbound faxes will display a blue arrow pointing up and to the right (vs an inbound fax which will show a green arrow pointing down and to the left).

Note also that column headings in the Grid View can be adjusted to display the most appropriate information for a given queue or folder. You may wish to adjust default column headings to display data related to outbound fax status. As per the above example, Status Description has been added to capture status. Sender Name and Sender Company Name may be added also to track sender information and Recipient Name and Recipient Company Name may be added to track recipient information. We will cover editing your view later in this document.

Hold for Review

You can choose to hold an outbound fax document for review, which places the fax transmission into a "paused" state to allow you or another registered user to validate the document and fax transmission details prior to the fax being sent.

You can find the Hold for Review button at the bottom of the Create Fax Window. This may be enabled by default. If not already checked by default, check the box for **Hold for Review** to have your message held, and click Save as shown in the image below:


The held document is pictured in the Grid View as shown below, with an indication that the document is "paused" in the Hold for Review state:

Address Book

The Address book allows you to save and manage fax contacts so you do not need to enter these as new each time you send a fax message from NEXTSTEP.

To navigate to the **Address Book** click and NEXTSTEP will display the Address Book window. Contacts may be stored specifically for your own individual use in **My Contacts** or may be stored for use amongst all users in your NEXTSTEP account as **Global Contacts**. Access may vary depending on permissions.
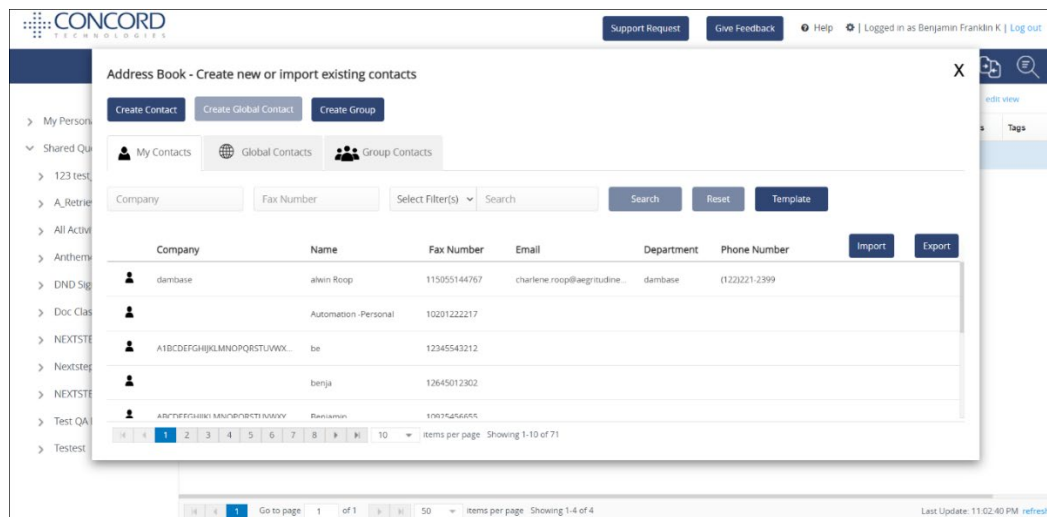
To create a new Contact, click **Create Contact** and enter the required fields (First Name and Fax Number) at minimum, and complete the rest of the form as needed to create your contact. When finished click **Save:**

If you need to send to a group of recipients on a regular basis, you can create a **Group** and include multiple contacts in that Group, up to 50 recipients per Group. To do this, click **Create Group** in the contacts window, add a name for the Group, and use the arrows to move contacts into the Group:
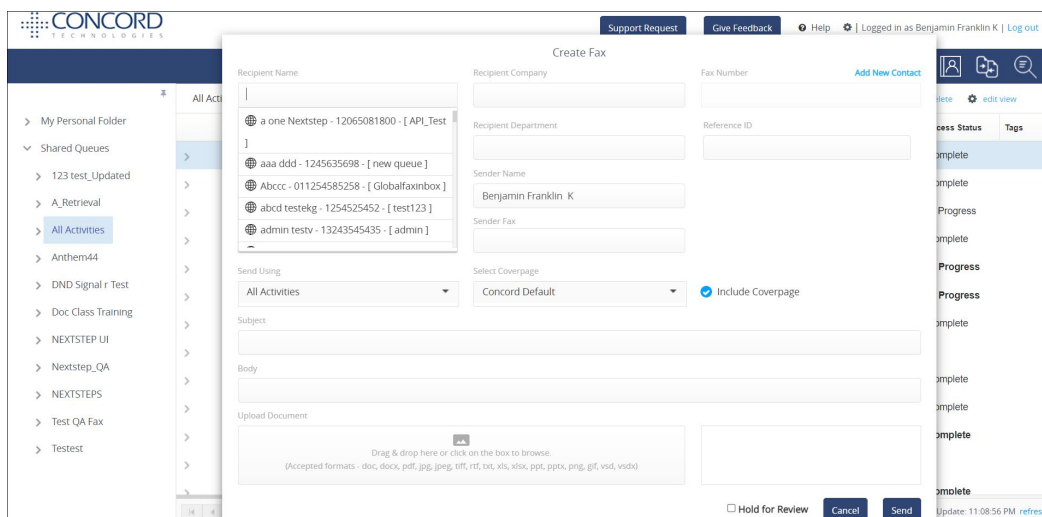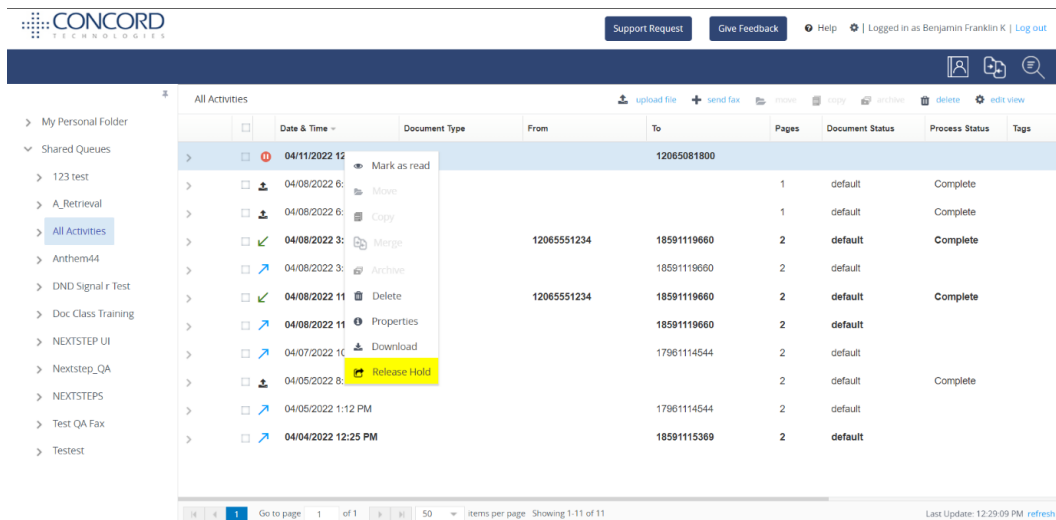

When finished, click **Save.**

Stored **Contacts** and **Groups** are auto-suggested in the recipient information when submitting a new fax message:
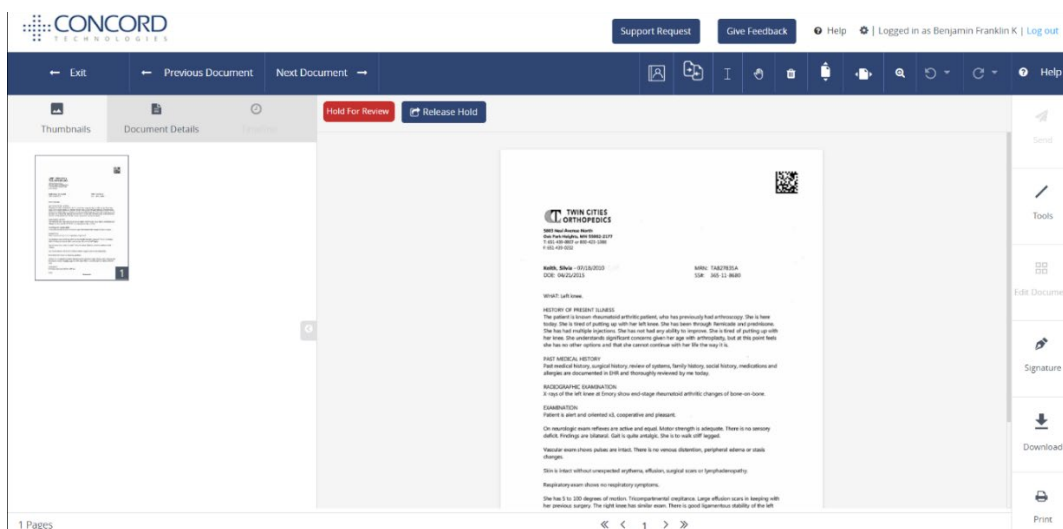
Release Hold

Documents held in Hold for Review status can be released in two ways. First, by a context (right) click on the document, which provides a menu of options including **Release Hold**. After clicking **Release Hold** to send the fax, the document will be processed and transmitted to the recipient:

The **Release Hold** function is also offered in the Document Viewer section so faxes may be released directly from the document view following content review:

Copy

A NEXTSTEP user can copy a document to any Queue or Folder they have access to. Copying a file means that one or more "copies" of the document will be placed in the designated Queue(s) or Folder(s) you are copying to, while an original "copy" will remain in the Queue or Folder you are copying from. It is possible to copy a single document to multiple destination Queues or Folders.

To begin, right-click and select **Copy**, or check the box next to the document you wish to copy and select **Copy** in the toolbar:
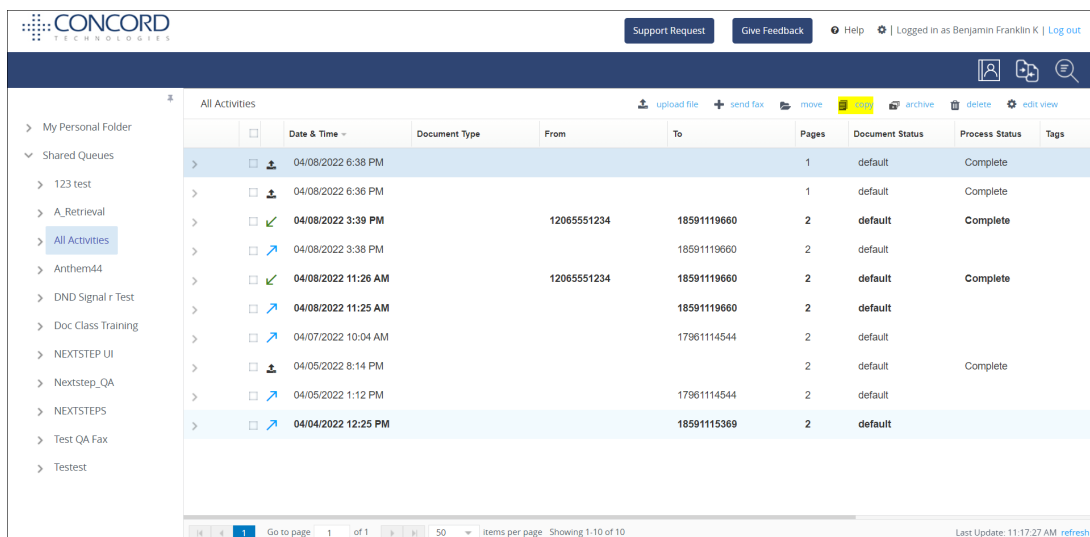
This will open a dialog box that allows you to select one or more locations to copy your document to. You can also add text notes in the **Description** field:

Select your intended destination(s) and click **Copy** to complete the copy process:
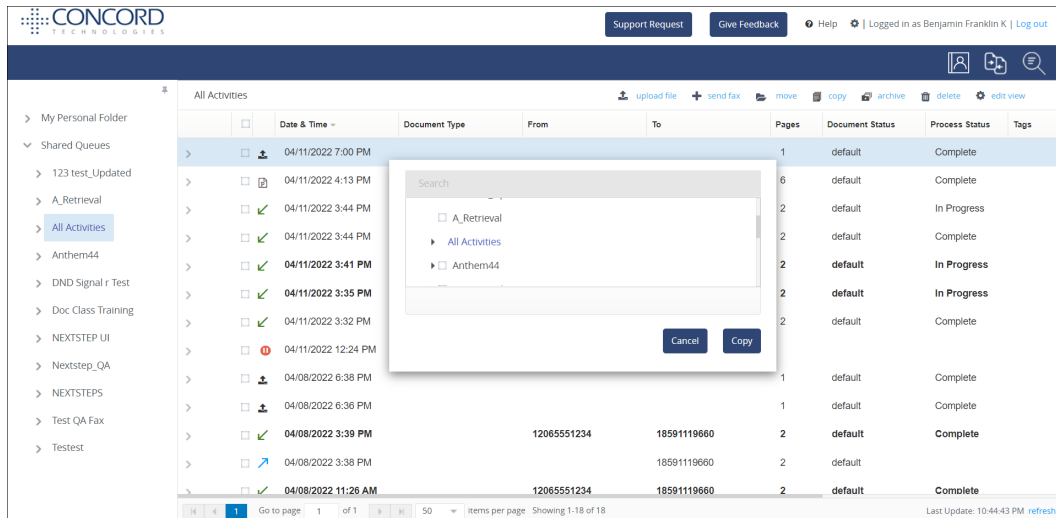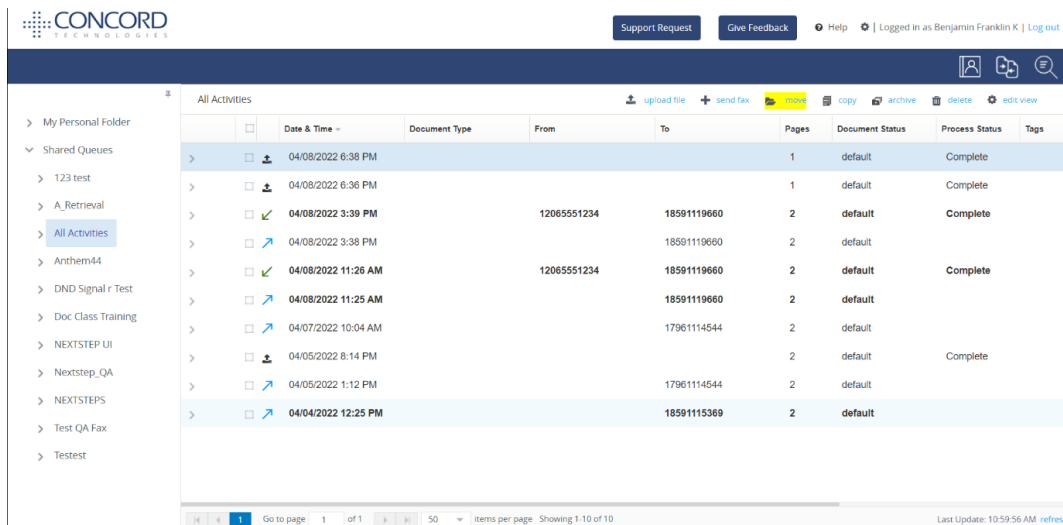
Move

A user can move a NEXTSTEP document to any Queue or Folder they have access to. Unlike Copy, the **Move** function does not create additional copies of the document, but instead moves the current version of the document to a new Queue or Folder. After moving, the document will be removed from the current Queue or Folder and added to the destination Queue or Folder.

To begin, right-click and select **Move,** or check the box next to the document you wish to move and select **Move** in the toolbar:

This will open a dialog box that allows you to select a location you want to move the document to:

To complete the process, select the desired location and click **Move:**

Archive

NEXTSTEP offers an option to archive a document. This places the document into an Archive Folder where it can be held for a desired period of time. If the document needs to be recovered to a Queue or Folder, you can restore it from the Archive Folder.

To archive a document, right-click and select **Archive,** or check the box next to the document you wish to archive and select **Archive** in the toolbar. This will move the document directly to the **Archived Items** folder within the Queue you are working in:

If a document needs to be restored from the Archive Items Folder, navigate to that folder in your queue and find the document you want to restore. Then, either right-click and select **Restore** or check the box next to the document you wish to restore and select **Restore** in the toolbar:
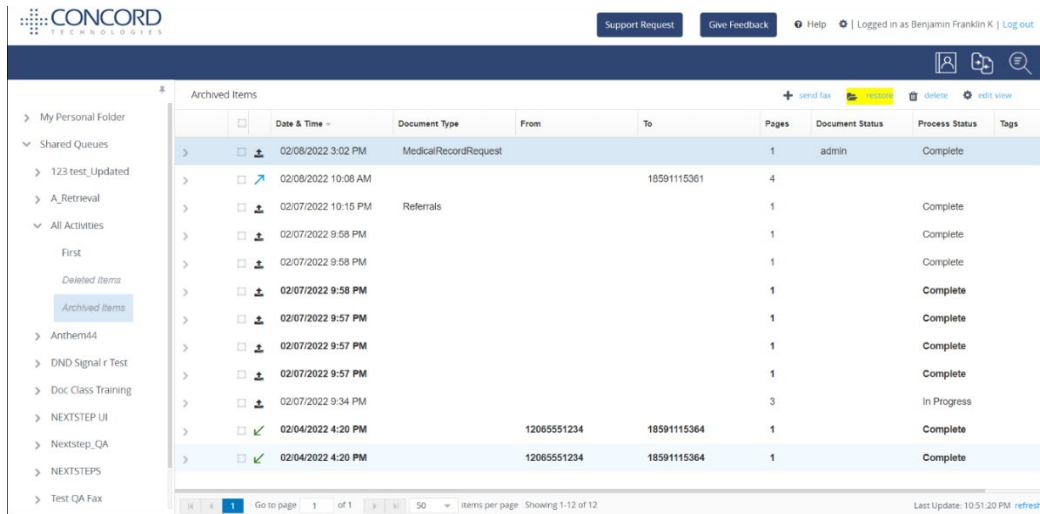
This will open a window that allows you to select what Queue or Folder you want the document to be restored to. When you have selected the location, click **Restore** to move the document to that destination:
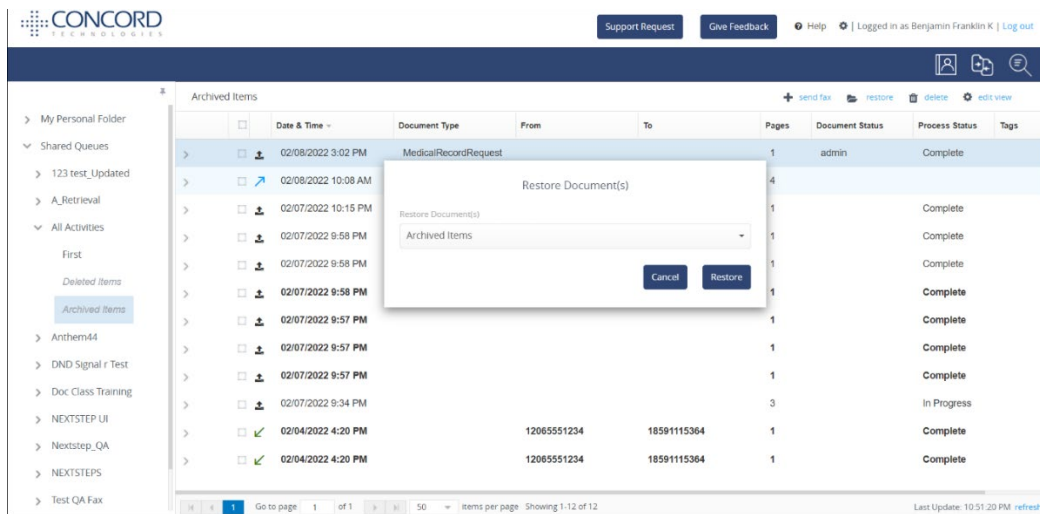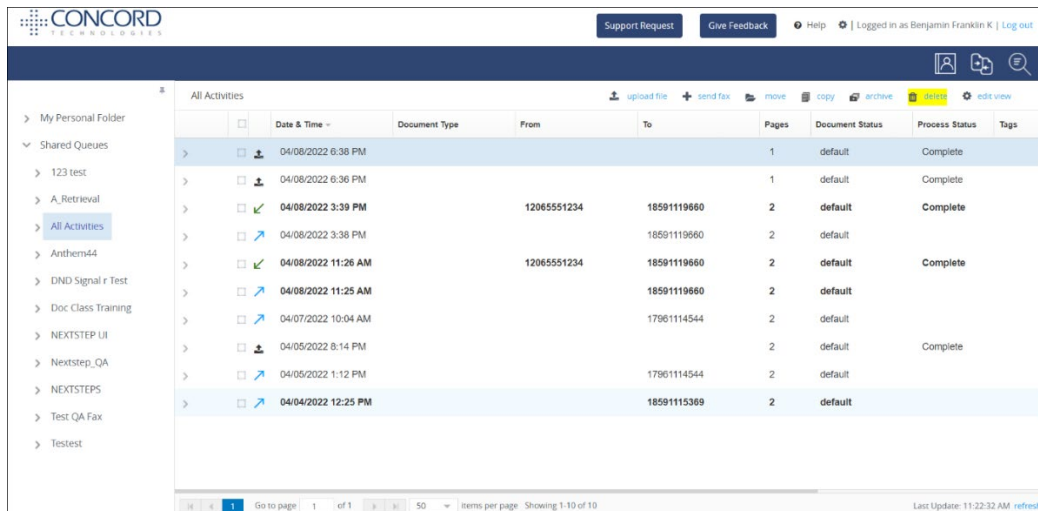
Note that the Archive function may be enabled on your NEXTSTEP Queue as an automated process, whereby documents are sent to the Archived Items Folder after a predetermined period of time. Please check with your NEXTSTEP administrator for details on how archiving is configured.

Delete

NEXTSTEP offers the ability to delete a document by moving it to the Deleted Items folder, from which the document can be purged from the NEXTSTEP service and Concord's platform. Note that, while documents are still available to access and retore while in the Deleted Items folder, once they are purged from the Deleted Items folder they can no longer be restored.

To delete a document, right-click and select **Delete,** or check the box next to the document you wish to delete and select **Delete** in the toolbar. This will move the document directly to the **Deleted Items** folder within the Queue you are working in:

If a document needs to be restored from the Deleted Items Folder, navigate to that folder in your queue and find the document you want to restore. Then, either right-click and select **Restore** or check the box next to the document you wish to restore and select **Restore** in the toolbar.

This will open a window that allows you to select what Queue or Folder you want the document to be restored to. When you have selected the location, click **Restore** to move the document to that destination:
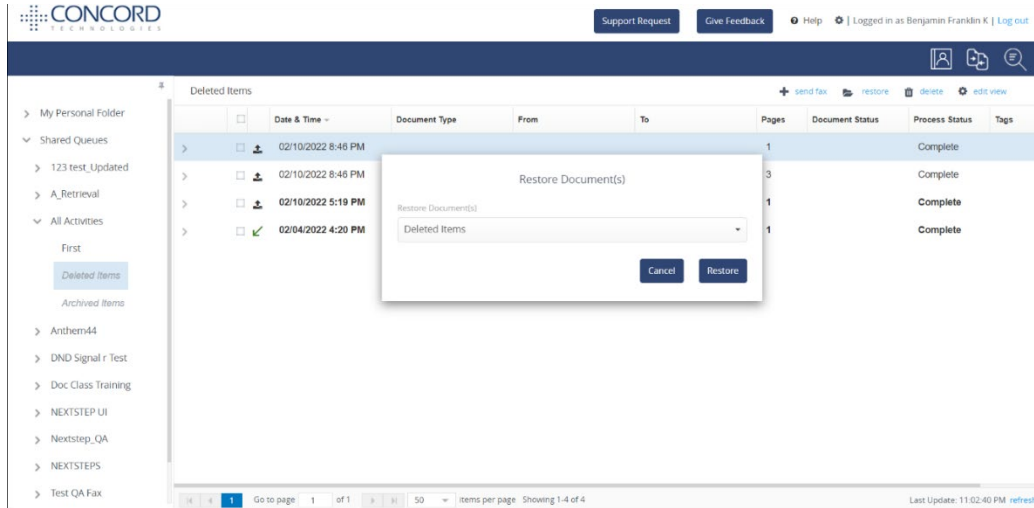
If you want to permanently purge a document from NEXTSTEP, that document must be in the Deleted Items folder. To purge it, navigate to the document and follow the same steps as deleting a document. If the document is in the Deleted Items folder when you perform a delete you will see the below notice:

Are you sure you want to permanently delete the selected document(s)?

Cancel   Continue

If you choose Continue, the document(s) will be purged and can no longer be recovered or restored.

Note that Delete and Purge functions may be enabled on your NEXTSTEP Queue as an automated process, whereby documents are sent to the Deleted Items Folder and/or purged after a predetermined period of time. Please check with your NEXTSTEP administrator for details on how Delete and Purge are configured. NEXTSTEP administrators should take care to review Delete and Purge settings to ensure proper disposal of documents.

Thumbnail Image & Document Preview
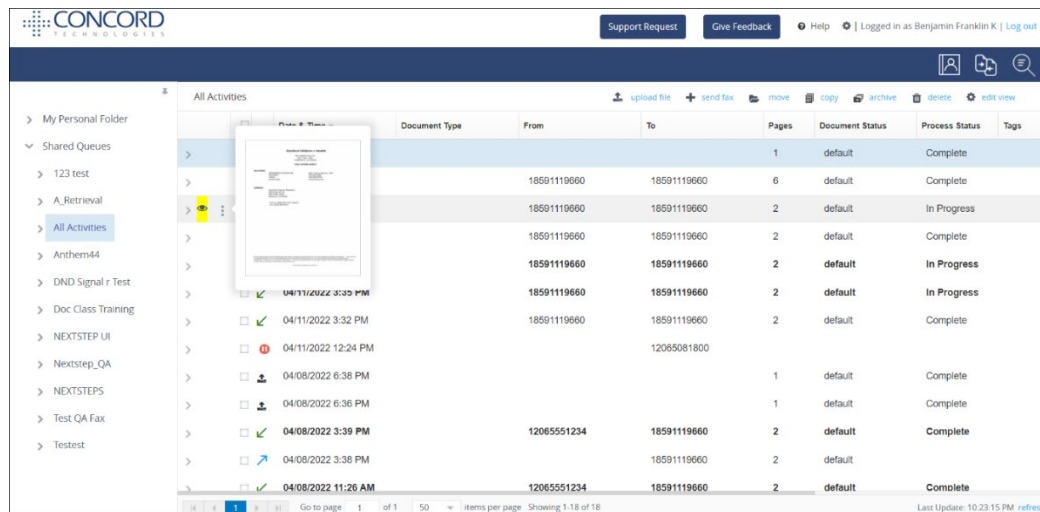
NEXTSTEP provides a Preview option that allows you to view a document without opening it to the Document View page. The behavior of Document Preview can be set in your preferences, such that a small, medium or large version of the document will be displayed when previewing. In the below example, the large preview is selected within Preferences:

Document Preview

You can view preview the document

To invoke a thumbnail Preview, mouse over on the eye icon to the left of any message displayed in the Grid View. Upon clicking the eye icon, the **Document Preview** is displayed in the left pane or as a full document, depending on preferences:

From the **Document Preview**, you can navigate to the document viewer by clicking **Edit Document** and can view the Thumbnail **image in the Full View** by clicking the **Expand Icon:**

Full Preview View:

Search

By default, the Grid View will display documents that arrived within the last 10 days. If there are no documents within this timeframe in the queue, you will be prompted to load the most recent documents:

No record(s) found for the past 10 days
Click here to view last transaction(s)

To further refine the time period shown to filter documents, users can click on the Search icon. This exposes a pane on the right with options to build the search criteria. If the date range is all that is important, click the calendar to choose the appropriate dates and click **Search:**
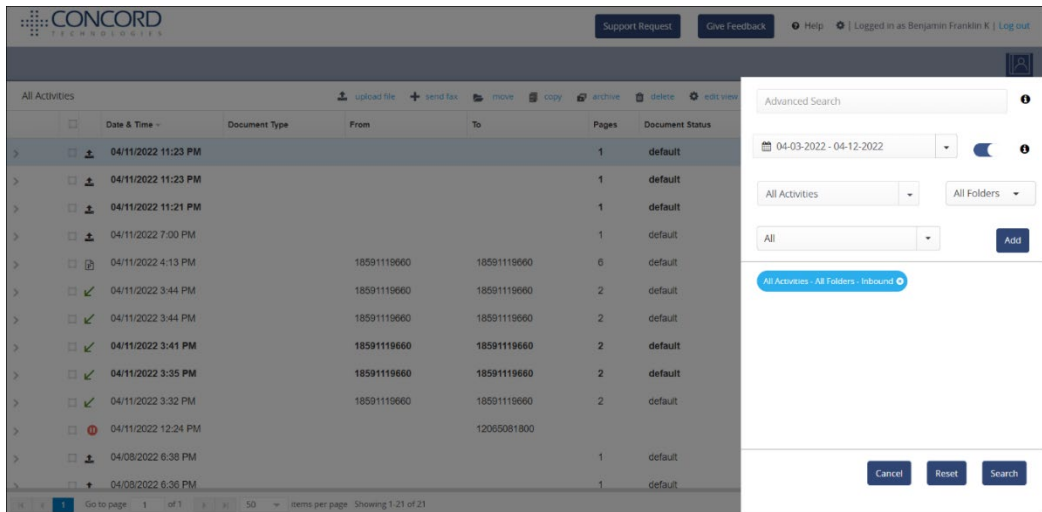
NEXTSTEP's basic Search allows users to search within a queue using properties of the document such as the sender's fax number, applied tags, document statuses, custom fields, description, etc. It is possible to add multiple search filters to find a specific message or set of messages that meet the search criteria.

To add criteria, choose which filter you wish to use and click **Add**. To include additional criteria, select additional filter(s) and choose **Add**. This will layer the search criteria. Some filters, such the "From" field shown below, require additional data to complete. In this case we are adding a specific "from" fax number. We are also indicating a specific tag. When you are ready, click **Search:**

📅 08-23-2022 - 09-02-2022   ▾

HC Training   ▾   All Folders   ▾

All   ▾   Add

HC Training - All Folders - and From is Equal to 12066735982 ✖

HC Training - All Folders - and Approved Tags ✖

Cancel   Reset   Search
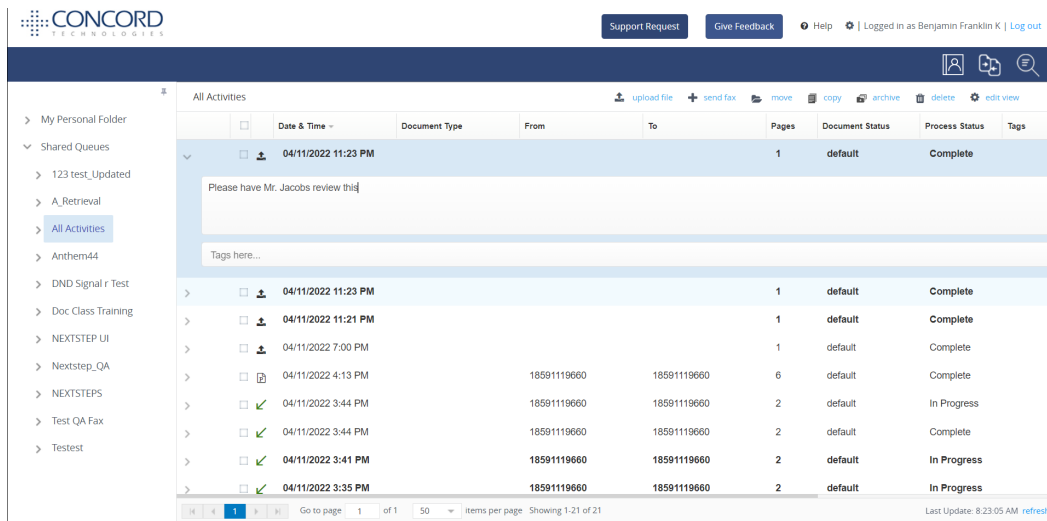
When you wish to return to the standard Grid View, click **Clear Search.**

Note that NEXTSTEP's **Advanced Search** allows you to search for keywords within the text of documents. This feature must be enabled specifically for your account. If you want to be able to search across Queues and Folders for data that exists within documents, please contact your Concord Account Representative.

Adding a Description
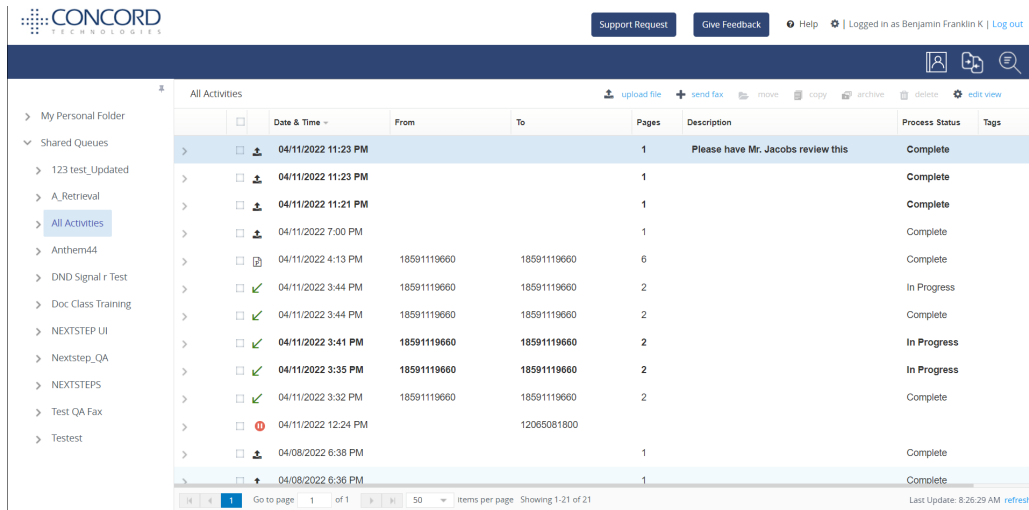
A Description is a text field that can be used to relay information in a collaborative setting or simply to make a note on a message for your own use. To add a Description to a document from the Grid View, simply single-click on the row of the item (a double click will open the image). Upon clicking on the item, the following box will be displayed, prompting you to enter the Description you want attributed to the document:

If the "Description" column is included in your Inbox view, the text will be displayed:

The description text can also be used when performing searches:

You can also add a Description from the Document View when a document is opened in NEXTSTEP. The Description field can be found at the bottom of the Document Details tab in any NEXTSTEP document:
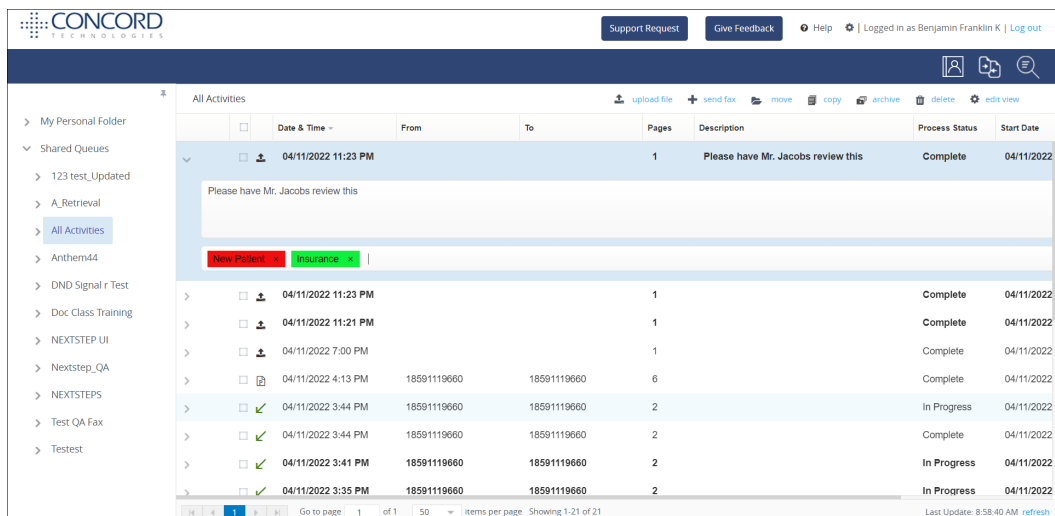
Using Tags

You can add one or more color-coded **Tags** to documents in NEXTSTEP, to readily identify common characteristics of Shared Queue documents. The text and color of each Tag is custom to that Queue and Tags may be used to represent many different forms of information. Tags are created and managed by your Concord NEXTSTEP Administrator and may be edited as needed. New tags may be added to a Queue by the admin at any time.
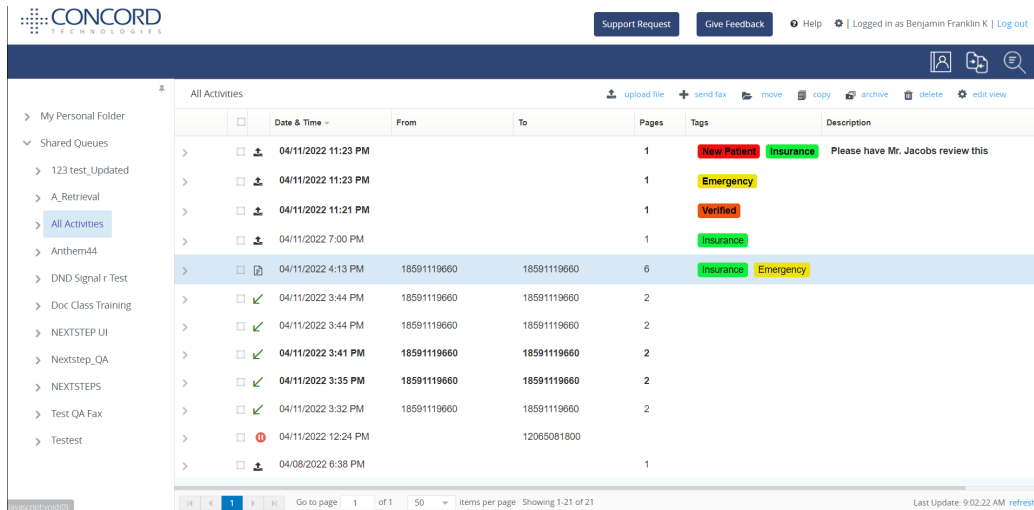
To apply a Tag to a message, first click on the message where the Tag will be applied. Just below the **Description** field, you will see a second field, where "*Tags here...*" is displayed. By clicking on this field, a drop-down menu of all available Tags will be listed. Select the Tag you wish to apply and the Tag will be applied automatically. Additional Tags can be applied as needed. Click the X on Tags to remove them from the document:

Tags can be displayed in columns in the Grid View and can also be used as Search criteria:

Tags can also be set and displayed in the Document View when a document is opened in NEXTSTEP. If Tags are available in your Queue they can be found in the Document Details tab:
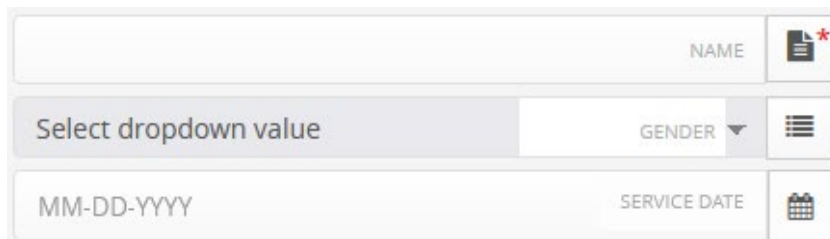
Custom Fields

Custom Fields are text boxes, dropdown selections and date/time selections that have been added to a Shared Queue to capture specific information while processing a document. In some instances, Custom Fields may be populated automatically by the NEXTSTEP service through the use of AI-based data extraction. This may be true for a Patient Name or Date of Birth for example. For the purposes of this guide, we will show the different types of Custom Fields and how these can be populated in NEXTSTEP by a user manually.

As the name implies, Custom Fields may be customized per customer and per Shared Queue so the fields, labels and layout will vary according to how these are being used. Custom Fields may be designated as required or hidden. Required fields must be completed while hidden fields will not be displayed in the NEXTSTEP UI and may serve another purpose in the workflow.

Custom Fields can be viewed and edited from the Document View screen upon opening a document. They can also be accessed by right-clicking a message in the Grid View and selecting Properties. Custom Fields are found under the Document Details tab.

The below example shows three different types of custom fields:

NAME = A standard text based custom field that you would complete by adding text. This field has been designated as Required.

GENDER = A dropdown selection list that you would complete by selecting the appropriate value from the dropdown list. Only one value may be selected.

SERVICE DATE = A date selection that you would complete by selecting the appropriate date from a calendar display. Only one date value may be selected.

Viewing Documents

To open and view a message from the Grid View, double click on the message or single click and then click Open to access the Document Viewer.
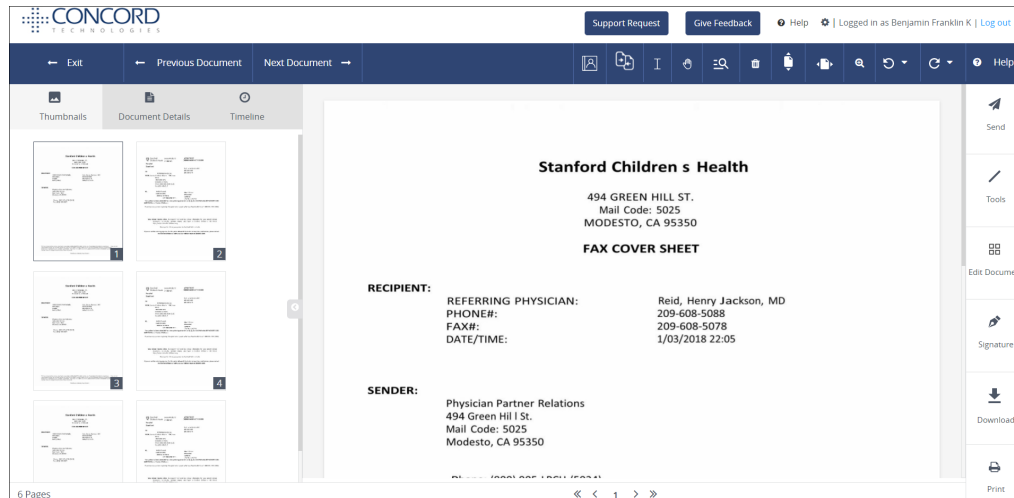
By default, you will be brought to the Thumbnails tab and the document will be displayed to the right.

Thumbnail images of each page are displayed in the left-side pane. To view a particular page, you can either click on the thumbnail you wish to open or navigate using the buttons in the menu bar at the bottom of the document page.

On the top menu bar, there are options to further customize your view of the document:

Images can be viewed in either wider or narrower layouts, using either the   buttons.

To magnify the image, click on the button.

To rotate the current page or all pages, use the   buttons.

Searching Within Documents from the Document View

By default, documents received or uploaded to NEXTSTEP are run through an Optical Character Recognition (OCR) process to convert images to accessible text. This means that you can search and copy data from these documents. To search, click the magnifying glass icon and the top menu will display the options used to search for text within documents:
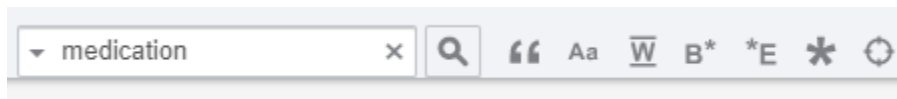
You can simply enter a search term and click the magnifying glass to perform a basic search. Hovering over the other options provides details on performing more advanced searches for exact matches, begins with, ends with, etc.

After performing the search, NEXTSTEP will display the results with the option to click on each result to jump to the appropriate place in the document:
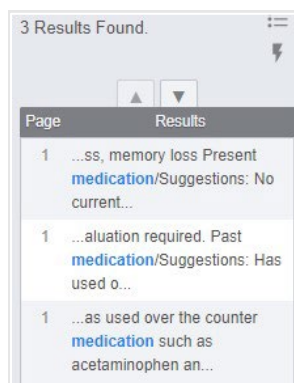
Copy / Paste from Document Viewer

Also, a function of the OCR scanning process is the ability to copy text from a document and paste this data into text areas within NEXTSTEP, such as the Description field, as well as to other applications external to NEXTSTEP.

To copy text, first select the copy icon:

Once selected, you will have the ability to click and hold to highlight text for a copy. You can manipulate the selection by dragging across the text you want to copy:

FACSIMILE COVER LETTER

	Date & Time:	09-08-2022 11:39 AM
	Deliver To:	Fax Training
FAX	Fax Number:	19082064714
	From:	John McFadden CF
	Phone:	7326048654
	Regarding:	New Fax

Please process.

When you are ready to copy, use **Ctrl+C** to copy the text. You can now paste this text within NEXTSTEP or to external applications as needed.

Document Viewer Tool Bar Options

The Tool Bar in the right-hand margin of the Document View provides several features that allow users to manipulate the document, move it within the NEXTSTEP platform, or send it externally. The following actions can be taken:

The **Send** button will allow you to *Move* or *Copy* documents to other folders or Shared Queues for which you have access. *Email* and *Fax* allow you to send the document to external destinations. Click on the **Send** button to display these options:
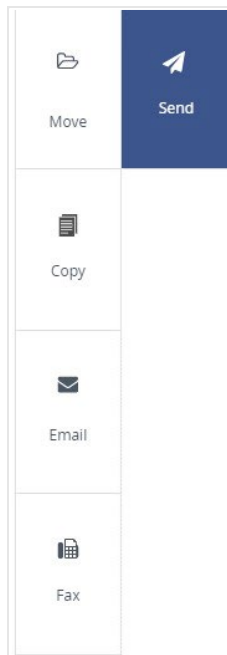
Sending an Email

You can email a document from the NEXTSTEP Document Viewer screen by clicking on **Send** and then **Email**. This will open the Email Document window:

Complete the form with a minimum of a ""To" recipient address and an email Subject line. You may also include a "CC" Carbon-Copy address and a text email body.

You also have the option of setting the file type for the document, which will be attached to your email when you send. When ready, click **Send**.

Note that it is **HIGHLY RECOMMENDED** that you **DO NOT** include any Personal Health Information (PHI) or Personally Identifiable Information (PII) in any of the fields pertaining to message subject or body as this creates a separate record of this data apart from the content of the attached document.

Tools

By clicking on the **Tools** icon, you will have the option to add shapes to the document, redact (blackout) or erase (whiteout) text that should be obscured, add text with the annotate option, highlight important text, and add a watermark.

The **Shapes** option allows you to highlight areas of the document:
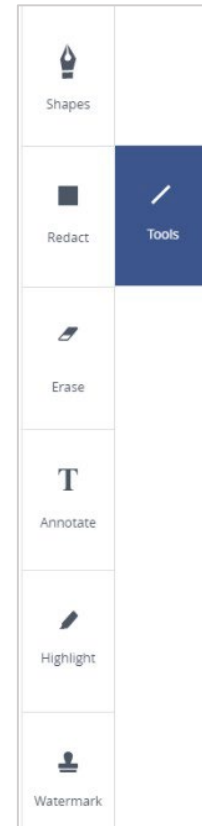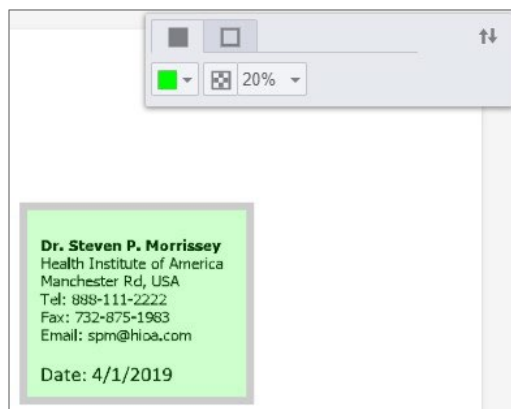
To hide content on the page, click either **Redact** or **Erase** and mouse over to the area which you would like obscured with a black or white box. Continue this process, as needed, until all information is redacted. With either option, you can size the area you wish to *Redact/Erase* by clicking and dragging your mouse.

Note that, while Redact and Erase areas are present in the document, text behind these "boxes" will not be visibile or searchable. However, it is possible to remove these and display redacted or erased data by clicking "Reset All Annotation" in the toolbar following edits. This may be applied to other document content edits such as annotation, highlighting and shapes.

By clicking the **Annotate** icon, you can enter comments or any text that you wish to add to your document. Mouse over to the area of the document where you wish to make your annotation. You will see a small Annotation Tool Bar, allowing for the placement of text:
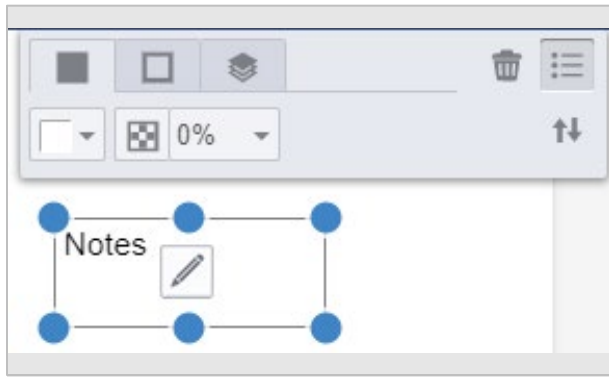
Type in your comments and they will be automatically saved. You can click the pencil icon to go back and edit your text.

You may click and drag the annotation box to move it or resize it using the text box controls.
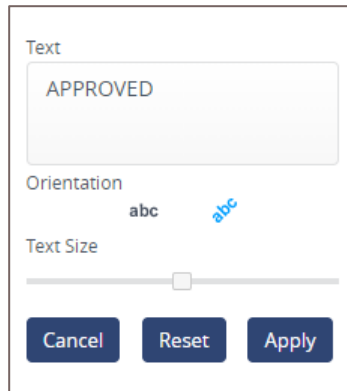
The **Watermark** feature allows you to add text across the page of the document in the size and orientation of your choice:

Edit Document

By clicking the **Edit Document** icon, you have the option to **Edit Pages** or **Merge**.
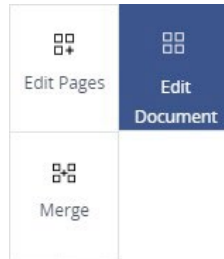
The **Edit Pages** feature allows you to delete pages from a document or split a document into multiple destination documents. To begin, mouse over the thumbnail of each page and click the delete icon to remove it or use the arrow to move one or more pages to the destination document. The plus sign in the middle pane allows you to add a new destination document for the purposes of splitting documents into multiple destination documents. You can split a document into one or more page groups according to your needs.

In the following example, the first page is deleted, pages 2-4 are moved to a new document, pages 5-7 are moved to a second new document, and pages 8-9 remain in the original document.
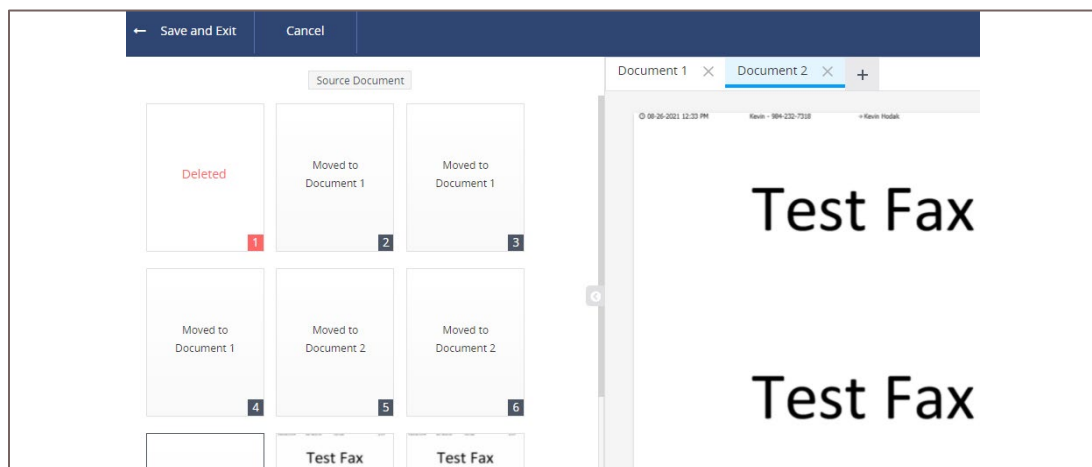
When you are finished, click **Save and Exit** to commit the changes and return to the Grid View. Any documents that you have split off will be displayed as new documents in the Grid View. The Timeline will reflect that a split was used to create the new document and reference to the original Document ID will be displayed.

Merge

The Merge feature allows you to combine two or more separately received or uploaded documents into one. A Merge can be accomplished from within the Document Viewer, by clicking Edit Document / Merge or by clicking the check box next to the documents you want to merge in the Grid View and selecting the Merge Button. After clicking Merge, an indication appears in the top toolbar to show the user that this document has been added to the Merge queue.

The user can add more documents to the Merge queue by repeating the process in other documents or selecting messages in the Grid View and choosing the **Merge** option. After the desired documents have been added to the Merge queue, click the icon to review and finalize the merge process will display the number of documents added, in this case two:

The next step is to confirm the Merge by opening the Merge window, reviewing your documents and clicking **Merge**. This will begin the Merge process. Once the Merge icon turns green, the pages are merged and you can click the **Save** button to complete the merge.
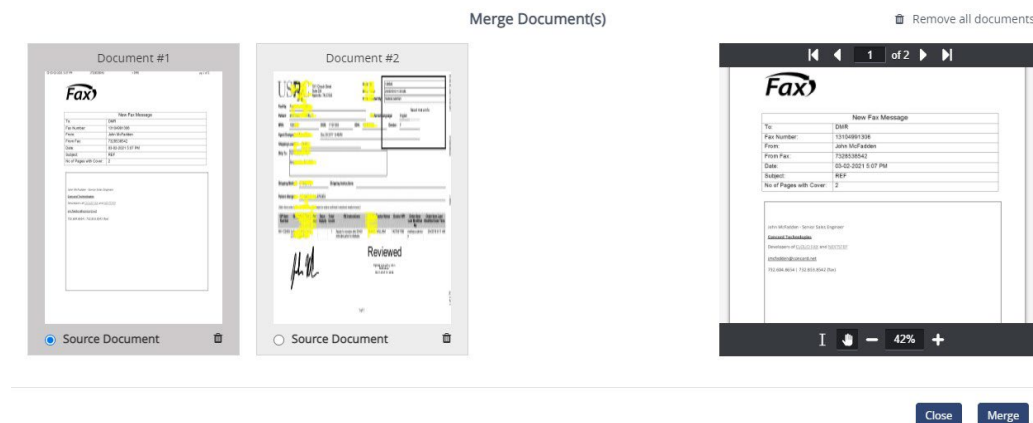
Adding a Signature

By clicking on the **Signature** icon, you have the option to place a typed or hand drawn signature, or use an uploaded signature image. Through either method you have the option to include a digital stamp, noting which user applied the signature and the date/time it was applied.

To use a typed or hand-drawn signature, click **Place Signature**. If you have not created a signature, you will have the option to draw one or type one. You will only need to do this once, unless you choose to change the signature(s).

In the below example we have a drawn signature ready for use and will include the **Digitalstamp** via the checkbox:

In this example we have a typed signature:

After clicking **Use Signature,** click your mouse on the area where you wish the signature to be displayed. Click directly on the signature to move it. You may magnify (or shrink) the signature by expanding the border:
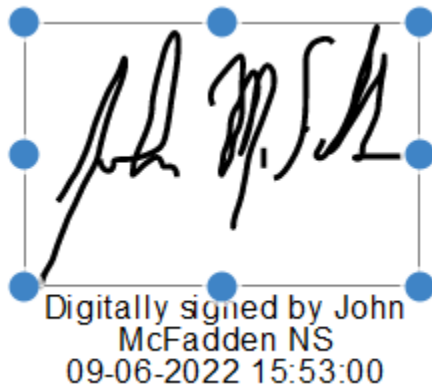
The Digitalstamp sits below the signature by default, but can be moved, sized and deleted independently.

The **Image Signature** option will allow you to directly upload an image of a signature that you have on file. To use this, you will first need to upload a signature image by clicking **Upload Image.** From here you can browse for an image file that displays the signature and crop to fit.

To use, click **Image Signature** and use your mouse to drag the image to the exact location and size it to your desired height and width. As with the previous signature methods, you will have the option to add a digital stamp to the signature.
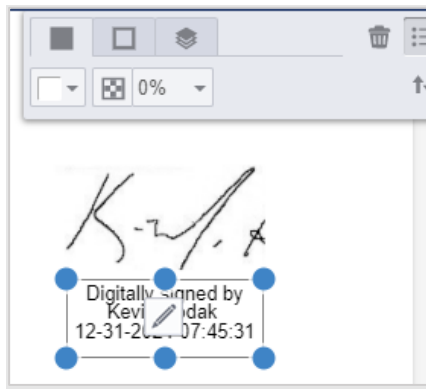
Downloading Documents

To **Download** documents from the Grid View, click on the **Download** icon. A Download menu will be displayed, allowing you to save the document as either a PDF (.pdf) or TIF (.tif) file. Select the page ranges you wish to download in the Set Range area and specify the file name, if desired.

Click **Download** and the document will be either saved to your default download location or you will see the prompts to "Open", "Save", "Save as", etc., depending on your browser settings.
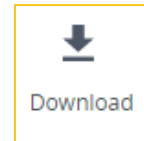
Printing Documents

To print documents from your Workflow, click on the **Print** icon. This allows you to print the document along with supplementary workflow data such as the Description, Tags, Activity Timeline, Document Details and Custom Fields. This additional data will be printed to one or more pages following the document itself. To complete the Print, select what you wish to include, adjust print settings as needed and click **Print**:
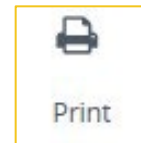
Print Document

✔ Include Document	☐ Include Activity Timeline
☐ Include Description	☐ Include Document Details
☐ Include Tags	☐ Include Custom Fields

Pages

⦿ Print All

◯ Print Current

◯ 1-5, 8, 10-15

Orientation

Portrait ▼

Paper Size

Letter ▼

Cancel   Print

Following this, your standard print menu will be displayed.

Viewing Document Timeline Details

An integral part of NEXTSTEP is the logging of activity as it pertains to each document and actions taken by associated users. When a document is viewed by a user, moved to a queue or folder, annotated, signed, forwarded, etc., a log entry is made indicating *who* did *what*, and *when*. This logging is viewable under the **Properties** section of the document after single-clicking it in Grid View or from the Timeline tab in the left-hand pane in the Document Viewer:
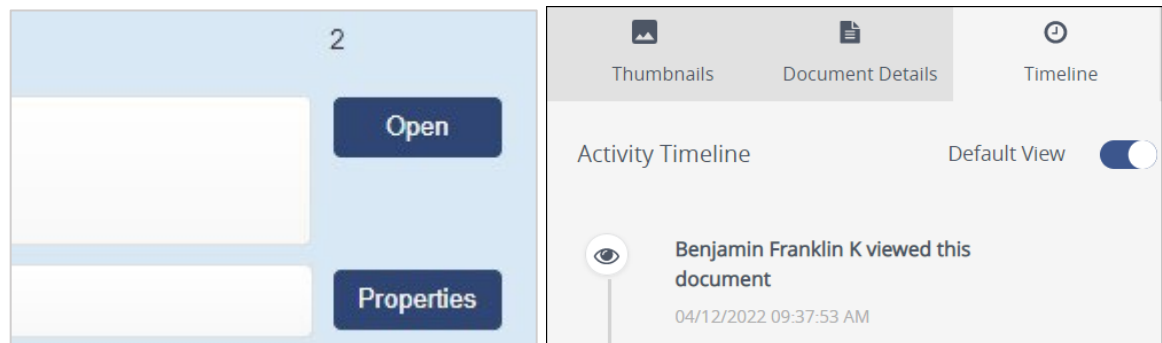
Clicking on **Timeline** will display the event history of actions taken, including the end user performing the action, the date and time the action was executed and the elapsed time since the last event. The Timeline lists actions in descending order, starting with the most recent:
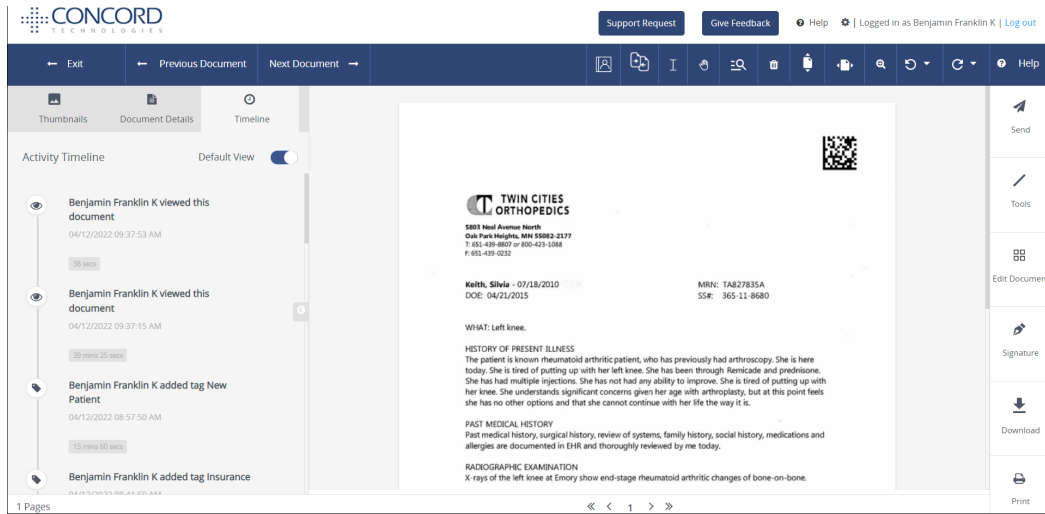
Within the Timeline, an icon is included with each action that is taken. The end user performing the action, and the date and time of the action are also noted. Timeline Icons are as follows:

 The **Print** icon indicates that the document has been printed by a user. The user performing the action, and the date and time of the action are also noted.

 The **View** icon indicates that the document has been viewed by a user. The user performing the action, and the date and time of the action are also noted.

 The **Annotate** icon indicates that a notation has been added to the document. The user performing the action, and the date and time of the action are also noted.

 The **Download** icon indicates that a document has been downloaded. The user performing the action, and the date and time of the action are also noted.

The **Signature** icon indicates that a signature has been added to the document. The user performing the action, and the date and time of the action are also noted.

The **Folder** icon indicates that a document has been moved to a new folder. The user performing the action, and the date and time of the action are also noted.

The **Watermark** icon indicates that a watermark has been applied to a document. The user performing the action, and the date and time of the action are also noted.
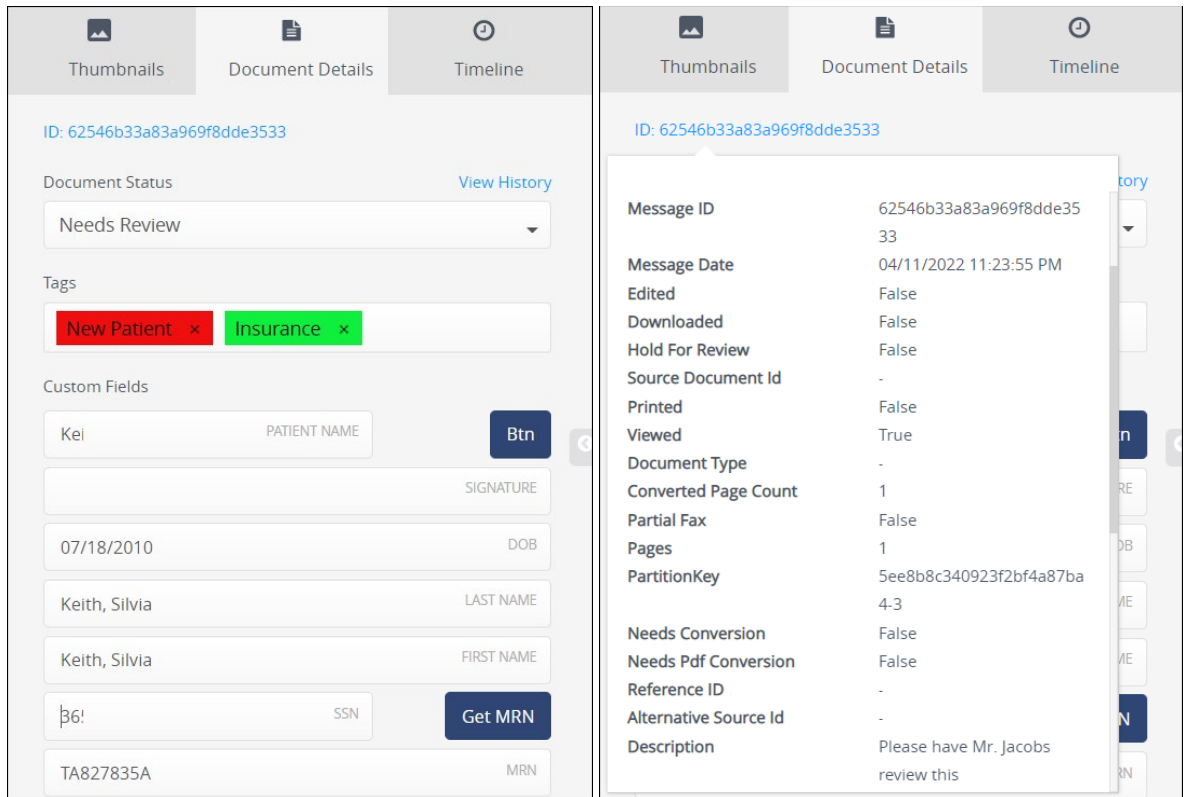
The **Fax** icon indicates that a document has been faxed to a new recipient.

Viewing Transmission Details

In the Document view, you will note there is a second tab, named, "**Document Details**". Via this tab, you can see the original fax call activity details in relation to the initial transmission of the fax document by clicking the **ID#**:

Getting Help

Concord's customer service team is available Monday–Friday from 6:00 AM to 6:00 PM (Pacific Time).

Phone: +1 (206) 441-3346

Email: premiumsupport@concord.net

Web: https://concord.net/about/contact-us/