



# NEXTSTEP Document Processing

## NEXTSTEP Portal User Guide

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## Table of Contents

Introduction .....	3
Disclaimer .....	3
NEXTSTEP Login .....	4
The Grid View .....	5
Edit View .....	6
Preferences .....	8
Preferences Definitions .....	9
Toolbar and Right-Click Menu Options .....	10
Send a Fax .....	11
Hold for Review .....	13
Address Book .....	14
Upload File .....	17
Archive .....	18
Delete .....	19
Move .....	21
Copy .....	22
Metadata Search .....	23
Document Preview .....	26
Document Viewer .....	27
Document Text Search .....	28
Copy / Paste from Document Viewer .....	29
Document Editing Tools .....	30
Signatures .....	34

Edit Document - Split .....	38
Edit Document - Merge .....	40
Quick Merge.....	42
Printing and Downloading Documents .....	43
Emailing a Document .....	44
The Description Field.....	45
Tags .....	47
Document Status .....	48
Custom Fields .....	49
The Document Timeline .....	50
Viewing Fax Transmission Details .....	52
Getting Help .....	54

## Introduction

Concord's **NEXTSTEP Document Processing** application offers clients a web portal to manage incoming faxes and other critical documents. NEXTSTEP brings documents together to build faster, more **efficient workflows** that are easy to use, secure and auditable.

NEXTSTEP authorized users may access and manage documents in their **Personal Folders** and/or the **Shared Queues** they are assigned to. This guide describes the basic user experience within NEXTSTEP, which may vary according to your organization's configuration.

Additional features are available to **automate** processes with workflow rules, classify documents according to their type and **extract** patient and other demographic information from incoming documents. For more information on these features and how they can help you better manage your **document workflow**, please contact your Concord account manager or [sales@concord.net](mailto:sales@concord.net).

## Disclaimer

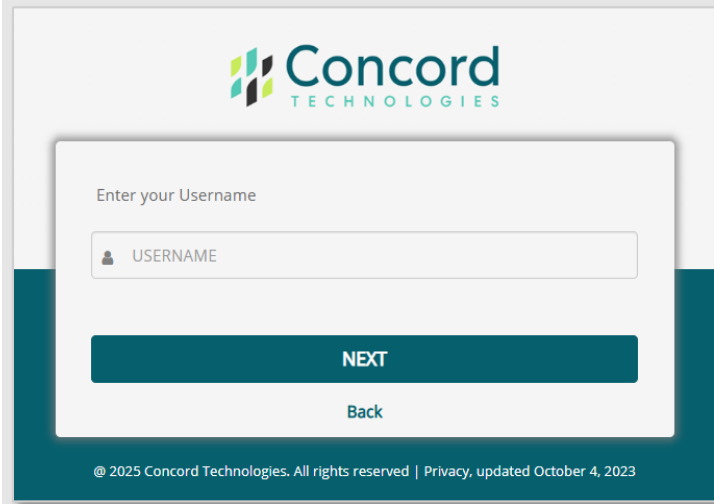
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## NEXTSTEP Login

Login steps **may vary** according to whether or not your organization is **Federated** with Concord for Single-Sign-On. The steps below represent the standard login process using **username** and **password**.

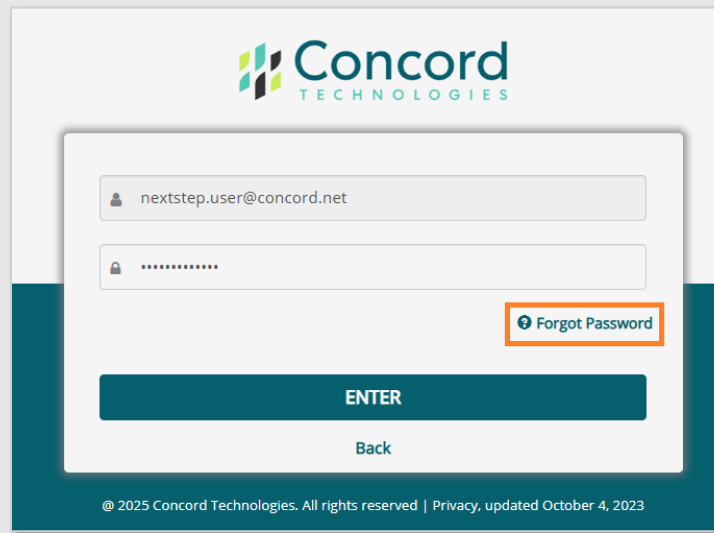
To access the NEXTSTEP portal, navigate to <https://login.concord.net>.

You will first be prompted to enter your **Username**:



The image shows the Concord Technologies login interface. At the top is the Concord Technologies logo. Below it, a white card contains the text "Enter your Username". There is a text input field with a user icon on the left and the placeholder text "USERNAME". Below the input field is a large teal button labeled "NEXT". Underneath the "NEXT" button is a smaller link labeled "Back". At the bottom of the white card, there is a small copyright notice: "© 2025 Concord Technologies. All rights reserved | Privacy, updated October 4, 2023".

Click **NEXT** to proceed to enter your **Password**:



The image shows the Concord Technologies login interface for password entry. At the top is the Concord Technologies logo. Below it, a white card contains two input fields. The first field has a user icon and the placeholder text "nextstep.user@concord.net". The second field has a lock icon and a series of dots representing a password. To the right of the password field is a link labeled "Forgot Password" with a circular arrow icon, which is highlighted by an orange rectangle. Below the input fields is a large teal button labeled "ENTER". Underneath the "ENTER" button is a smaller link labeled "Back". At the bottom of the white card, there is a small copyright notice: "© 2025 Concord Technologies. All rights reserved | Privacy, updated October 4, 2023".

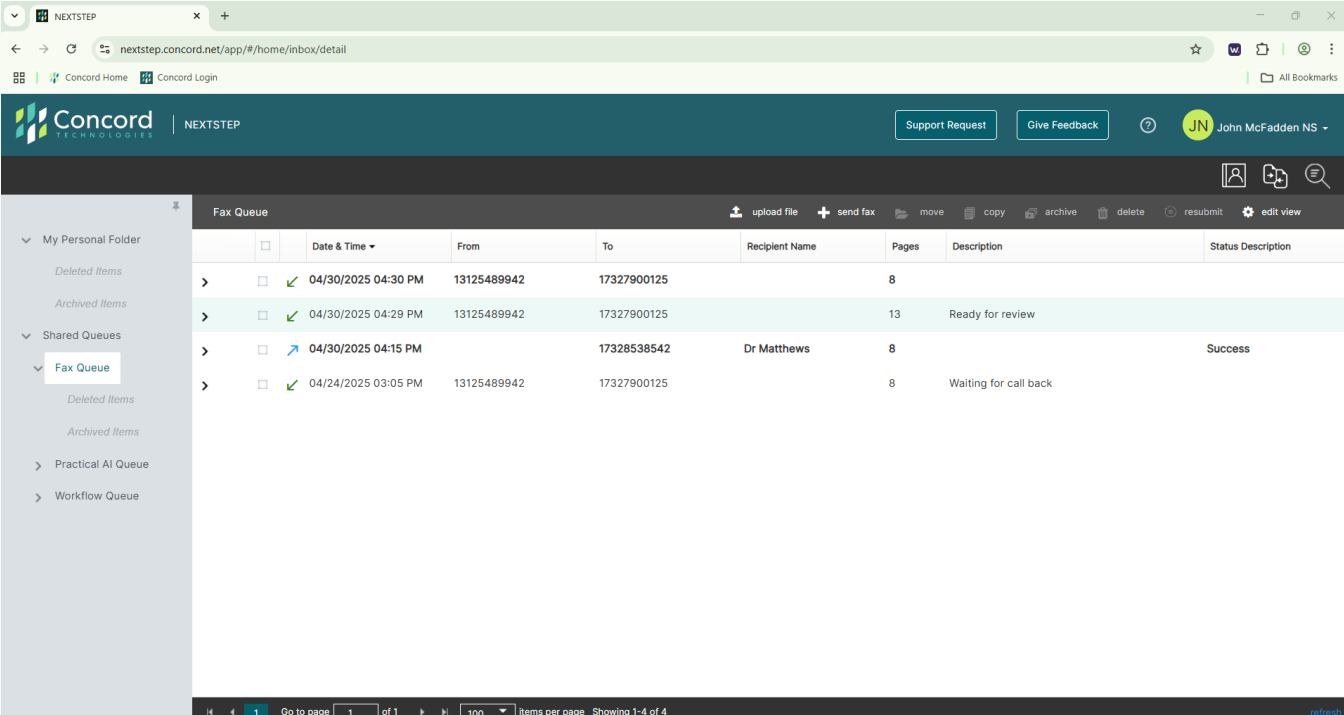
After entering your password, click **ENTER** to complete the login process. If you do not know, or have forgotten your password, click on **Forgot Password** and follow the ensuing prompts.

## The Grid View

Upon logging in to **NEXTSTEP**, you will be presented with the **Grid 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 view documents and collaborate on processing them. Any **subfolders** that are associated with your Shared Queues will also be listed.

Click on your desired **Personal Folder** or **Shared Queue** to view and manage documents via the **Grid View**:



The screenshot shows the NEXTSTEP web application interface. The left sidebar contains a navigation menu with 'My Personal Folder' and 'Shared Queues'. Under 'Shared Queues', 'Fax Queue' is selected. The main area displays a table of fax queue items. The table has columns for checkboxes, Date & Time, From, To, Recipient Name, Pages, Description, and Status Description. There are four rows of data. Above the table is a toolbar with icons for upload file, send fax, move, copy, archive, delete, resubmit, and edit view. The bottom of the interface shows pagination controls: 'Go to page 1 of 1', '100 items per page', and 'Showing 1-4 of 4'.

		Date & Time	From	To	Recipient Name	Pages	Description	Status Description
>	<input type="checkbox"/>	04/30/2025 04:30 PM	13125489942	17327900125		8		
>	<input type="checkbox"/>	04/30/2025 04:29 PM	13125489942	17327900125		13	Ready for review	
>	<input type="checkbox"/>	04/30/2025 04:15 PM		17328538542	Dr Matthews	8		Success
>	<input type="checkbox"/>	04/24/2025 03:05 PM	13125489942	17327900125		8	Waiting for call back	

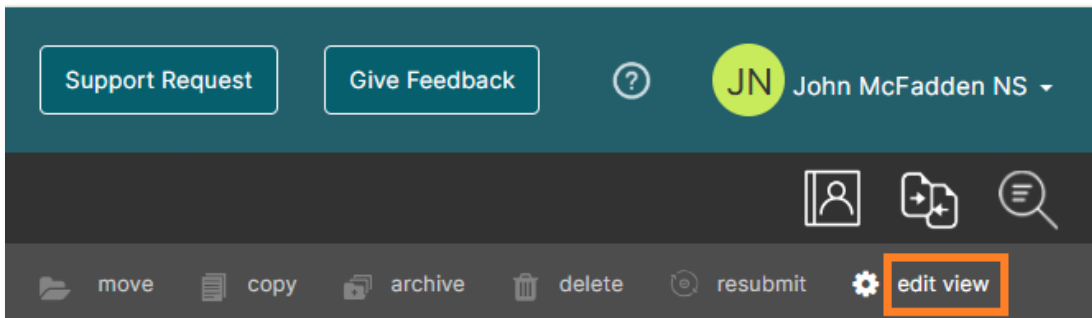
The specific columns of information you see will be dictated by your corporate **Default View**, but this can be updated by clicking **Edit View**.

## Edit View

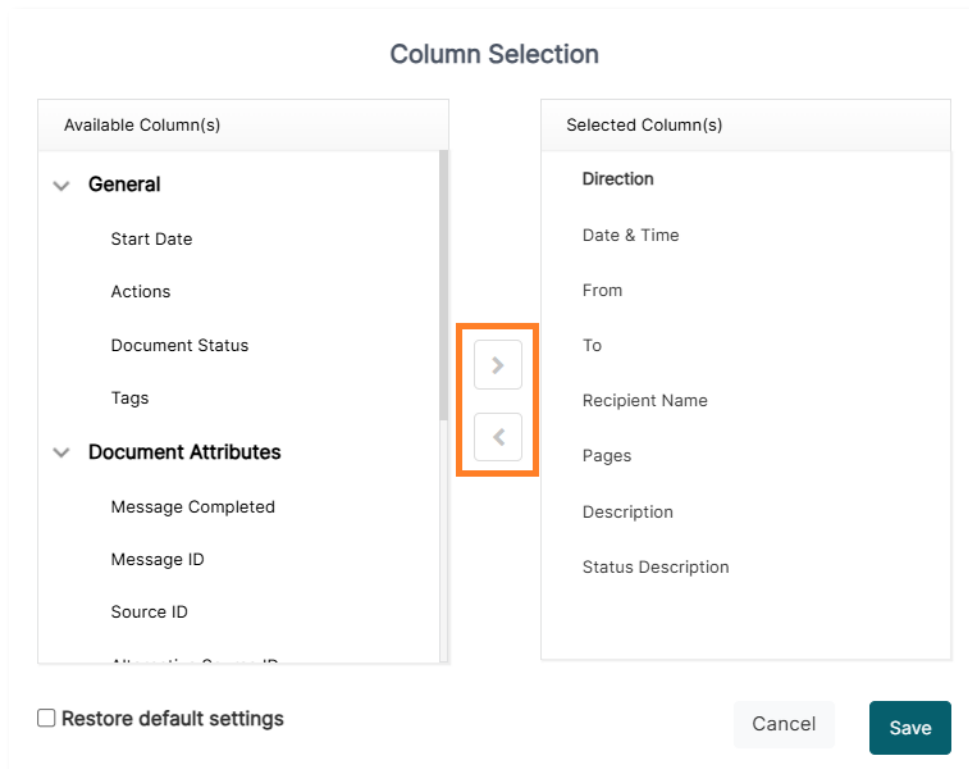
The **Grid View** displays a column-based listing of documents and associated metadata in a Shared Queue or Folder. This will initially be displayed as a default set of columns dictated by your corporate **Default View**.

You can modify the columns using the **Edit View** button and 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 to open:



This will open the **Column Selection** window. Here you will see the **Available Columns** and **Selected Columns** separated into 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.

You can **remove** Selected Columns from the Grid View by selecting what you no longer want displayed and use the **left arrow** to return these to Available Columns.

By selecting items in the Selected Columns, you can **drag** these up and down in the Selected Columns list to **reorder** your columns as needed.

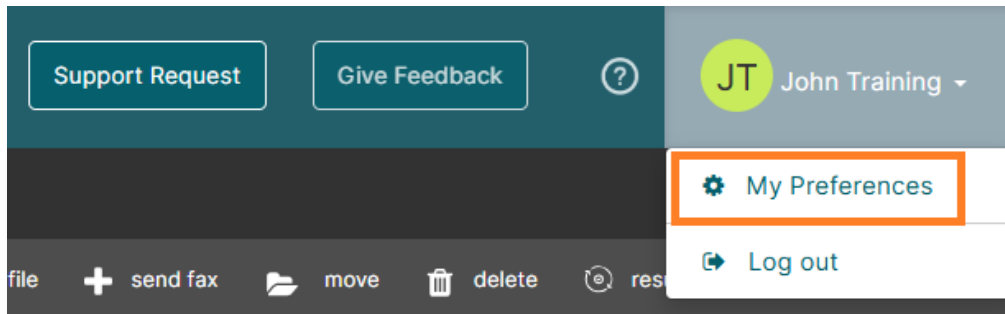
Clicking **Restore default settings** will return your view to the corporate default.

Upon saving, any updates you made to your view will be reflected in the **Grid View**.



## Preferences

The Preferences menu can be accessed by clicking on your name in the upper-right corner and selecting **My Preferences**:



Once you open the **Preferences** menu, there are several possible settings to configure, which are defined below. These preferences are only applicable to the **user account** editing them and will not affect the behavior of any other user:

**Preferences**

General

**Screen Auto-Refresh Interval (Optional)** 10 Minutes ▾

All updates should appear dynamically in real-time by default

**Activity Timeout** 30 Minutes ▾

Set an interval to automatically session logout

**Default Shared Queue** Practical AI Queue ▾

Select a shared queue to default upon login

**Audible Alerts** Default ▾

You can select a chime from a set of sounds to alert you when you receive a new mail / fax.

[Preview](#)

**Time Zone Preference** (UTC-05:00) America/New\_York ▾

Set a desired time zone

Refresh the browser once to view the change in time zone

**Enable Email Notification** ☒

**Document Preview**

You can view preview the document

☐

☐

☒

☒ Enable Warning popups

☒ Show Tooltips

☒ Show Toast Notifications

☐ Insert/Update Notification

Cancel
Save

## Preferences Definitions

**Screen 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 in to NEXTSTEP following a **period of inactivity**. The 'None' option (if available) will disable auto-logout after 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 played.

**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 via NEXTSTEP (success or failure).

**Document Preview:** This allows you to select what **sized** 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.

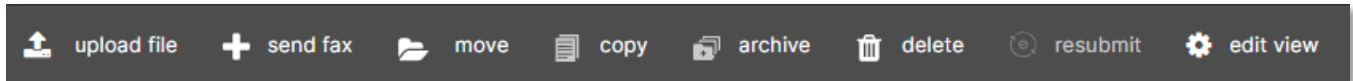
**Show Tooltips:** This enables tooltips when **hovering** over elements in the NEXTSTEP interface.

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

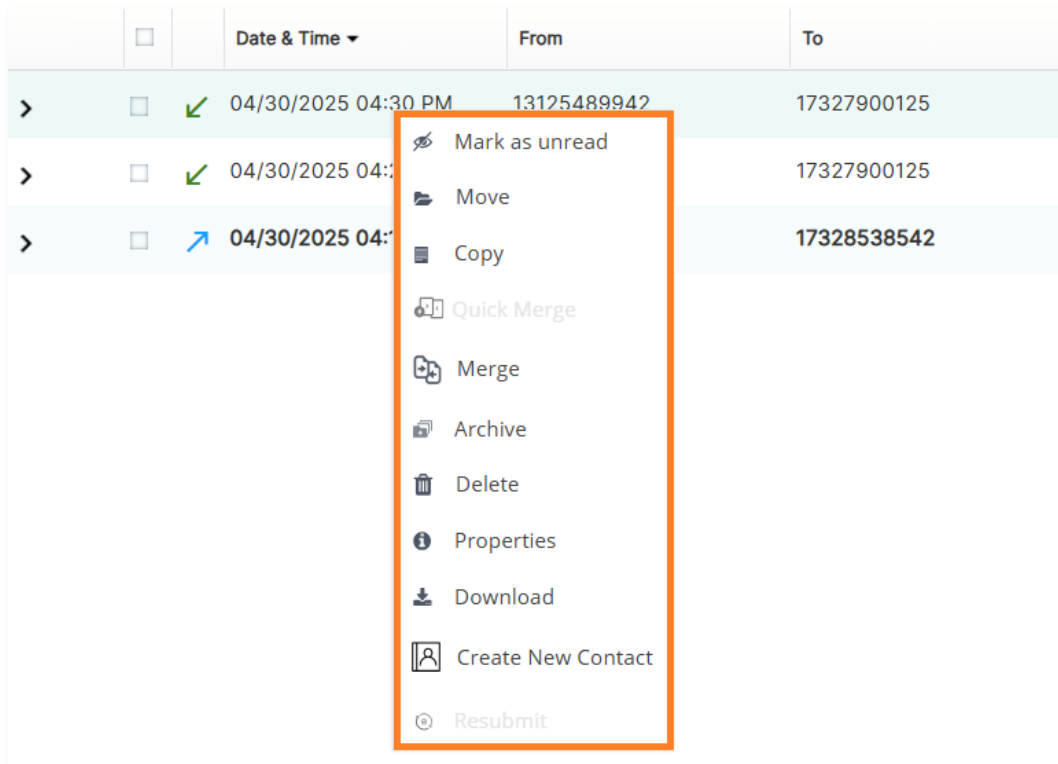
**Insert/Update Notifications:** Allows for **updates** made to document properties to be **displayed** in the Grid View, independent from the refresh interval. This may also apply to new messages depending on Refresh Interval settings.

## Toolbar and Right-Click Menu Options

There are often **multiple ways** to access the same options in NEXTSTEP. The **toolbar** at the top of the screen can be used to access services used to upload documents, send or resend an outbound fax and delete items, amongst others. Options **may vary** according to what permissions are set for your organization, queue or user account:



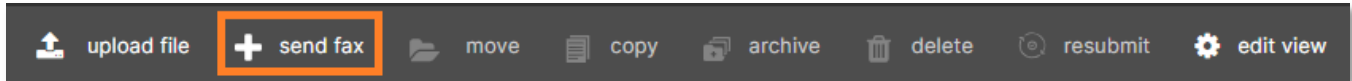
It is also possible to open a list of options for a document by **right-clicking** on that item in NEXTSTEP:



Options here may also **vary** according to what **permissions** are set for your organization, Shared Queue or user account

## Send a Fax

To send an outbound fax, click the **Send Fax** button in the Grid View to open the Create Fax form:



Enter the **Recipient** information and optional **Reference ID** for tracking. Only the recipient **fax number** is required. The Recipient Name will typically be added to the coversheet and fax header of your outbound fax:

<b>Recipient Name</b> <input type="text" value="Dr Emily Harris"/>	<b>Recipient Company</b> <input type="text" value="Health Inc"/>	<b>Fax Number *</b> <input type="text" value="17329884217"/> <a href="#">Add New Contact</a>
<b>Recipient Phone Number</b> <input type="text"/>	<b>Recipient Department</b> <input type="text"/>	<b>Reference ID</b> <input type="text" value="Auth for Signature"/> <a href="#">Add More Recipients</a>

**Sender** information will be pre-populated based on your user account but can be updated. **Sender Name** will be populated to most cover page templates:

<b>Sender Company</b> <input type="text" value="Concord Technologies - NEXTSTEP"/>	<b>Sender Name</b> <input type="text" value="John McFadden"/>
<b>Sender Phone</b> <input type="text" value="7326048654"/>	<b>Sender Fax</b> <input type="text" value="7327900117"/>

The **Send Using** dropdown allows you to specify which **Shared Queue** the fax should be sent from, amongst those you have access to. You may also have the option to choose from different **cover pages**, depending on your settings:

<b>Send Using</b> <input type="text" value="Fax Queue"/>	<b>Select Coverpage</b> <input type="text" value="Concord Default (Healthcare)"/> <a href="#">Preview</a>	<input checked="" type="checkbox"/> <b>Include Coverpage</b>
---	--	--

As long as **Include Coverpage** is enabled, the subject and body sections can be populated with information to add to subject and body of your cover page template:

<b>Subject</b> <input type="text" value="Assessment Requires Signature"/>
<b>Body</b> <input type="text" value="Please sign and return via fax."/>

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.

In most cases you must include **at least** one document that will be converted to a fax and sent to your recipient. You may choose to include multiple documents, in varying document formats. As long as you are uploading documents of the **supported formats** listed, you can mix and match multiple document types:

Upload Document
 

Drag & drop here or click on the box to browse.  
(Accepted formats - doc, docx, pdf, jpg, jpeg, tiff, rtf, txt, xls,xlsx, ppt, pptx, png, gif, vsd)

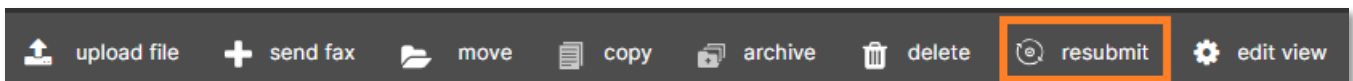
Attached 192.18 KB of 100 MB  
 Authorization.doc (60.00 KB) ×  
 Coordination of Care Checklist.pdf (132.18 KB) ×

☐ Hold for Review

Once you have completed all necessary steps you can click **Send** to submit your fax for delivery. Fax delivery status will be presented in the Grid View via the **Status Description** column:

My Personal Folder							
<span>upload file</span> <span>+ send fax</span> <span>move</span> <span>copy</span> <span>archive</span> <span>delete</span> <span>resubmit</span> <span>edit view</span>							
	<input type="checkbox"/>	Date & Time	Pages	To	Recipient Name	Description	Status Description
>	<input type="checkbox"/>	05/13/2025 04:02 PM	10	17326048654	Front Desk		Voice Answer
>	<input type="checkbox"/>	05/08/2025 08:03 AM	9	17328538542	John McFadden		Success
>	<input type="checkbox"/>	05/07/2025 01:36 PM	25	17328538542	Dr Emily Harris		Success

If you want Concord to attempt to resend a fax to the same fax number, click the item and select **Resubmit**:




If you choose to **Hold for Review**, your fax will be held until it is released by the reviewer.

## Hold for Review

You can choose to hold an outbound fax 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 and click **Save** following completion of the Create Fax form to have your message held:

Upload Document
 



Drag & drop here or click on the box to browse.  
(Accepted formats - pdf, jpg, jpeg, tiff, png)


Attached 60.00 KB of 100 MB
 

Authorization.doc (60.00 KB)
 ×

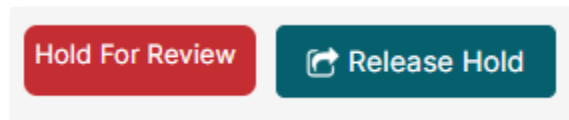
☒ **Hold for Review**

Note that, when you select Hold for Review when faxing from the **Personal Folder**, only you can review and release the fax from hold. When using Hold for Review in a **Shared Queue** setting, other users with access to the shared queue can release the hold.

Items that are placed on hold for review will be displayed in the grid view with a **pause** icon:

	Date & Time ▼	Pages	To	Recipient Name	Description	Status Description
	05/01/2025 03:29 PM		17328538542	Dr Emily Harris		InProgress

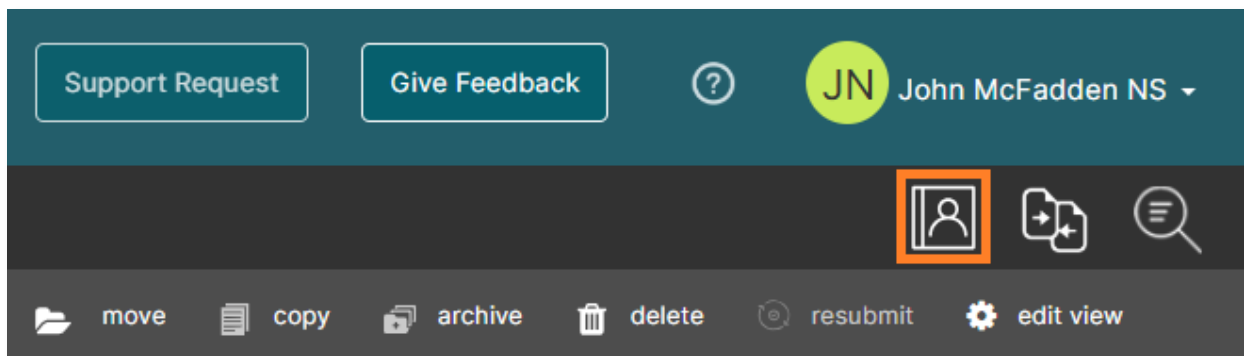
Items can be released from hold by **right-clicking** from the grid view and choosing **Release Hold** or **double-clicking** to open the item, where you can select Release Hold:



## Address Book

The NEXTSTEP Address book allows you to save **fax contacts** as individuals or recipient **groups**. Contacts may be stored for your own individual use in **My Contacts** or may be stored for use by all users in your NEXTSTEP account in **Global Contacts**.

To access your Address Book, click the **Address Book Icon** below your name in NEXTSTEP:



This opens your address book and the various ways that you can **create** or **import** contacts:

Address Book - Create new or import existing contacts

Create Contact

Create Global Contact

Create Group

My Contacts

Global Contacts

Group Contacts

Company

Fax Number

Select Filter(s)

Search

Search

Reset

Template

Company	Name	Fax Number	Email	Department	Phone Number	Import	Export
Aurora Center	Aurora Intake	17328538542	intake@direct.aurora.com	Admissions	(908)744-1233		
Care for All	Care for All Intake	13475238781	intake@direct.care4all.com	Admissions	(347)985-6985		
Concordia	Concordia Intake	17327900118	intake@direct.concordia.com	Admissions	(732)856-9871		
Cumberland Special Hospital	CSH Admissions	19085581742	admissions@cumberlandm...	Admissions	(908)855-7452		
Dover Help Center	Dover Intake	16093365421	intake@direct.doverhc.org	Admissions	(609)587-5147		
GenPsych	GenPsyche Intake	17327900125	admissions@direct.genpsyc...	Admissions	(201)987-5621		

1

2

10

items per page

Showing 1-10 of 11

Access to create and edit **Global Contacts** will vary depending on user **permissions**. You may see this option as **greyed-out** when you open your address book. This means that any contacts you create will be available **only to you**.

## Contacts

To create a contact, click the appropriate/available **Create Contact** or **Create Global Contact** button. This opens the Create Contact **form**:

Create Contact

Company

First Name \*

Last Name

Fax Number \*

Sun House

Parker

Lewis

19087423269

Email ID

Department

Phone Number

Cancel

Save

**First Name** and **Fax Number** are required fields. It is recommended that all fields in the **top row** are completed, as these can be used to select recipients and may be populated to cover pages. The fields in the **bottom row** are not populated to Concord Default cover pages though they may be added to **custom covers**.

When all necessary data has been entered, click **Save** to store a contact for future use.

Contacts will be **autosuggested** as you begin typing the name, company or fax number of the recipient:

Create Fax

Recipient Name

Recipient Company

Fax Number \*

Add New Contact

Lew

 Parker Lewis - 19087423269 - [ Sun House ]

Recipient Department

Reference ID

Sender Name

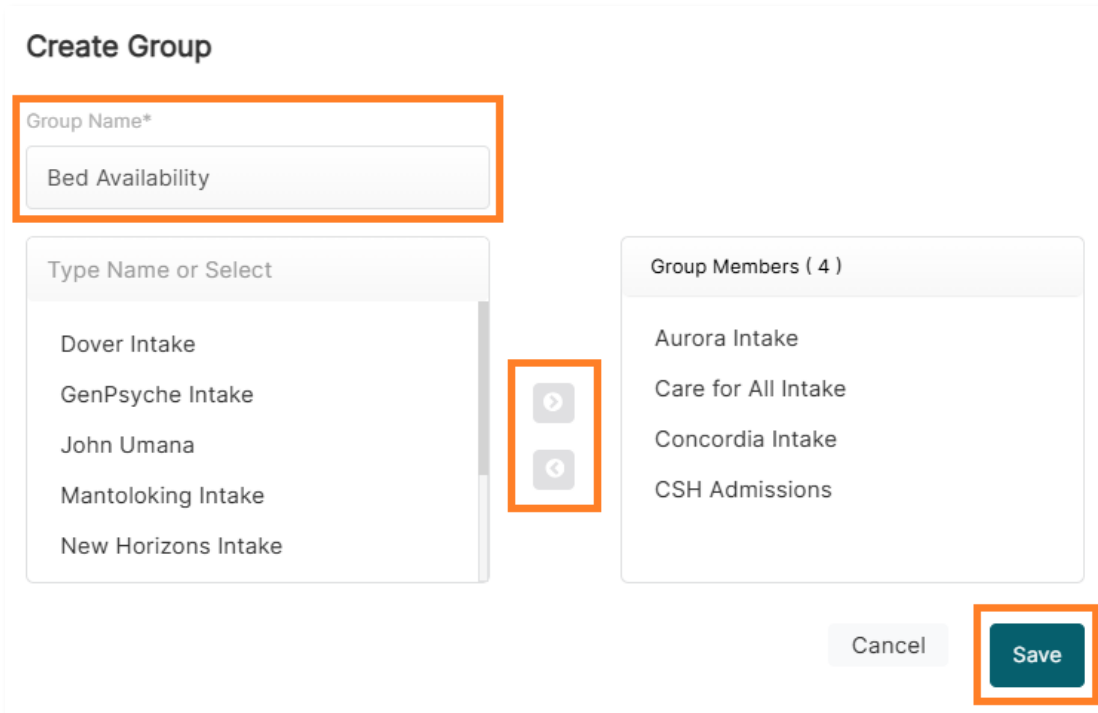
John McFadden NS



## Groups

If you have need to send to a **group of recipients** on a regular basis, you can create a **Group** and include multiple contacts in that Group, with up to **50** recipients per Group.

To do this, click **Create Group** in the Contacts window. This will open the **Create Group form**, which lists all of your available contacts for inclusion in a group:



Here you can **name** your group and use the **arrows** to select contacts for inclusion in your group. When you have selected all necessary contacts, click **Save** to create your group.

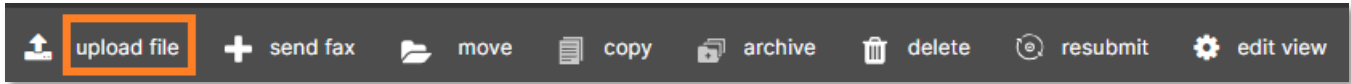
Groups will appear as selectable **recipients** when sending a fax:



## Upload File

You can **upload** a variety of file types to edit, process and collaborate on documents within NEXTSTEP. Documents may be uploaded ahead of a **Send Fax** if there is a need to edit or sign a document prior to faxing this to a recipient.

To upload a file, click the **Upload File** button on the NEXTSTEP toolbar:



Upon clicking **Upload File**, choose a **document** from your local device or shared drive.

The currently supported **file extensions** are *jpeg, .jpg, .png, .pdf, .tif, .tiff*

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

Fax Queue										upload file	send fax	move	copy	archive	delete	resubmit	edit view
	<input type="checkbox"/>	Date & Time ▾	From	To	Recipient Name	Pages	Description	Status Description									
>	<input type="checkbox"/>	05/05/2025 09:04 AM				1											

Uploaded documents have most of the same characteristics of a faxed document and can be **managed** and **edited** in the same ways.

## Archive

All NEXTSTEP Personal Folders and Shared Queues have both Archived Items and Deleted Items folder available by default. The **Archived Items** folder offers an option to store a document for a period of time. If the document needs to be recovered to a Shared Queue or folder, you can **restore** it from the Archives Items folder as needed.

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 Shared Queue you are working:

Fax Queue 1 fax item(s) selected									
		Date & Time	From	To	Recipient Name	Pages	Description	Status Description	
>	<input type="checkbox"/>	04/30/2025 04:30 PM	13125489942	17327900125		8			
>	<input checked="" type="checkbox"/>	04/30/2025 04:29 PM	13125489942	17327900125		13	Ready for review		
>	<input type="checkbox"/>	04/30/2025 04:15 PM		17328538542	Dr Matthews	8		Success	

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:

Archived Items 1 fax item(s) selected									
		Date & Time	From	To	Pages	Description	Status Description		
>	<input checked="" type="checkbox"/>	04/10/2025 08:45 AM	13125489942	17327900125	8	Waiting for labs			

A **restored** document will be returned to the folder it was archived from.

Note that the **Archive** function may be enabled on your NEXTSTEP Queue as an **automated process**, whereby documents are moved to the Archived Items Folder after a predetermined period of time. Please check with your **NEXTSTEP administrator** for details on how archiving is configured.

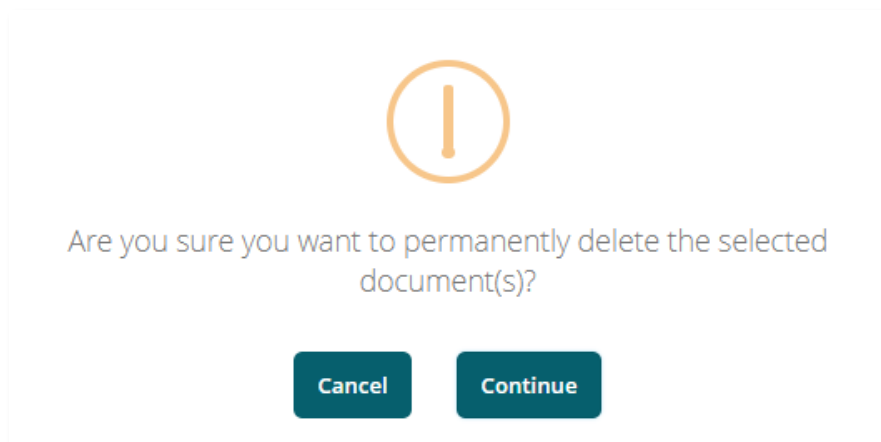
## Delete

NEXTSTEP allows for the deletion of documents by moving them to the **Deleted Items** folder. This folder acts as a **recycle bin** from which items can be completely **purged** or **restored**, as needed. Items that are deleted from within the Deleted Items folder are purged from NEXTSTEP and 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:

Fax Queue 1 fax item(s) selected									
	<input type="checkbox"/>	Date & Time	From	To	Recipient Name	Pages	Description	Status Description	
>	<input checked="" type="checkbox"/>	04/30/2025 04:30 PM	13125489942	17327900125		8			
>	<input type="checkbox"/>	04/30/2025 04:29 PM	13125489942	17327900125		13	Ready for review		

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 select **Delete** as per the above. If the document is in the Deleted Items folder when you delete it, you will see the below **notice**:



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

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:

Deleted Items 1 fax item(s) selected									
	<input type="checkbox"/>	Date & Time	From	To	Pages	Description	Status Description		
>	<input checked="" type="checkbox"/>	04/24/2025 03:02 PM	13125489942	17327900125	8	Ready for filing			

A **restored** document will be returned to the folder it was deleted from.

Note that **Delete** and **Purge** functions may be enabled on your NEXTSTEP Shared Queue as an automated process, whereby documents are moved 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.

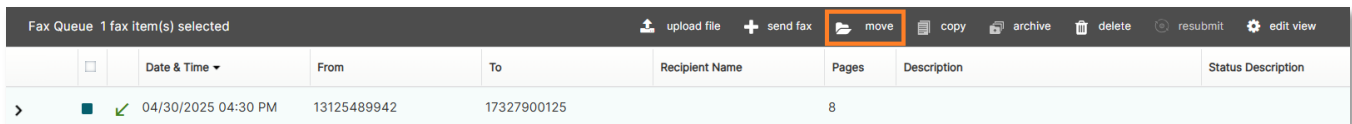
**NEXTSTEP administrators** should take care to review **Delete** and **Purge** settings to ensure proper disposal of documents.

## Move

By default, a NEXTSTEP user can **move** a NEXTSTEP document to any Shared Queue or folder they have access to. This **permission** may be limited by the configuration on your NEXTSTEP account.

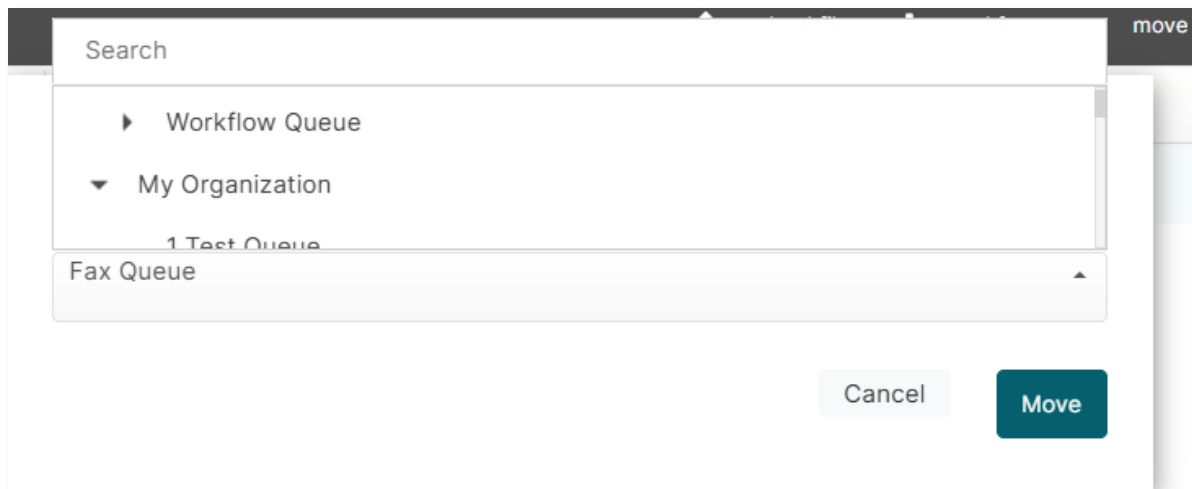
You can move a document to a Shared Queue you have direct access to by **dragging** that item to that Shared Queue in the **Grid View**.

To move a document to another Shared Queue, folder or user, 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 drop-down menu of places that you can move the document to. The list will begin with **Shared Queues** you have direct access to, followed by **My Organization**, which will list additional Shared Queues and NEXTSTEP-enabled user accounts, based on your permissions and account structure.

You can use the **Search** box to search for the Shared Queue or user you wish to move the item to:



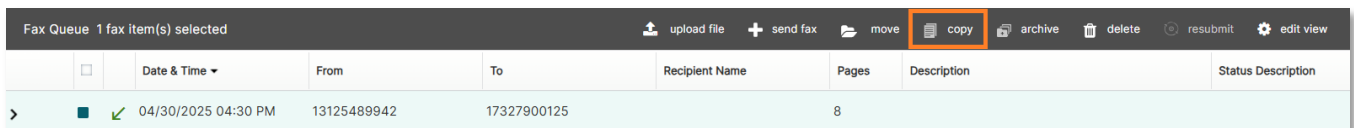
When you have selected your destination, click **Move** to complete. When documents are moved, they will be **removed** from the current Shared Queue or Folder and **added** to the destination Shared Queue or Folder.

## Copy

By default, a NEXTSTEP user can **copy** a NEXTSTEP document to any Shared Queue or folder they have access to. This **permission** may be limited by the configuration on your NEXTSTEP account.

Copying a file means that **one or more** copies of that document will be placed in the designated Shared Queue(s) or folder(s) you are copying to, while the **original copy** will remain in the Shared Queue or folder you are copying from. It is possible to copy a single document to **multiple** destination Shared Queues or Folders.

To copy a document to another Shared Queue, folder or user, 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 drop-down menu of places that you can copy the document to. The list will begin with **Shared Queues** you have direct access to, followed by **My Organization**, which will list additional Shared Queues and user accounts, based on your permissions and account structure.

You can use the **Search** box to search for the Shared Queue(s) or user(s) you wish to copy the item to:

Copy Document(s)

Copy Document(s)

Fax Queue

Description here...

Cancel
Copy

Here you can also include a **Description** that will be passed along with your copy/copies.

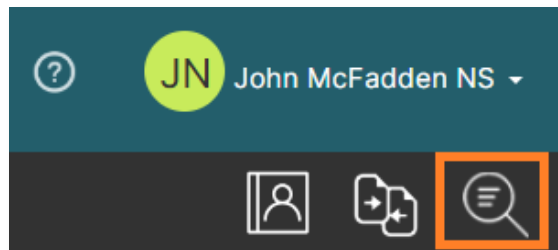
When you have selected your destination, click **Copy** to complete. A document copy will be **retained** in the existing Shared Queue or folder and one or more additional copies of that document will be created based on your selection(s).

## Metadata Search

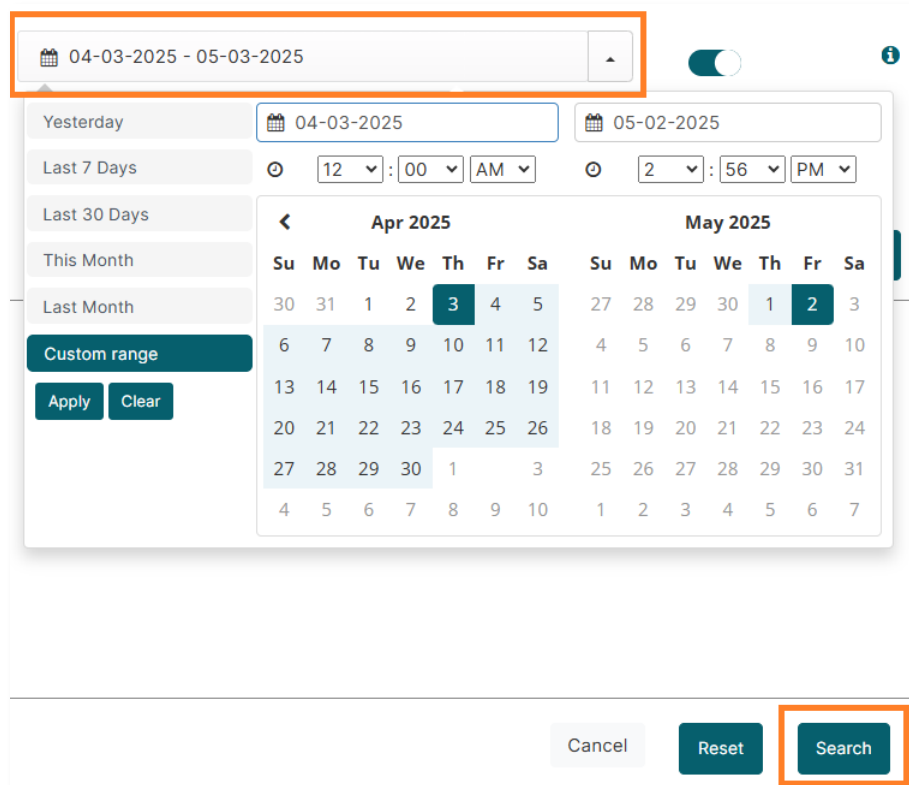
NEXTSTEP provides multiple options to **search** for documents or content. This section will look at searching for documents based on related **metadata**, such as the sending fax number, recipient name, tag or date/time.

By default, the **Grid View** will display documents that arrived in the queue within the last **30 days**. If there are no documents within this timeframe in the queue, you will be prompted to load the most recent documents or may **search** for specific criteria.

To search based on metadata, click the **search icon** from the Grid View:

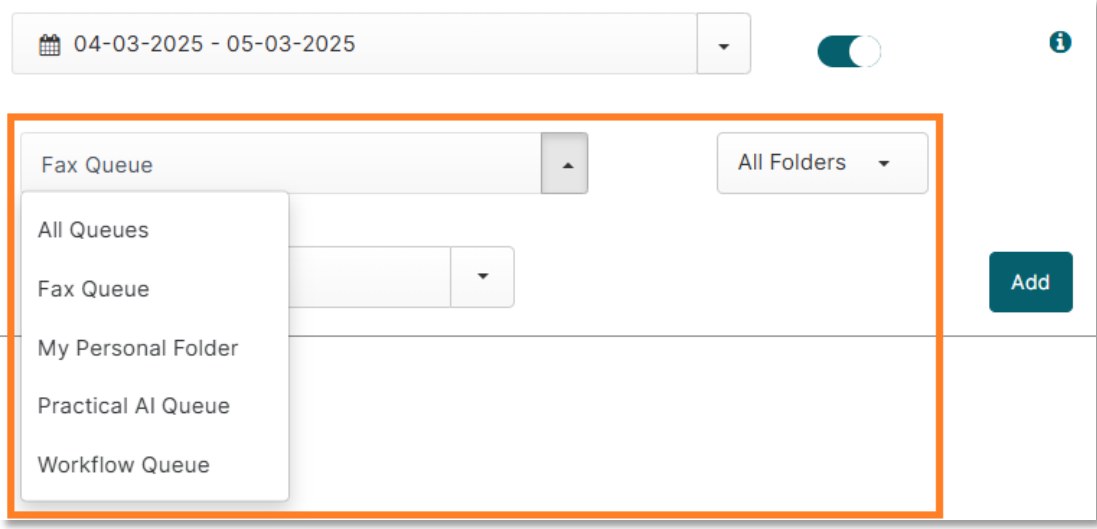


This exposes a panel on the right side of the screen with options to build search criteria. If the **date range** is all that is important, click the calendar to choose the appropriate dates and click **Search**:


 A screenshot of a date range selection panel. At the top, there is a text input field containing '04-03-2025 - 05-03-2025' with a calendar icon on the left and a dropdown arrow on the right. Below this, there are several radio button options: 'Yesterday', 'Last 7 Days', 'Last 30 Days', 'This Month', and 'Last Month'. The 'Last 30 Days' option is selected. To the right of these options, there are two date pickers: one for '04-03-2025' and another for '05-02-2025'. Below the date pickers, there are two calendar views for 'Apr 2025' and 'May 2025'. The 'Apr 2025' calendar shows the date '3' selected. At the bottom of the panel, there are three buttons: 'Apply', 'Clear', and 'Search'. The 'Search' button is highlighted with an orange rectangular box.

If you have access to one or more Shared Queues, you will see an option to specify which Shared Queue or folder you want to search in:





04-03-2025 - 05-03-2025

Fax Queue

All Folders

Add

All Queues

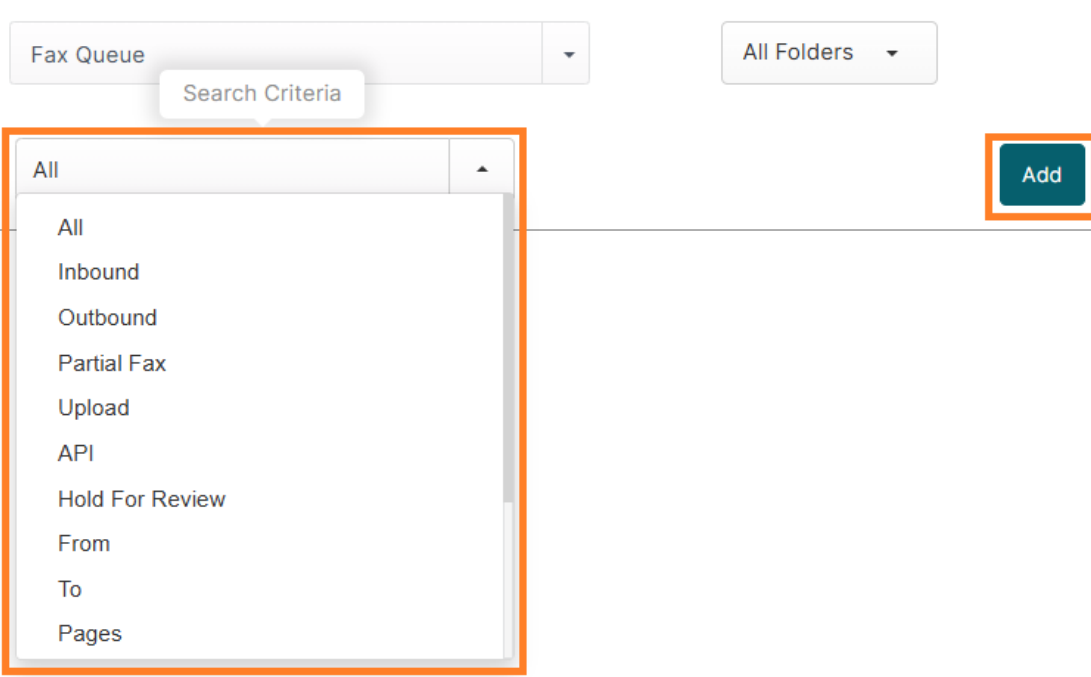
Fax Queue

My Personal Folder

Practical AI Queue

Workflow Queue

To add **criteria**, choose which filter you wish to use from the **Search Criteria** dropdown list and click **Add**:



Fax Queue

All Folders

Add

Search Criteria

All

All

Inbound

Outbound

Partial Fax

Upload

API

Hold For Review

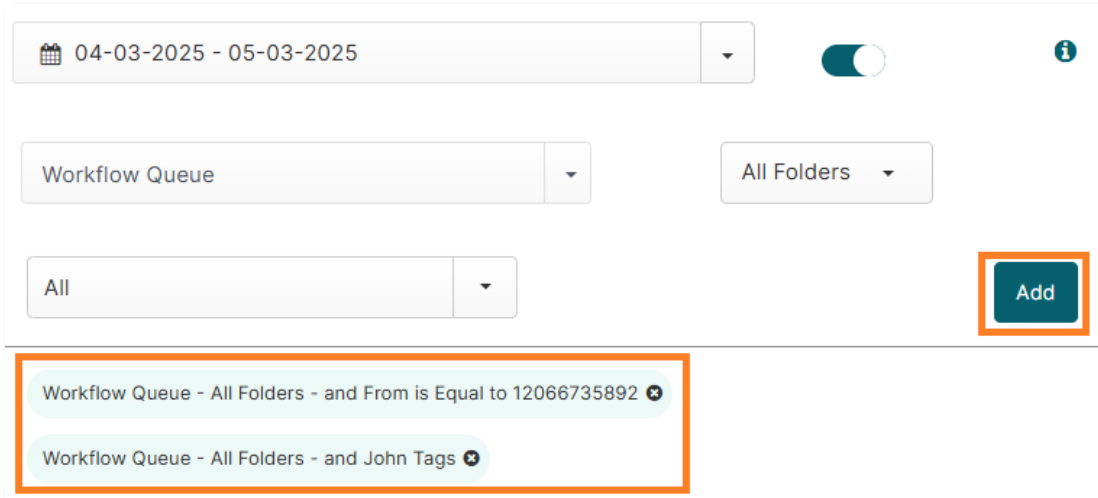
From

To

Pages

The available items in the **Search Criteria** list are dictated by your configuration. This may **vary** from one Shared Queue to another depending on options configured in each Shared Queue.

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 querying for a specific **tag**:



04-03-2025 - 05-03-2025

Workflow Queue

All Folders

All

Add

Workflow Queue - All Folders - and From is Equal to 12066735892

Workflow Queue - All Folders - and John Tags

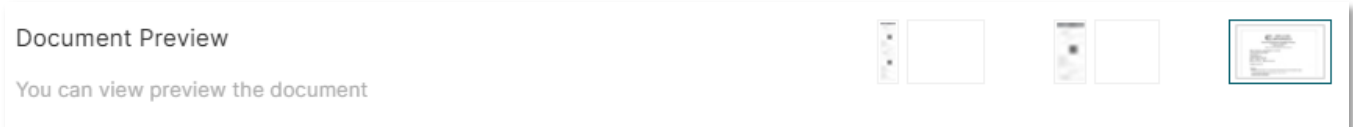
Note that an additional search option can be enabled on a NEXTSTEP account. NEXTSTEP's **Advanced Search** allows you to search for documents based on the text contained in those documents. For more information, please contact your Concord Account Representative.

All search **results** will be displayed in the grid view. To clear results, click **Clear Search**.

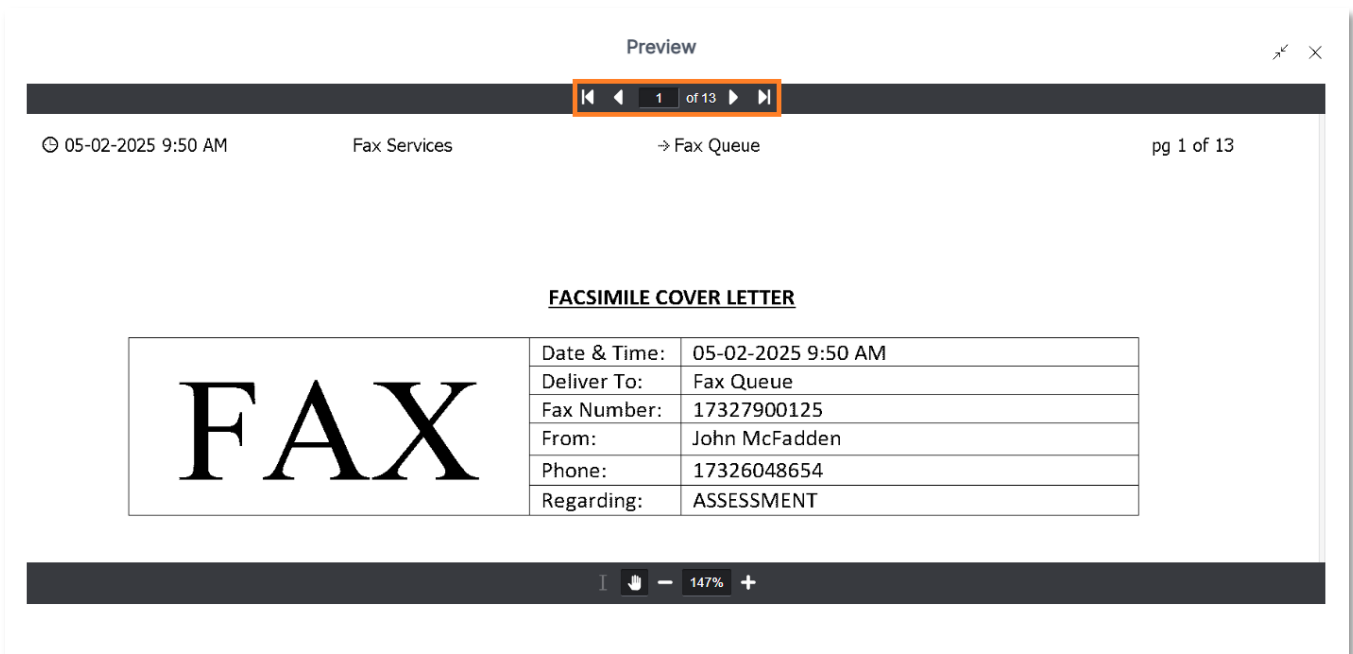
## Document Preview

NEXTSTEP provides a preview option that allows you to view a document without opening it in 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**. This is the recommended setting as it will allow you to see the largest version of the preview with the fewest clicks:



To invoke a thumbnail Preview, mouse over on the **eye icon** to the left of any item 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:



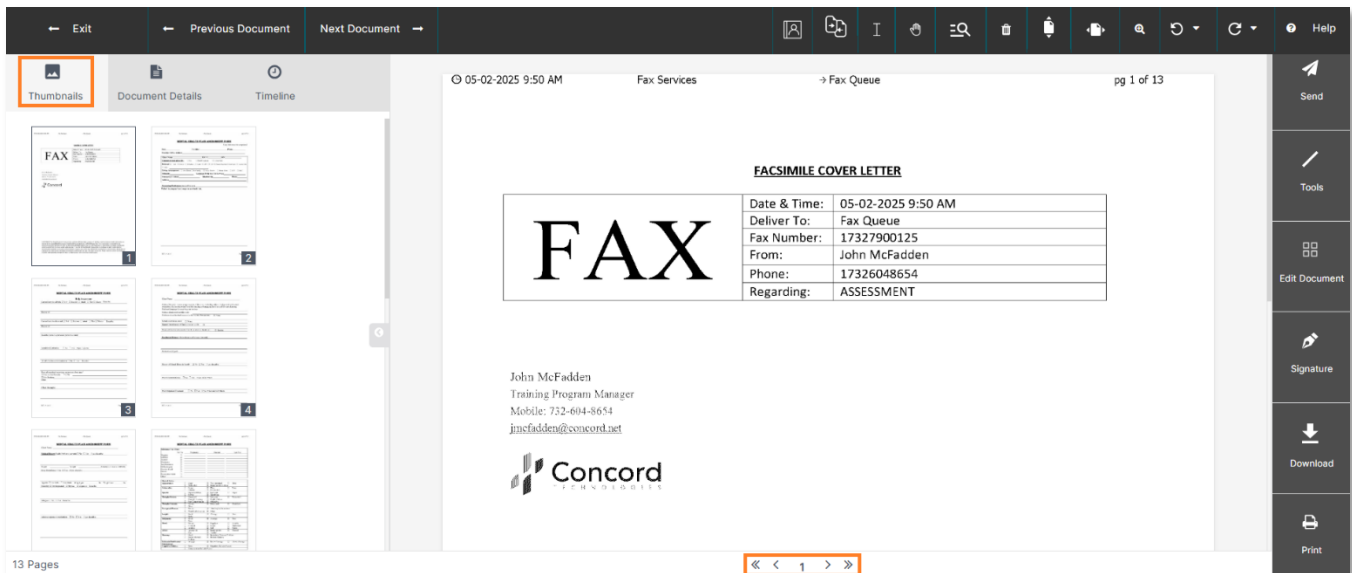
Via Document Preview you can view **all pages** of the document by scrolling or clicking the navigation icons.

## Document Viewer

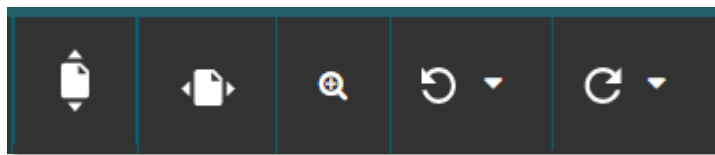
To open a document from the Grid View, **double click** on the item or single click and then click Open to access the **Document Viewer**.

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-right menu bar**, there are options to further customize your **view** of the document:



Documents may be sized to the height or the width of the screen by clicking the **Fit to Height** or **Fit to Width** button.

To choose the specific size of the document on your screen, click the **magnifying glass**.

To rotate the current page or all pages, use the **Rotate Left** or **Rotate Right** buttons.

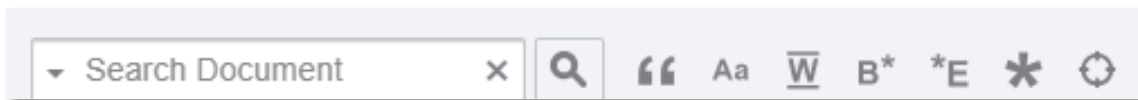
## Document Text Search

Documents received or uploaded to NEXTSTEP may pass through an **Optical Character Recognition (OCR)** scan to make the text of those documents accessible in NEXTSTEP. One of the ways this may be leveraged by a user is in the ability to **search** for text within a document

To search for text, open that document in the **Document View** and click the magnifying glass **Search icon** in the top menu:

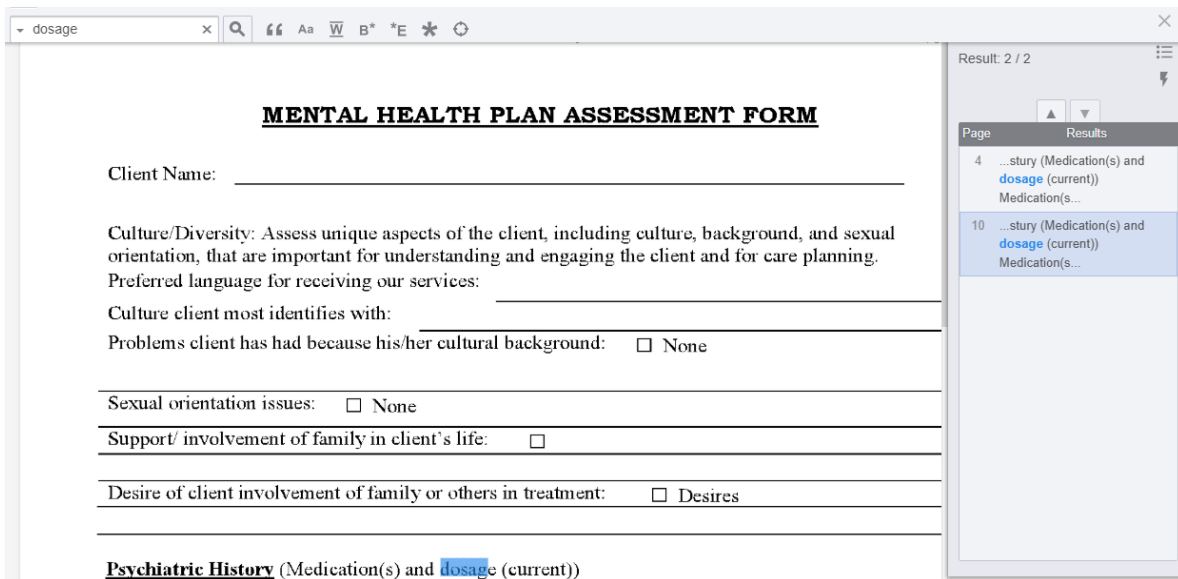


This will display a text window and the **options** that may be used to search within documents:



Here you can simply enter a **search word** and click the **magnifying glass** to perform a basic search. Hovering over the other options provides details on performing more **advanced searches** using exact match, 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 that result in the document, as per below example of a search for the word 'dosage:'



▼ dosage x 🔍 “ Aa W B\* \*E \* ⌂

**MENTAL HEALTH PLAN ASSESSMENT FORM**

Client Name: \_\_\_\_\_

Culture/Diversity: Assess unique aspects of the client, including culture, background, and sexual orientation, that are important for understanding and engaging the client and for care planning.  
 Preferred language for receiving our services: \_\_\_\_\_  
 Culture client most identifies with: \_\_\_\_\_  
 Problems client has had because his/her cultural background: ☐ None

Sexual orientation issues: ☐ None

Support/ involvement of family in client's life: ☐

Desire of client involvement of family or others in treatment: ☐ Desires

**Psychiatric History** (Medication(s) and dosage (current))

Result: 2 / 2

Page	Results
4	...story (Medication(s) and dosage (current)) Medication(s)...
10	...story (Medication(s) and dosage (current)) Medication(s)...

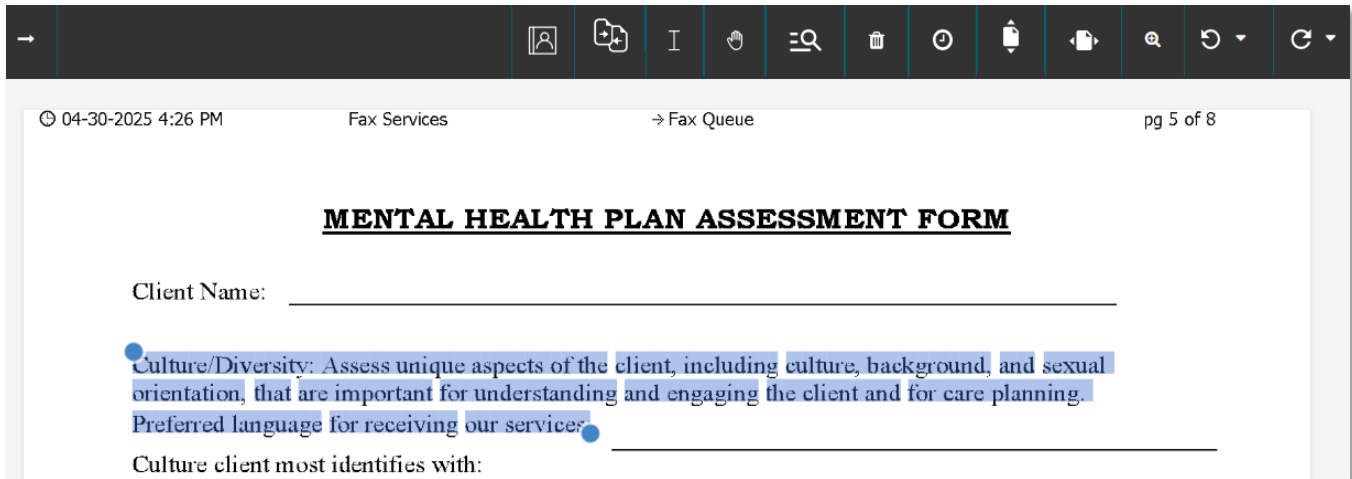
## Copy / Paste from Document Viewer

Another benefit of the OCR scan process is the ability to **copy text** from a document and paste this data within or outside of NEXTSTEP.

To copy text, first click the **Copy button**:



Once clicked, you will have the ability to **select text** within a document to copy. You can manipulate the selection by dragging across the text you want to copy:

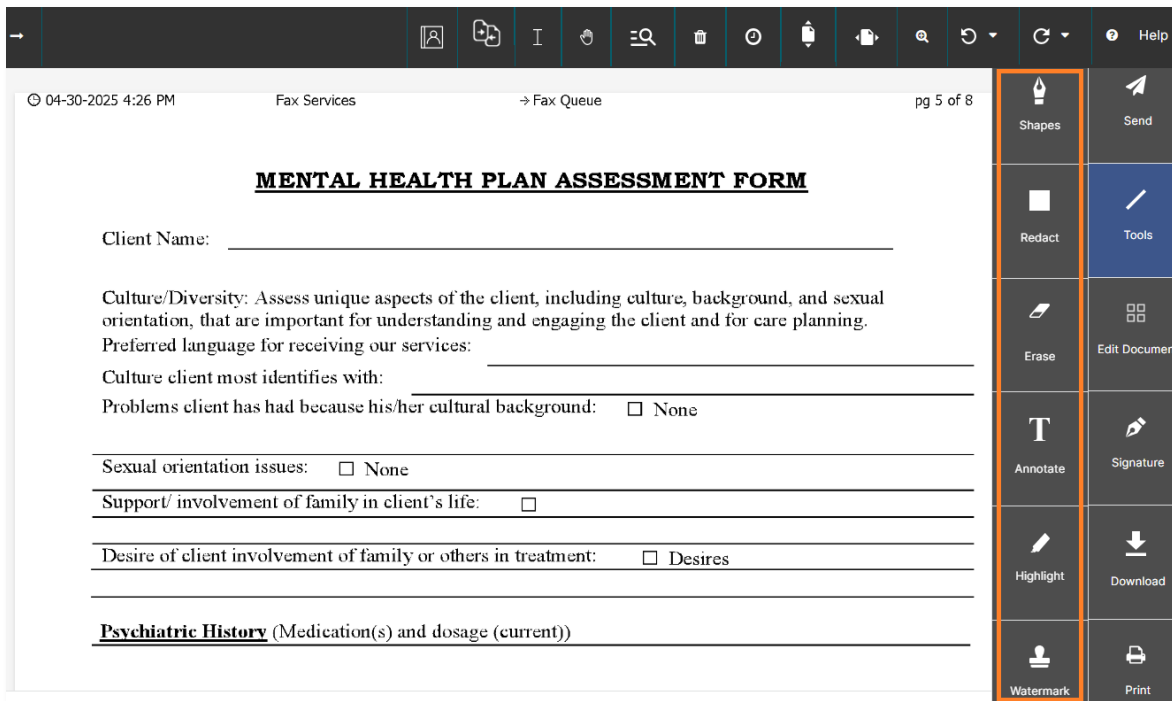


Following selection, use **CTRL+C** to copy the text from the document and then you paste this within NEXSTEP or to external documents and systems.

## Document Editing Tools

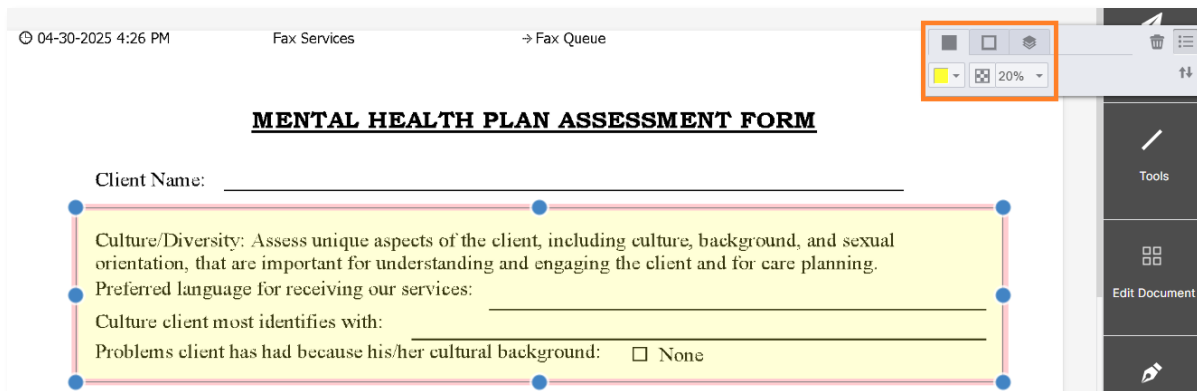
NEXTSTEP provides several ways of **editing documents** that have been uploaded or received into Shared Queues and Personal Folders. This includes editing the content on the pages of your documents with **annotation**, **redaction** and **highlights**.

Many of these methods of editing content can be found under the **Tools** button:



### Shapes

The Shapes option allows you to draw a **rectangle**, **oval** or **freeform shape** across an area of the document:

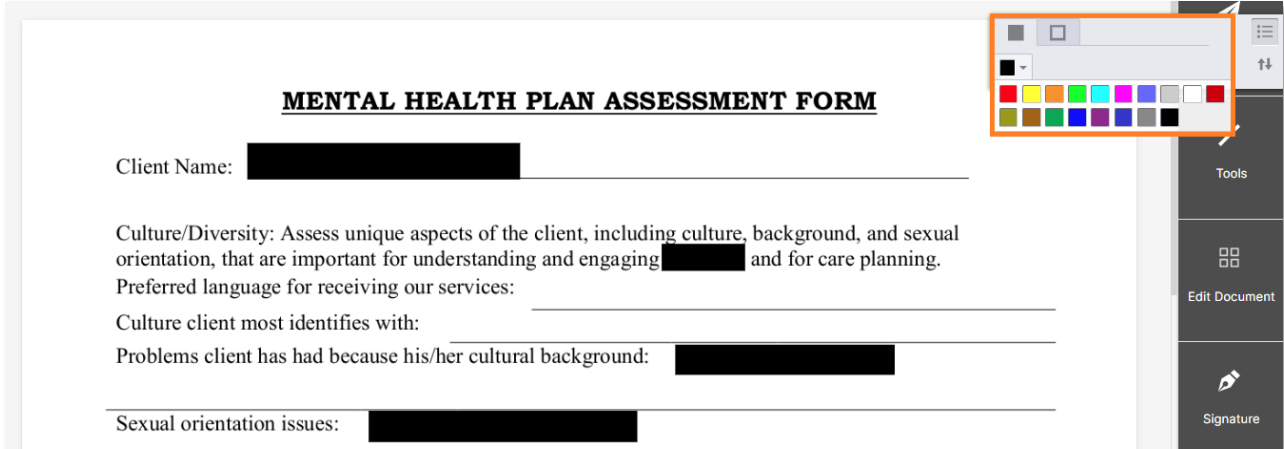


As the shape is applied, you can configure the shape for **color**, **fill** and **opacity** to create a highlighted area. Note

that using colors is **not recommended** if you intend to refax a document after editing it. Colors will not be preserved and may render text illegible.

## Redact

The Redact button allows you to **obscure text** in a document, typically by covering that text with **black** space:



**MENTAL HEALTH PLAN ASSESSMENT FORM**

Client Name: [REDACTED]

Culture/Diversity: Assess unique aspects of the client, including culture, background, and sexual orientation, that are important for understanding and engaging [REDACTED] and for care planning.

Preferred language for receiving our services: \_\_\_\_\_

Culture client most identifies with: \_\_\_\_\_

Problems client has had because his/her cultural background: [REDACTED]

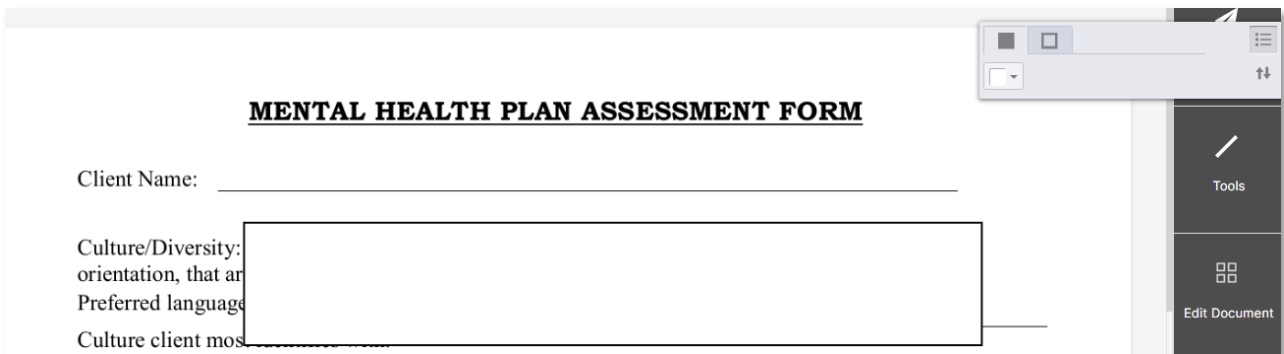
Sexual orientation issues: [REDACTED]

Redaction can be configured for **color**. Regardless of the color used, when redaction is applied, the text obscured by that redaction will no longer be **visible** or **searchable** within that document.

Note that it is possible to remove redaction and display redacted text by clicking **Reset All Annotation** in the toolbar following edits.

## Erase

The Erase button allows you to eliminate text in the document by covering this with **white** space:



**MENTAL HEALTH PLAN ASSESSMENT FORM**

Client Name: \_\_\_\_\_

Culture/Diversity: [ERASED]

Preferred language: \_\_\_\_\_

Culture client most identifies with: \_\_\_\_\_

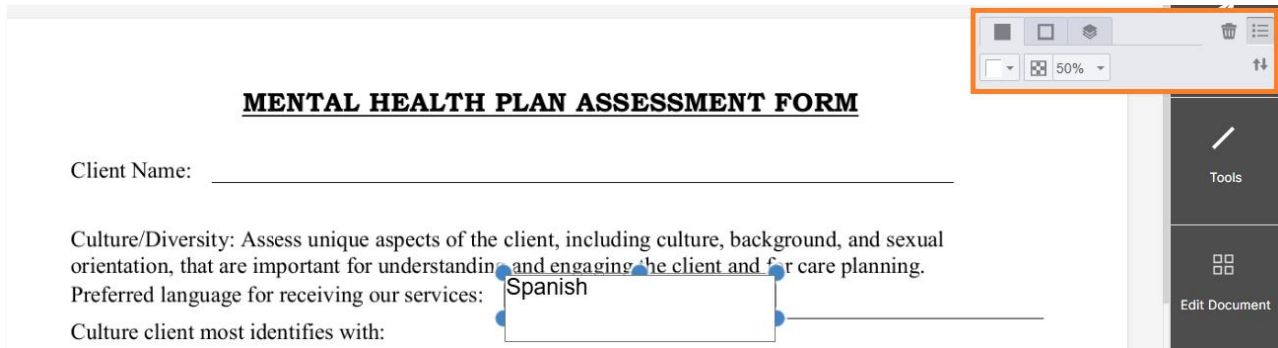
When text erasures are applied, the text that has been obscured will no longer be **visible** or **searchable** within that document. The white space may be overwritten using **Annotate**.

Note that it is possible to remove the white space and display erased text by clicking **Reset All Annotation** in the toolbar following edits.



## Annotate

Using Annotate, you can add text to your documents by drawing a **text box** where you want to add new text:



**MENTAL HEALTH PLAN ASSESSMENT FORM**

Client Name: \_\_\_\_\_

Culture/Diversity: Assess unique aspects of the client, including culture, background, and sexual orientation, that are important for understanding and engaging the client and for care planning.

Preferred language for receiving our services: Spanish \_\_\_\_\_

Culture client most identifies with: \_\_\_\_\_

Tools

Edit Document

Text boxes can be configured for **color** and **opacity**.

Formatting may be applied to your text including **color**, **font** and **font size**:

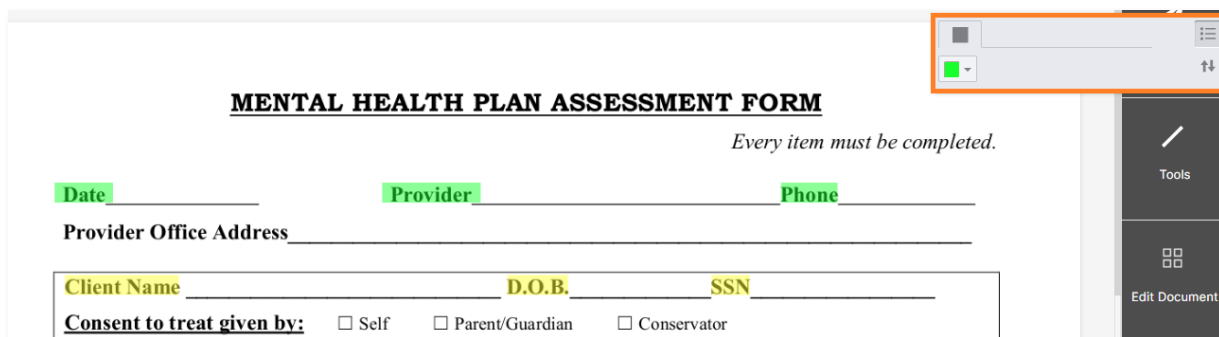


[Fill] [Stroke] [Text] [List] [B] [I] [U] [S] [E] [Color] [Font: Arial] [Size: 12] [Undo/Redo]

Choose your text formatting **before** applying your text box to the document.

## Highlight

Highlight allows you to select text and **highlight** this in a variety of **colors**:



**MENTAL HEALTH PLAN ASSESSMENT FORM**

*Every item must be completed.*

Date \_\_\_\_\_ Provider \_\_\_\_\_ Phone \_\_\_\_\_

Provider Office Address \_\_\_\_\_

Client Name \_\_\_\_\_ D.O.B. \_\_\_\_\_ SSN \_\_\_\_\_

**Consent to treat given by:** ☐ Self ☐ Parent/Guardian ☐ Conservator

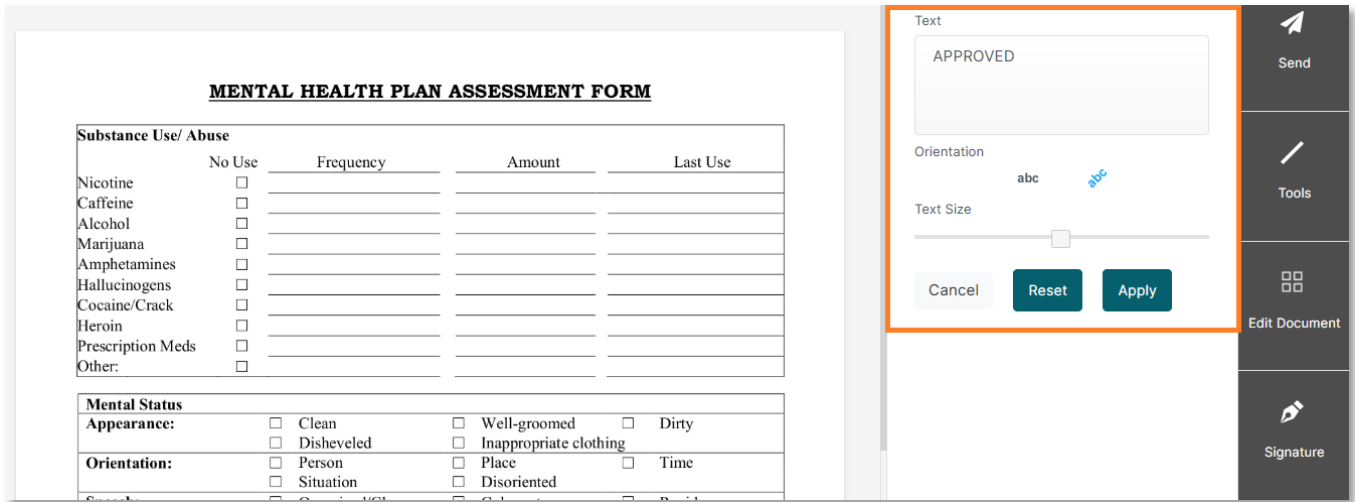
Tools

Edit Document

**Highlight colors** can be selected from the dropdown. Users may apply different highlight colors to make it clear who highlighted any given piece of text in a document.

## Watermark

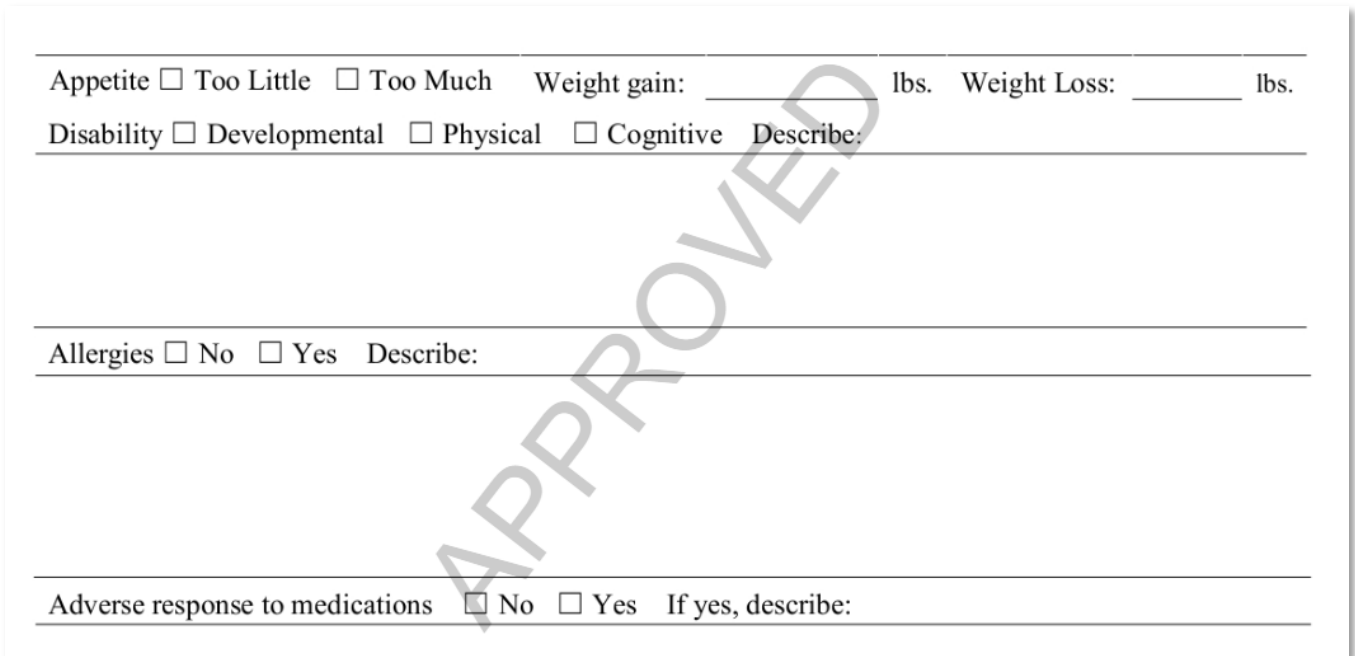
The watermark tool lets you add a piece of text that will be displayed across **every page** of your document:



The screenshot shows a document titled "MENTAL HEALTH PLAN ASSESSMENT FORM" with sections for "Substance Use/ Abuse" and "Mental Status". To the right, a configuration panel for the watermark is visible, showing the text "APPROVED", orientation settings, and text size controls. The panel includes "Cancel", "Reset", and "Apply" buttons. A sidebar on the right contains icons for "Send", "Tools", "Edit Document", and "Signature".

You can configure the text for **orientation** and **size**.

When you **apply** the watermark, it will be added to all pages of your document as **grey text**:



The screenshot shows a document page with a large, diagonal "APPROVED" watermark. The form contains several sections with checkboxes and text input fields:

- Appetite** ☐ Too Little ☐ Too Much **Weight gain:** \_\_\_\_\_ lbs. **Weight Loss:** \_\_\_\_\_ lbs.
- Disability** ☐ Developmental ☐ Physical ☐ Cognitive **Describe:** \_\_\_\_\_
- Allergies** ☐ No ☐ Yes **Describe:** \_\_\_\_\_
- Adverse response to medications** ☐ No ☐ Yes **If yes, describe:** \_\_\_\_\_

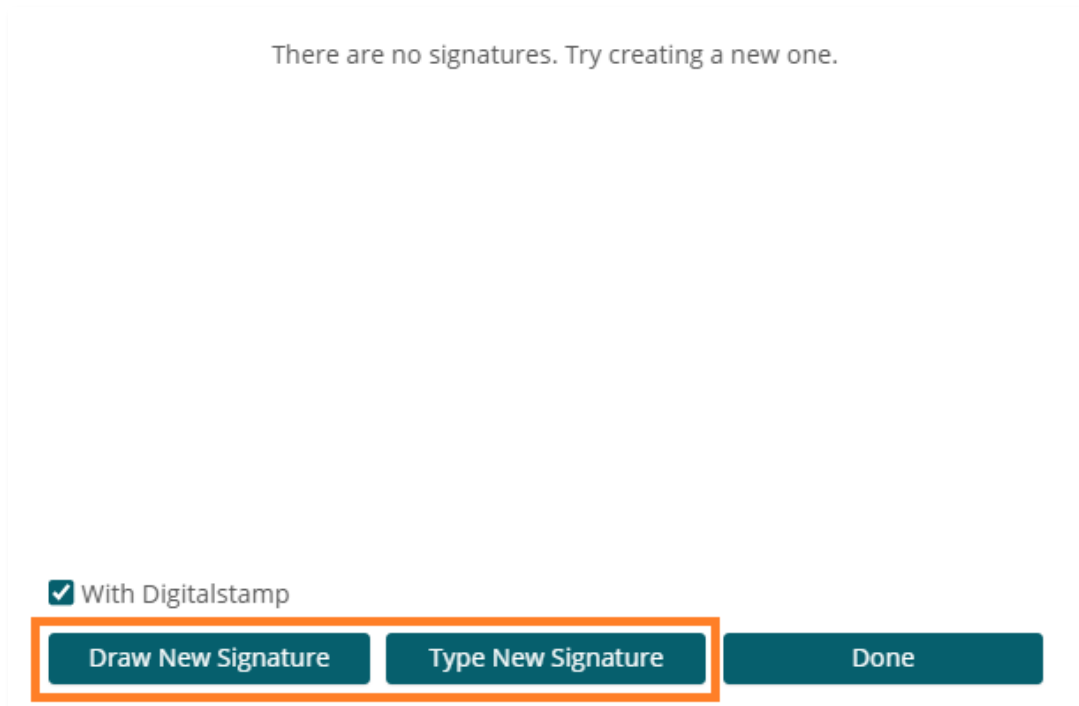
## Signatures

NEXTSTEP provides the capability to **store** and **apply** signatures via the Signature tool. This includes the ability to create a signature by **drawing** one with a mouse, **typing** one and applying a font, and/or **uploading** an example of a written signature.

When applied, signatures may also include a **Digital Stamp**, which will reference the user that applied the signature and the date/time it was applied.

To use a **mouse-drawn** or **typed** signature, click **Place Signature**.

If you have not created a signature, you will have the option to **draw** one or **type** one:



Here you can select which **type** of signature you wish to create and then **Draw** or **Type** a new signature to generate.

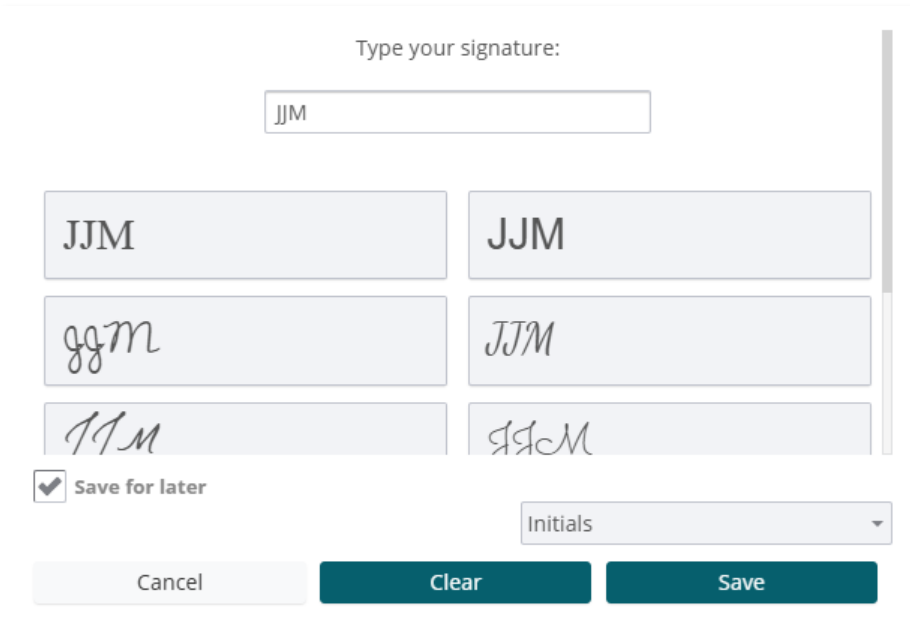
In the below example, we've chosen to **Draw New Signature**, and create a signature using a mouse. This presents a window where the signature can be **drawn**:



Use your **mouse** to draw a signature. **Clear** as needed to redraw.

From the dropdown you can select what **label** to apply to your signature as it is **saved**. You will only need to create and save once, unless you choose to change the signature(s).

In the next example, we've opted to **type** a signature, in this case using **initials**, and then selecting a **font** that will be used when the initials are applied to the document:



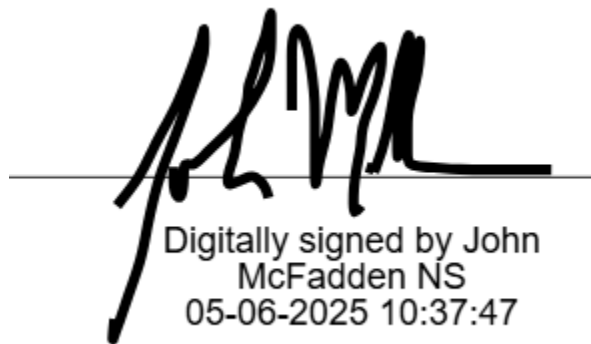
When placing signatures, you will have the option to **select** between a **drawn** and **typed** signature if you have

created both. To select your signature, click **Use Signature**:



You also have the option to include/exclude the **Digital Stamp** with your signature. The Digital Stamp may be added in addition to the drawn or typed signature and will reference the username of the user that applied the signature and when they applied it.

Below is an example of a placed **drawn** signature, including the **Digital Stamp**:



Digitally signed by John  
McFadden NS  
05-06-2025 10:37:47

## Image Signature

The Image Signature option allows you to **upload** an image file containing a signature. You can sign a piece of paper and then **scan** this to create an image of your signature that can be uploaded to NEXTSTEP and cropped to fit your documents.

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** only the signature:



To apply, click **Image Signature** and use your mouse to drag across the location to position and size your signature. As with the other signature methods, you will have the option to add a **Digital Stamp** as you apply an Image Signature.

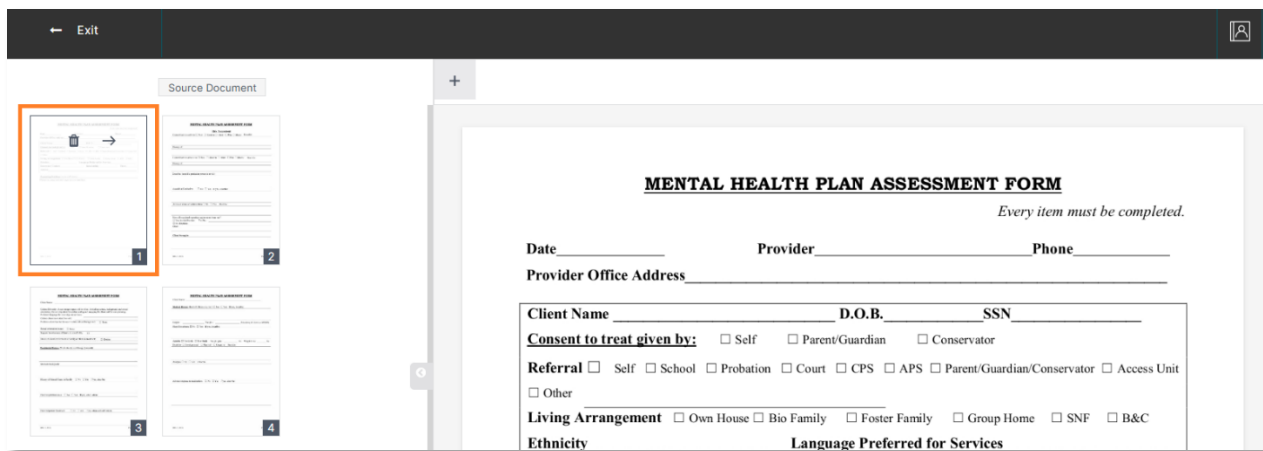
## Edit Document - Split

Via the **Edit Document** button, you have options to **delete** pages from a document, **split** a document into multiple parts, or to **merge** multiple documents together.

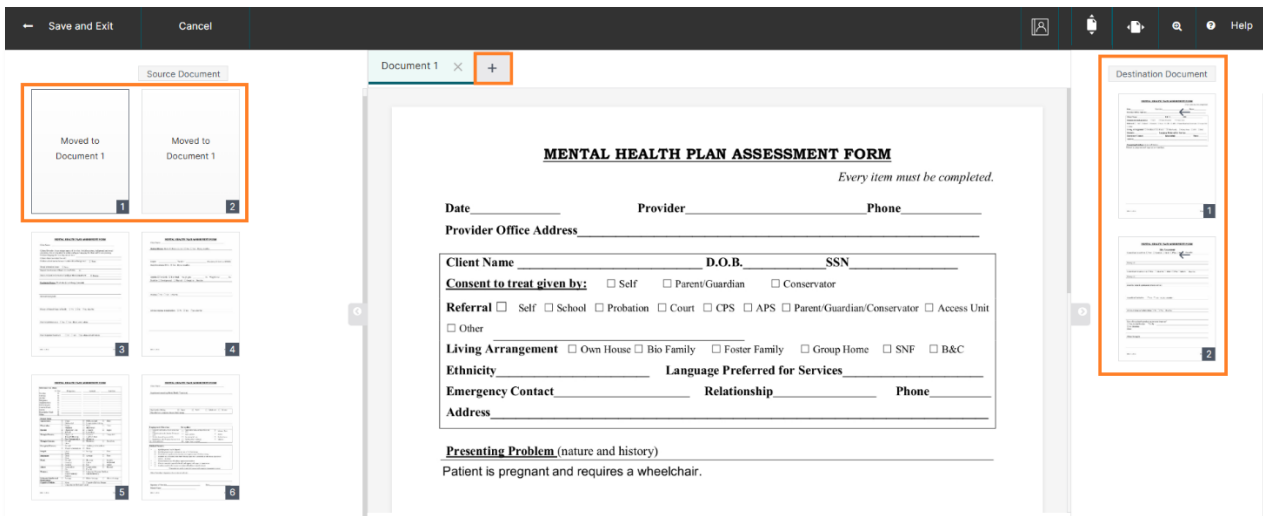
### Edit Pages (Split / Delete)

The **Edit Pages** feature allows you to delete pages from a document or split a single document into multiple separate documents.

When you click **Edit Pages**, you will see your existing **Source Document** load as thumbnails in the left panel. As you mouse over the thumbnail of each page, you can click the **delete icon** to remove it or use the **arrow** to move that page over to the **Destination Document**:



As the pages are **moved**, they will be displayed in the **Destination Document**:





The **plus sign icon** in the middle panel allows you to add **new Destination Documents** for the purpose of splitting a Source Document into more than two parts. You can split a document into as many parts as that document

contains pages, if needed. Note that **one** page must always remain with the **Source Document**.

When you are ready, click **Save and Exit** to commit the changes and return to the Grid View. This will trigger the splitting of the pages. Any documents that you have split off will be displayed as **new documents** in the Grid View.

The **Timeline** of each document will reflect that a split was used to create the new document and reference to the **original Document ID** will be displayed:

 John McFadden NS split document to ID:681a434c236fe1e9a190cc42, with 2 page(s)  
 John McFadden NS split document from ID:681909b7c4456c33e8e3bd9d  
05/06/2025 01:13:48 PM



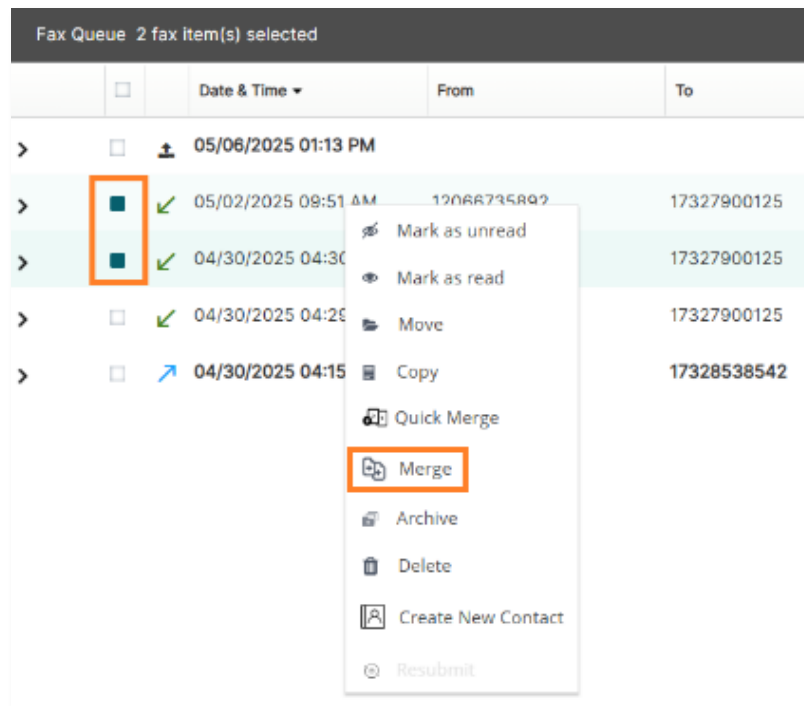
## Edit Document - Merge

There are **two methods** of merging documents together in NEXTSTEP:

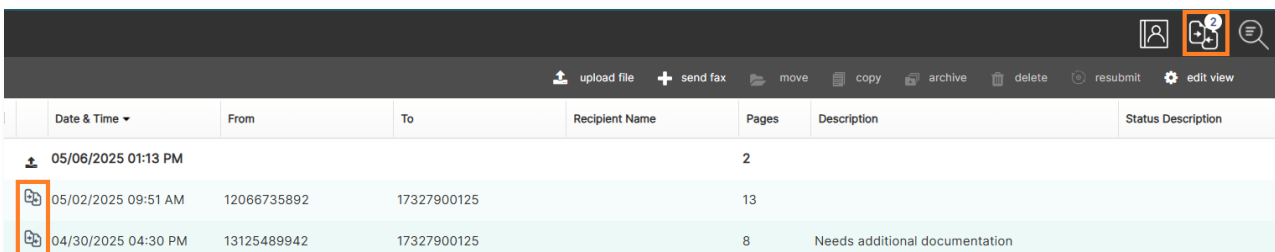
- **Merge** allows you to combine two or more separately received or uploaded documents into one using a **Merge Cart** to manage the documents being prepared for merging.
- **Quick Merge** lets you select multiple documents from the grid view and merge them together via a **single click**.

### Merge

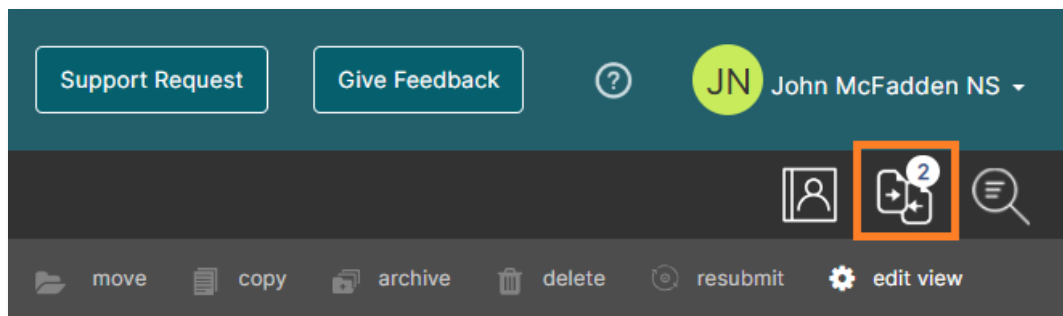
A Merge can be started from within the **Document Viewer**, by clicking **Edit Document / Merge** or by clicking the check box next to the documents you want to merge in the **Grid View**, right-clicking and selecting the **Merge** Button:



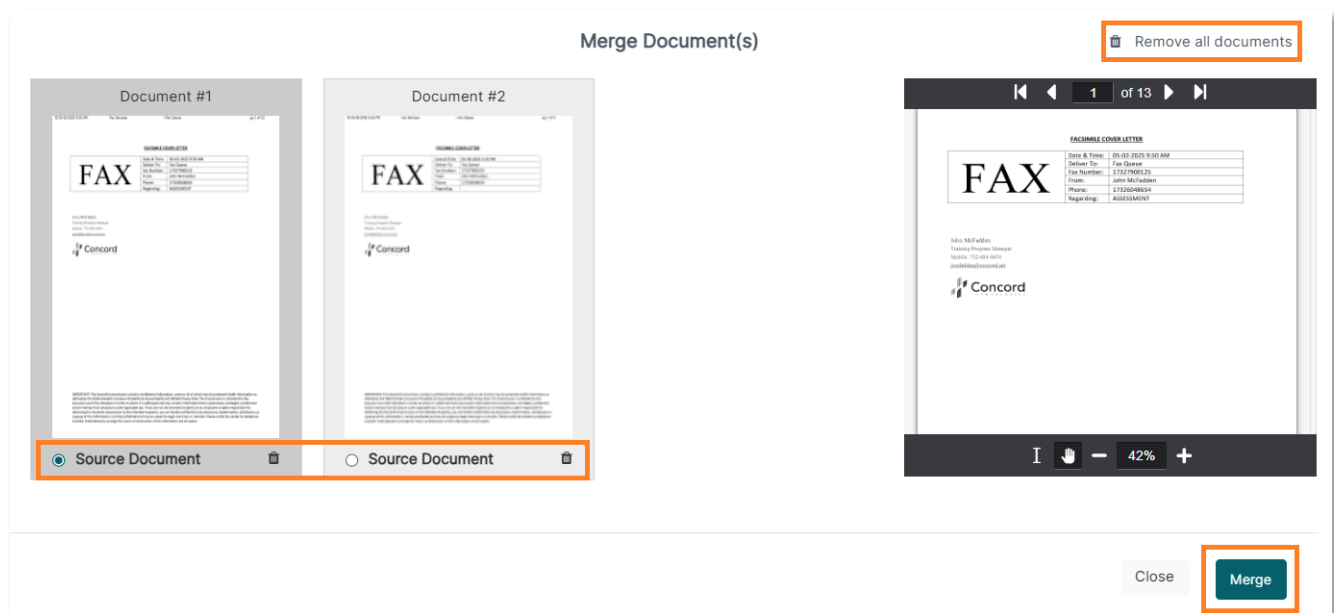
After clicking Merge, a **merge icon** appears next to each item to be included in the merge. The toolbar shows the number of documents that have been added to the **Merge Cart**:



Click the **Merge Cart** icon to open and process your merge:



From the Merge Cart you can dictate which of your documents will be the **Source Document** and retain its **original Message ID**, as other documents are merged to it:



You can **delete** individual documents or **remove all** documents from the Merge Cart as needed.

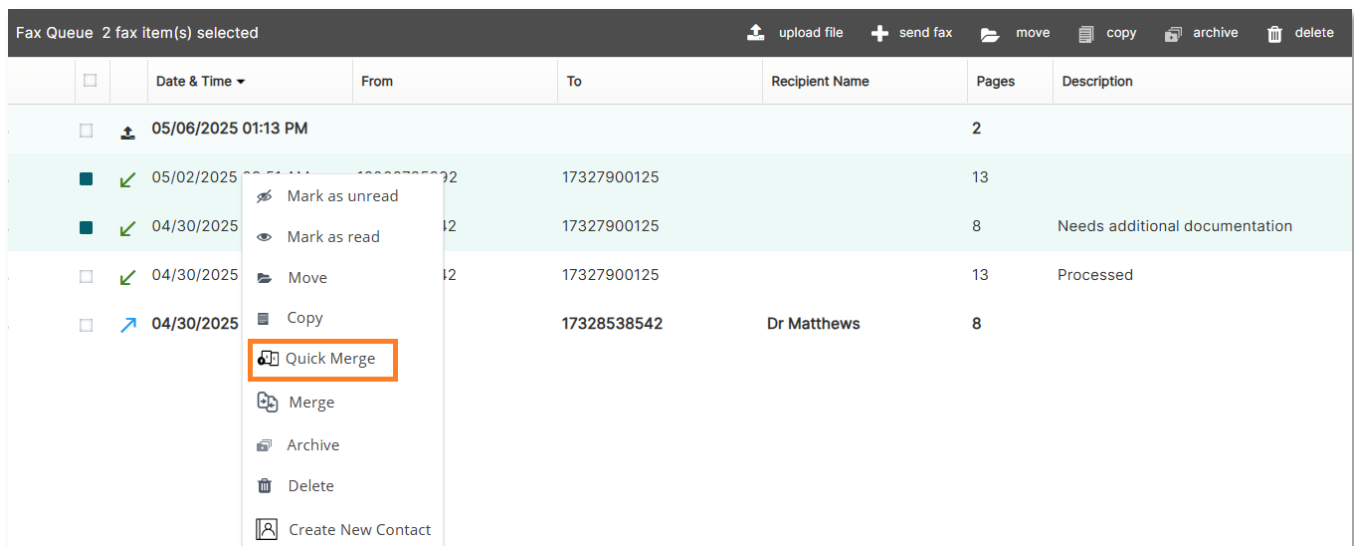
When you are ready to merge your documents, click **Merge** and your documents will be merged with the **Source**.

Note that it is not possible to perform many standard actions such as **moving** or **deleting** a document while they are in the **Merge Cart**.

## Quick Merge

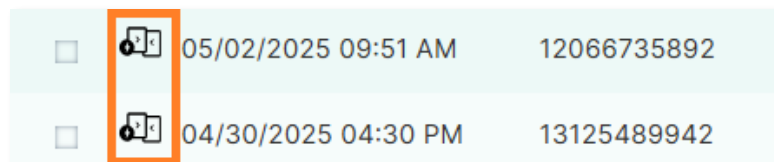
**Quick Merge** allows you to merge items together with fewer clicks, but **less control** over what document will be the **source**.

To activate a Quick Merge, **select** the items that you want to merge together and then **right-click** to select **Quick Merge**:

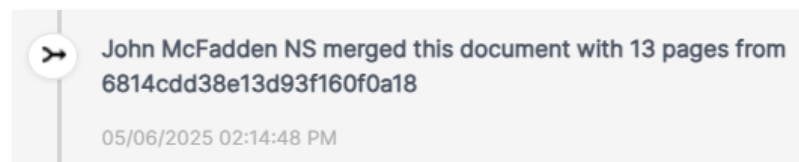


Upon clicking you will be **notified** that a Quick Merge has been **initiated**.

Items selected for Quick Merge may appear separately with a **merge icon** for a brief period until the Quick merge is **completed** and the items are merged together:



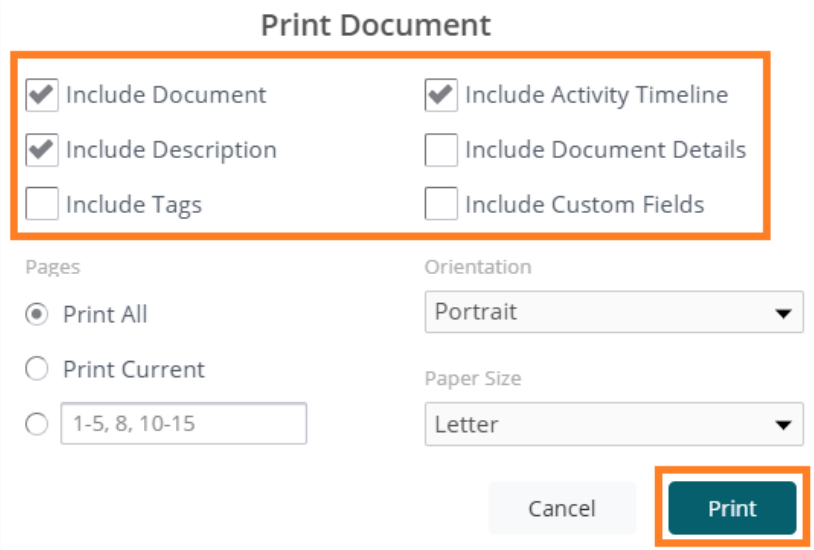
Once any merge is completed, the **Source** document will contain a record of the merge in the **Timeline**:



## Printing and Downloading Documents

NEXTSTEP allows you to **print documents** and supplementary **workflow data** such as Description, Tags, Activity Timeline and Custom Fields. Any additional data selected for inclusion will be printed to one or more pages following the document itself.

When printing, **select** what you wish to include and click **Print**:



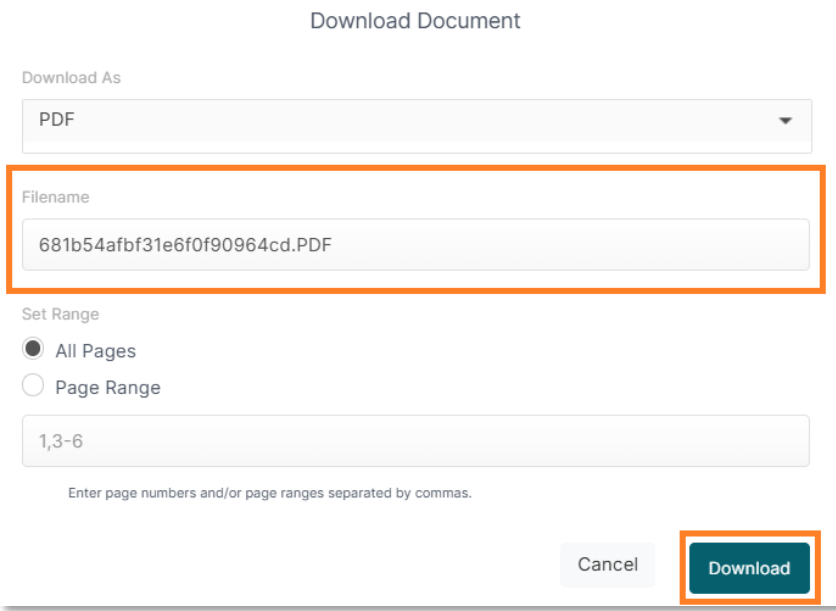
**Print Document**

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

Pages: ☒ Print All      Orientation: Portrait  
☐ Print Current      Paper Size: Letter  
☐ 1-5, 8, 10-15

Cancel      **Print**

To **Download** documents from the Grid View, **right-click** an item and select **Download**. A Download menu will be displayed, allowing you to save the document according to your browser configuration. The given **filename** can be adjusted from Concord's NEXTSTEP **Message ID** as needed:



**Download Document**

Download As: PDF

Filename: 681b54afb31e6f0f90964cd.PDF

Set Range: ☒ All Pages  
☐ Page Range: 1,3-6

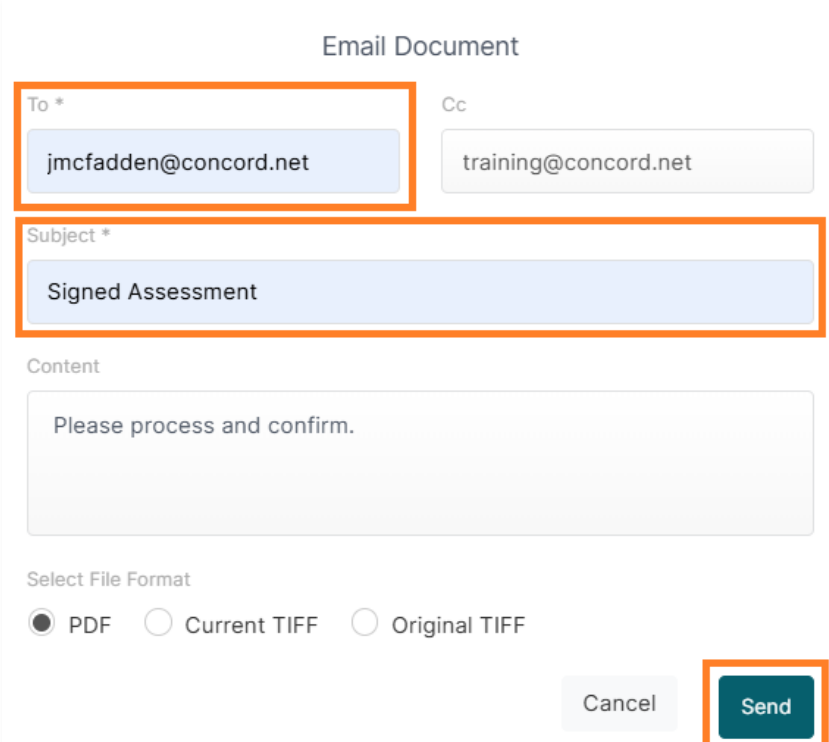
Enter page numbers and/or page ranges separated by commas.

Cancel      **Download**

## Emailing a Document

You can email a document from the NEXTSTEP **Document Viewer** by clicking on **Send** and then **Email**.

This will open the Email Document **form**:



The form is titled "Email Document" and contains several fields and options. The "To \*" field is highlighted with an orange border and contains the email address "jmcadden@concord.net". The "Cc" field contains "training@concord.net". The "Subject \*" field is also highlighted with an orange border and contains "Signed Assessment". The "Content" field contains the text "Please process and confirm.". Below this is a "Select File Format" section with three radio buttons: "PDF" (selected), "Current TIFF", and "Original TIFF". At the bottom right, there are two buttons: "Cancel" and "Send", with the "Send" button highlighted by an orange border.

Complete the form with a minimum of a **To** recipient address and an email **Subject** line.

You may also include a **CC** email address and message body **Content**.

You have the option of setting the **file type** for the document, which will be **attached** to your email when you send. **PDF** will always be current, including any edits that have been made to the document. The **TIFF** may be current or original. The **Original TIFF** will display no edits if made.

When ready, click **Send**.

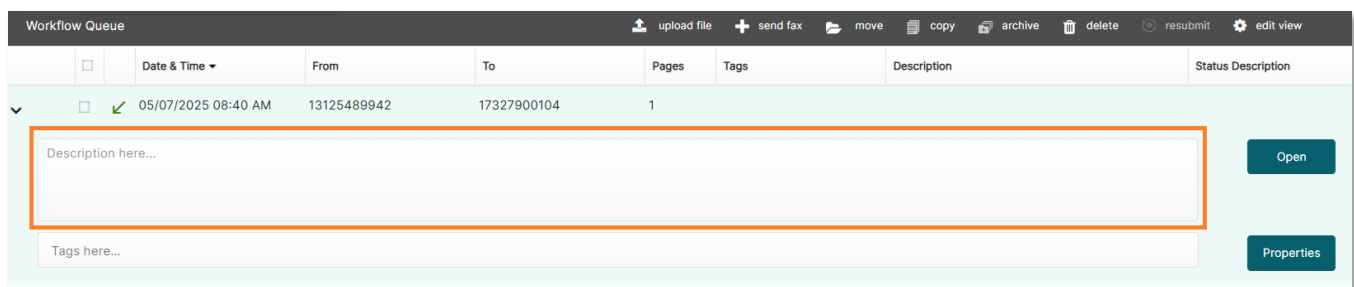
Note that Concord will apply **opportunistic TLS encryption** to emails as they are sent, but the opportunistic nature of this method means that encryption is **not assured** when documents are emailed from NEXTSTEP.

## The Description Field

The **Description** field may be populated by any user during document processing to relay information in a collaborative **Shared Queue** setting or to make a note on a message for your own use in a **Personal Folder**. The Description field can be viewed as a **column** and searched for via **Metadata Search**.

To add a Description to a document from the **Grid View**, simply **single-click** on the row of the item (vs. a double-click, which will open the document).

Upon single-clicking on the item, a **text box** will be displayed, prompting you to enter the Description you want attributed to the document:

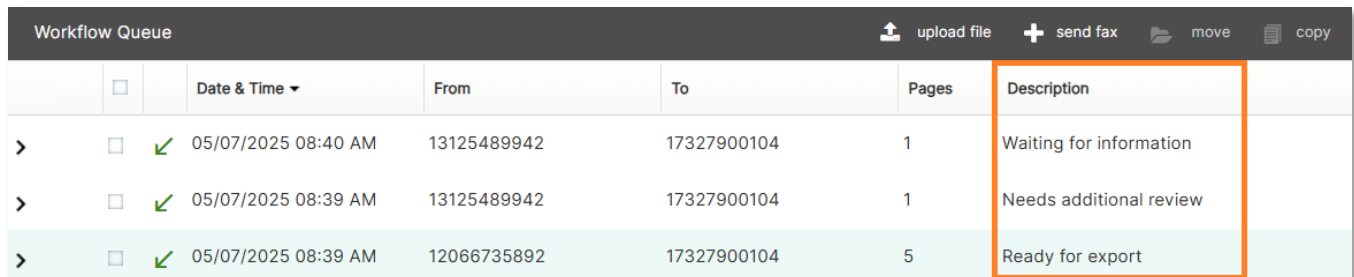


	<input type="checkbox"/>	Date & Time ▾	From	To	Pages	Tags	Description	Status Description
✓	<input type="checkbox"/>	05/07/2025 08:40 AM	13125489942	17327900104	1		Description here...	

Tags here...

Open Properties

If the **Description column** is included in your view, the Description text will be displayed there:



	<input type="checkbox"/>	Date & Time ▾	From	To	Pages	Description
>	<input type="checkbox"/>	05/07/2025 08:40 AM	13125489942	17327900104	1	Waiting for information
>	<input type="checkbox"/>	05/07/2025 08:39 AM	13125489942	17327900104	1	Needs additional review
>	<input type="checkbox"/>	05/07/2025 08:39 AM	12066735892	17327900104	5	Ready for export

The description text can also be used when performing a **Metadata Search**:



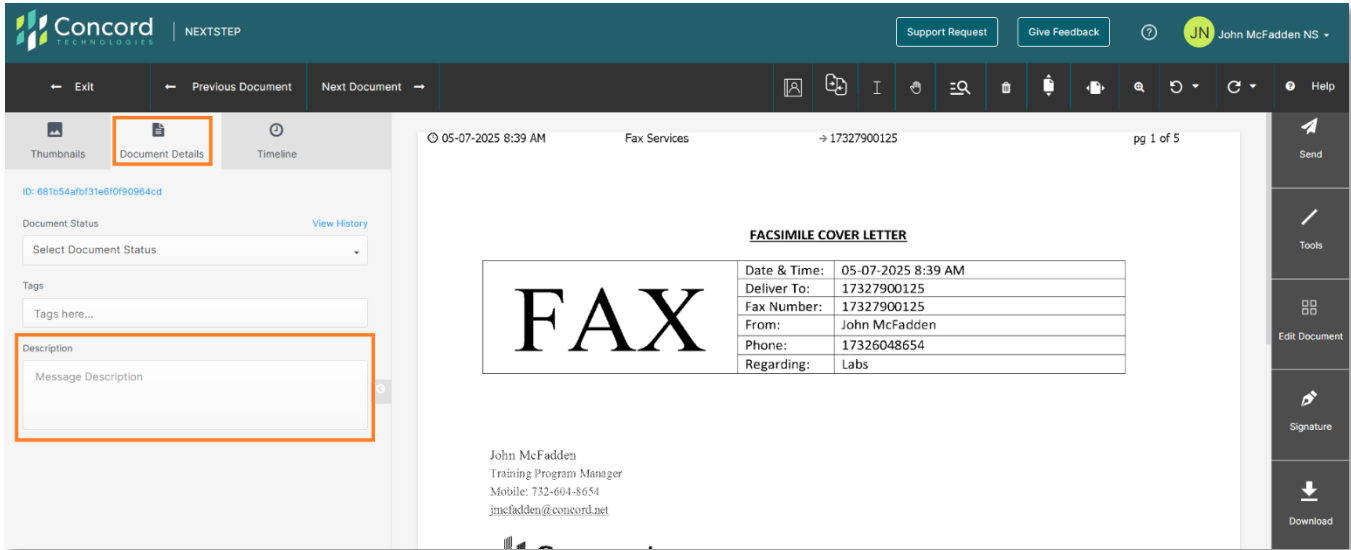
Description ▾

Search Equals ▾

Add

You can also add a Description when a document is opened in the NEXTSTEP **Document Viewer**.

The Description field can be found at the bottom of the **Document Details** tab in any NEXTSTEP document:



Concord | NEXTSTEP

Support Request Give Feedback JN John McFadden NS

Exit Previous Document Next Document

Thumbnails **Document Details** Timeline

ID: 681b54afbf31e6f0f90964cd

Document Status View History

Select Document Status

Tags

Tags here...

Description

Message Description

05-07-2025 8:39 AM Fax Services → 17327900125 pg 1 of 5

**FACSIMILE COVER LETTER**

FAX	Date & Time:	05-07-2025 8:39 AM
	Deliver To:	17327900125
	Fax Number:	17327900125
	From:	John McFadden
	Phone:	17326048654
	Regarding:	Labs

John McFadden  
 Training Program Manager  
 Mobile: 732-604-8654  
 jmfadden@concord.net

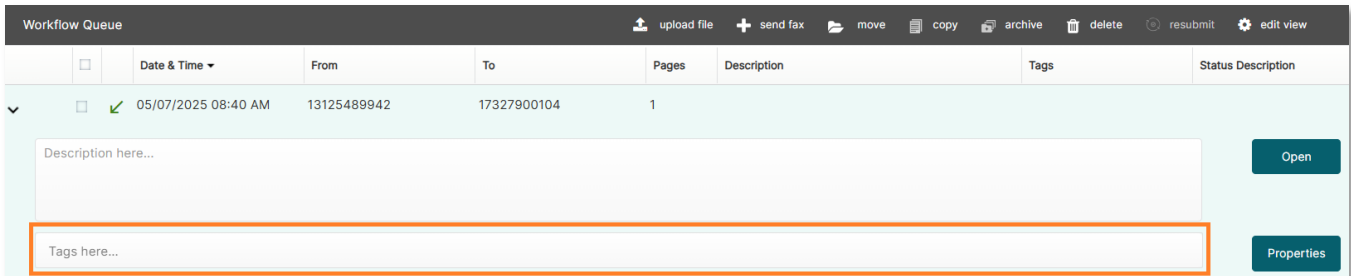
Send Tools Edit Document Signature Download

Adding a Description from this screen will add this to the same standard **Description** column in the **Grid View**.

## Tags

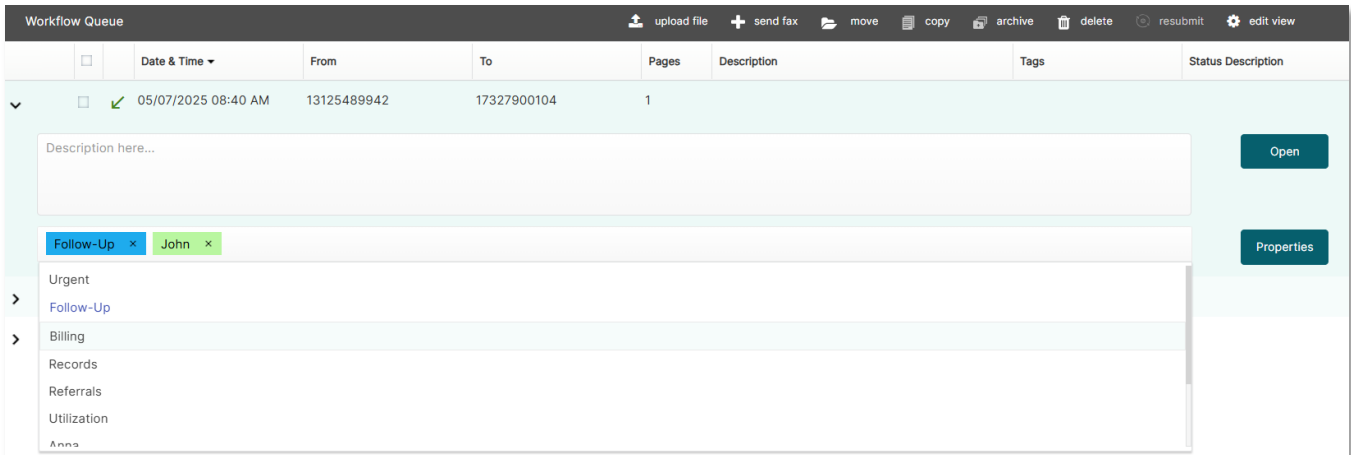
In NEXTSTEP, **Tags** may be selected by users as documents are being processed, to provide workflow **visibility** according to what is on the Tag. Tags display a **label** and a **color**, and **multiple** Tags can be added to single items as needed. Tags are often used to represent **assignment** and **priority** but may be customized to suit a specific workflow need. Tags are created and managed by a NEXTSTEP **administrator** and new Tags may be added to a Shared Queue by the admin at any time.

To apply a Tag to a message via **Grid View**, you can **single-click** on the message where the Tag will be applied. Just below the Description field, you will see a second area where **'Tags here...'** is displayed:



The screenshot shows the 'Workflow Queue' interface. At the top, there is a toolbar with icons for 'upload file', 'send fax', 'move', 'copy', 'archive', 'delete', 'resubmit', and 'edit view'. Below the toolbar is a table with columns: 'Date & Time', 'From', 'To', 'Pages', 'Description', 'Tags', and 'Status Description'. A message is selected, showing details like '05/07/2025 08:40 AM', '13125489942', '17327900104', and '1' page. Below the message details, there is a 'Description here...' text area and a 'Tags here...' text area, which is highlighted with an orange border. To the right of the 'Tags here...' field are 'Open' and 'Properties' buttons.

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 added. **Additional Tags** can be applied as needed. Click the **X** on Tags to remove them from the item:



The screenshot shows the 'Workflow Queue' interface with the same message as before. The 'Tags here...' field now contains two tags: 'Follow-Up' (blue) and 'John' (green). Below the tags, a drop-down menu is open, showing a list of available tags: 'Urgent', 'Follow-Up', 'Billing', 'Records', 'Referrals', 'Utilization', and 'Anna'. To the right of the tags are 'Open' and 'Properties' buttons.

Tags can be displayed as a **column** on the **Grid View** and can also be used as **Search** criteria.

Tags can also be set and displayed via the **Document View** when a document is opened there. If Tags are available in your Queue they can be found in the **Document Details** tab.

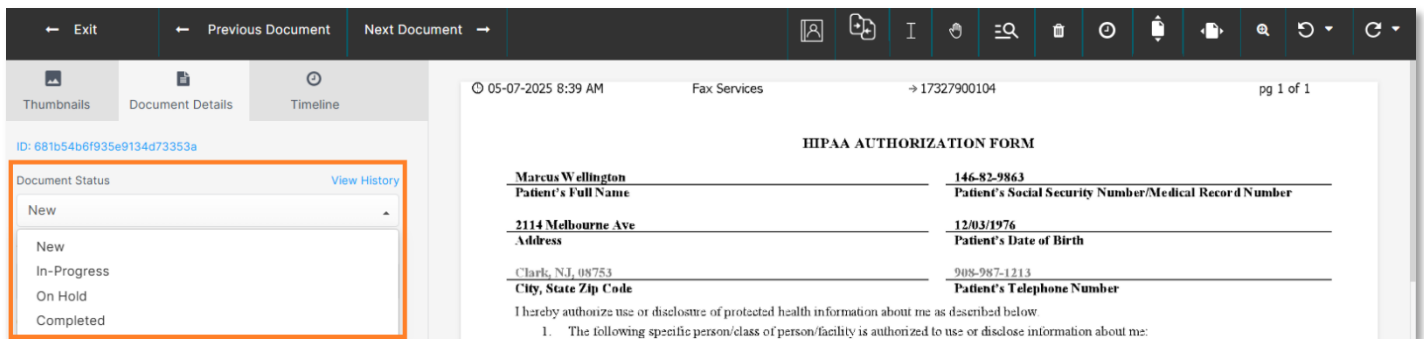


## Document Status

In NEXTSTEP, **Document Status** is used to represent the processing stage a document has reached as it is being worked by a team in a **Shared Queue**. Document Status **values** are configurable by Shared Queue and different Shared Queues may have **different** Document Status lists to represent the stages of processing for each particular queue/process.

Document Statuses may also be connected to **rules** in NEXTSTEP, such that **changing** a Document Status will trigger a subsequent **action**. Typical **triggered actions** are **moving** the document to another Shared Queue or subfolder, and/or **exporting** the document to a network drive or interconnected application.

The Document Status is typically updated when the document is open in the **Document Viewer**. Via the **Document Details** tab, you can **select** the proper Document Status as the document is moving through your workflow:



Note that the document may be **moved automatically** following the Document Status update, if you have **rules** configured in this regard.

Document Status can be displayed as a **column** on the **Grid View** and can also be used as **Search** criteria. They can also be accessed by **right-clicking** a message in the **Grid View** and selecting **Properties**.

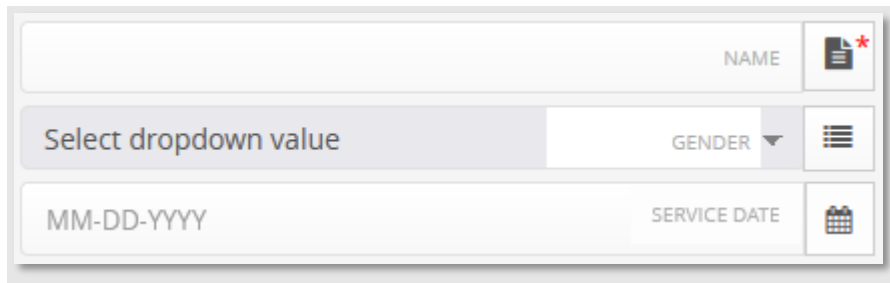
## Custom Fields

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, and Concord supports many additional data fields for extraction.

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**.

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 example below shows three different **types** of Custom Fields that you may have configured on your Shared Queue:



The screenshot displays three custom fields in a list. The first field is labeled 'NAME' and has a red asterisk icon, indicating it is required. The second field is labeled 'GENDER' and has a dropdown arrow icon. The third field is labeled 'SERVICE DATE' and has a calendar icon. The 'NAME' field is a text box, 'GENDER' is a dropdown menu, and 'SERVICE DATE' is a date picker.

- **NAME:** A standard text box that you would complete by **adding text**. This field has been designated as **required** as indicated by the **red asterisk**.
- **GENDER:** A **dropdown** selection list that you would complete by **selecting the proper 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/time value may be selected.

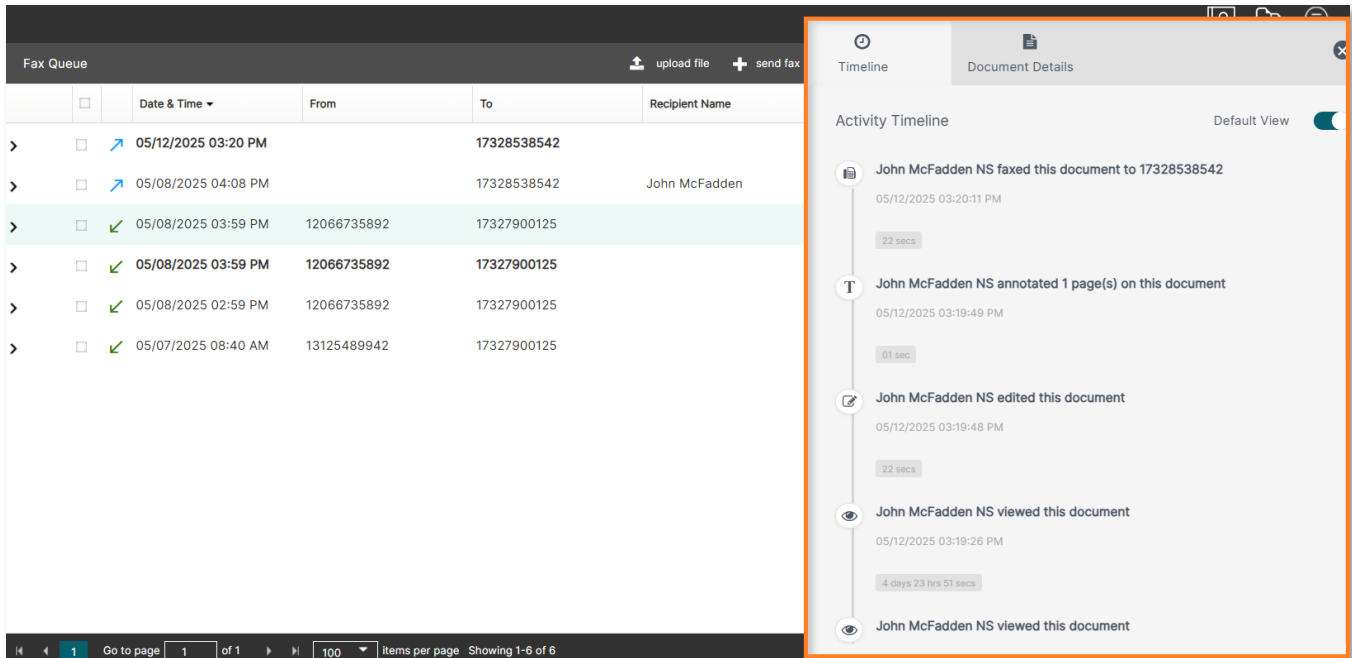
Note that **any Custom Field** may be set by a NEXTSTEP Administrator to be **required**. Required fields must be completed to save the document and proceed with other actions.

## The Activity Timeline

Activity **logging** to the Document Timeline provides an **audit trail** of what actions were taken by users at specific times, as they worked on documents in NEXTSTEP. When a document is viewed by a user, moved to a queue or folder, annotated, signed, faxed, etc., a log entry is made indicating the **action**, the **user** and the **time**. This logging is viewable in the **Activity Timeline**.

You can access the timeline from the **Timeline tab** when a document is open in the **Document Viewer**.

From the **Grid View**, you can access the Timeline on an item by **right-clicking** on an item and selecting **Properties**:



The screenshot shows the 'Fax Queue' table on the left and the 'Activity Timeline' panel on the right. The table lists document activity with columns for Date & Time, From, To, and Recipient Name. The timeline panel shows a list of actions performed by 'John McFadden NS' on a document, including faxing, annotating, editing, and viewing, with timestamps and elapsed times.

	Date & Time	From	To	Recipient Name
>	05/12/2025 03:20 PM		17328538542	
>	05/08/2025 04:08 PM		17328538542	John McFadden
>	05/08/2025 03:59 PM	12066735892	17327900125	
>	05/08/2025 03:59 PM	12066735892	17327900125	
>	05/08/2025 02:59 PM	12066735892	17327900125	
>	05/07/2025 08:40 AM	13125489942	17327900125	

**Activity Timeline**

- John McFadden NS faxed this document to 17328538542  
05/12/2025 03:20:11 PM  
22 secs
- John McFadden NS annotated 1 page(s) on this document  
05/12/2025 03:19:49 PM  
01 sec
- John McFadden NS edited this document  
05/12/2025 03:19:48 PM  
22 secs
- John McFadden NS viewed this document  
05/12/2025 03:19:26 PM  
4 days 23 hrs 51 secs
- John McFadden NS viewed this document

The **Activity Timeline** tab 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.

**Timeline Icons** are as follows:



The **Print** icon indicates that the document has been printed by a user.



The **View** icon indicates that the document has been viewed by a user.



The **Annotate** icon indicates that a notation has been added to the document.



The **Download** icon indicates that a document has been downloaded.



The **Signature** icon indicates that a signature has been added to the document.



The **Folder** icon indicates that a document has been moved to a new folder.



The **Watermark** icon indicates that a watermark has been applied to a document.



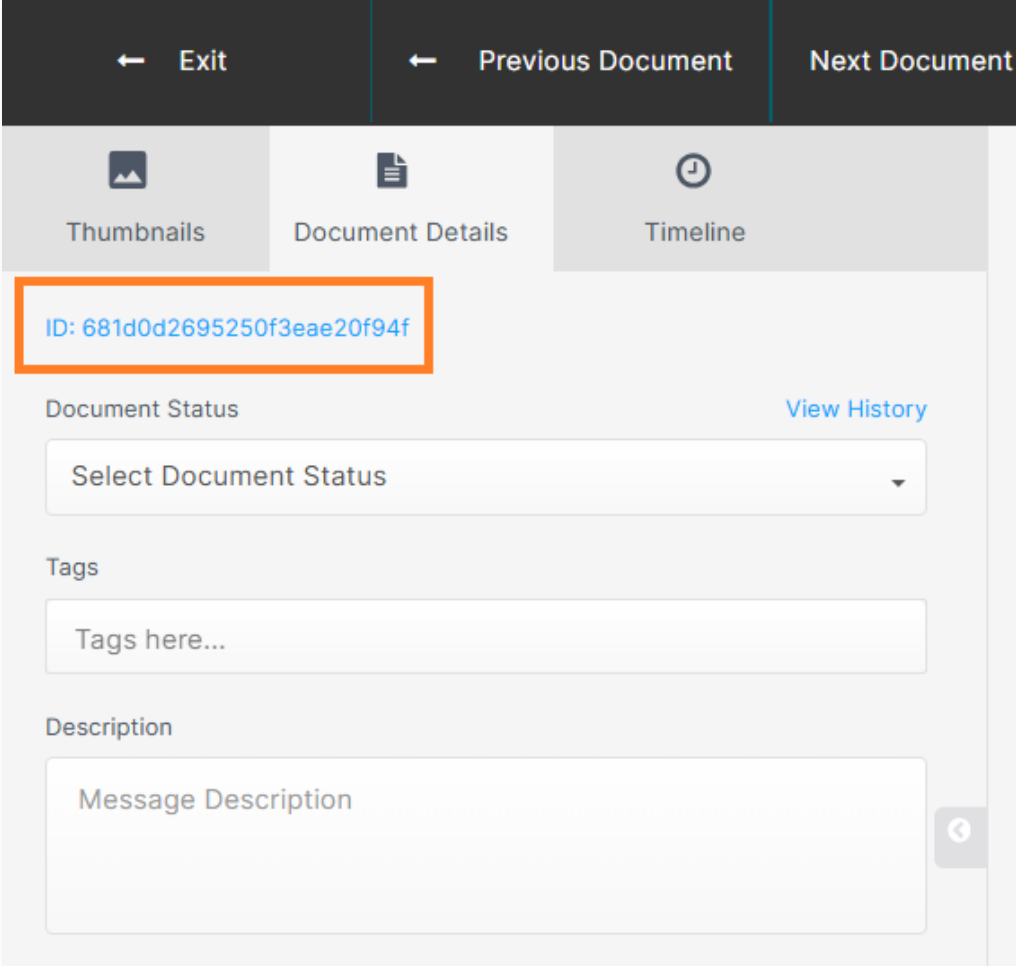
The **Fax** icon indicates that a document has been faxed to a new recipient.

## Viewing Fax Transmission Details

If you need to view additional details associated with the **transmission** of a fax document. This can be found by navigating to **Document Details**.

In **Document View**, you will find a link to the transmission information via the **Document Details** tab.

Here you will see a hyperlink to the NEXTSTEP **Document ID** which will provide additional information on that document:



← Exit   ← Previous Document   Next Document

Thumbnails   Document Details   Timeline

ID: 681d0d2695250f3eae20f94f

Document Status [View History](#)

Select Document Status ▼


Tags


Tags here...


Description

Message Description

After clicking on the **Document ID**, you will be presented with additional information about that document and its source. To find data related to **fax** transmission, **scroll down**:


**Thumbnails**


**Document Details**


**Timeline**

## Getting Help

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

**Phone:** +1 (206) 441-3346

**Email:** [premiumsupport@concord.net](mailto:premiumsupport@concord.net)

**Web:** <https://concord.net/about/contact-us/>