NEXTSTEP
Document Processing

NEXTSTEP Portal User Guide

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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.

Disclaimer

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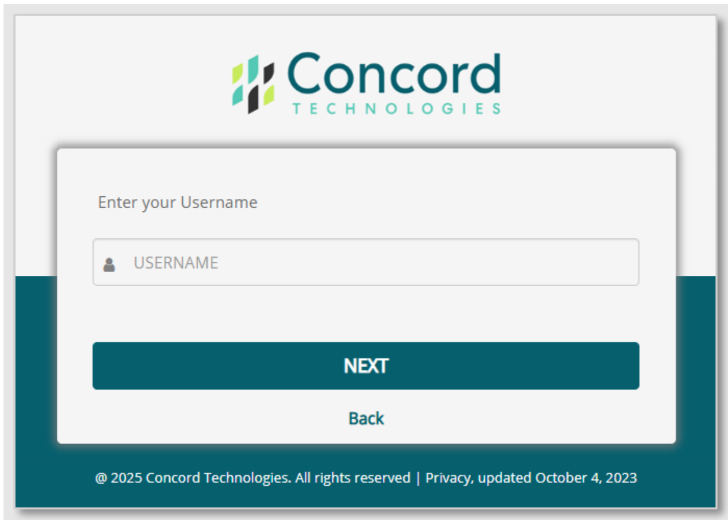
NEXTSTEP Login

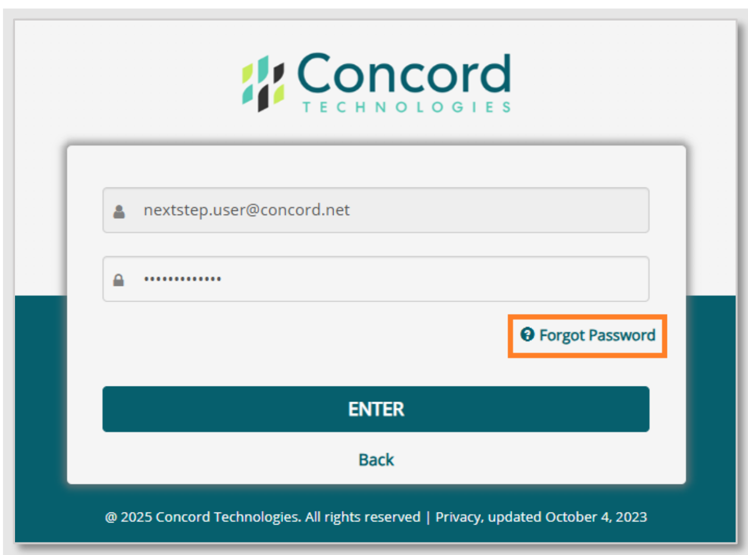
Login steps **may vary** according to whether or not your organization is **Federated** with Concord for Single-Sign-On. The steps below represent the standard login process using **username** and **password**.

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

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



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



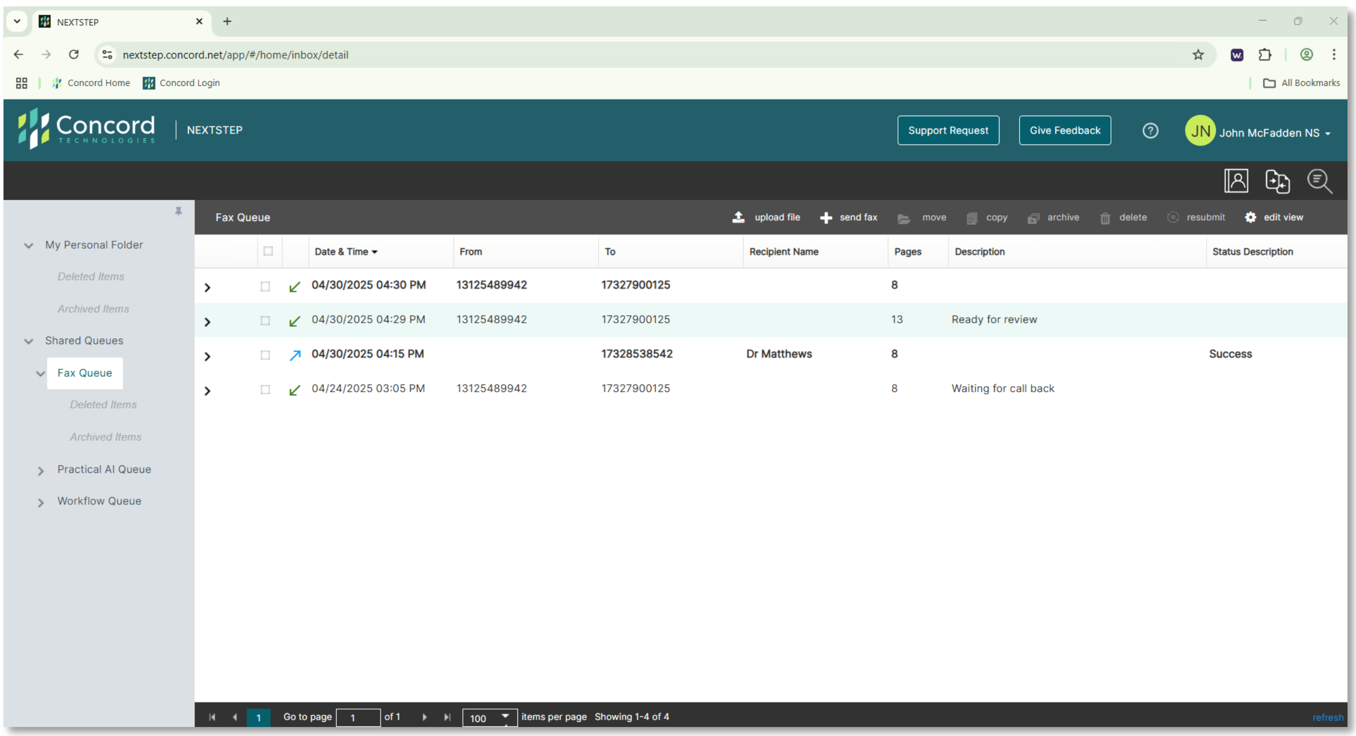
After entering your password, click **ENTER** to complete the login process**.** If you do not know, or have forgotten your password, click on **Forgot Password** and follow the ensuing prompts.

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**:



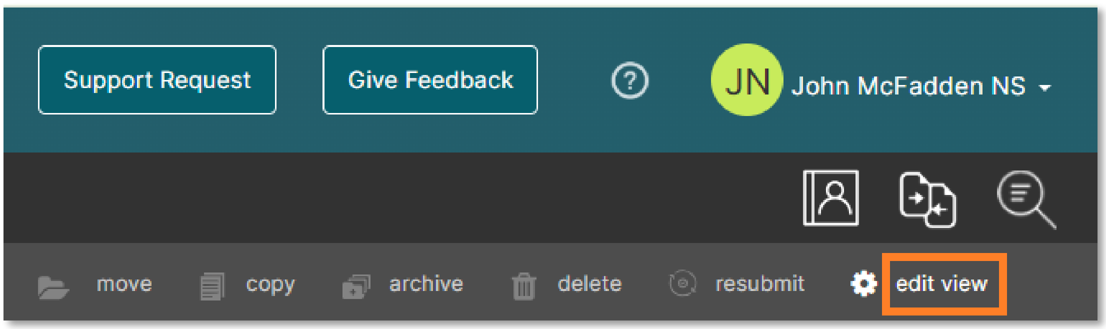
The specific columns of information you see will be dictated by your corporate **Default View**, but this can be updated by clicking **Edit View**.

Edit View

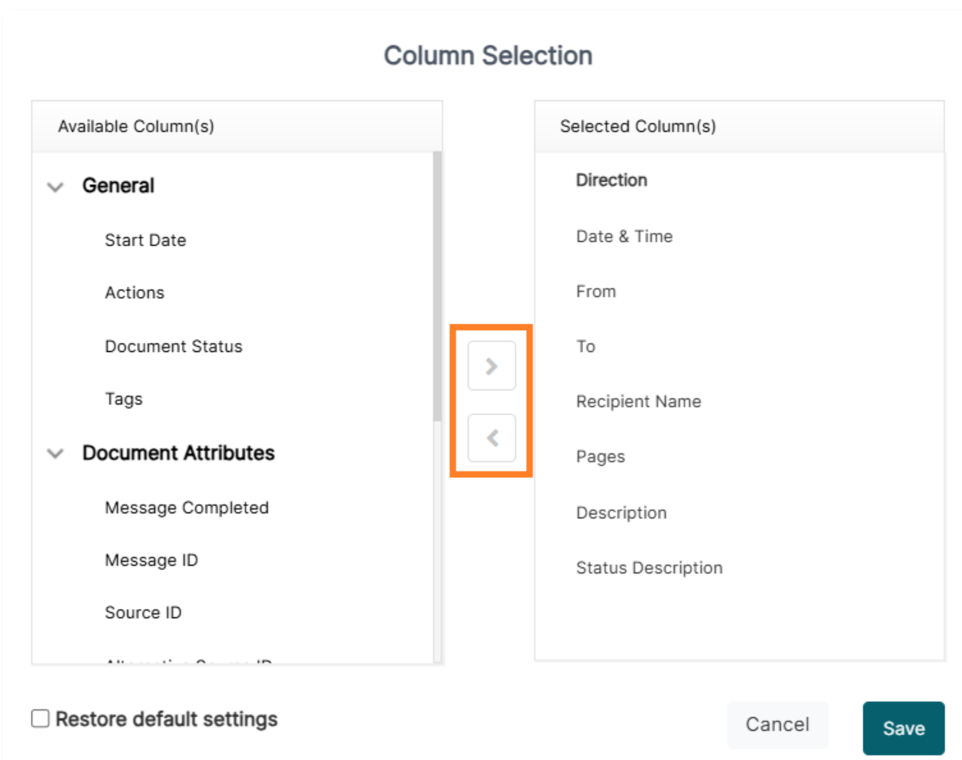
The **Grid View** displays a column-based listing of documents and associated metadata in a Shared Queue or Folder. This will initially be displayed as a default set of columns dictated by your corporate **Default View.**

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.

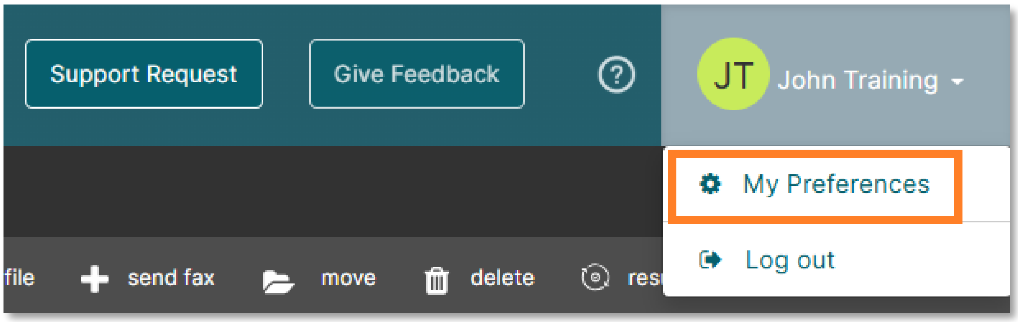
By selecting items in the Selected Columns, you can **drag** these up and down in the Selected Columns list to **reorder** your columns as needed.

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

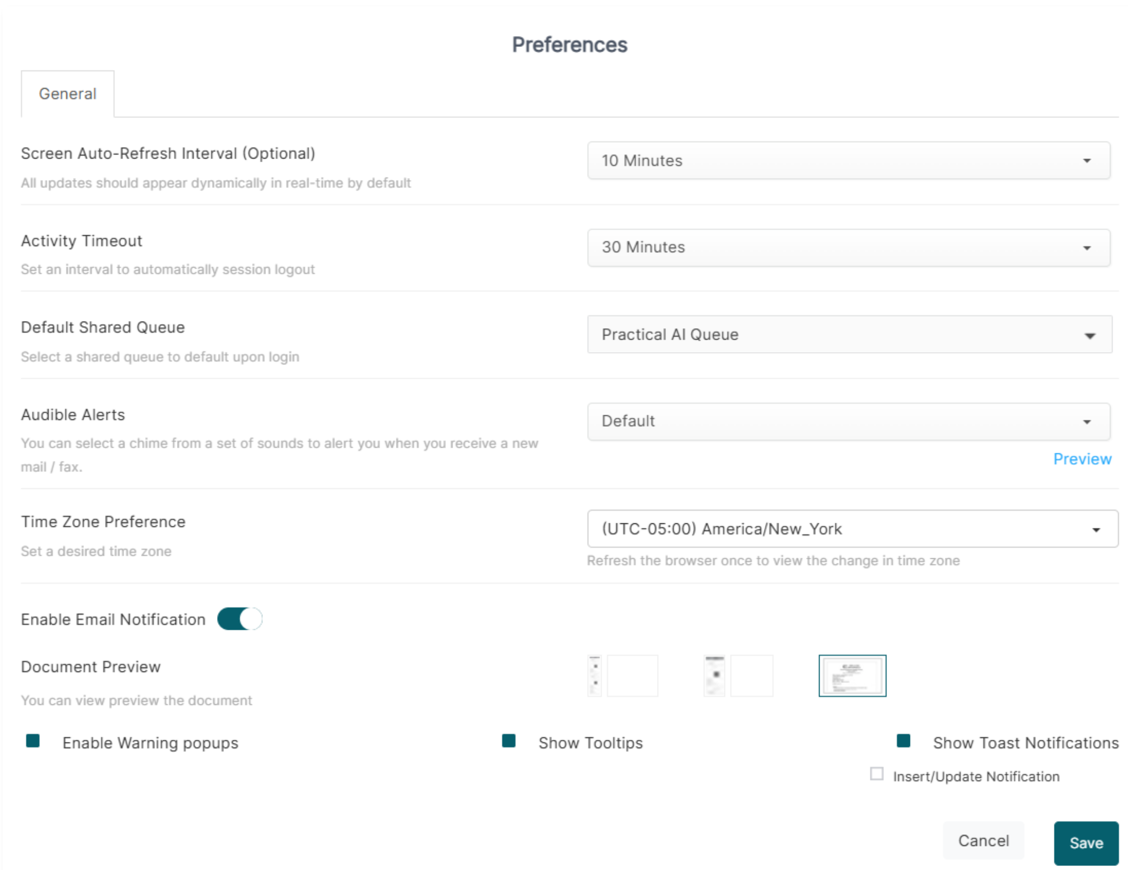
Upon saving, any updates you made to your view will be reflected in the **Grid View**.

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 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-logoff 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.

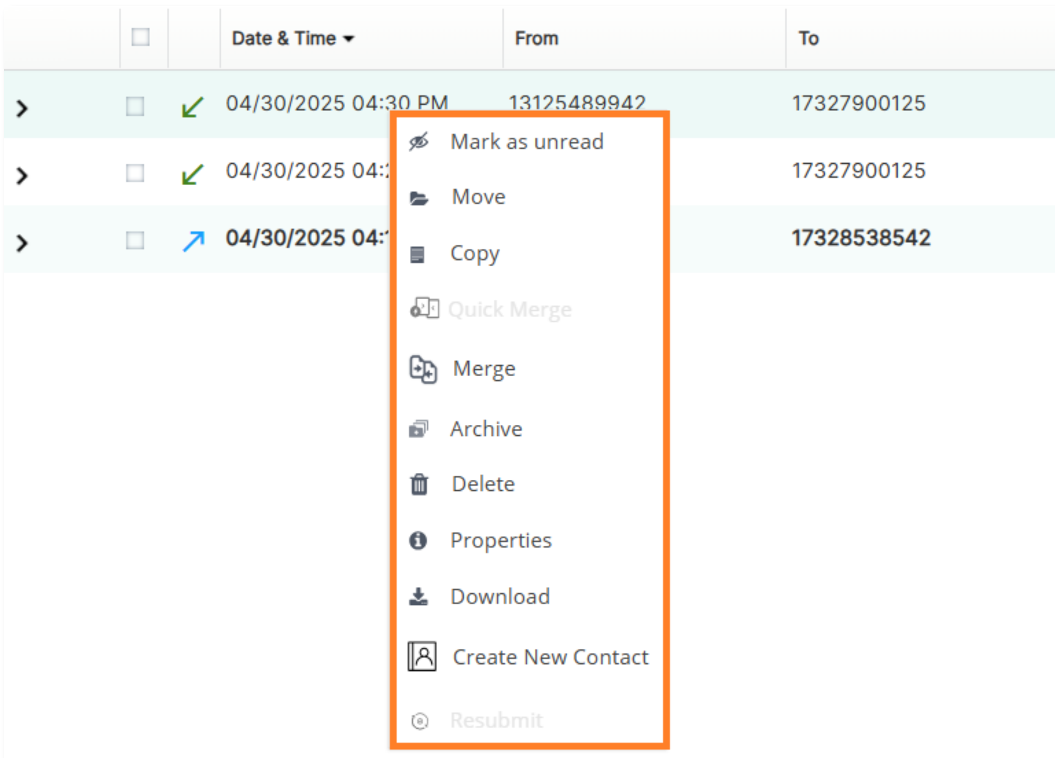
Show Toast Notification: This setting enables **pop-up notifications** when new messages are received.

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:

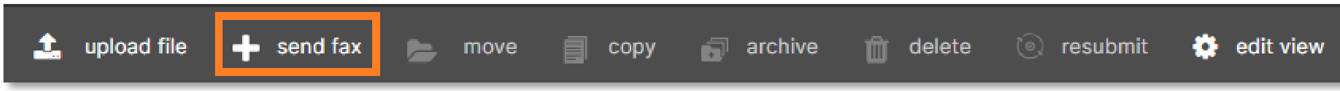
It is also possible to open a list of options for a document by **right-clicking** on that item in NEXTSTEP:



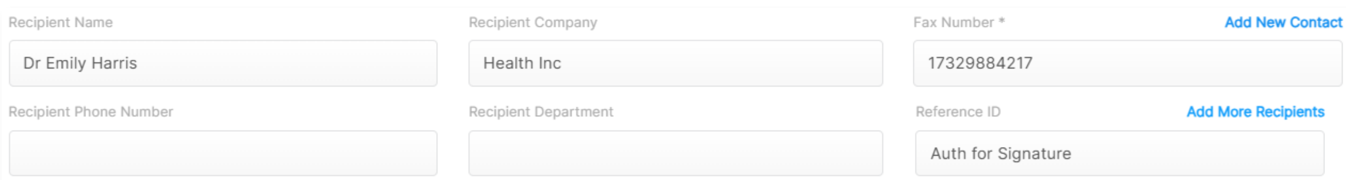
Options here may also **vary** according to what **permissions** are set for your organization, Shared Queue or user account

Send a Fax

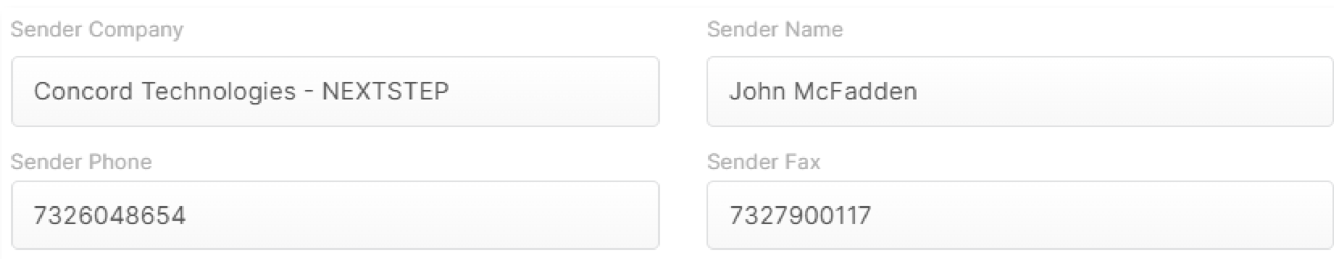
To send an outbound fax, click the **Send Fax** button in the Grid View to open the Create Fax form:



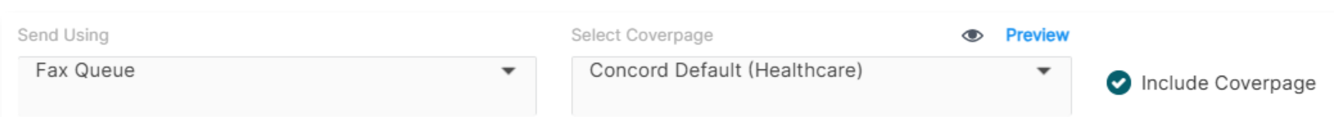
Enter the **Recipient** information and optional **Reference ID** for tracking. Only the recipient **fax number** is required. The Recipient Name will typically be added to the coversheet and fax header of your outbound fax:



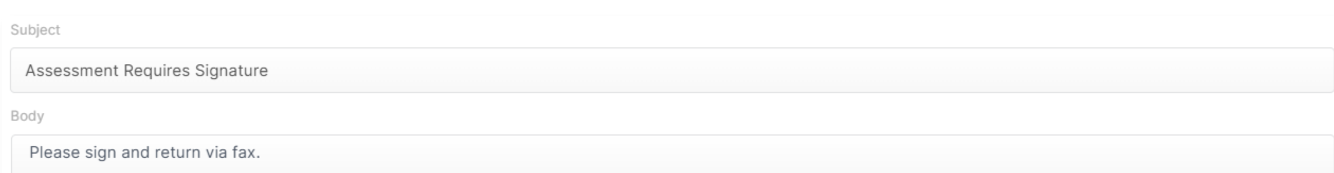
Sender information will be pre-populated based on your user account but can be updated. **Sender Name** will be populated to most cover page templates:



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:



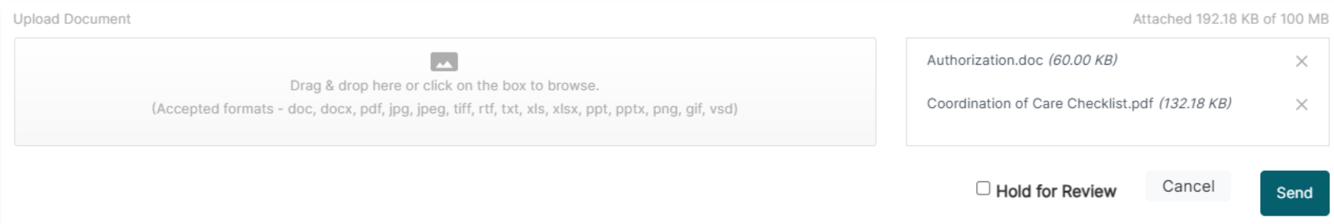
As long as **Include Coverpage** is enabled, the subject and body sections can be populated with information to add to subject and body of your cover page template:



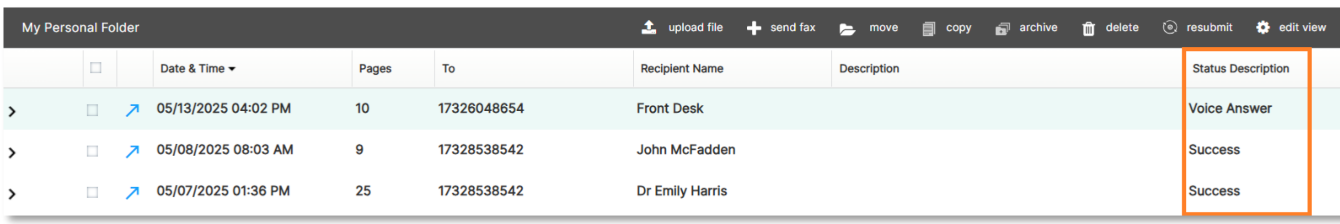
Note that it is **HIGHLY RECOMMENDED** that you **DO NOT** include any Personal Health Information (PHI) or

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.

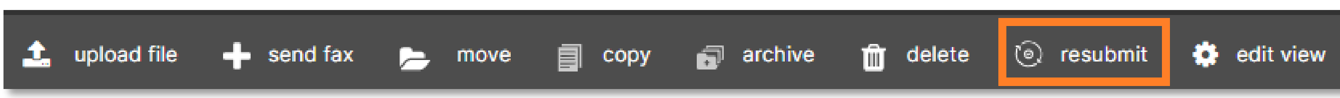
In most cases you must include **at least** one document that will be converted to a fax and sent to your recipient. You may choose to include multiple documents, in varying document formats. As long as you are uploading documents of the **supported formats** listed, you can mix and match multiple document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



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:



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

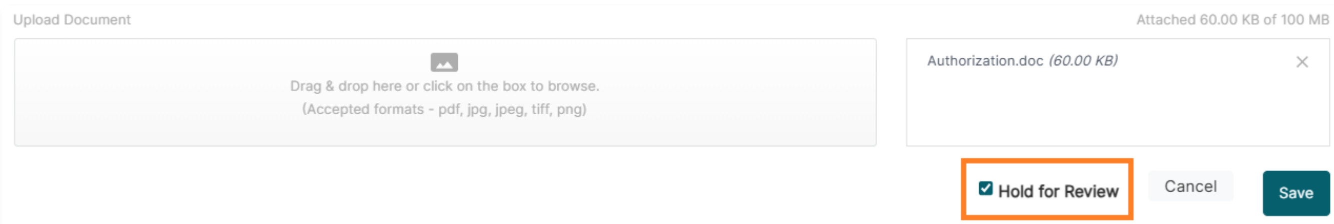


If you choose to **Hold for Review**, your fax will be held until it is released by the reviewer.

Hold for Review

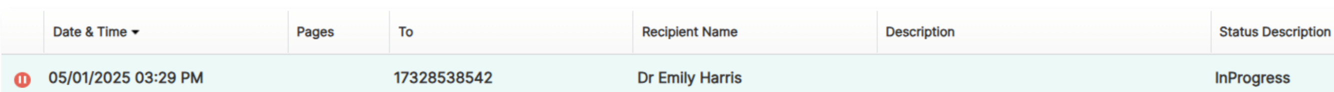
You can choose to hold an outbound fax for **review**, which places the fax transmission into a **paused** state to allow you or another registered user to validate the document and fax transmission details prior to the fax being sent.

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:

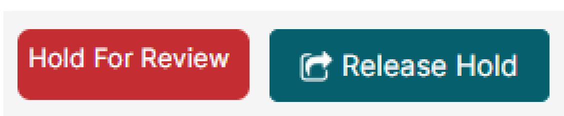


Note that, when you select Hold for Review when faxing from the **Personal Folder**, only you can review and release the fax from hold. When using Hold for Review in a **Shared Queue** setting, other users with access to the shared queue can release the hold.

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



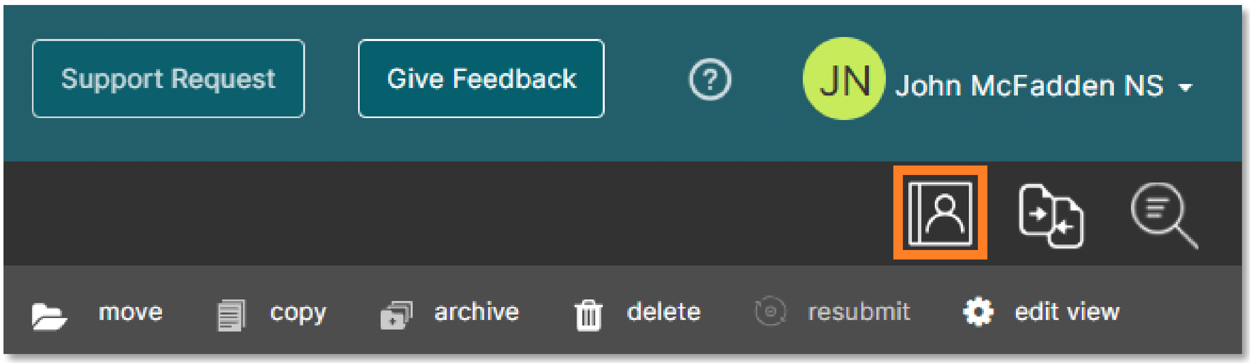
Items can be released from hold by **right-clicking** from the grid view and choosing **Release Hold** or **double-clicking** to open the item, where you can select Release Hold:



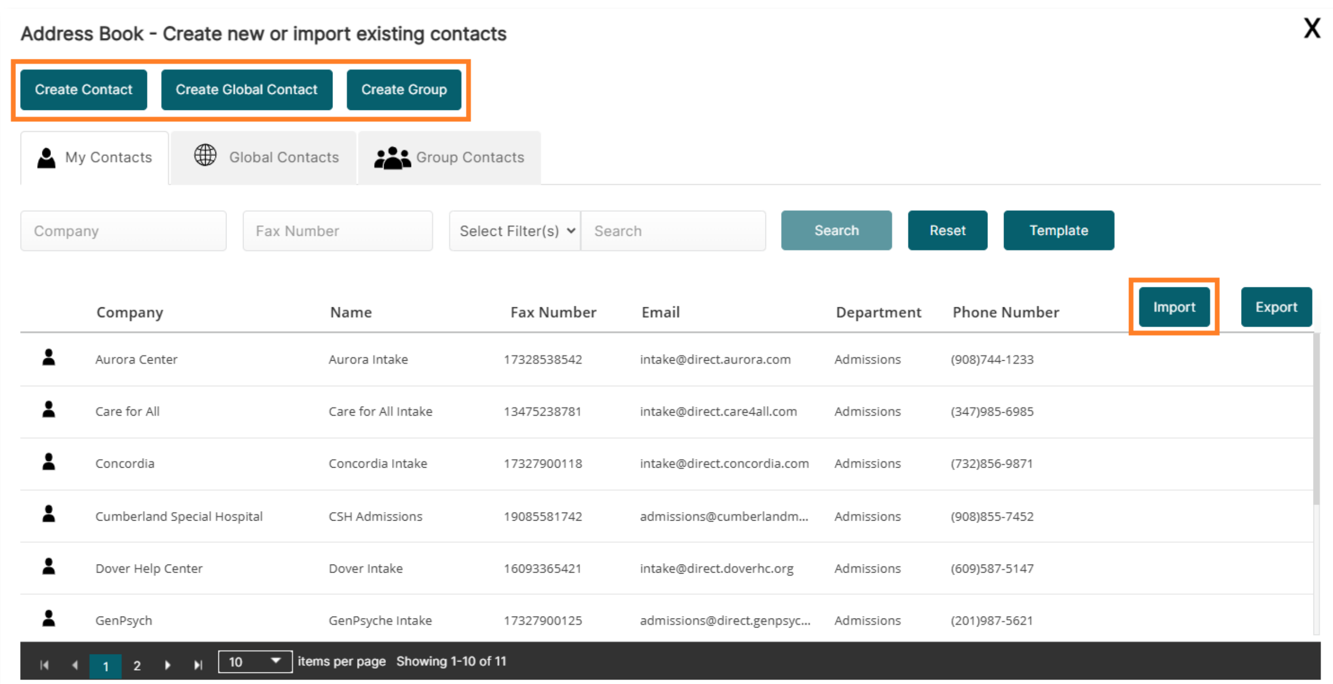
Address Book

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 A**ddress Book Icon** below your name in NEXTSTEP:



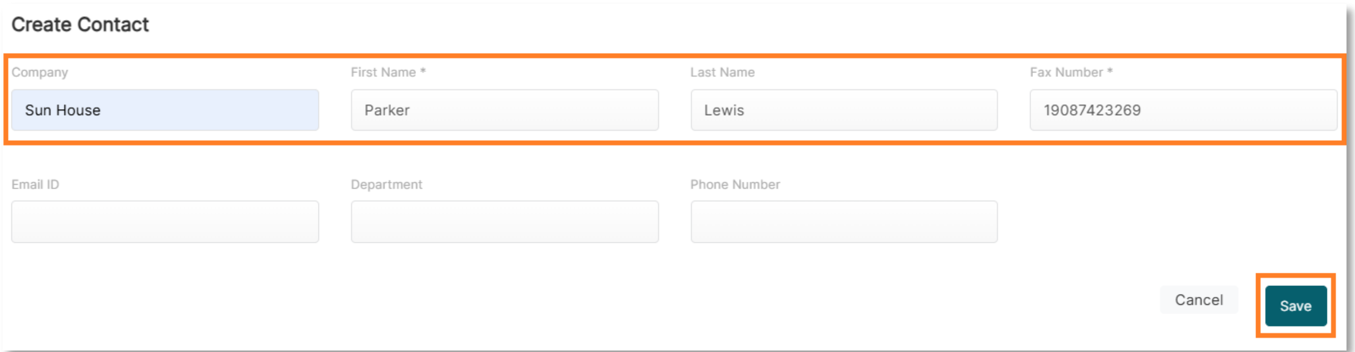
This opens your address book and the various ways that you can **create** or **import** contacts:



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**:



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**.

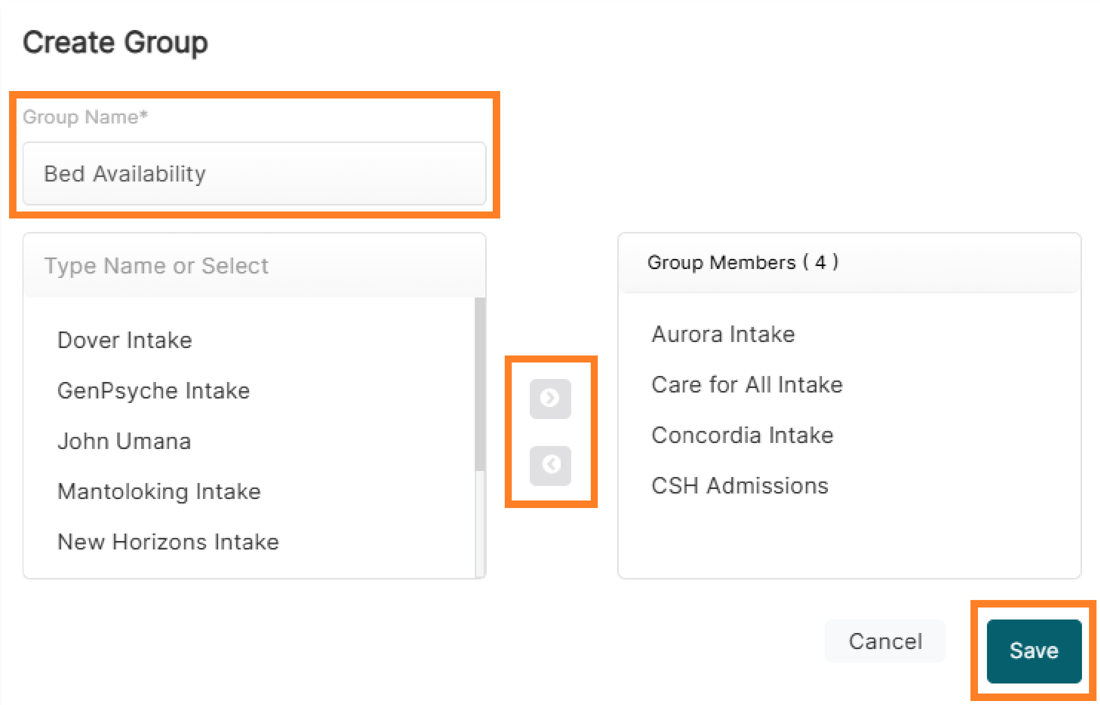
When all necessary data has been entered, click **Save** to store a contact for future use.

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

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:



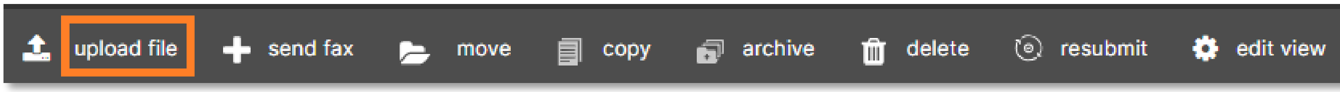
Here you can **name** your group and use the **arrows** the select contacts for inclusion in your group. When you have selected all necessary contacts, click **Save** to create your group.

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.

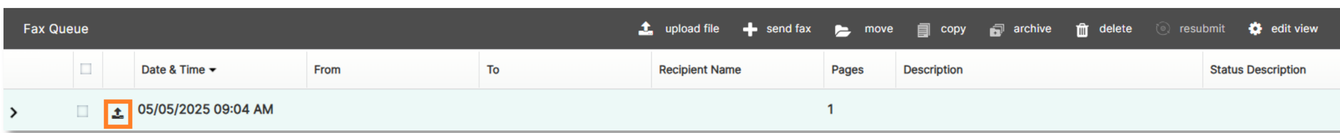
To upload a file, click the **Upload File** button on the NEXTSTEP toolbar:



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:



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 — upload file | send fax | move | copy | archive | delete | resubmit | edit view

Date & Time	From	To	Recipient Name	Pages	Description	Status Description
04/30/2025 04:30 PM	13125489942	17327900125		8		
04/30/2025 04:29 PM	13125489942	17327900125		13	Ready for review	
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 — send fax | restore | delete | edit view

Date & Time	From	To	Pages	Description	Status Description
04/10/2025 08:45 AM	13125489942	17327900125	8	Waiting for labs	

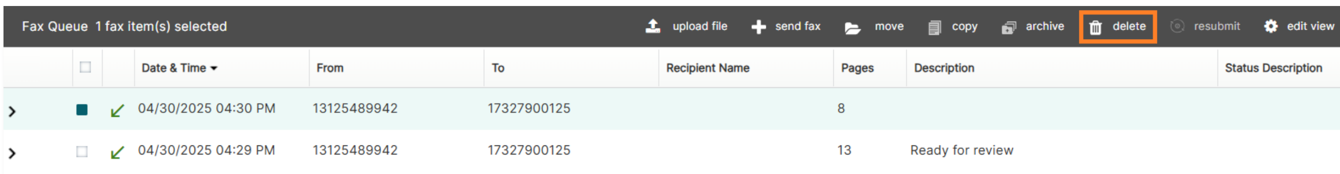
A **restored** document will be returned to the folder it was archived from.

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.

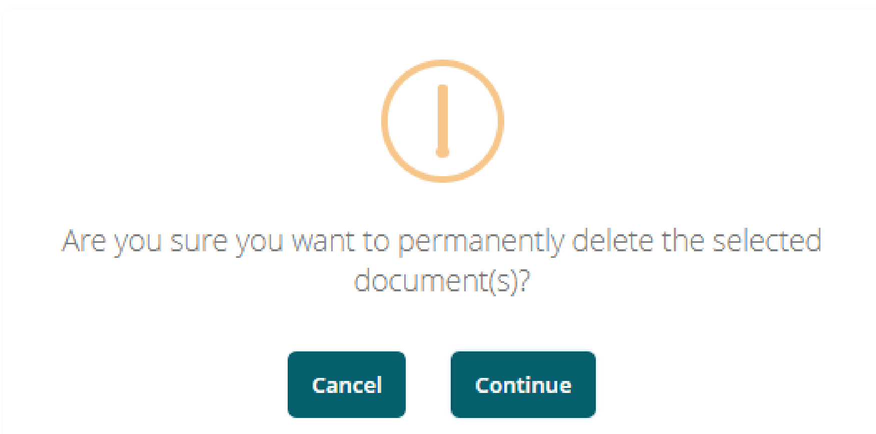
Delete

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:

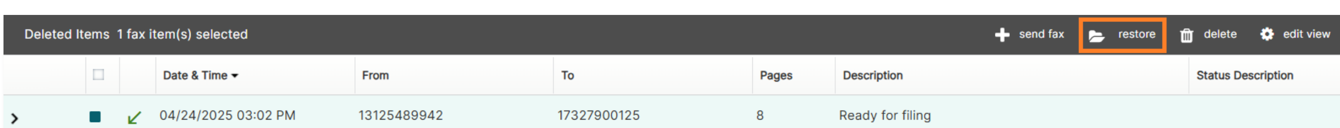


If you want to permanently **purge** a document from NEXTSTEP, that document must be in the Deleted Items folder. To purge it, navigate to the document and select **Delete** as per the above. If the document is in the Deleted Items folder when you delete it, you will see the below **notice**:



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:



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.

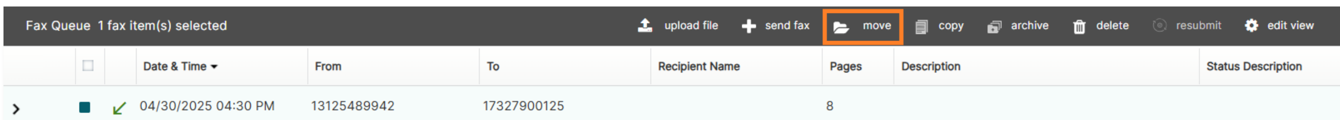
NEXTSTEP administrators should take care to review **Delete** and **Purge** settings to ensure proper disposal of documents.

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.

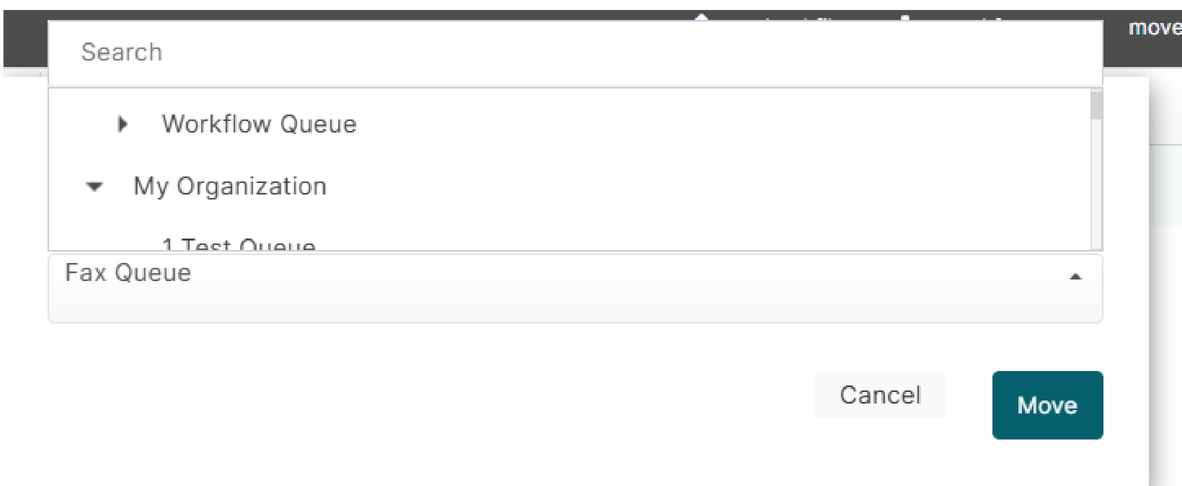
You can move a document to a Shared Queue you have direct access to by **dragging** that item to that Shared Queue in the **Grid View**.

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:



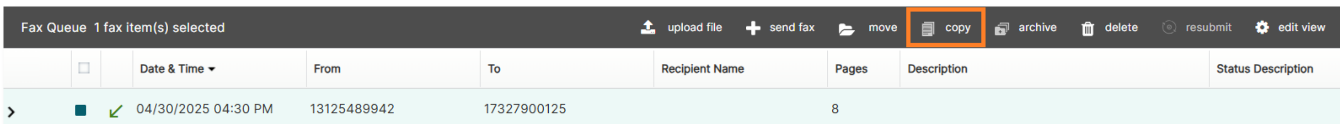
When you have selected your destination, click **Move** to complete. When documents are moved, they will be **removed** from the current Shared Queue or Folder and **added** to the destination Shared Queue or Folder.

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.

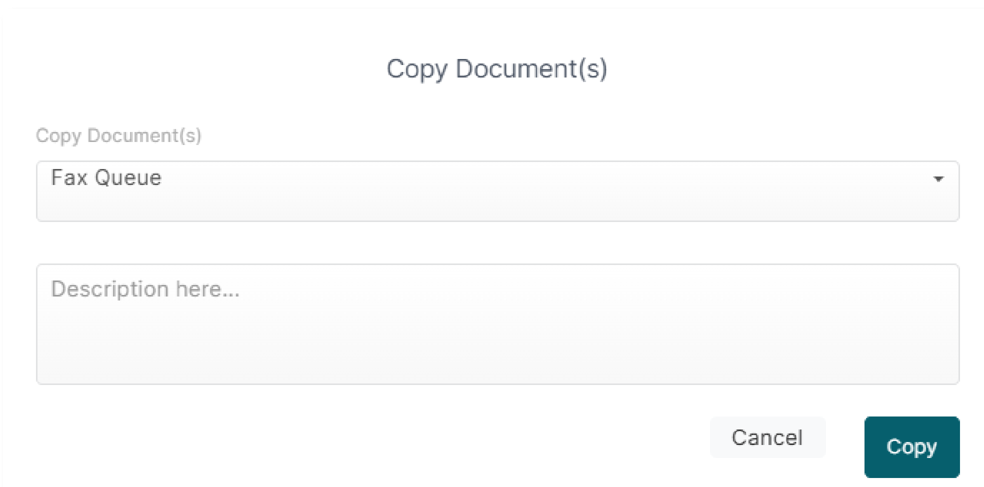
Copying a file means that **one or more** copies of that document will be placed in the designated Shared Queue(s) or folder(s) you are copying to, while the **original copy** will remain in the Shared Queue or folder you are copying from. It is possible to copy a single document to **multiple** destination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



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).

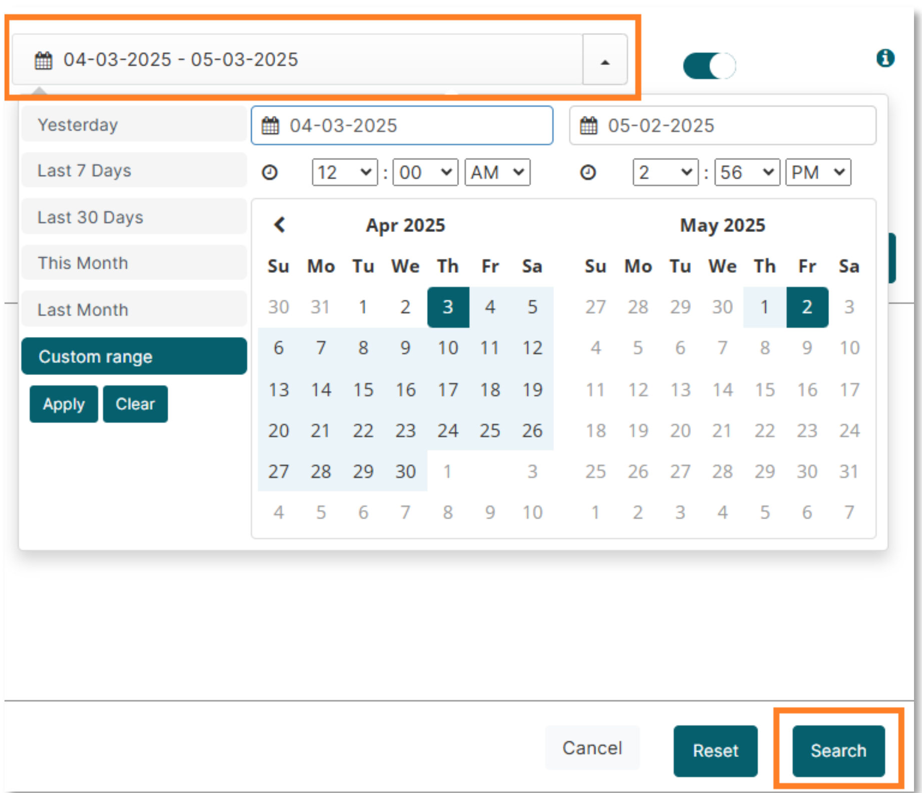
Metadata Search

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.

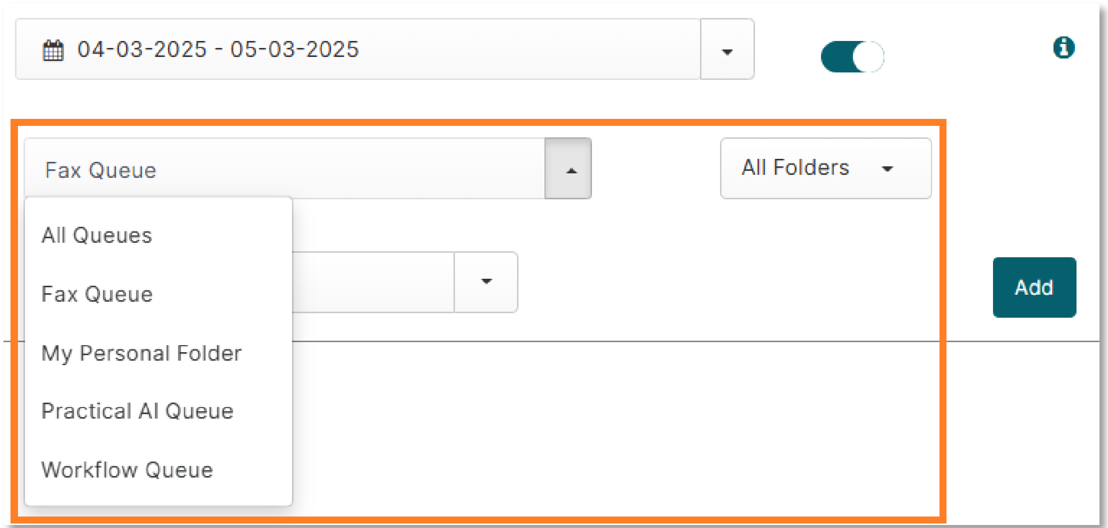
By default, the **Grid View** will display documents that arrived in the queue within the last **30 days**. If there are no documents within this timeframe in the queue, you will be prompted to load the most recent documents or may **search** for specific criteria.

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

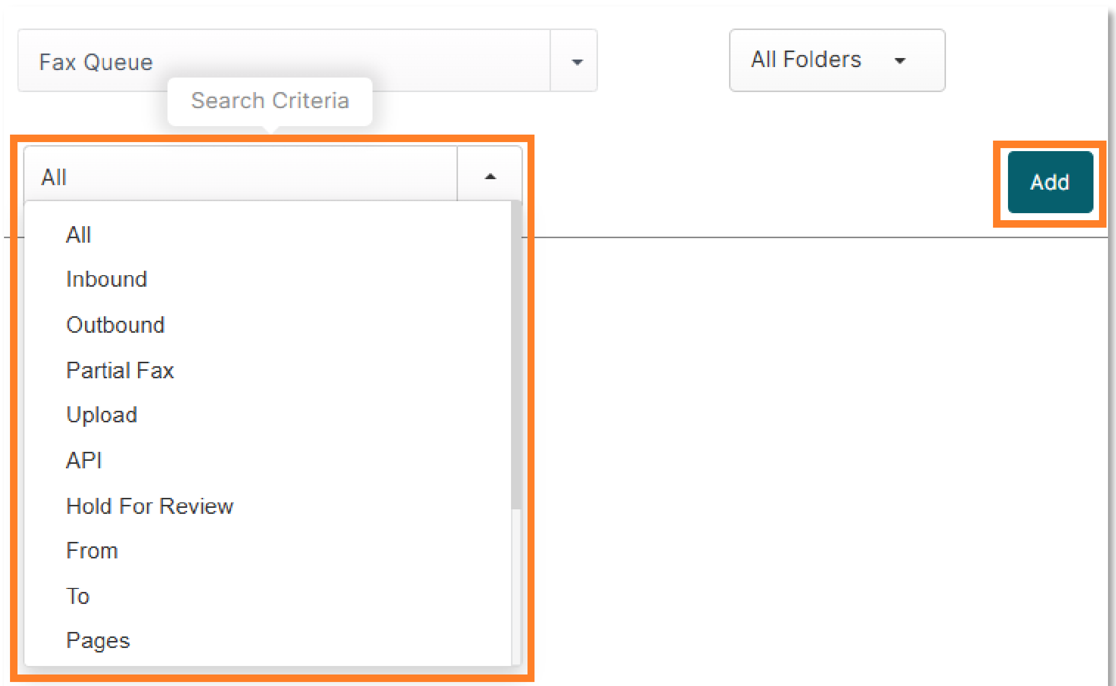
This exposes a panel on the right side of the screen with options to build search criteria. If the **date range** is all that is important, click the calendar to choose the appropriate dates and click **Search**:



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:



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



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:**

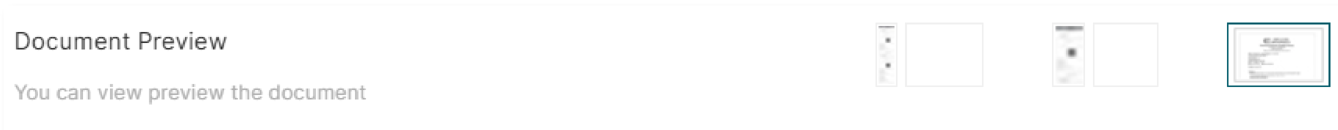
Note that an additional search option can be enabled on a NEXTSTEP account. NEXTSTEP's **Advanced Search** allows you to search for documents based on the text contained in those documents. For more information, please contact your Concord Account Representative.

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

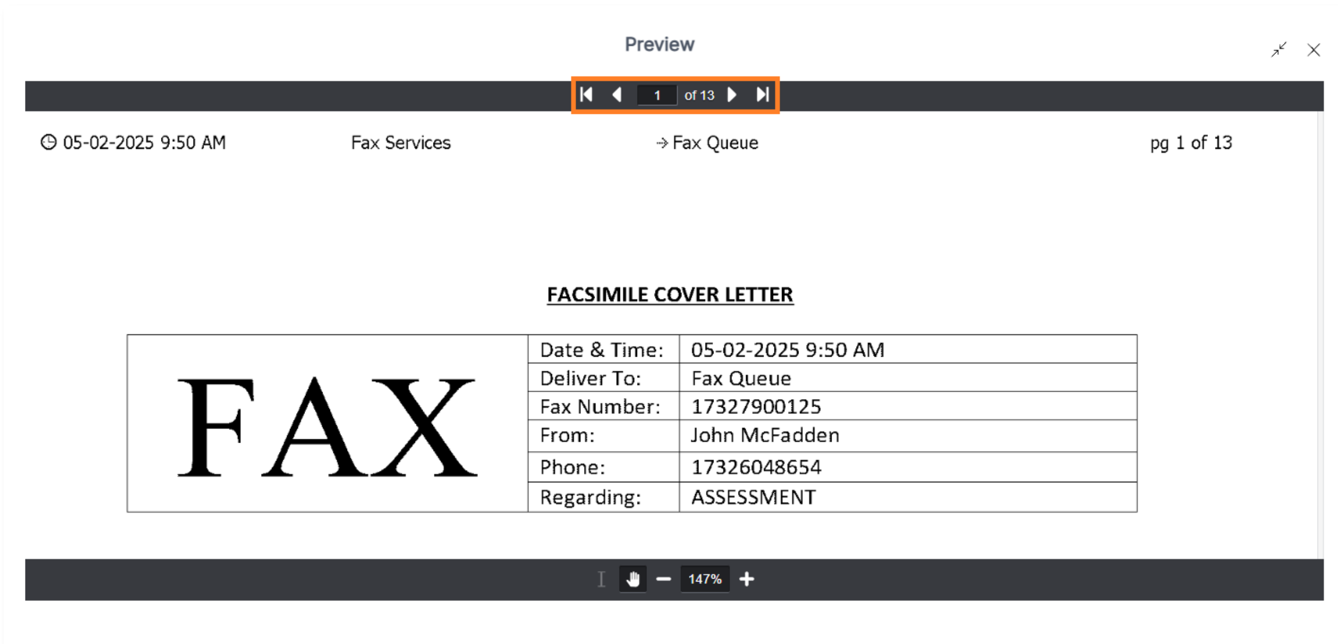
Document Preview

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:



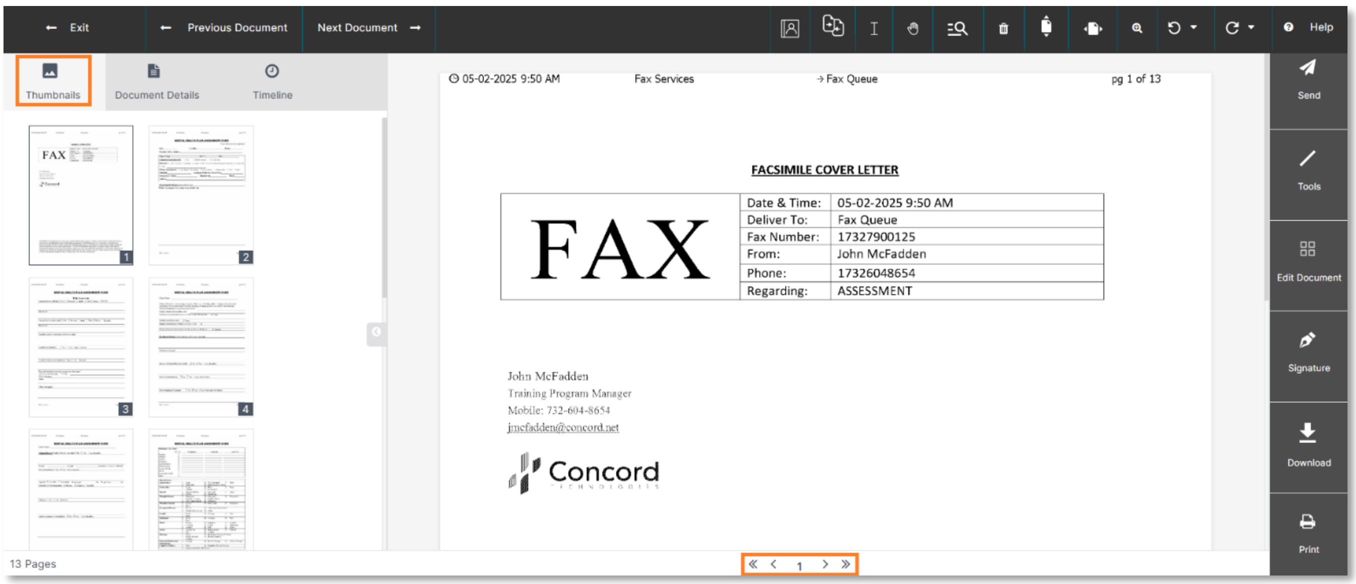
Via Document Preview you can view **all pages** of the document by scrolling or clicking the navigation icons.

Document Viewer

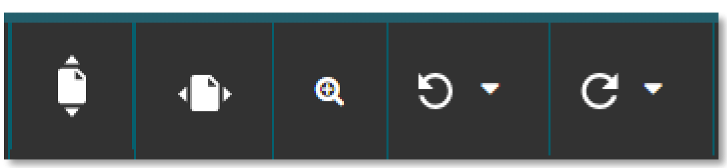
To open a document from the Grid View, **double click** on the item or single click and then click Open to access the **Document Viewer**.

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.

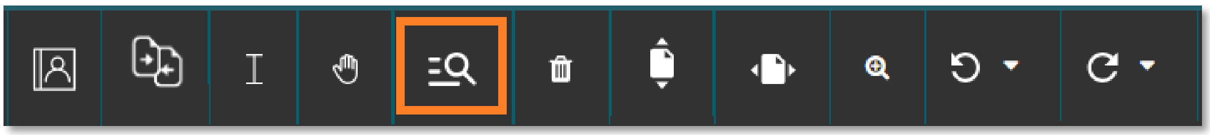
To choose the specific size of the document on your screen, click the **magnifying glass.**

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

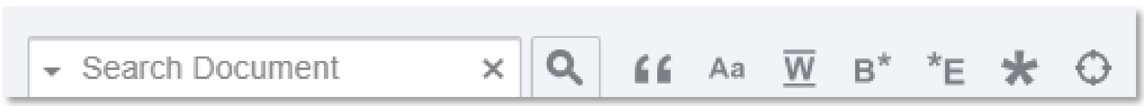
Document Text Search

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:

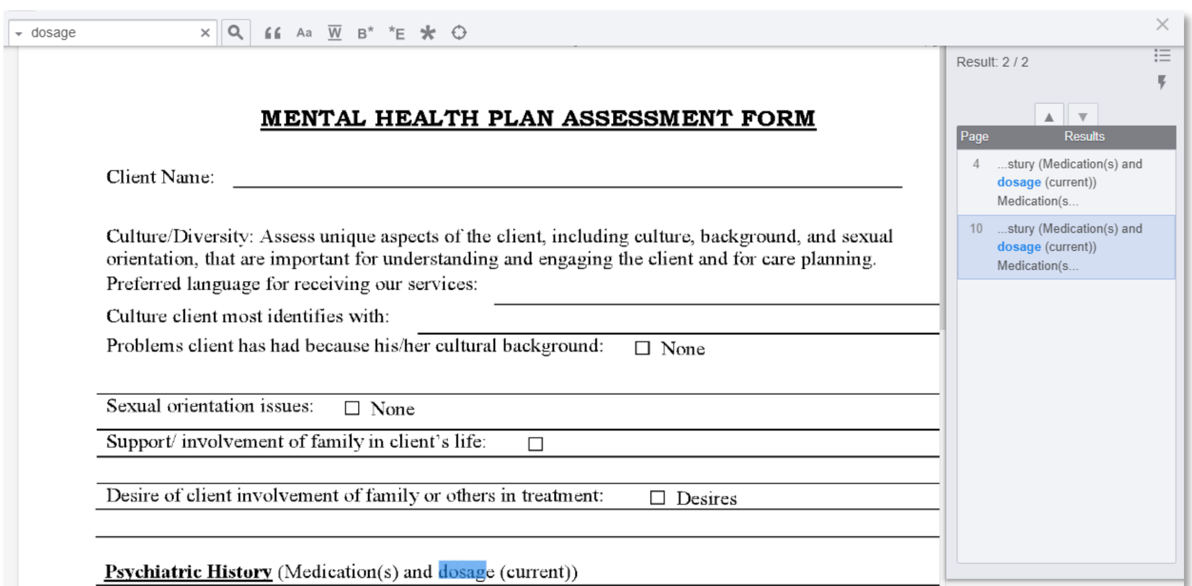


This will display a text window and the **options** that may be used to search within documents:



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.

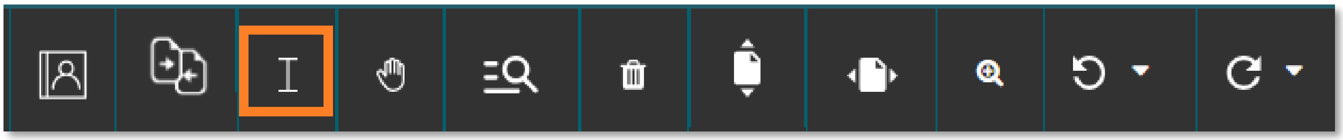
After performing the search, NEXTSTEP will display the results with the option to **click on each result** to jump to that result in the document, as per below example of a search for the word 'dosage:'



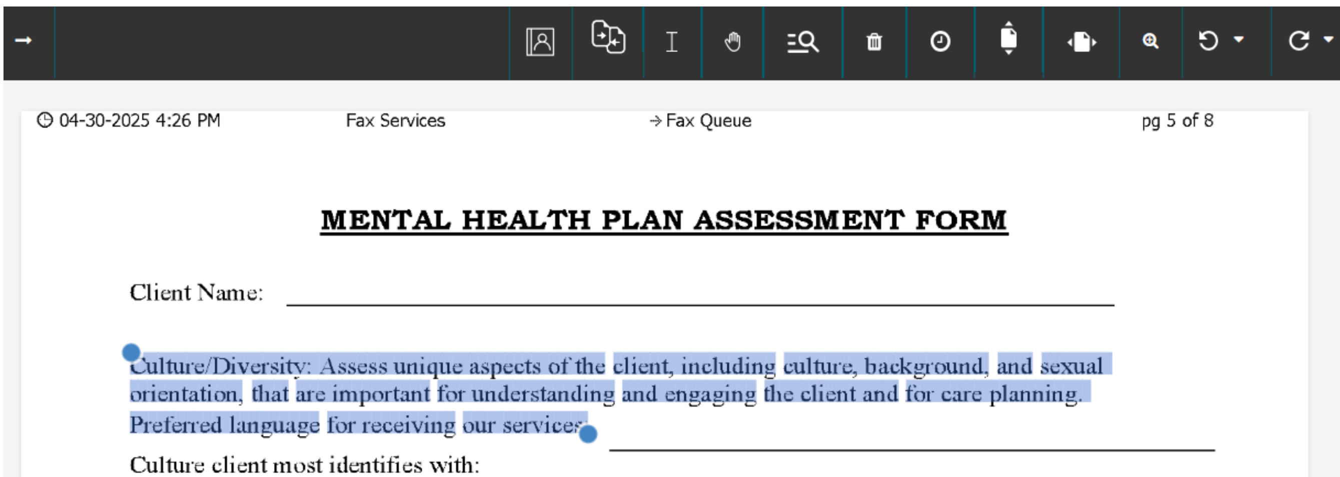
Copy / Paste from Document Viewer

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:

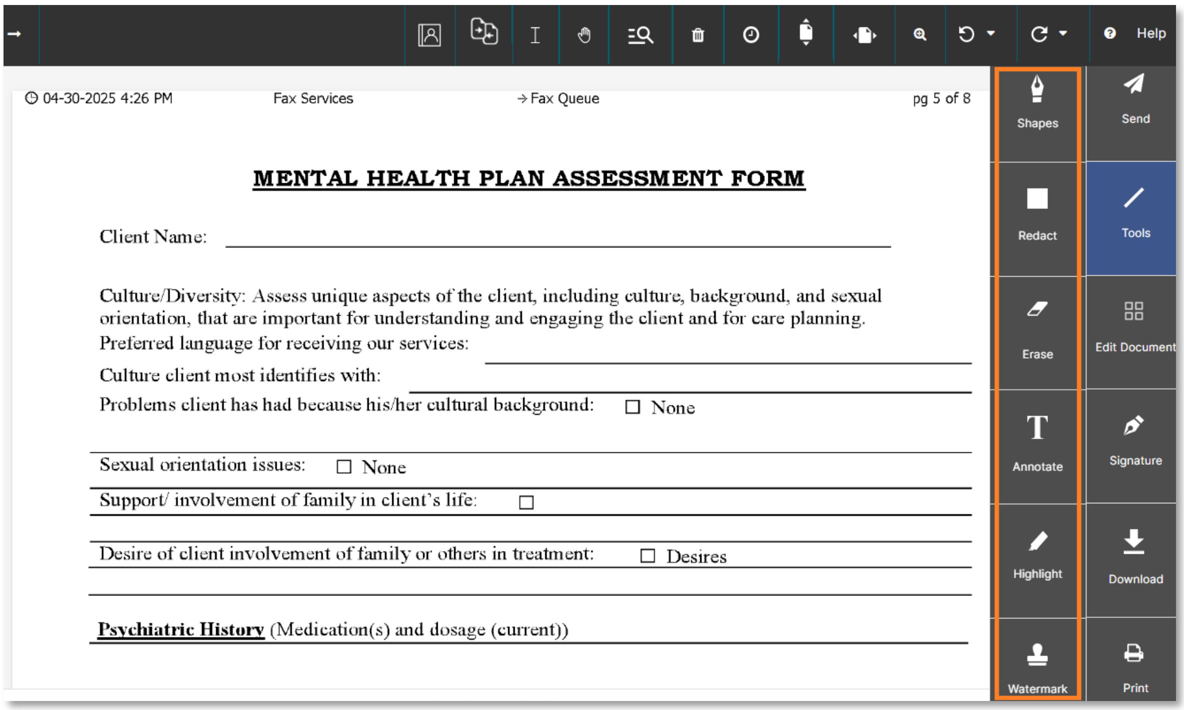


Following selection, use **CTRL+C** to copy the text from the document and then you paste this within NEXSTEP or to external documents and systems.

Document Editing Tools

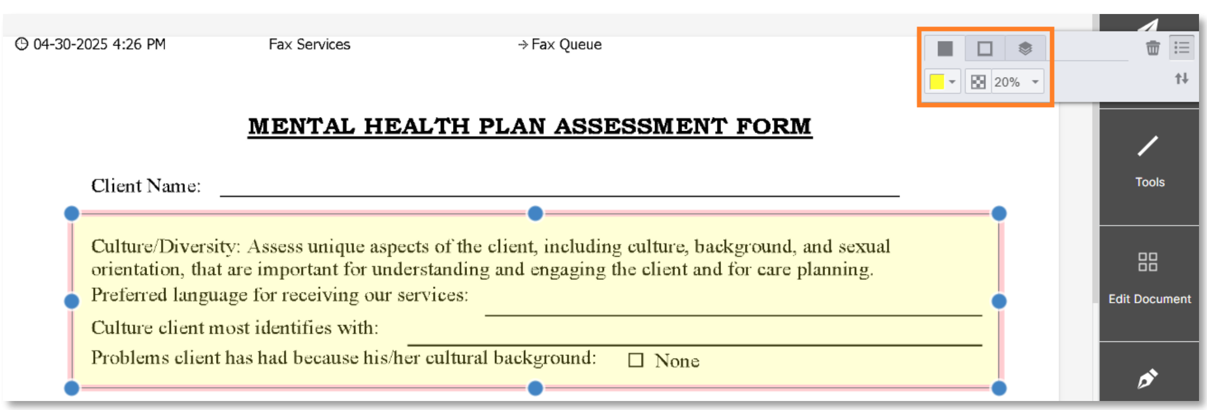
NEXTSTEP provides several ways of **editing documents** that have been uploaded or received into Shared Queues and Personal Folders. This includes editing the content on the pages of your documents with **annotation**, **redaction** and **highlights**.

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



Shapes

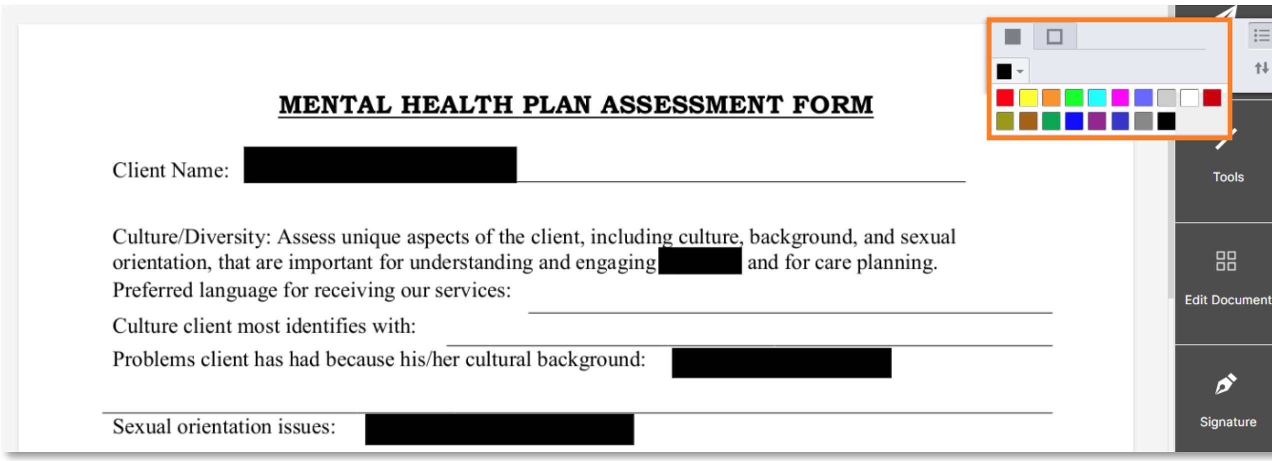
The Shapes option allows you to draw a **rectangle**, **oval** or **freeform shape** across an area of the document:



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:

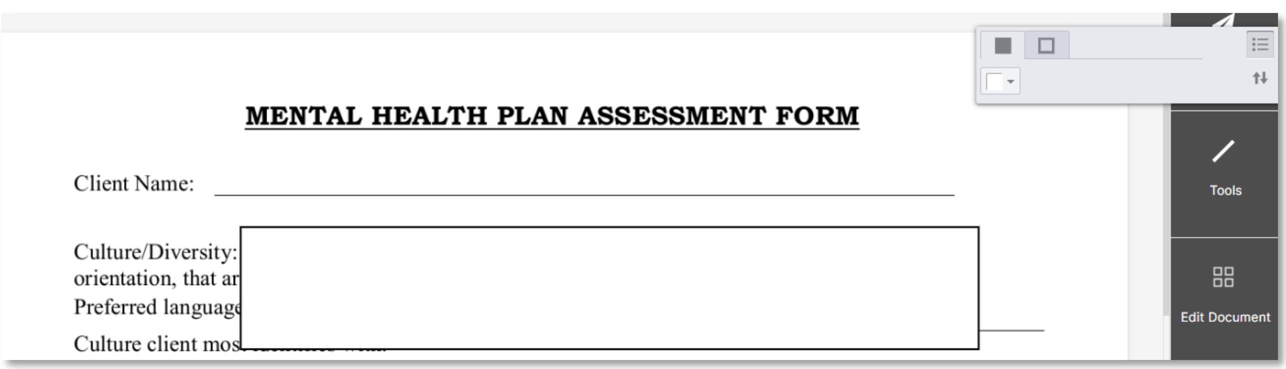


Redaction can be configured for **color**. Regardless of the color used, when redaction is applied, the text obscured by that redaction will no longer be **visible** or **searchable** within that document.

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:

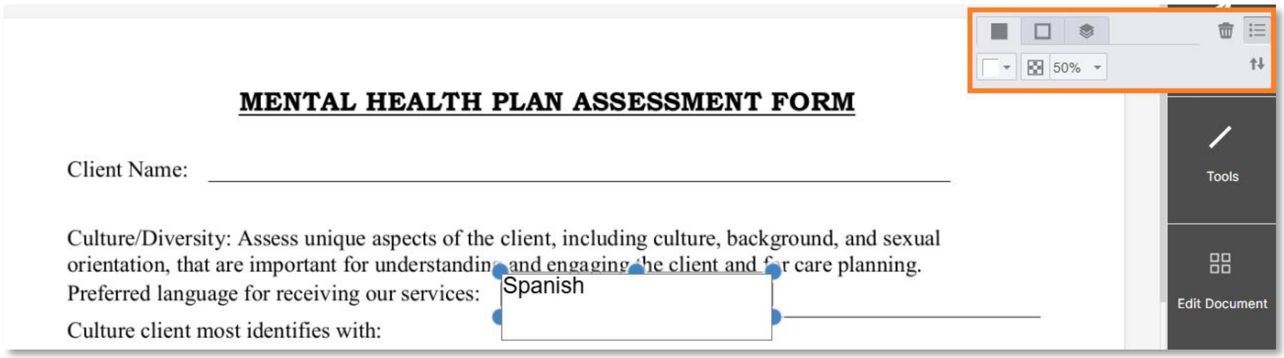


When text erasures are applied, the text that has been obscured will no longer be **visible** or **searchable** within that document. The white space may be overwritten using **Annotate.**

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

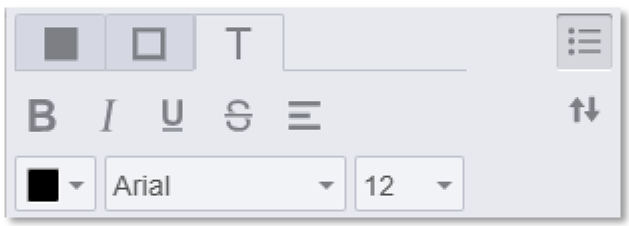
Annotate

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



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

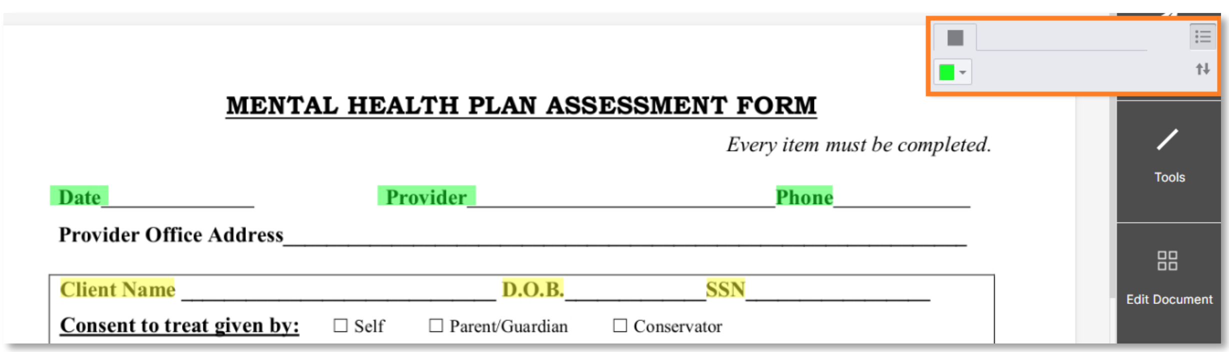
Formatting may be applied to your text including **color**, **font** and **font size**:



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

Highlight

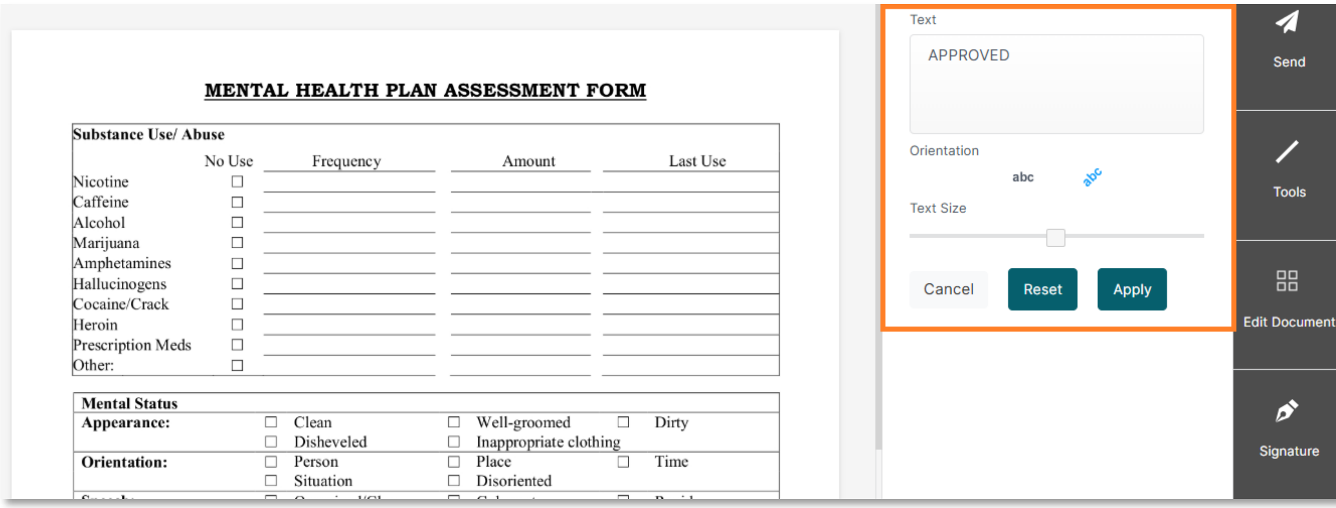
Highlight allows you to select text and **highlight** this in a variety of **colors**:



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.

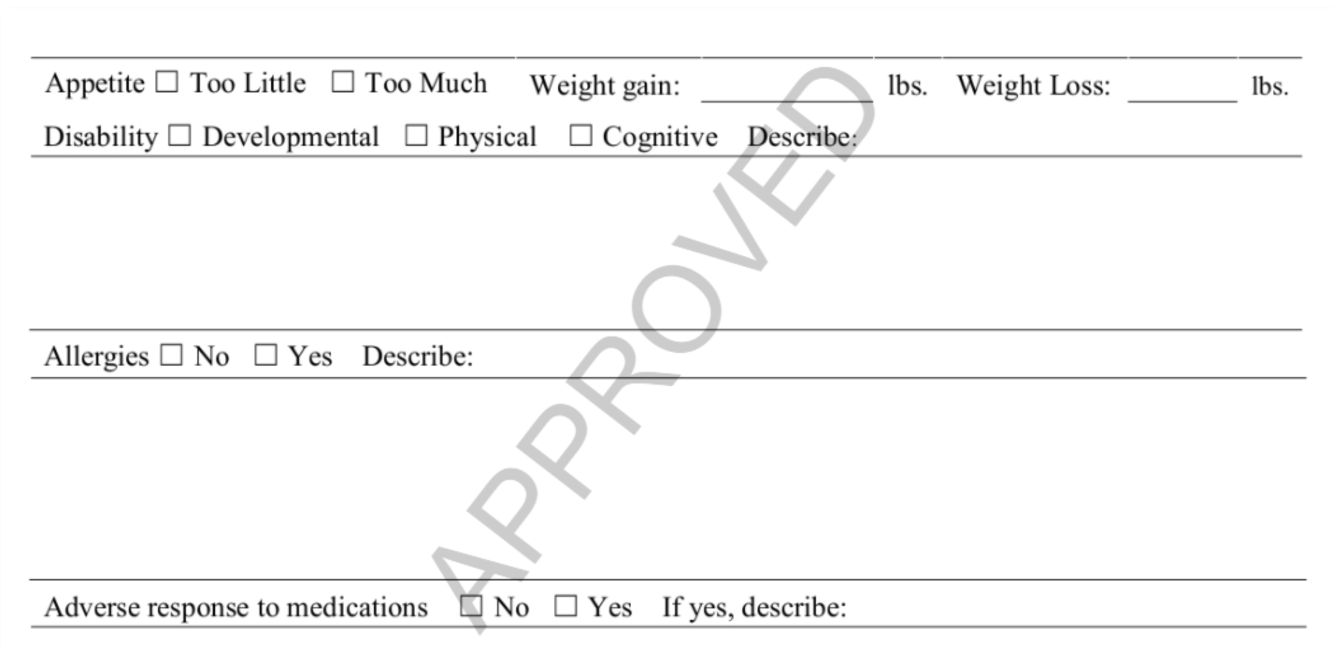
Watermark

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



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**:



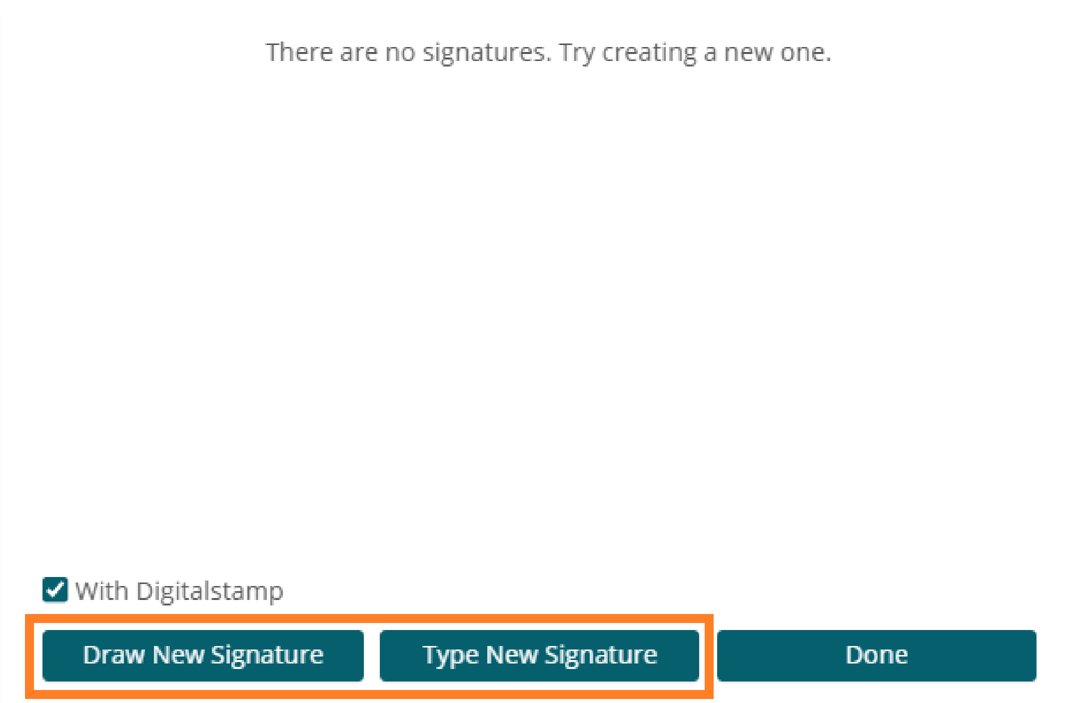
Signatures

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:



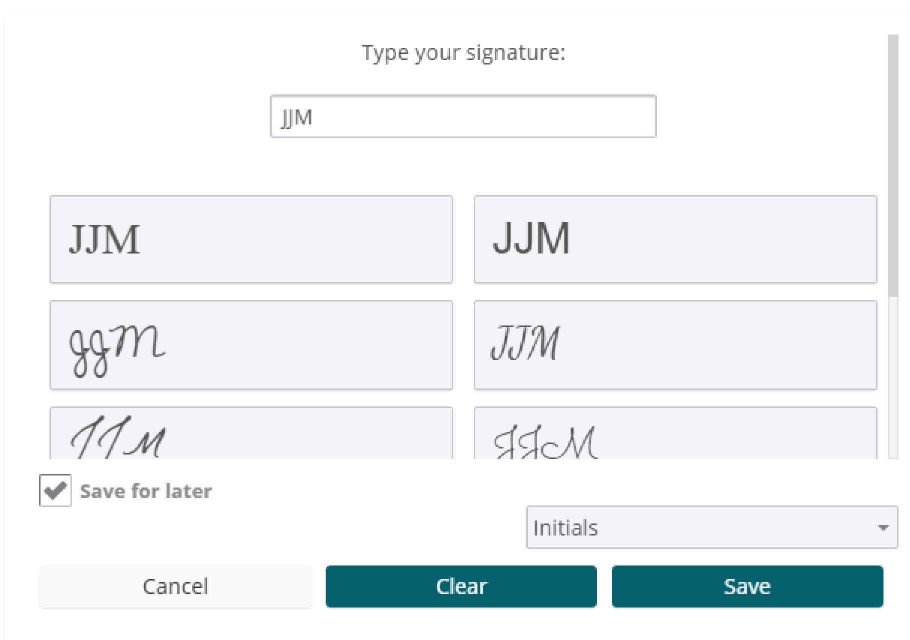
Here you can select which **type** of signature you wish to create and then **Draw** or **Type** a new signature to generate.

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**:

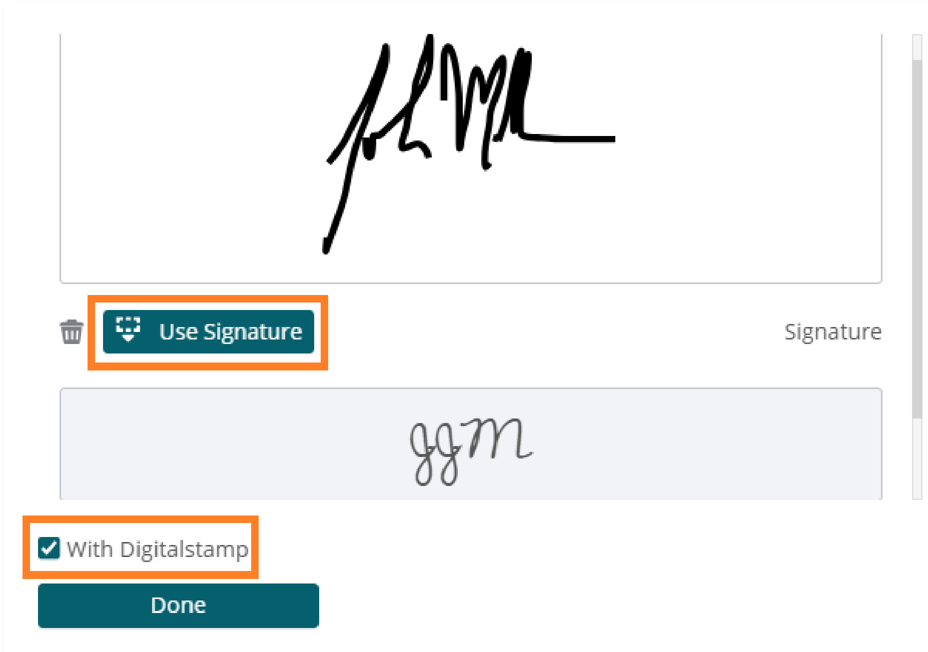
Use your **mouse** to draw a signature. **Clear** as needed to redraw.

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**:

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.

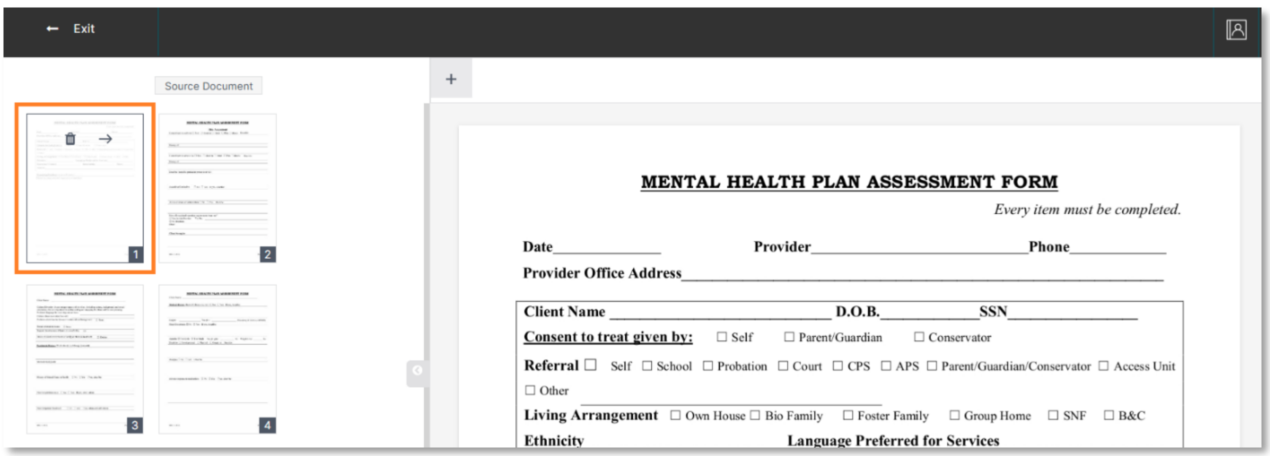
Edit Document - Split

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.

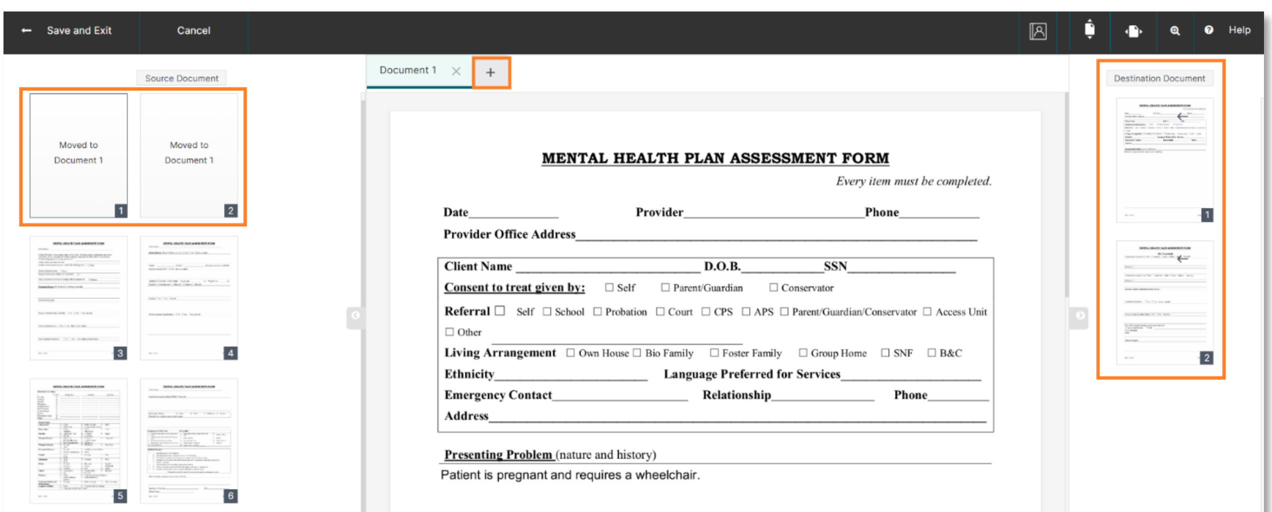
Edit Pages (Split / Delete)

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**:



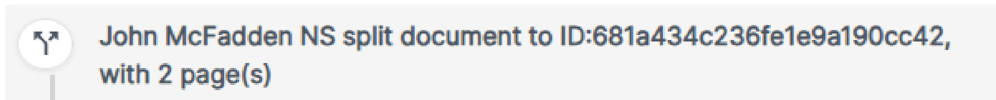
As the pages are **moved**, they will be displayed in the **Destination Document**:

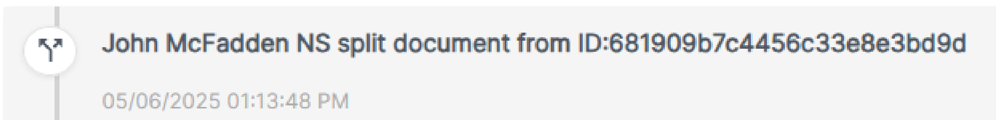


The **plus sign icon** in the middle panel allows you to add **new Destination Documents** for the purpose of splitting a Source Document into more than two parts . You can split a document into as many parts as that document contains pages, if needed. Note that **one** page must always remain with the **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:





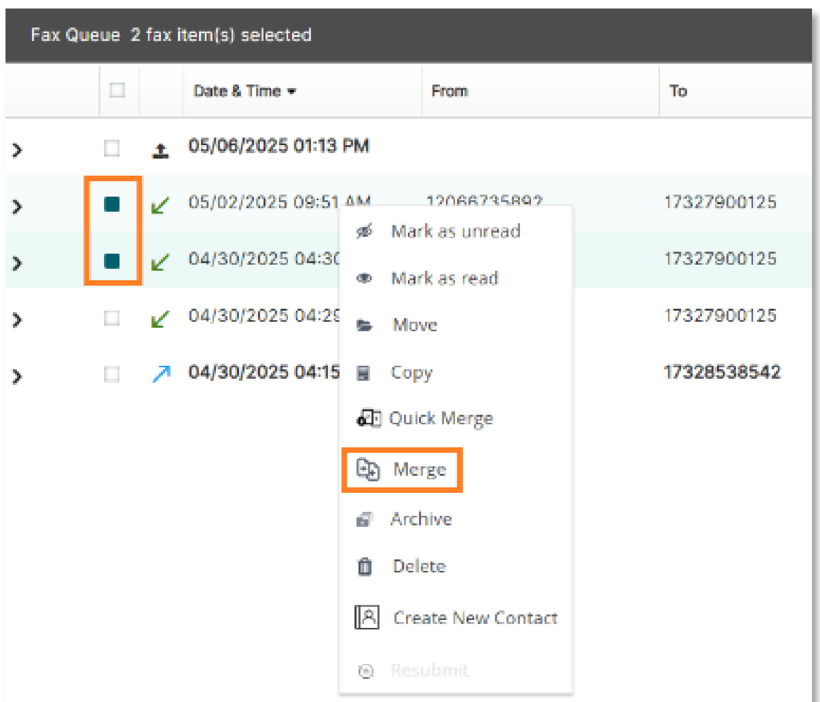
Edit Document - Merge

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

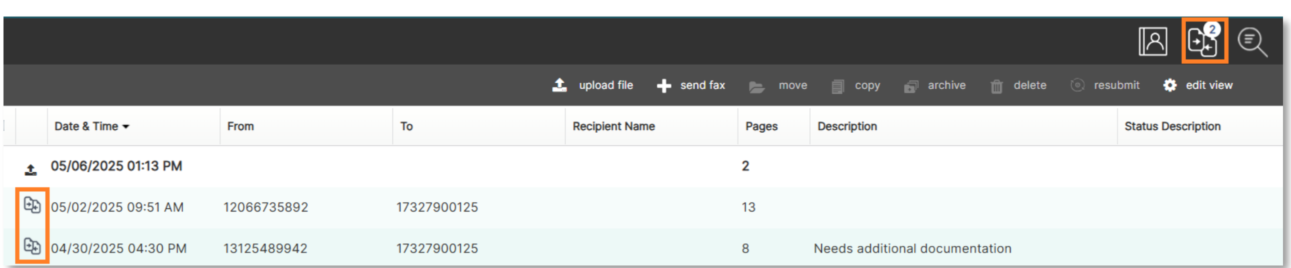
- **Merge** allows you to combine two or more separately received or uploaded documents into one using a **Merge Cart** to manage the documents being prepared for merging.
- **Quick Merge** lets you select multiple documents from the grid view and merge them together via a **single click**.

Merge

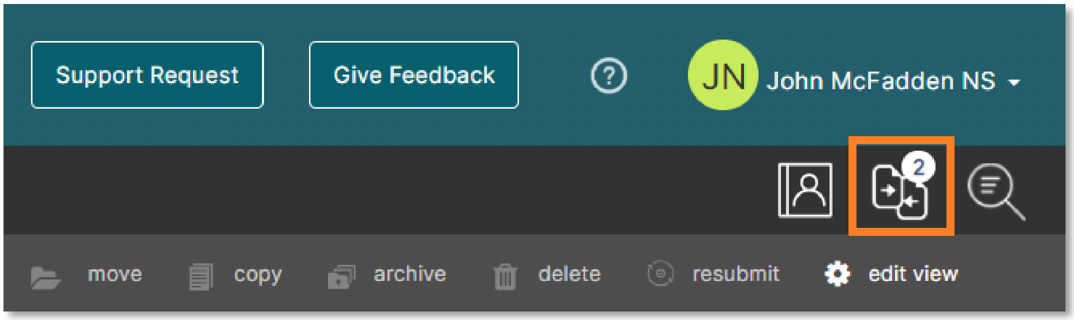
A Merge can be started from within the **Document Viewer**, by clicking **Edit Document / Merge** or by clicking the check box next to the documents you want to merge in the **Grid View**, right-clicking and selecting the **Merge** Button:



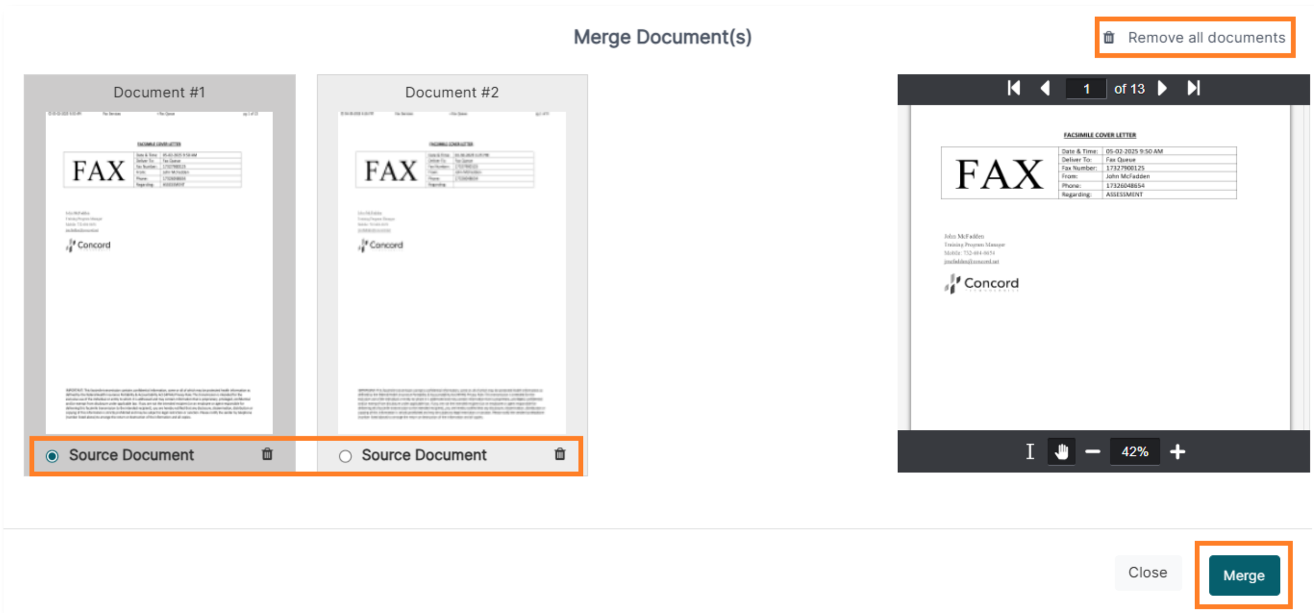
After clicking Merge, a **merge icon** appears next to each item to be included in the merge. The toolbar shows the number of documents that have been added to the **Merge Cart**:



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.

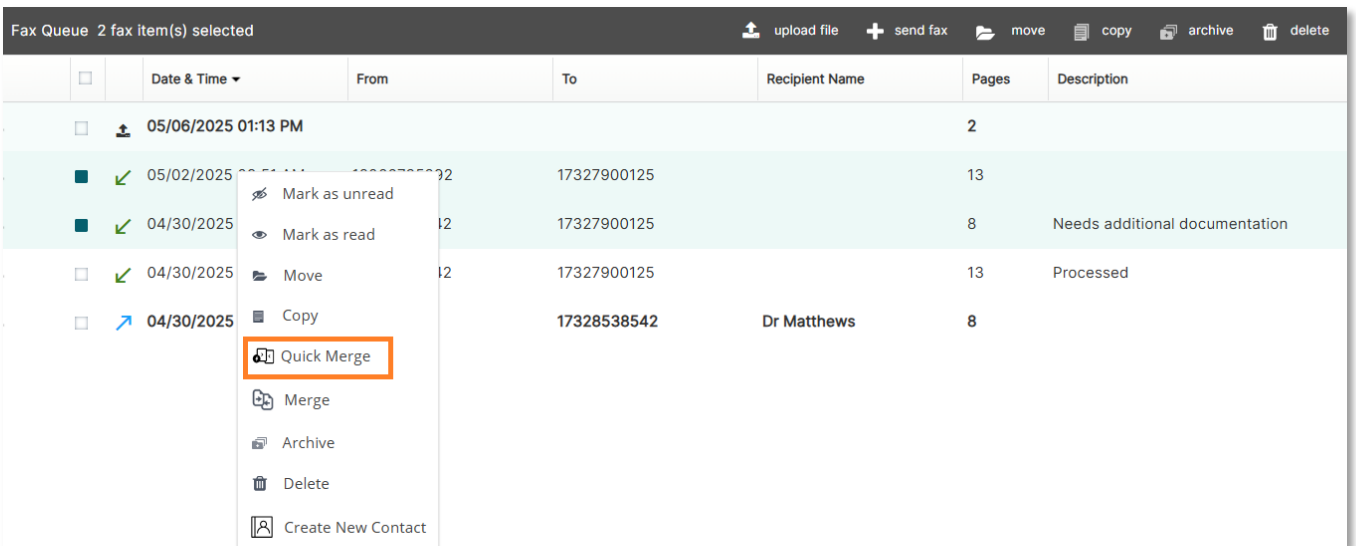
When you are ready to merge your documents, click **Merge** and your documents will be merged with the **Source.**

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

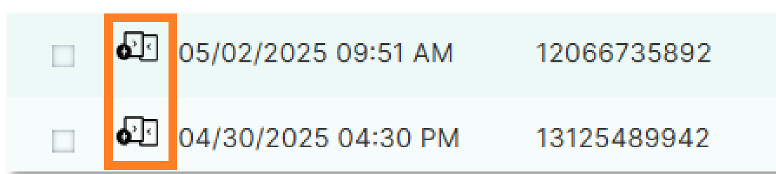
Quick Merge allows you to merge items together with fewer clicks, but **less control** over what document will be the **source**.

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

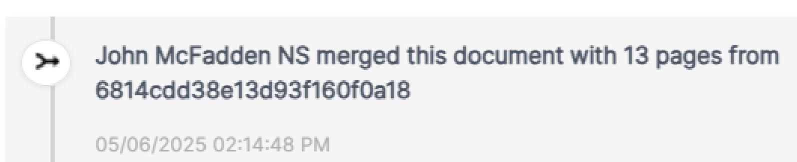


Upon clicking you will be **notified** that a Quick Merge has been **initiated**.

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:



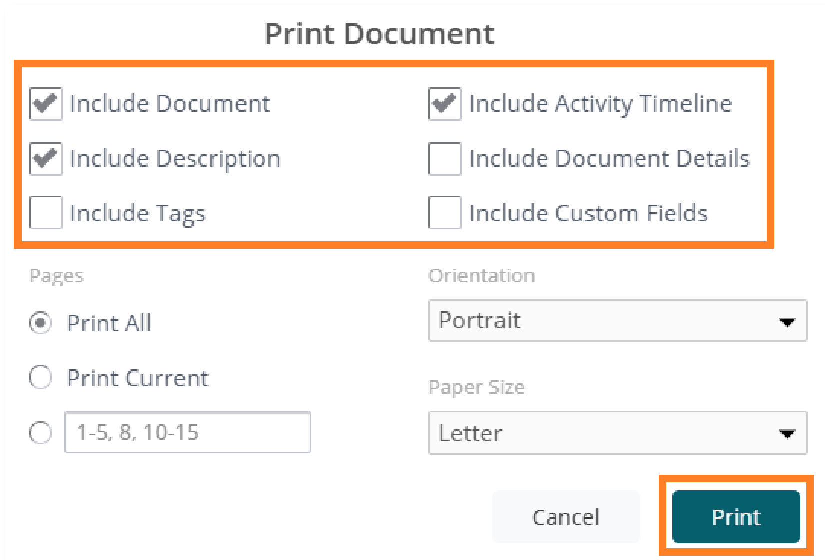
Once any merge is completed, the **Source** document will contain a record of the merge in the **Timeline**:



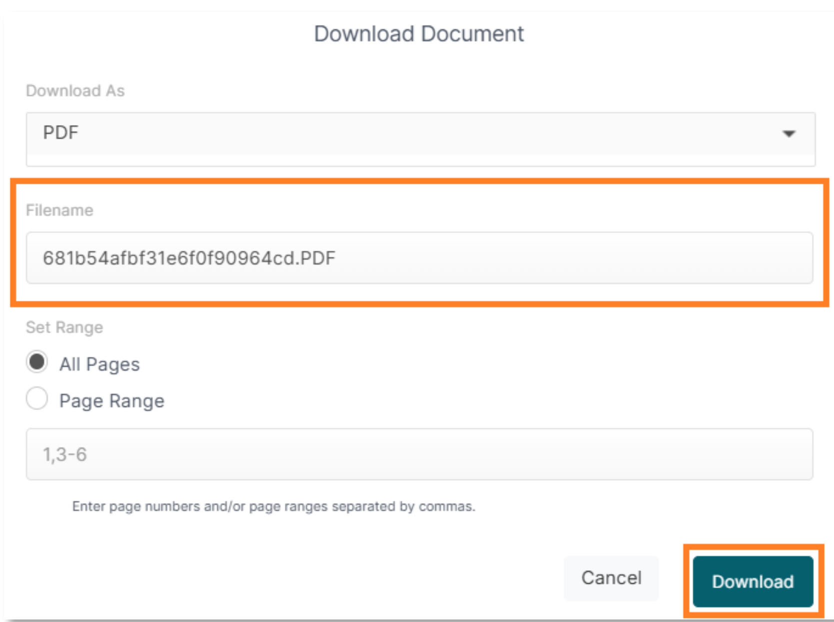
Printing and Downloading Documents

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**:



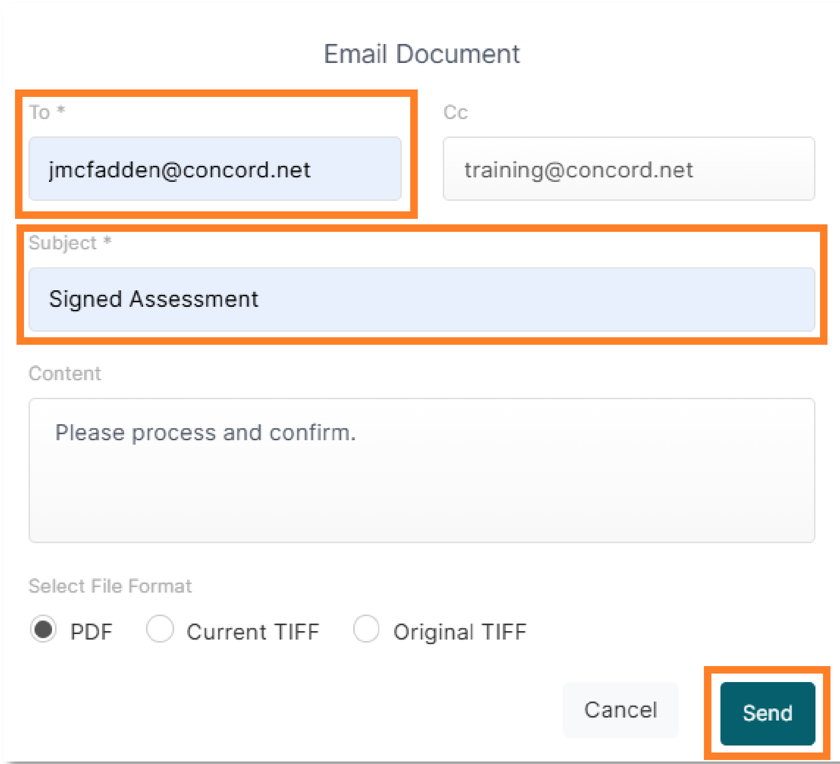
To **Download** documents from the Grid View, **right-click** an item and select **Download**. A Download menu will be displayed, allowing you to save the document according to your browser configuration. The given **filename** can be adjusted from Concord's NEXTSTEP **Message ID** as needed:



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**:



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**.

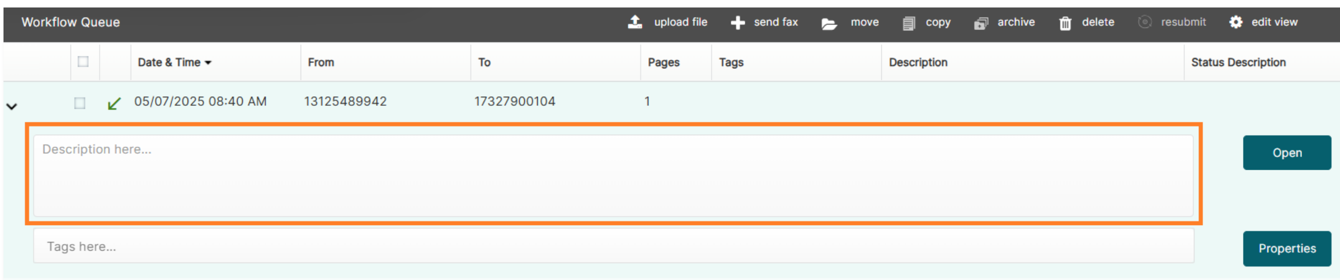
Note that Concord will apply **opportunistic TLS encryption** to emails as they are sent, but the opportunistic nature of this method means that encryption is **not assured** when documents are emailed from NEXTSTEP.

The Description Field

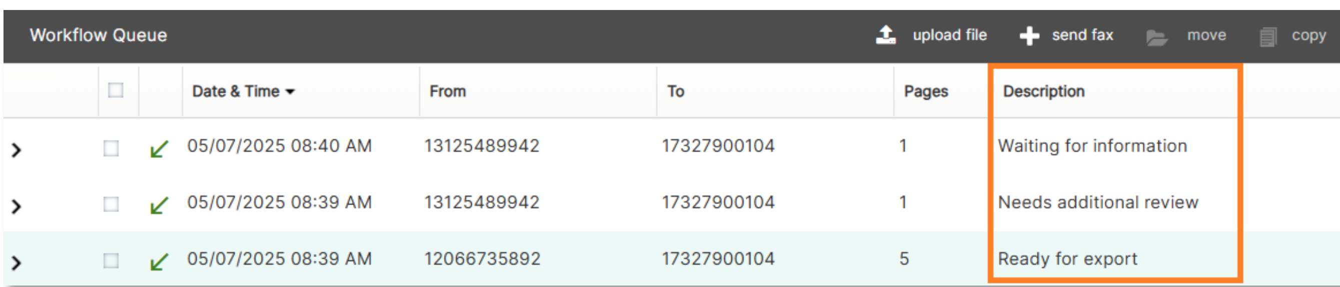
The **Description** field may be populated by any user during document processing to relay information in a collaborative **Shared Queue** setting or to make a note on a message for your own use in a **Personal Folder**. The Description field can be viewed as a **column** and searched for via **Metadata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

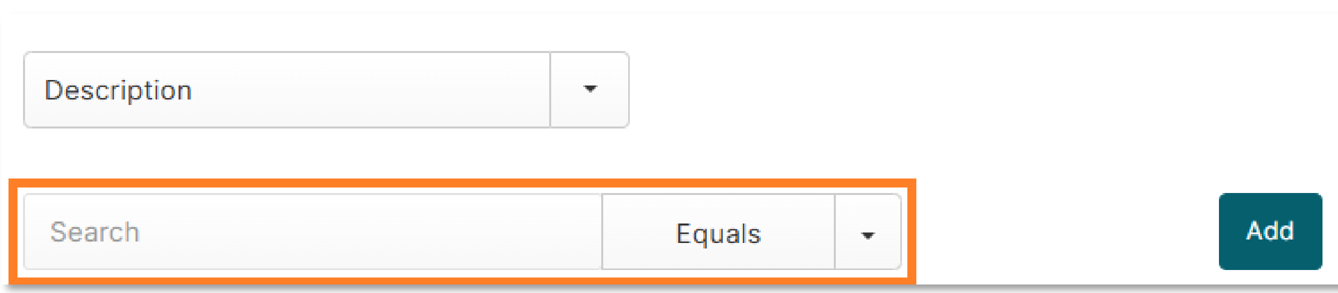
Upon single-clicking on the item, a **text box** will be displayed, prompting you to enter the Description you want attributed to the document:



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

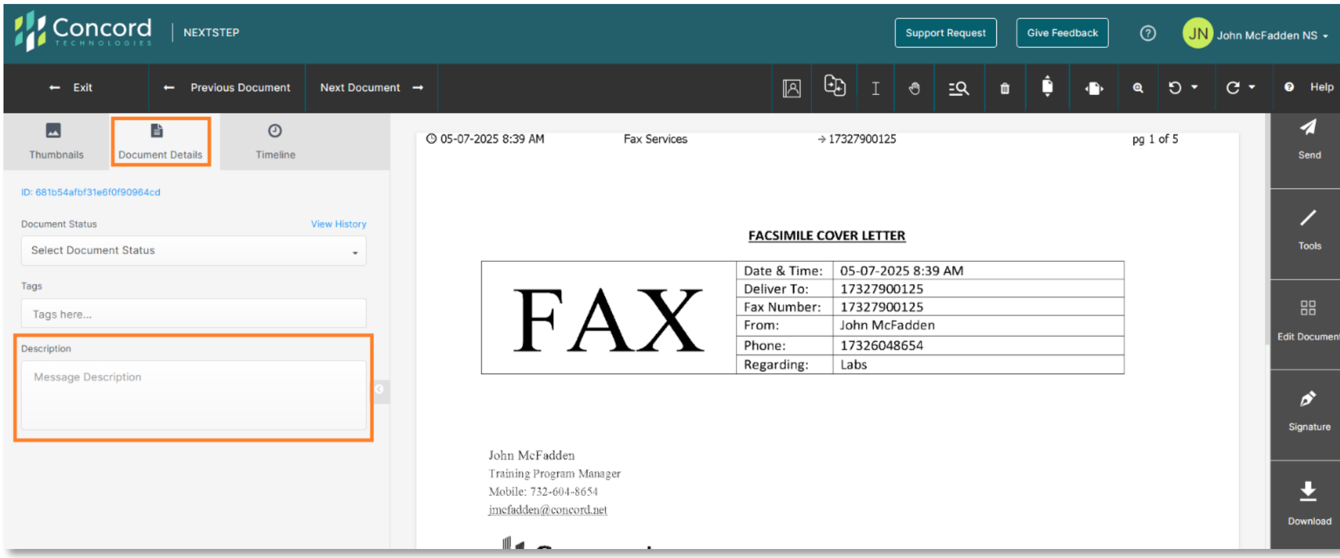


The description text can also be used when performing a **Metadata Search**:



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:

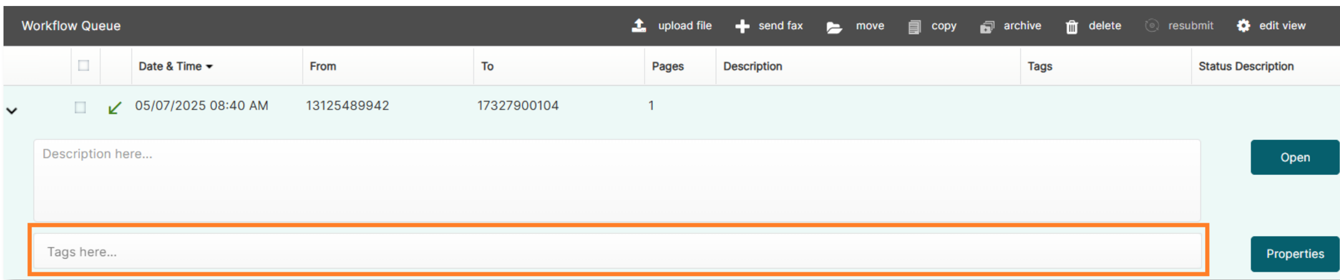


Adding a Description from this screen will add this to the same standard **Description column** in the **Grid View**.

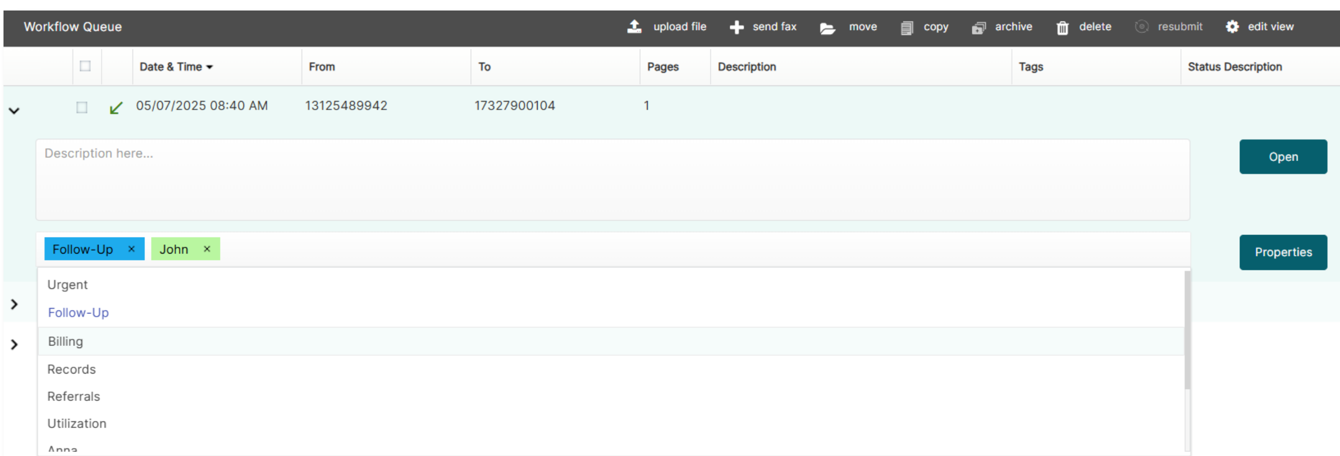
Tags

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:



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:



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

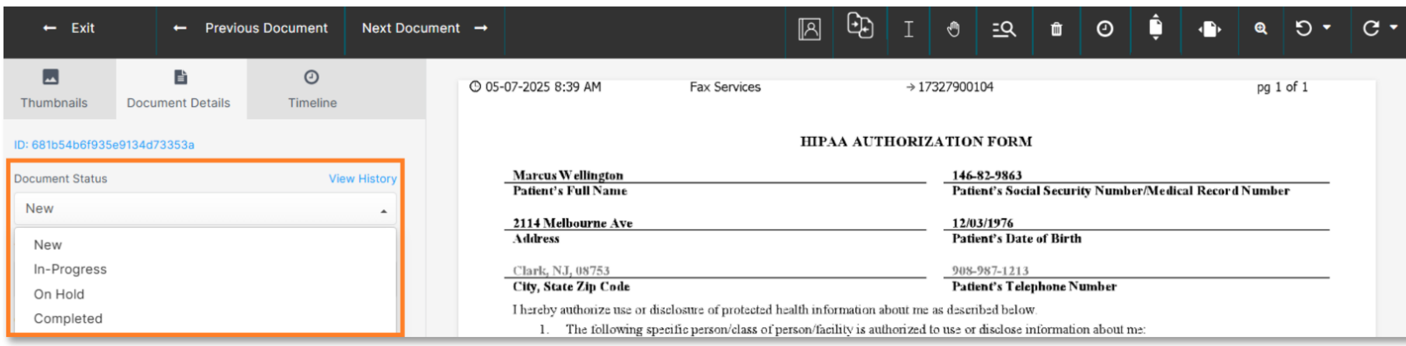
Tags can also be set and displayed via the **Document View** when a document is opened there. If Tags are available in your Queue they can be found in the **Document Details** tab.

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**.

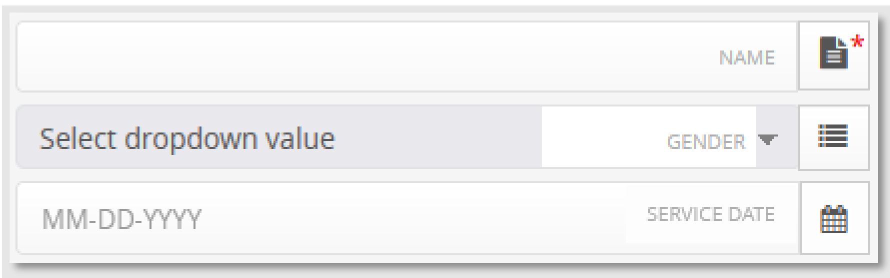
Custom Fields

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:



- **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.

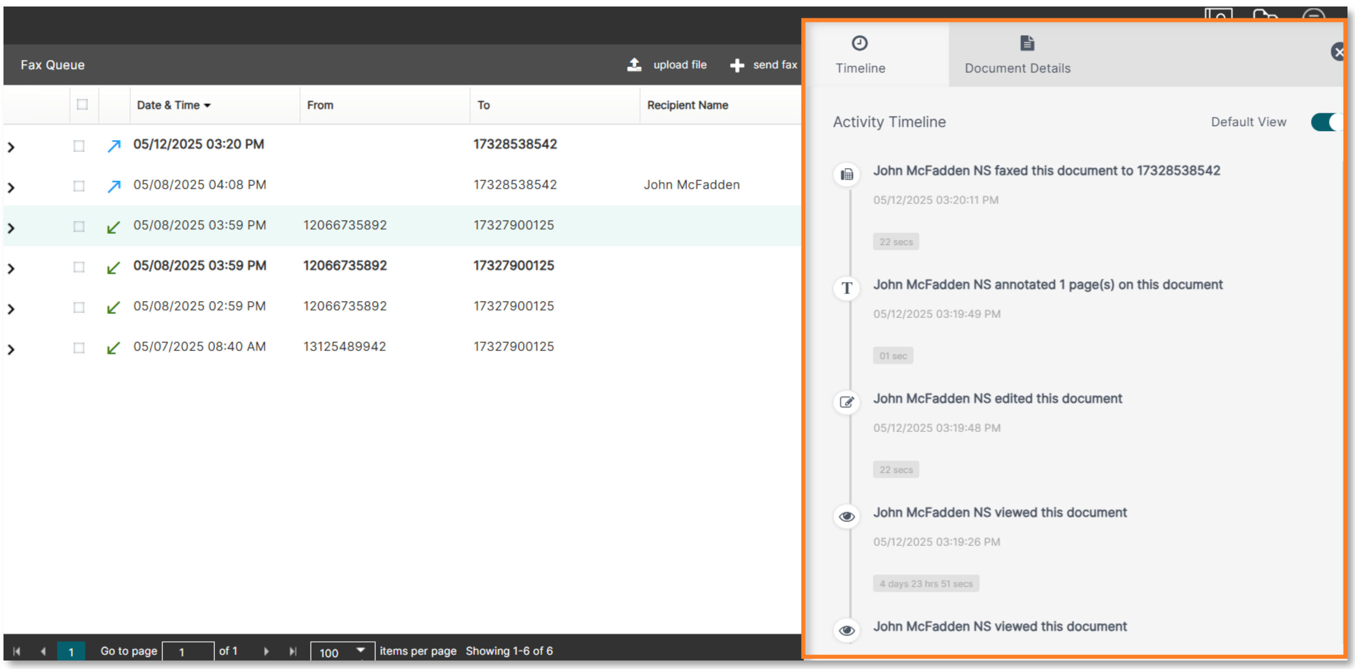
Note that **any Custom Field** may be set by a NEXTSTEP Administrator to be **required**. Required fields must be completed to save the document and proceed with other actions.

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 **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.

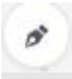
Timeline Icons are as follows:

 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.

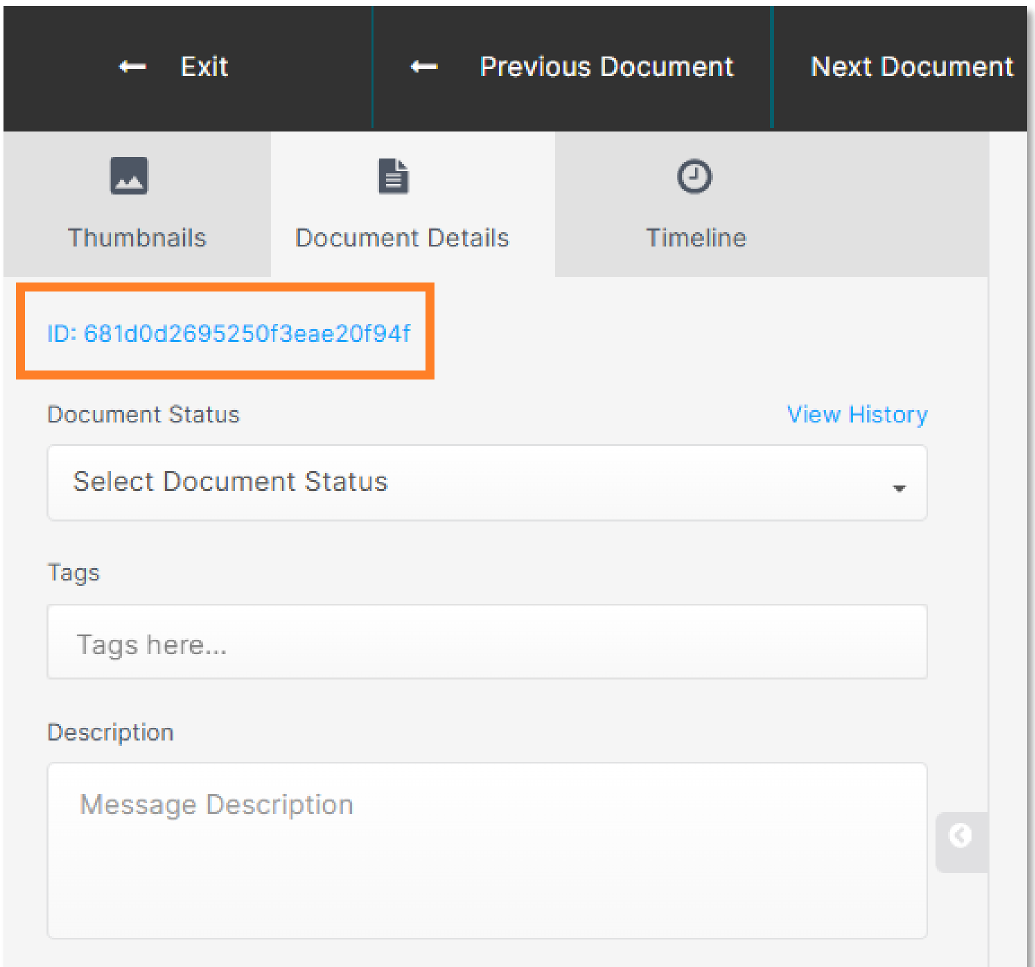
 The **Fax** icon indicates that a document has been faxed to a new recipient.

Viewing Fax Transmission Details

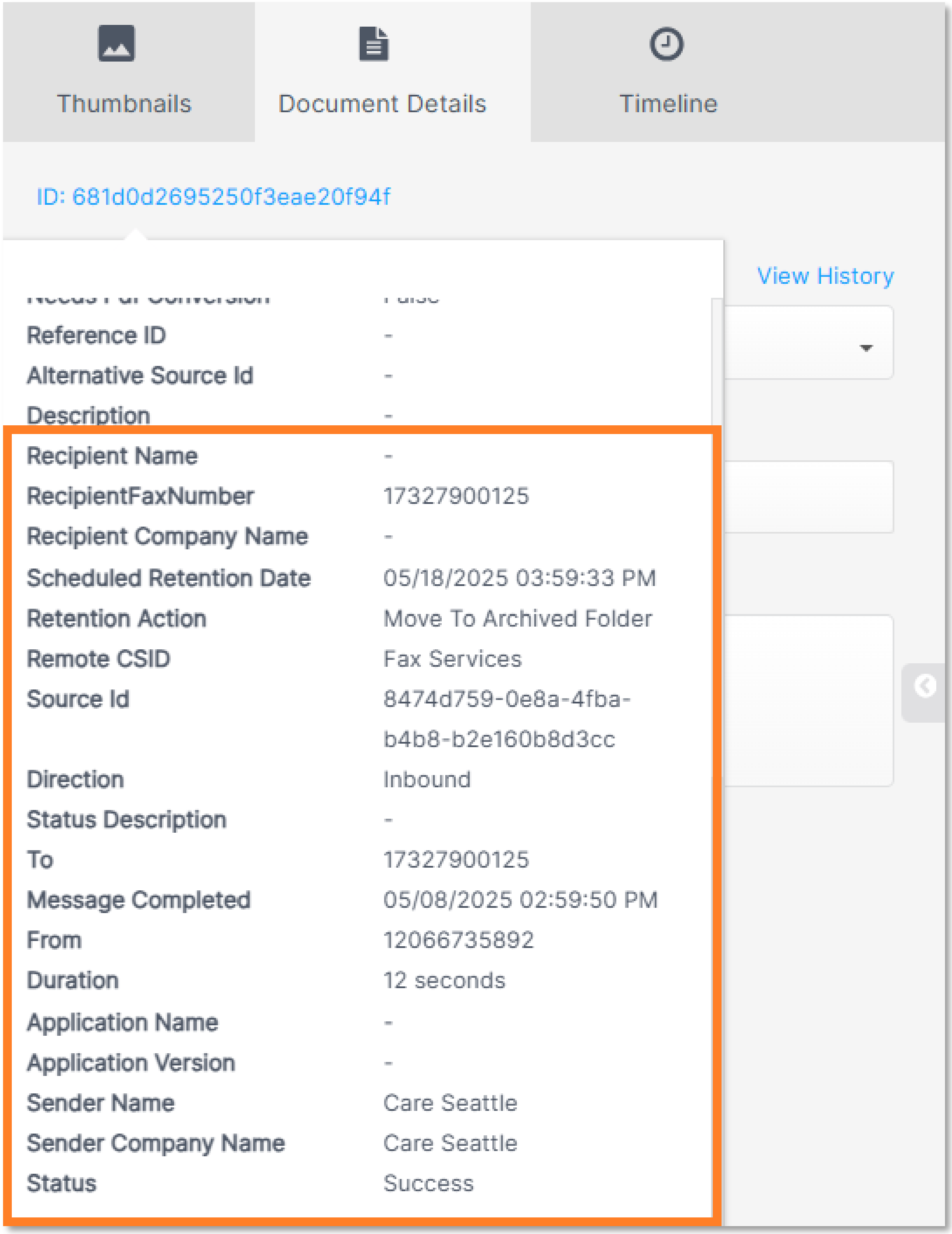
If you need to view additional details associated with the **transmission** of a fax document. This can be found by navigating to **Document Details.**

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:



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
ID: 681d0d2695250f3eae20f94f
View History
Reference ID -
Alternative Source Id -
Description -
Recipient Name -
RecipientFaxNumber 17327900125
Recipient Company Name -
Scheduled Retention Date 05/18/2025 03:59:33 PM
Retention Action Move To Archived Folder
Remote CSID Fax Services
Source Id 8474d759-0e8a-4fba-b4b8-b2e160b8d3cc
Direction Inbound
Status Description -
To 17327900125
Message Completed 05/08/2025 02:59:50 PM
From 12066735892
Duration 12 seconds
Application Name -
Application Version -
Sender Name Care Seattle
Sender Company Name Care Seattle
Status Success

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

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