NEXTSTEP
Document Processing

Shared Queue Admin Guide

Concord Technologies

2025 First Avenue Suite 800

Seattle, WA, 98121, USA

Call Us: +1 206-441-3346

Concord.net

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Overview

Concord Technologies' **NEXTSTEP** platform offers both a **web portal** to view and manage faxes and other documents in a shared workflow environment, as well as a **set of tools** to leverage the content found in those documents in more meaningful ways.

Whether your business is in healthcare or another highly regulated industry, **documents** likely play a critical role in your operations. NEXTSTEP helps bring those documents together to create more **efficient** and **auditable** workflows.

This guide describes the **Shared Queue Administrator** capabilities available in NEXTSTEP. A Shared Queue Admin is a specially designated NEXTSTEP user that has admin capabilities for one or more specific **Shared Queues.** Queue Admins can add existing users to queues, manage queue settings and pull reports for the queues they have administrative access to.

Disclaimer

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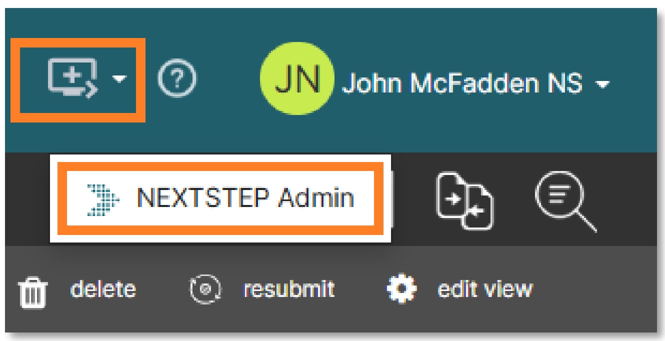
Navigating to Shared Queue Administration

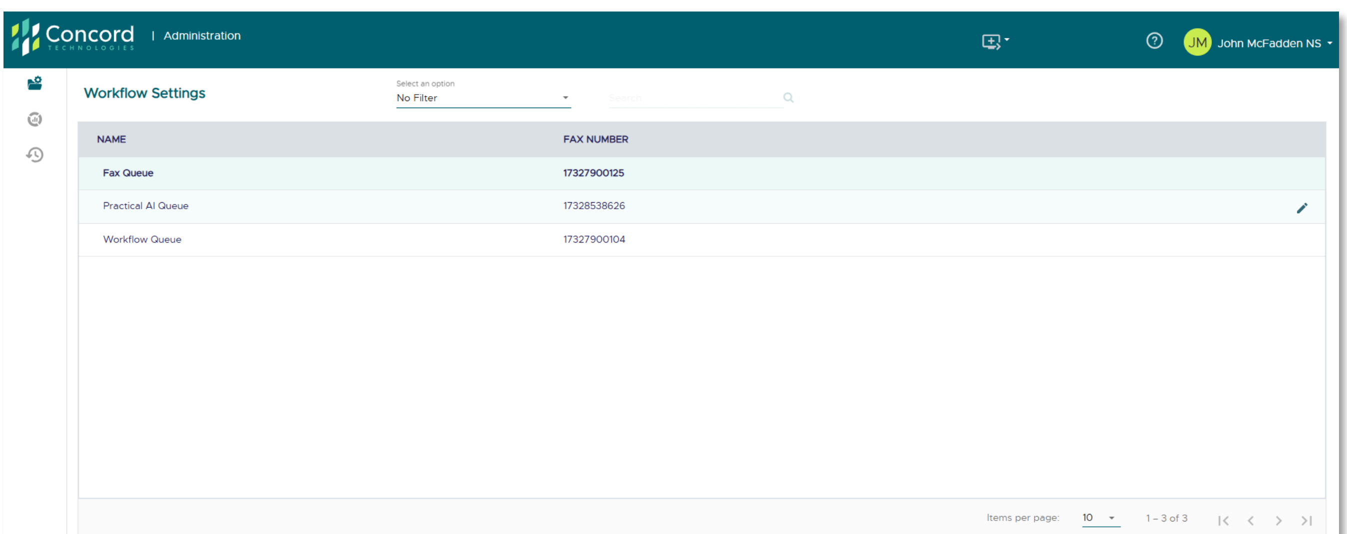
NEXTSTEP Queue Admins represent a user account that has been empowered to make administrative changes to a set of NEXTSTEP Shared Queues. This may include **adding** or **removing** user access to queues, editing the **settings** of the queue itself, or querying for **reports** on activities in these managed queues.

Any changes that can be made by a NEXTSTEP Queue Admin will be done by navigating **away** from the NEXTSTEP **User** interface to the **NEXTSTEP Admin interface**.

To navigate to NEXTSTEP Queue Administration, click the **+ Screen** icon at the top-right of the screen and choose **NEXTSTEP Admin**:



This will open the **NEXTSTEP Queue Admin Screen** and display of all Shared Queues you have access to manage:



Mapping NEXTSTEP Users to a Shared Queue

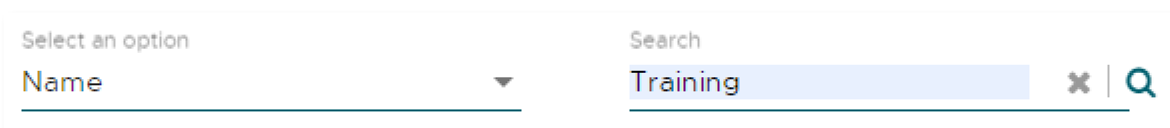
NEXTSTEP Queue Admins **do not** have the ability to add new users to the Concord platform. New user additions must be performed by a fully provisioned Concord Administrator or via a customer's integrated user provisioning process.

Once a NEXTSTEP user account has been created, a NEXTSTEP Queue Admin may **map** a user to any of the Shared Queues the Queue Admin has access to manage.

When the NEXTSTEP Queue Admin Portal opens, you will be placed in the **Workflow Settings** section, which is where Shared Queues are **created** and **managed**, and where users can be **mapped** to a Shared Queue.

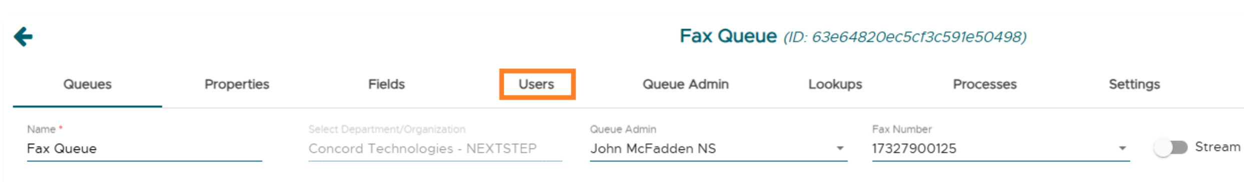
From here you can select a Shared Queue by **double-clicking** to open, or you can **search** for a Shared Queue by **Name** or associated **Fax Number**.

To **search** for a specific Shared Queue, choose the search criteria (**Name** or **Fax Number**), enter your search criteria, and click the **search icon**:

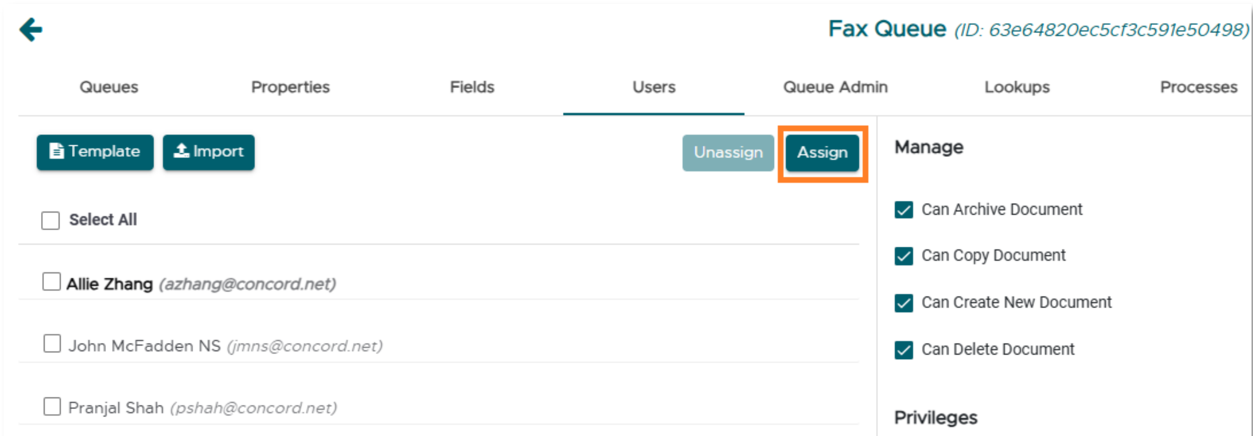


From the list of results, **double-click** the Shared Queue you want to add the user to. Alternatively, you can also hover over the specific shared queue and click the pencil icon that pops up to the right to edit as well.

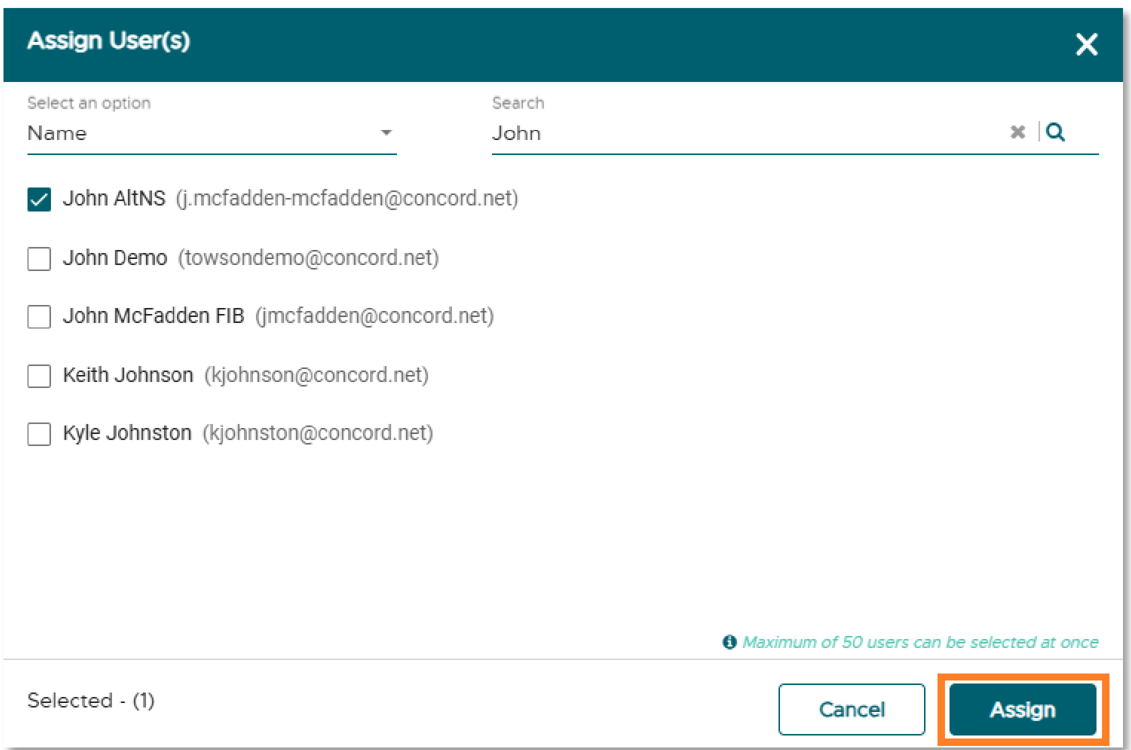
Once the queue is displayed, click **Users** to access options for **single** or **bulk** user **mapping** to the Queue:



This will open the **User Management** section of the Shared Queue:



Clicking **Assign** allows an admin to select one or more NEXTSTEP enabled users that were not previously added to this queue:



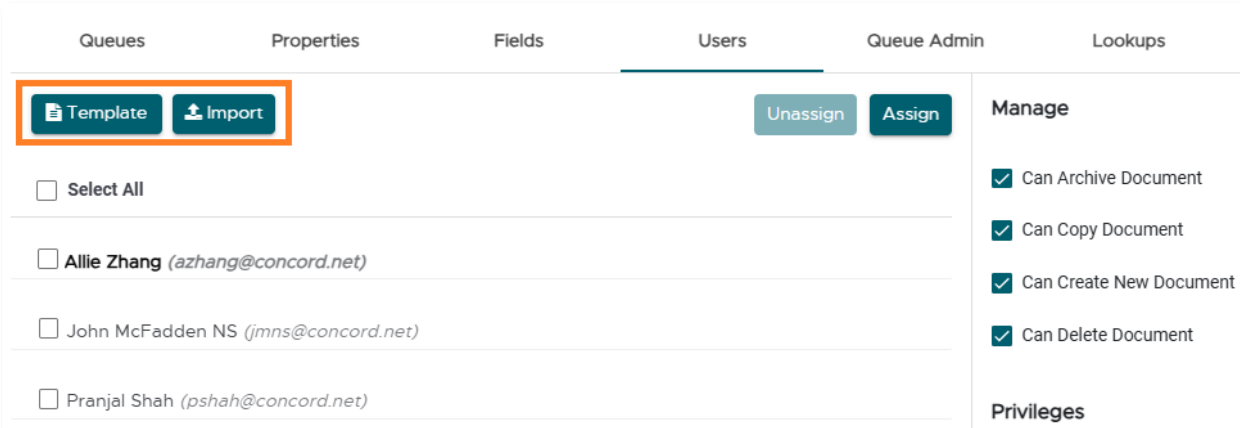
Here you may search for a user by **Name** or **Email**.

Click the **checkbox** next to the user(s) you want to add to select them for access.

Once selected, clicking **Assign** will **map** any selected users to the NEXTSTEP Share Queue.

Clicking **Import** allows the admin to import a **spreadsheet** file in CSV (comma separated) format containing the columns **User Name** and **User Email** to identify and map existing users to a NEXTSTEP queue in bulk. A **template** for the CSV file is available for download by clicking **Template**.

Note that **users** included in your CSV **must exist in Concord** and be **NEXTSTEP enabled**, and the **email** address must correspond **exactly** to the email associated with the user:



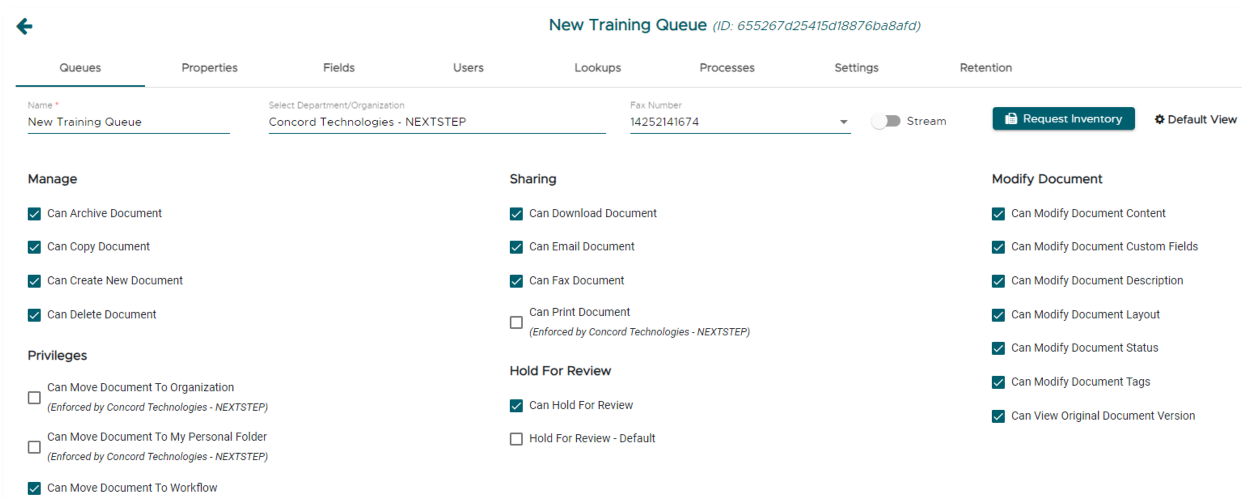
To **Delete** user(s) from a Shared Queue you can select one or more users from the user list associated with that queue and click **Unassign**.

Shared Queue Permissions

Workflow Permissions for Users Working in Shared Queues

Upon creation of a new Shared Queue, the default **Permissions** for the queue will be displayed. These control user access to a variety of **behaviors** in a NEXTSTEP Shared Queue.

Queue Admins can control what permissions users have when accessing each NEXTSTEP Shared Queue. The **default permissions** displayed will correspond to the Company Level defaults, which can be **edited** for this queue:



Note that double-clicking an **existing** Shared Queue will display the **Permissions** of that queue for review and editing as needed.

Permissions are **categorized** and **defined** as follows:

Manage

Can Archive Document	Enables or disables the ability for users to move documents to the Archived Items folder.
Can Copy Document	Enables or disables the ability for users to copy a document to another queue or folder.

Can Create New Document	Enables or disables the ability for users to create a new document via upload.
Can Delete Document	Enables or disables the ability for users to delete a document completely from NEXTSTEP.

Privileges

Can Move Document to Organization	Enables or disables the ability for users to move documents to any Shared Queue or Personal Folder in their organization from this queue.
Can Move Document to My Personal Folder	Enables or disables the ability for users to move documents to their Personal Folder from this Shared Queue. This option is automatically enabled when **Can Move Document to Organization** is enabled.
Can Move Document to Workflow	Enables or disables the ability for users to move documents to other NEXTSTEP Shared Queues. This option is automatically enabled when **Can Move Document to Organization** is enabled.

Sharing

Can Download Document	Enables or disables the ability for users to manually download a document.
Can Email Document	Enables or disables the ability for users to send a document via email from within NEXTSTEP.
Can Fax Document	Enables or disables the ability for users to send a document as an

	outbound fax.
Can Print Document	Enables or disables the ability for users to print a document.

Hold for Review

Can Hold for Review	Enables or disables the ability for users to hold a document for review by another user when sending an outbound fax.
Hold For Review – Default	Enables ***Hold for Review*** as the default option when users are sending outbound faxes from this queue.

Modify

Can Modify Document Content	Enables or disables the ability for users to modify document content. This includes annotation, redaction, signatures, etc.
Can Modify Document Custom Fields	Enables or disables the ability for users to modify a document's Custom Fields.
Can Modify Document Description	Enables or disables the ability for users to modify a document's Description field.
Can Modify Document Layout	Enables or disables the ability for users to split or merge pages within a document.
Can Modify Document Status	Enables or disables the ability for users to modify Document Statuses.
Can Modify Document Tags	Enables or disables the ability for users to modify document Tags.

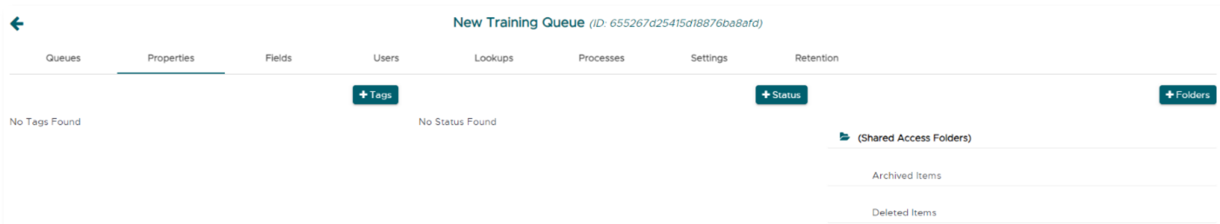
Can View Original Document Version	Enables or disables the ability for users to view the original document image (prior to any modifications made within NEXTSTEP such as redaction, erasing, annotating, etc).

Shared Queue Properties

Tags, Documents Statuses and Folders

Shared Queue Properties can be configured from the **Properties** tab of the Shared Queue edit window.

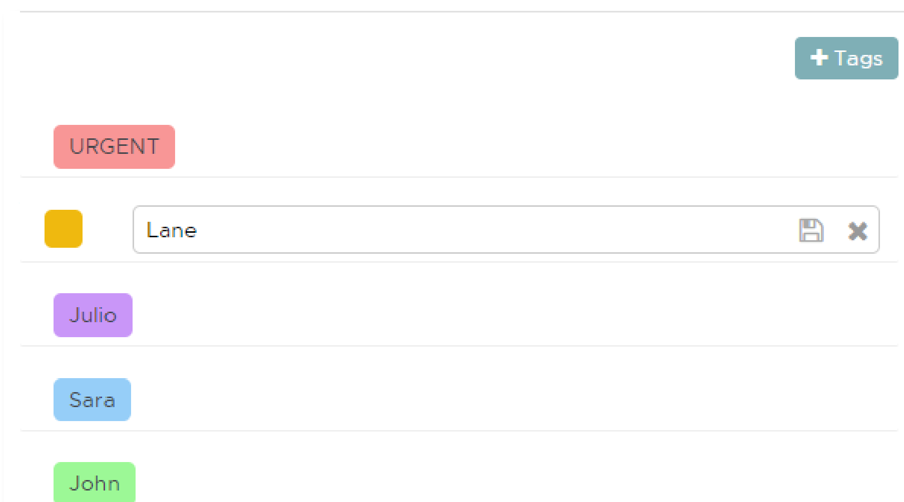
From here, a NEXTSTEP Admin can add and edit workflow elements such as **Tags**, **Document Statuses** and **Folders** for a specific Shared Queue:



Tags

Tags are **color-coded** workflow identifiers that may be added by users to documents as they are worked on. Tags can be used to define urgency, display approval/rejection, show user assignment, and/or can be configured to support your specific needs.

To **create** a Tag, click **+Tags**, enter the **text** for the Tag and choose a **color**. You can also enter a Hexadecimal value for the color. When ready to save, click the **Save** button:

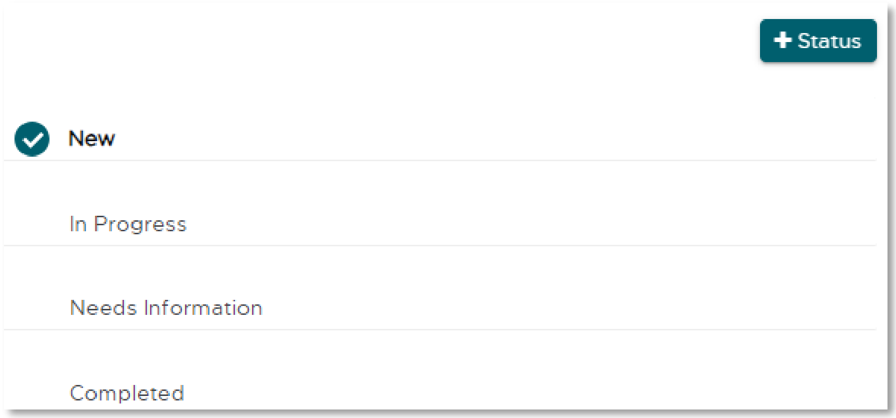


Statuses

Statuses (or **Document Statuses)** are typically used to represent **steps** in a workflow process, where users will update the Status via a **dropdown** in NEXTSTEP, as documents are processed through various steps in workflow.

A **change** in Status can also be used to **trigger** a workflow **rule** to, for example, move the document to the archive and also make the document available for download when the status is set to **Completed.** Other rules options may apply.

To **create** a Status, click **+Status** and enter the first item in the Status **dropdown**. When ready to save, click the **Save** button and you can then enter **additional** Statuses that will appear in the drop-down:



If you wish to make one of the Statuses the **default**, meaning this will be assigned to **new** documents as they arrive in NEXTSTEP, click the **check next to the Status name.**

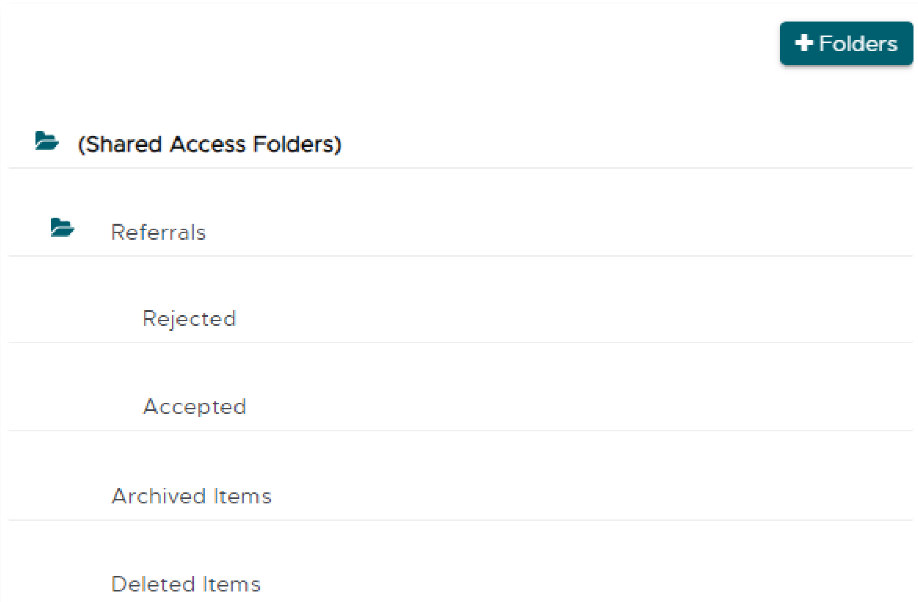
Folders

Folders are used to store documents in independent containers based on the needs of the document workflow in your Shared Queue. By default, you will see an **Archived Items** and **Deleted Items** folder for each Shared Queue. These **cannot** be deleted, but additional Folders can be added to support your needs.

Folders can also be **nested** within other Folders to create **Sub-Folders**, as needed, to support the granularity required for your documents and processes. Because of this nesting capability it is important that you always **click on the proper level** when adding a new Folder.

To **add** a new **Folder** at the top-most level, first click **Shared Access Folders** and then click **+Folders**.

To **add** a new **Sub-Folder** to an existing Folder, first click the **existing Folder** and then click **+Folders**:



The above example includes a **Folder** in the form of *Referrals*, which has two **Sub-Folders**, *Rejected* and *Accepted.*

Shared Queue Custom Fields

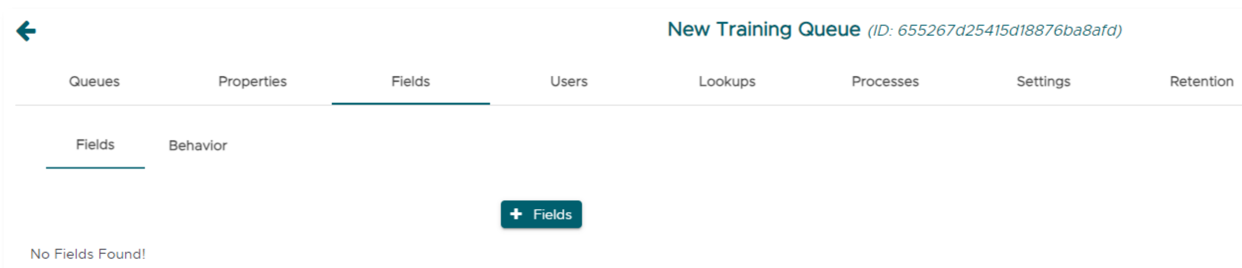
Text Fields for Manual and Automated Population

Custom Fields are used to capture discreet **data points** related to or extracted from documents during NEXTSTEP processing. Custom Fields may be populated **manually** by users working in the NEXTSTEP interface or may be **automatically** populated using NEXTSTEP's AI-based data extraction services.

Automated data extraction combines Optical Character Recognition (**OCR**) and machine learning technologies to extract specific information from unstructured documents, without the need for forms or templates.

Please contact your **Concord Account Manager** for more information about the current supported list of **extraction fields** and how to leverage Concord's **Practical AI** to streamline document processing.

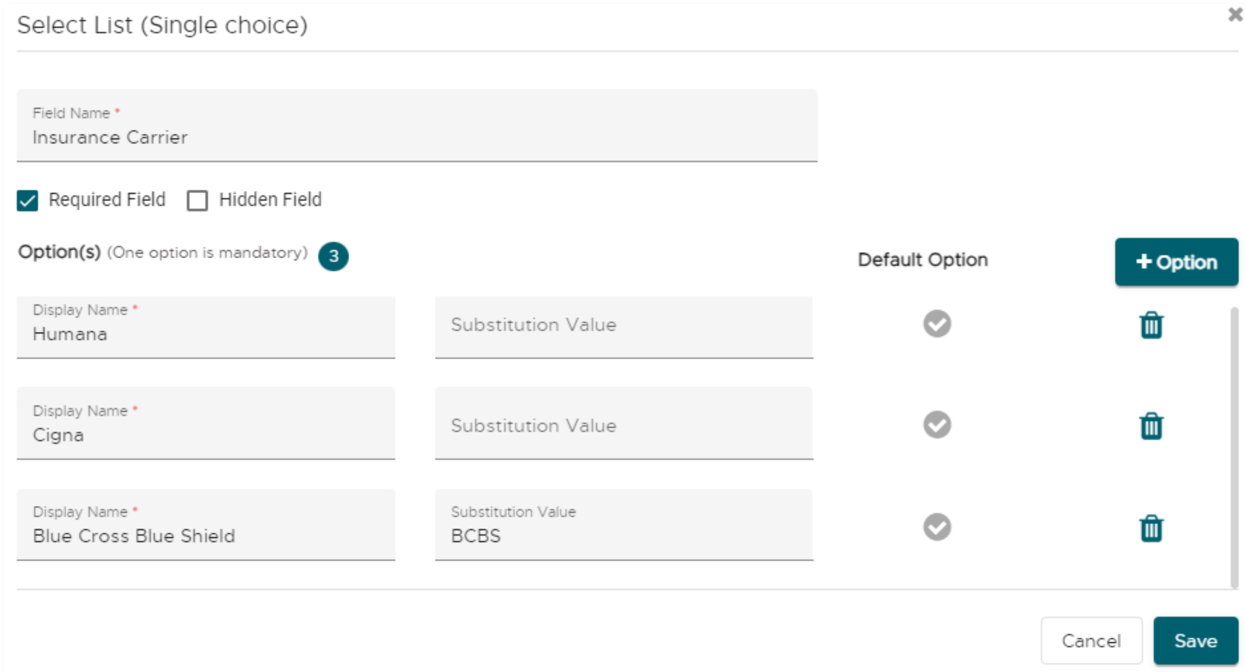
To **add** or **edit** a Custom Field, navigate to the appropriate Shared Queue and click **Fields**:



If you have not yet added any Custom Fields, click **+Fields** to add one of **four** different types of **Custom Fields**:

Select List (Single Choice)

This Custom Field will appear in the NEXTSTEP interface as a **drop-down** list of options for users to **select** from during document processing:



You must add a **Field Name**, which will be **displayed** in the NEXTSTEP interface and would form the **label** for **exporting** Custom Field data from a Shared Queue.

At least one **Option** must be added, which will be selectable by NEXTSTEP users working in the interface. **Add** Options as needed to complete your Select List.

You can include a **Substitution Value** for any Option if needed. This value will be substituted for the **Display Name** when data is **exported** from NEXTSTEP.

By clicking the **Check** next to an Option, you can set it as the **Default Option**, which will populate the **Select List** field with that value, unless changed by a user.

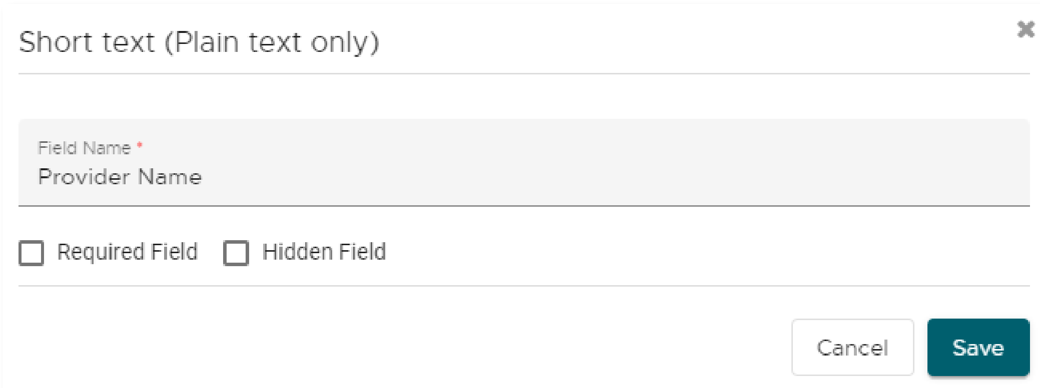
Any Custom Field can be set as **Required** and/or **Hidden**:

Required Fields must be populated during processing for a user to save data.

Hidden Fields will not be displayed in the NEXTSTEP interface for users to populate but may be populated via data extraction or field mapping for use in data integration.

Short Text (Plain Text Only)

This Custom Field appears as a **text box**, where a specific, labelled piece of data would be entered. This data may be entered by users **manually** or populated through the use of data **extraction**, if enabled:

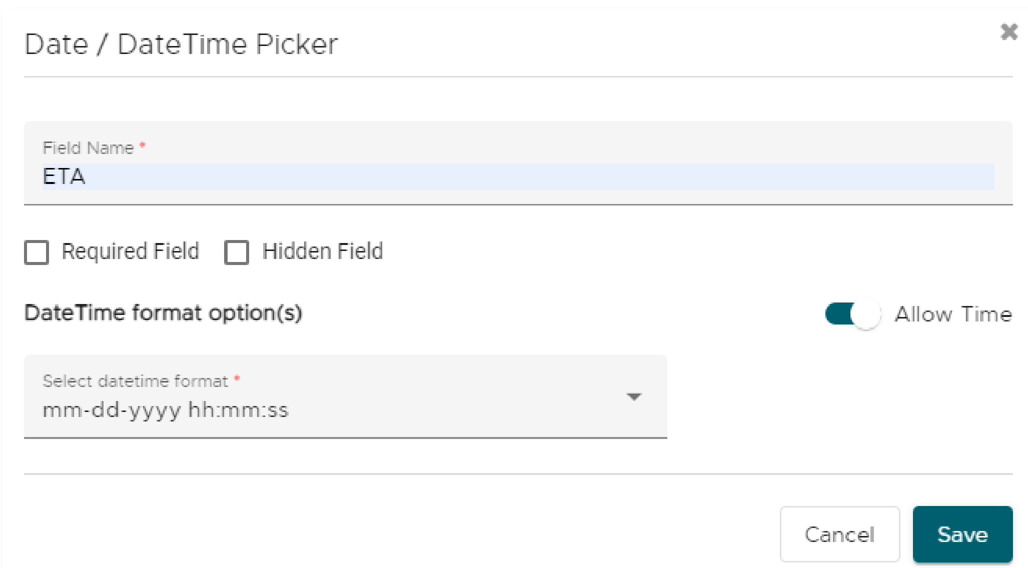


You **must** add a **Field Name**, which will be **displayed** in the NEXTSTEP interface and may be used form the label when **exporting** Custom Field data from a Shared Queue.

You have the option of making the field **Required** and/or **Hidden**.

Date / Date Time Picker

This Custom Field will appear as a **date / date & time** selector that users will set when managing documents in the NEXTSTEP interface:



You **must** add a **Field Name**, which will be **displayed** in the NEXTSTEP interface and would form the **label** for **exporting** Custom Field data from a Shared Queue.

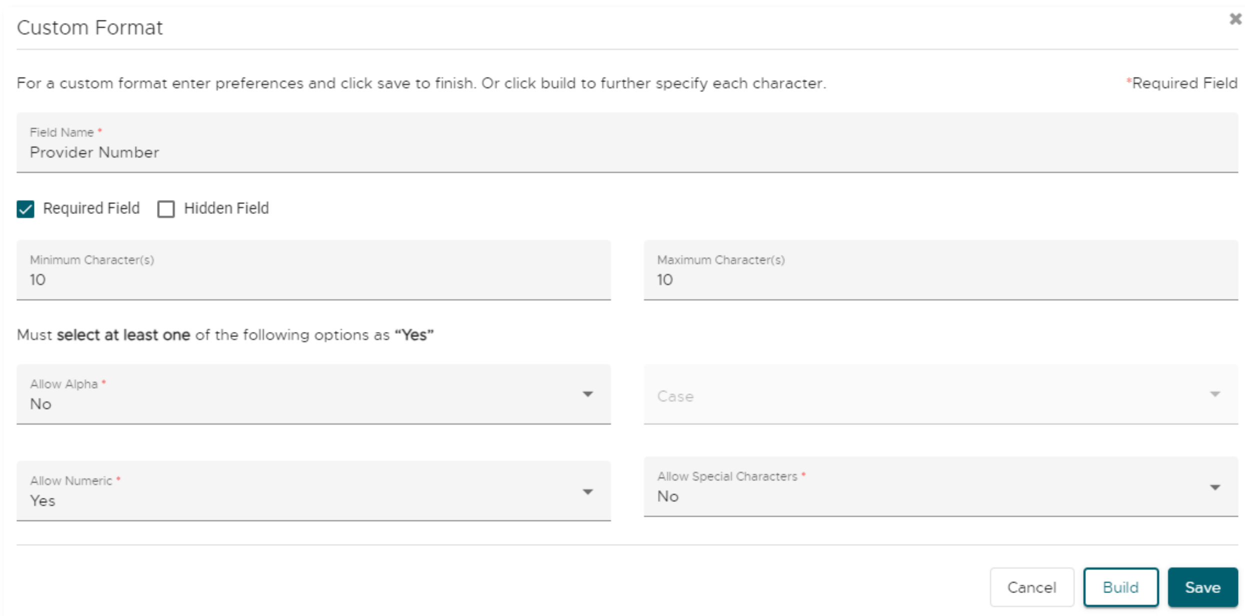
Use the **Allow Time** slider to select whether you want to include **Time** along with **Date** in the selection.

Choose your date & time **format,** which will form the basis for **displaying** and/or **exporting** date & time selections.

You have the option of making the field **Required** and/or **Hidden**.

Custom Format

The Custom Format Field acts in similar fashion to a **Short Text Field**, but allows for the configuration of specific **requirements** for the **data** that will be entered into the field, including character type and length:



You **must** add a **Field Name**, which will be **displayed** in the NEXTSTEP interface and may be used as the **label** when **exporting** Custom Field data from a Shared Queue.

You have the option to set the **Minimum** and/or **Maximum** number of characters the field can contain.

You **must** select whether the field may contain **Alpha**, **Numeric** and/or **Special** characters.

If **Alpha** characters are allowed, you must specify **Case.**

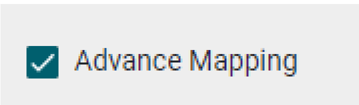
You have the option of making the field **Required** and/or **Hidden**.

Click **Build** to specify the exact format of the data expected in this field.

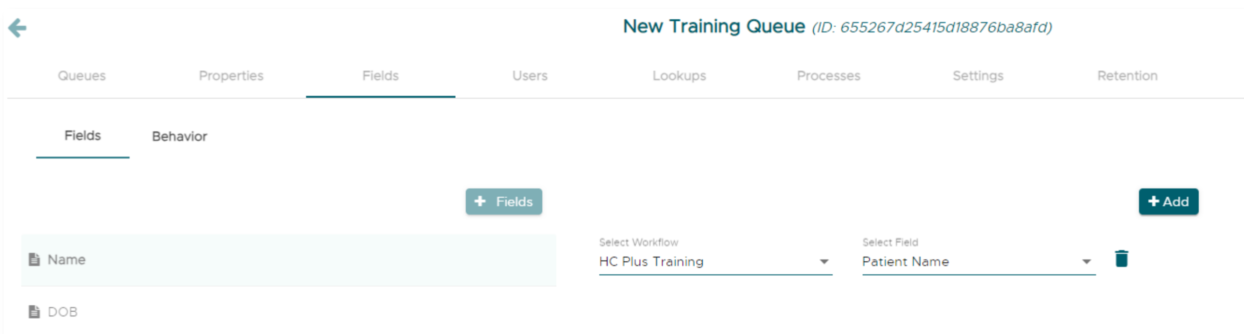
Custom Field Advance Mapping

Advanced Mapping of custom fields is used when documents may be **moved** or **copied** from one Shared Queue to another, and field data needs to be **retained** in the transfer. This may be configured for **Short Text** fields only.

To configure, click the **Advanced Mapping** box at the bottom of the screen to expose this portion of the configuration:



Then you can configure what **Custom Fields** from your Shared Queue you want to be able to **copy to another Shared Queue**, when documents are moved between the two queues:



In the above example, the "Name" field from the **New Training Queue** is mapped to the "Patient Name" field in the **HC Plus Training** queue to ensure that documents moved from the New Training Queue to HC Plus Training (or vice versa) will maintain the patient name that was originally entered or captured.

Shared Queue Default View

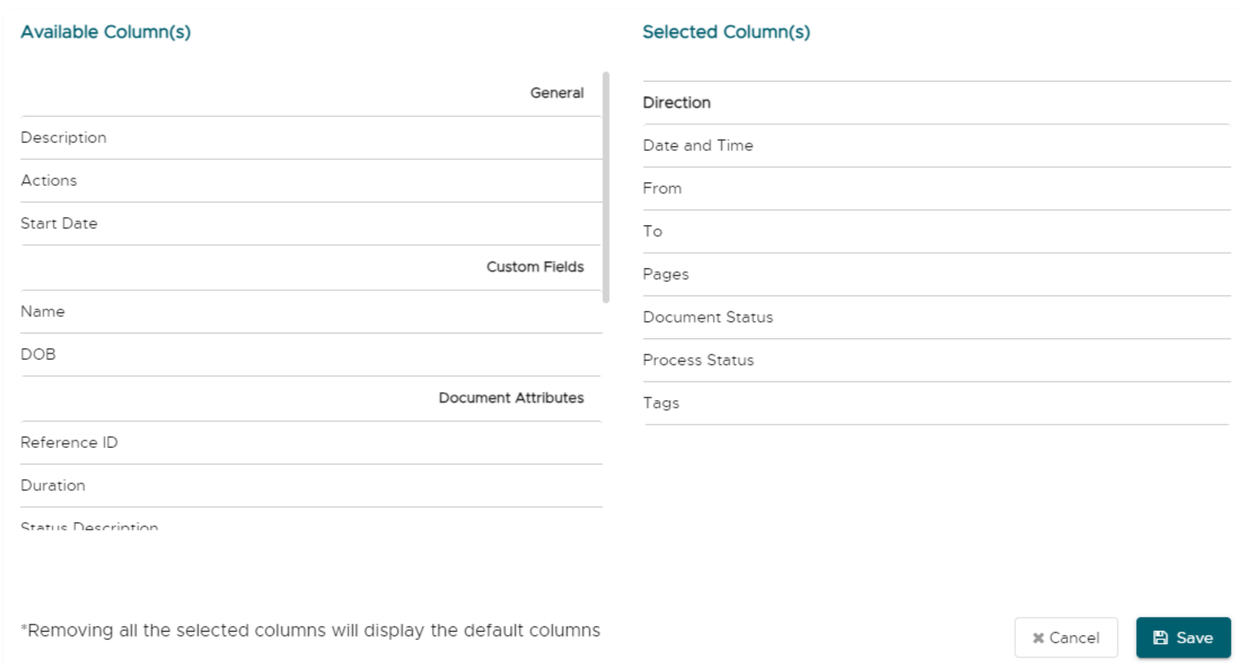
Configuring the Columns of Data Displayed to Users in a Shared Queue

Once a Shared Queue has been created and configured to use the workflow tools best suited to the process being handled by this queue, a NEXTSTEP Admin can configure what **columns** will be displayed to users when they first access the queue, and in what **order**.

This will form the basis of the **Shared Queue Default View** which the users will have the option to **edit** for themselves, if needed, once they access the NEXTSTEP Shared Queue.

To configure a Default View, navigate to the Shared Queue and click the **Default View** button:

This opens the **Default View configuration** for this Shared Queue:



To the right, under **Selected Columns**, are the columns of data that will be **displayed** by default when users first log into NEXTSTEP and view that Shared Queue.

To the left, under **Available Columns**, are columns of data that **could be added** to a default view but are currently **not** being displayed in that queue.

Available Columns will vary depending on what you have configured for a particular Shared Queue.

To **add** an **Available Column** to the Default View, **drag** the available column to the **Selected Columns** area and place the column where you want it to be visible. Items at the **top** of the Selected Columns list will display furthest to the **left** in the Shared Queue when users access it.

If you want to **release** a **Selected Column** from the Default View, **drag** this over to the **Available Columns** list and it will be **removed** from the Selected Columns and will not be displayed in the queue by default.

If you want to **reorder** columns in the list of Selected Columns, **click and hold** the mouse on that column and then drag it into place.

Once the **Default View** is configured properly, click **Save**.

Note that updating the **Default View** will apply changes only for users who have **not** edited their own **View**. Existing users that have edited their View may click **Restore Default View** to see the default view updates

Shared Queue Retention Settings

The settings for **Retention** allow you to dictate the queue-level behavior for archiving and purging data from NEXTSTEP. Here you would only edit the settings if you needed to set data retention and purge durations that **depart** from your **Company-level** standards

Note that **Archiving** documents will move these to the **Archived Items** folder in a NEXTSTEP queue or Personal Folder, while **Deleting** documents will move them to the **Deleted Items** folder.

When documents are **Purged**, they are fully removed from the NEXTSTEP platform and **cannot be recovered**.

To configure, navigate to **Retention**:

Here you will find the Retention settings for this Shared Queue, which may be configured with the following options, where X, Y and Z are a number of **days**:

Retain documents for a period of *X* days and then **Purge** – *or -*

Retain documents for a period of *X* days, then move to the **Deleted Items** folder for *Y* days, then **Purge** – *or -*

Retain documents for a period of *X* days, then move to the **Archived Items** folder for *Y* days, then move to the **Deleted Items** folder for *Z* days, then **Purge**.

Once retention settings have been **saved**, new documents will be treated according to the updated settings.

Shared Queue Processes

Configuring Default and User Initiated Processes

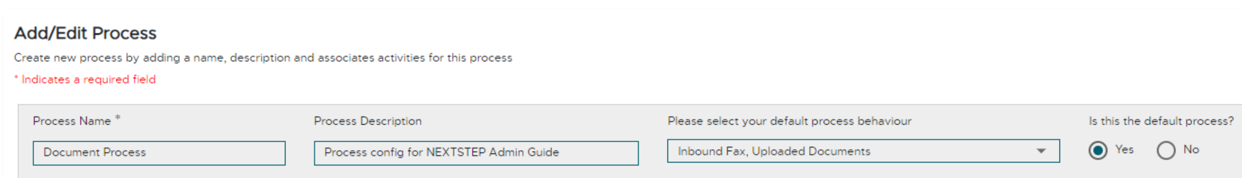
This section will review the NEXTSTEP Admin function of configuring **Processes** for a Shared Queue. Processes may contain OCR and AI-driven functions like **Document Classification** or **Advanced Capture,** settings required for **integration,** and/or other automated or user-triggered activities used in a workflow.

While this section will provide an **overview** as to how Processes are **configured**, it is **highly recommended** that you consult with your Concord Sales Representative, your Implementation Manager or Concord Premium Support **before** configuring your first Process.

To begin, navigate to the **Shared Queue** on which you want to add a Process and click the **Processes** tab.

To configure a **new** Process, click **+Process**

This opens the **Add/Edit Process** form:


Add/Edit Process
Create new process by adding a name, description and associates activities for this process
* Indicates a required field

Process Name *	Process Description	Please select your default process behaviour	Is this the default process?
Document Process	Process config for NEXTSTEP Admin Guide	Inbound Fax, Uploaded Documents	Yes No

Here you will enter information to help **identify** this process, establish **when** this process will be run and for **what** documents:

Process Name	Identifier for this process.
Process Description	Description of the process to help you identify what this process is for or does.
Default Process Behavior	This will be revealed if **"Is this the default process?"** is set to **Yes** and dictates what kind(s) of documents will be run through this

	process: • **Inbound Faxes:** Fax documents received into this queue • **Outbound Faxes:** Fax documents sent via users operating in this queue • **Partial Faxes:** Inbound fax documents that are tagged as a possible partial receipt • **Uploaded Documents:** Documents uploaded via manual or automated methods
Default Process	This is a Yes/No selection and will determine whether this process is run automatically when new documents enter a queue (**Yes**) or whether some subsequent or manual trigger will be used to run this process (**No**).

When **all** information is entered, click **Save**.

This will **create** the Process and then you must add one or more **Activities** that will be used in your process. Each **Activity** has its own purpose and configuration. These are described in detail in the next section.

Shared Queue Process Activities

In this section we will review the **Activities** that can be configured within a **Process**. Specific Activities and the **order** in which they are configured can be heavily dependent on what you are trying to achieve and what **additional** Activities need to be added to your process.

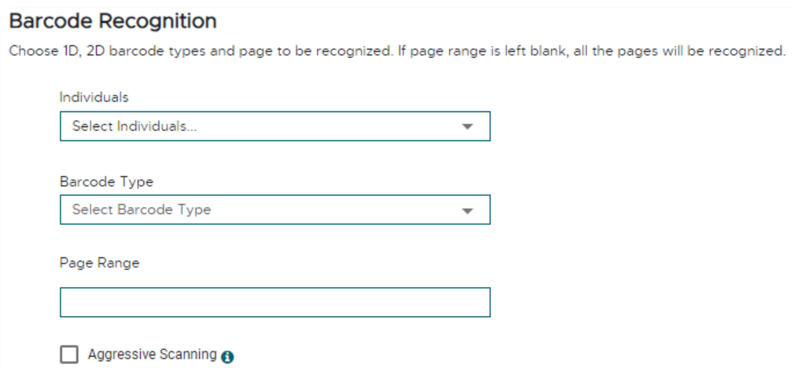
The typical order of operations in a process will begin with **OCR**, where pages are scanned to capture text, but processes such as Document Cleanup could precede this. Below we will define the **possible** Activities and their configuration in the order they appear in the **dropdown** selector, but the order in which they are added (and thus run) will **depend** on what is **required** of the process.

Again, it is **highly recommended** that you consult with your Concord Sales Representative, your Implementation Manager or [Concord Premium Support]() **before** configuring your first Process.

To add an Activity, click **+Activity**

Barcode Recognition

This Activity allows you to configure your process to **recognize** and **capture** barcode data on documents:



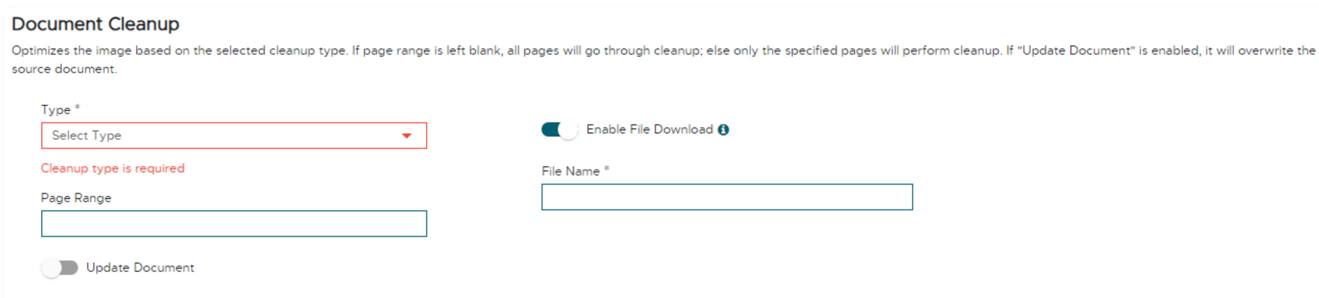
Configurable elements of the **Barcode Recognition Activity** are defined as follows:

Individuals	Optional selection for the general type of barcode you wish to scan for, All 1D, All 2D or both. Used in place of **Barcode Type** below.
Barcode Type	Optional selection of specific Barcode Type to only scan for that type. Used in place of **Individuals** above.

Page Range	Optional selection of specific page to scan for the presence of a barcode.
Aggressive Scanning	Option toggle for document rescan if no barcode is found on initial scan.

Document Cleanup

This activity can be run to help clean up documents, typically received via **fax**, for better subsequent **processing** of OCR-related Activities:



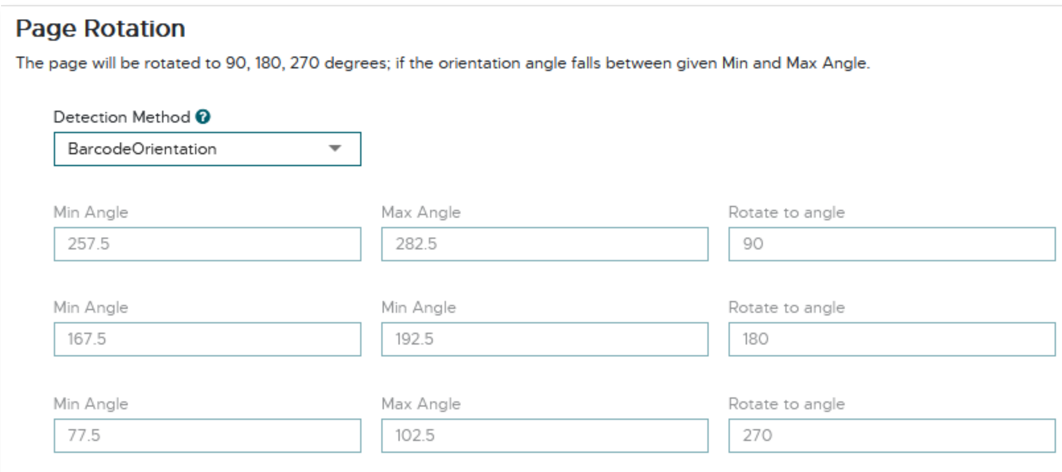
Configurable elements of the **Document Cleanup Activity** are defined as follows:

Type	Required field to select the type of cleanup you want to have performed. Note that only **one** Type can be selected, and additional Document Cleanup Activities should be added for any additional cleanup types you want to run.
Page Range	Optional page range selection for where in the document Concord should perform cleanup. If **blank**, all pages will be run through this Document Cleanup Activity.
Update Document	This selector allows the Activity to overwrite the source document with the cleaned-up version of the document.
Enable File Download	Enables optional download of cleaned-up document.

File Name	Required only if **Enable File Download** is selected. Provides filename convention for downloading cleaned-up documents.

Page Rotation

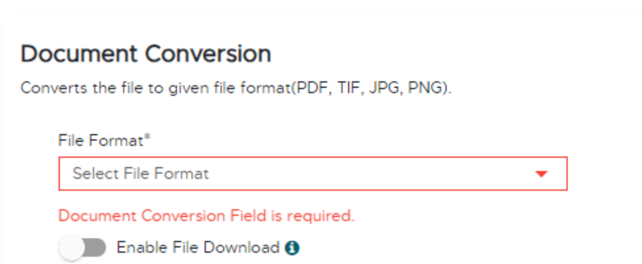
This **Activity** can be used to rotate documents based on the presence of a barcode, which may be used by NEXTSTEP to understand the alignment of a document as it is received:



Here there is only one item to configure: **Detection Method.** You must select **Barcode Recognition** to utilize this in your process and must configure **Barcode Recognition** in addition to the **Page Rotation** Activity**.**

Document Conversion

This activity is used to set a specific **document type** for output that is typically associated with integration via **API** or automated **export**:



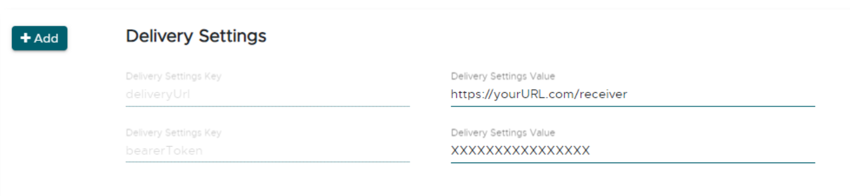
Configurable elements of the **Document Conversion Activity** are defined as follows:

File Format	Required file format setting allows for selection of PDF, TIF, JPG or PNG file type for documents that will be **retrieved** or **pushed** from the NEXTSTEP platform.
Enable File Download	Enables optional (but expected) download of documents in the format selected above.

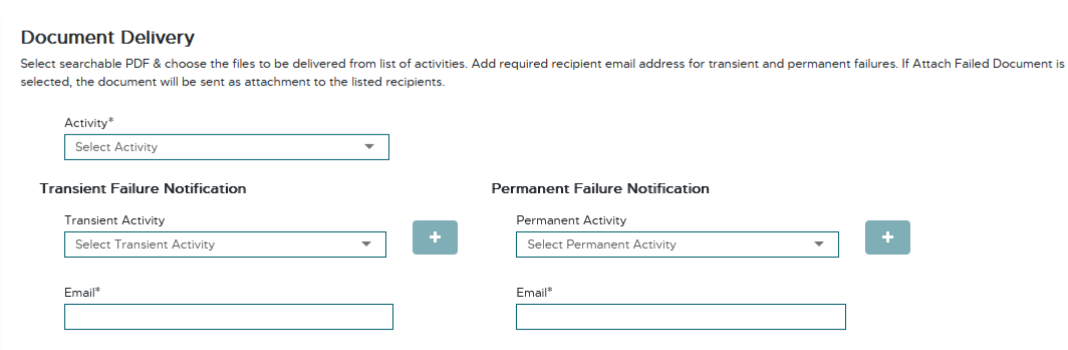
Document Delivery

This Activity is used to configure HTTPS **push** settings to transmit documents and/or data from NEXTSTEP a **client endpoint** and provide **notification** if there is an issue with **processing** or file **delivery**.

Note that configuring this service requires that you add a **Delivery URL** and **Bearer Token** to the **Shared Queue** / **Settings** tab for the Shared Queue you will be configuring:

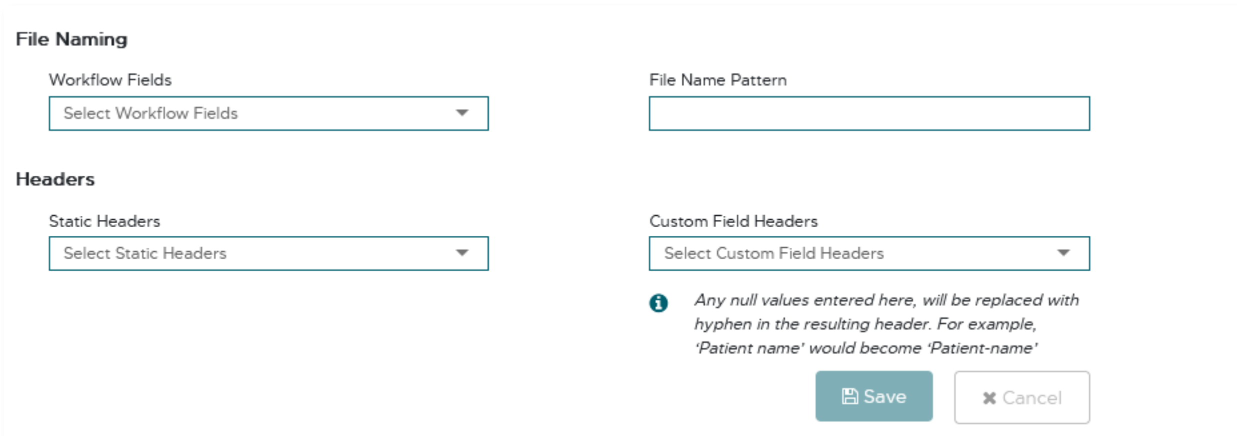


Once these details are added, you can configure the **Document Delivery** Activity:



In the **top** section of the **Document Delivery** Activity configuration, we have the following settings:

Activity	Here you will select the components that will be incorporated into the delivery process output. The options available will depend on what Activities you've already added to your process, but this will typically include **Metadata Transform** and a **file type**.
Transient / Permanent Failure Notification	These settings are used to configure notifications on process and/or delivery failure, to notify customer contact(s) of a problem with an Activity or the delivery of data to a customer's endpoint.



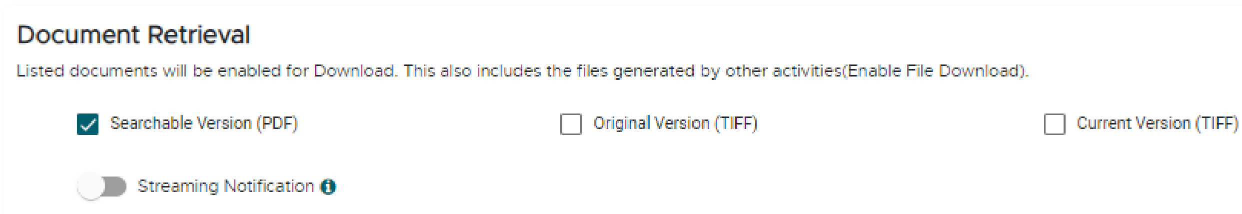
In the **bottom** section of the **Document Delivery** Activity configuration, we have the following settings:

File Naming - Workflow Fields	Here you can select what elements will be used to create the file name for documents that are pushed via the **Document Delivery** process. Options will vary depending on the Shared Queue configuration
File Name Pattern	Based on selection made in **Workflow Fields** above, this will display the naming convention that will be used to create your files.
Static Headers	Fixed data to be inserted in an HTTP header upon transmission. Typically used for authentication.
Custom Field Headers	Variable data representing **Custom Fields** created in the Shared Queue to be inserted in the HTTP header upon transmission. Typically used for

	authentication.

Document Retrieval

This Activity enables the **downloading** of documents from NEXTSTEP using an API Document **Retrieval** call or Concord's **Folder Monitor** application:



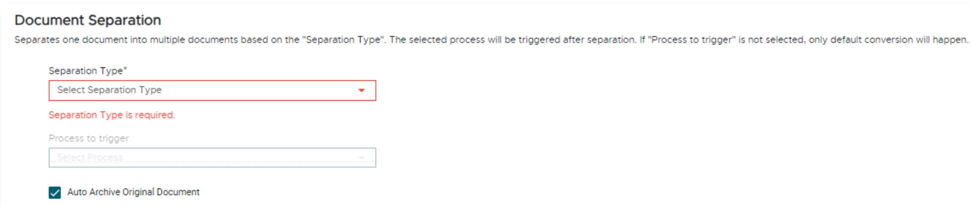
Here you can configure the **version** of the **document** you want to be able to retrieve:

Searchable Version (PDF)	PDF output including any edits or annotations made in the NEXTSTEP User Interface.
Original Version (TIFF)	TIFF output in the form the document was received or uploaded, without any edits or annotations made in the NEXTSTEP User Interface.
Current Version (TIFF)	TIFF output including any edits or annotations made in the NEXTSTEP User Interface by users working on documents.

In most instances **Streaming Notification** should remain **Off**.

Document Separation

This Activity is used to **separate** documents based on a pre-configured Separation Type:



Configurable elements of the **Document Separation** Activity are defined as follows:

Separation Type	Select the separator that will be used to identify when separation should take place: **Document Type:** Documents will be separated according to pages corresponding to a particular document type, as determined by the **Document Classification** process. You also have the option to use the Fax Cover Sheet as your separator via this method. **Patient Name:** Documents will be separated according to the pages that are relevant to a specific patient. This requires that **Patient Name Extraction** is enabled as an Activity on this process, which will automatically extract patient name data and use this to assemble sub-documents according to the patients they pertain to. **Barcode:** Documents will be separated according to the presence of barcodes. As a new barcode appears in a document, pages from that point forward will be associated with this barcode, until a new barcode is found to repeat the process of assembly and separation. **Page number:** Documents will be separated according to a specific page count, assuming each sub-document will be of a like page number.
Process to Trigger	*Optional **secondary** Process. If you have another process added to the queue, you can select that process to be triggered **after** page separation has run.*
Auto Archive Original Document	Optional selection to enable the archiving of the original document, as it was received or uploaded, prior to separation. The original document will be placed in the **Archive Items** folders of this Shared Queue if enabled.

Extraction (Advanced Capture)

This Activity is used to configure **automated extraction** of specific **data fields** from within documents received or uploading to this Shared Queue.

Concord supports the extraction of many fields including **Patient Name**. **Date of Birth** and **Insurance Provider**. For a complete listing of supported Extraction Fields, please contact your Concord Sales Representative, Implementation Manager or Concord Premium Support.

You must have the **License** for **Advanced Capture** enabled in your **Company Settings** to complete the configuration.

You must also have at least one **Custom Field** created, which will become the placeholder for data that is extracted from documents processed in this queue. You should create a Custom Field for each element you wish to extract, and then you can proceed to configuring **Extraction**:

Configurable elements of the **Extraction** Activity are defined as follows:

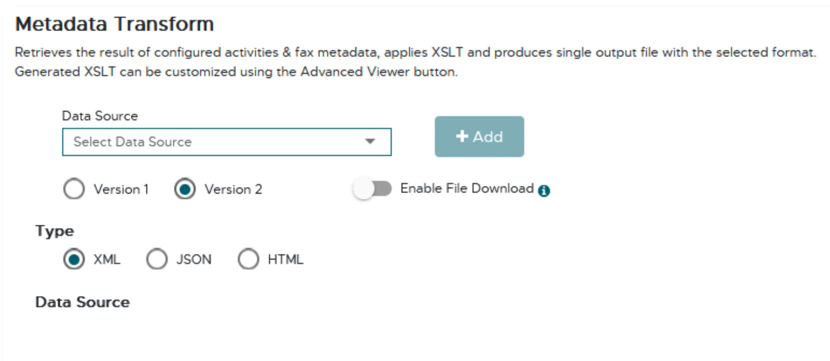
Extracted Value	This is a dropdown selector of currently supported extraction fields. Select the field you wish to configure for extraction.
Mapping Configuration	This dropdown will display the formats the **Extracted Value** can be presented in. The selected field will dictate what options are available but in general: • **Original** will preserve the data in the format it was extracted. • **Standardize** will reformat the data to output in a consistent format.
Workflow Field	This dropdown allows you to select what **Custom Field** will be the repository for

	the extracted data.

Metadata Transform

This Activity is used to construct the **format** of metadata **output** files, usually used in conjunction with NEXTSTEP integration via **Document Retrieval** (pull) or **Document Delivery** (push) Activities.

This configuration may be very **specialized** to support your requirements and it is **highly recommended** that you consult with Concord Sales, your Concord Implementation Manager or Concord Premium Support to assist with configuring the appropriate **metadata output** for your needs:



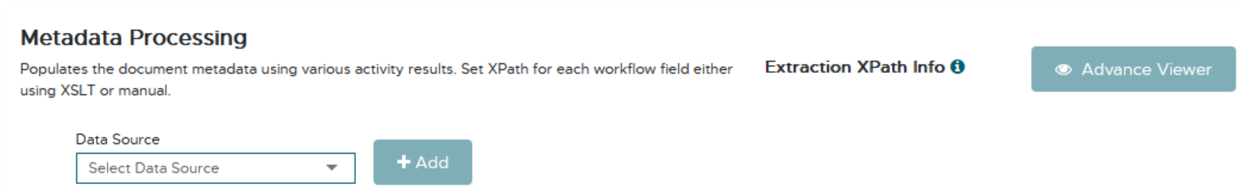
Configurable elements of the **Metadata Transform** Activity are defined as follows:

Data Source	Dropdown selection of all possible **sources** of data that may be included in metadata that is exported from NEXTSTEP. Select Data Source and click **Add** to include this source in your output.
Version	XSLT version used to transform data, Version 1 is legacy, and **Version 2** should be selected for most new processes.
Type	This dictates the **format** the export data will take: XML, JSON or HTML.
Enable File Download	Enabling this allows you to retrieve document **content** along with selected metadata.

Datasource	This will relate the data to the **source** ID for each message.

Metadata Processing

Metadata Processing is used to **compile** the elements that will be incorporated into the **output** format configured in **Metadata Transform**. Data may be pulled from **multiple sources**, including **fax** call data, **extraction** and **Document Classification** to populate your output format with meaningful information:

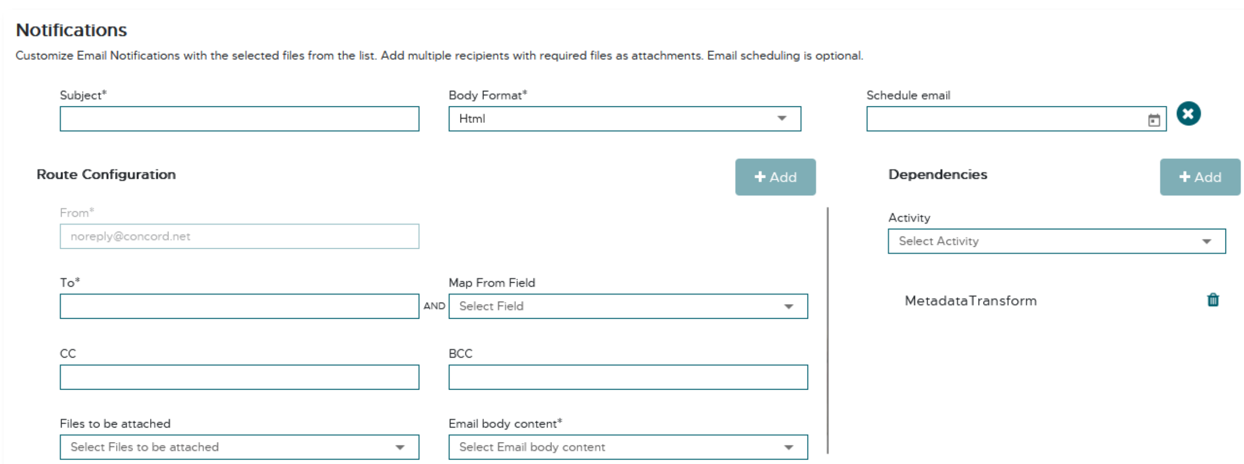


Here you can select the **data source(s)** you wish to incorporate into your output.

It is **not recommended** that you utilize **Advance Viewer** or edit any **XSLT** configuration. Please contact your Implementation Manager, Sales Engineer**,** or [Concord Premium Support](#) for assistance with additional customization.

Notification

The Notification Activity is used when **email** notification is required following some **event** in a NEXTSTEP Shared Queue. This could relate to **new faxes** being received, messages being **moved** to a new **Shared Queue** or **Folder**, or the result of a **Process** run in that queue:



Base configurable elements of the **Notification** Activity are defined as follows:

Subject	The subject line that will be used when email notifications are sent.
Body Format	The content-type of the notification email message body, text or HTML.
Schedule Email	Calendar selection for a **one-time** notification.
Dependencies	Any **Activity** that may be used as a prerequisite to trigger notification.

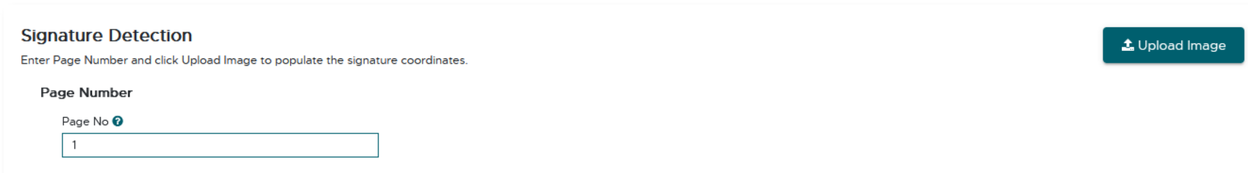
The **Route Configuration** elements are defined as follows:

From	Default email “from” address that email notifications will come from.
To	The email address to which notifications will be sent.
Map From Field	Optional variable field to use as notification recipient based on data populated to a **Custom Field**.
CC / BCC	Additional email addresses that may be notified as CC or BCC recipient(s).
Files to be Attached	Selection of possible **source** documents to attach to the notification, based on previously configured Activities.
Email Body Content	Selection of possible email message body content to attach to notification, based on previously configured Activities.

Signature Detection

This Activity allows for the **scanning** of documents for the presence of a **signature**. The configuration of this Activity requires that you upload an **example** document that should contain a signature when received and select the **area** within the example where a signature would be found.

Once enabled, NEXTSTEP will look for the presence of a **signature** in that area when new documents are received:



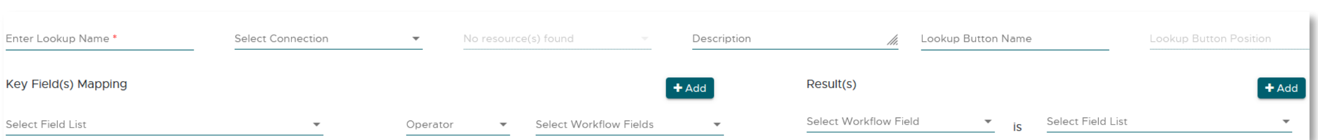
Click **Upload Image** to upload your example document in PNG or JPG formats and select signature detection area.

Choose the **Page Number** on which a signature scan should be performed.

Data Lookup

This Activity is used to configure a data lookup process using **Custom Fields** as the query item(s). In order to select a **Lookup Activity** to add to your Process, you must first configure **Lookups** on the **Shared Queue** you wish to add this to.

To begin, navigate to your Shared Queue, click **Lookups** and **+Create**:



Here you will configure the **Lookup** utilizing a pre-configured **Data Connection** added at the **Company** level. You must have this Data Connection in place to proceed with completing the form fields for Lookups:

Enter Lookup Name	The identifier that will be used for this Lookup, which will be selected in the **Data Lookup Activity** configuration.
Select Connection	The pre-configured **Data Connection** that will be used to access the database from which to pull results based on **Custom Field** input.

Description	Description of the Lookup for identification purposes.
Lookup Button Name	The button label that will appear to users performing a Lookup in the NEXTSTEP UI.
Lookup Button Position	Where the lookup button will appear in the NEXTSTEP UI, based on the **Custom Fields** that are added in Key Field Mapping.

The **Key Field Mapping** configuration allows you to select what field(s) will be used as query **variable(s)**, and how the query will be performed:

Select Field List	Add fields from the **integrated application** that you wish to be used as query elements in a data lookup.
Operator	Select the operator (equals, does not equal, greater than, less than, etc.) that will be used to hone your users' queries.
Select Workflow Fields	Choose the **Custom Field** that will be used be contain each query element added via **Select Field List**.

The **Results** configuration allows you to select what field(s) will be used to populate results **following** the Lookup:

Select Workflow Field	Choose what **Custom Field(s)** will be used to display the results of a data lookup.
Select Field List	Choose what field(s) from the **integrated application** will be populated to **Results Custom Fields**.

Integration

This Activity allows for the configuration of integrations with **specific applications** provided by **third party** organizations. Documentation pertaining to these Integrations are provided **outside** of this document.

Please contact your Implementation Manager, Sales Engineer**,** or Concord Premium Support for more information on **integrations**.

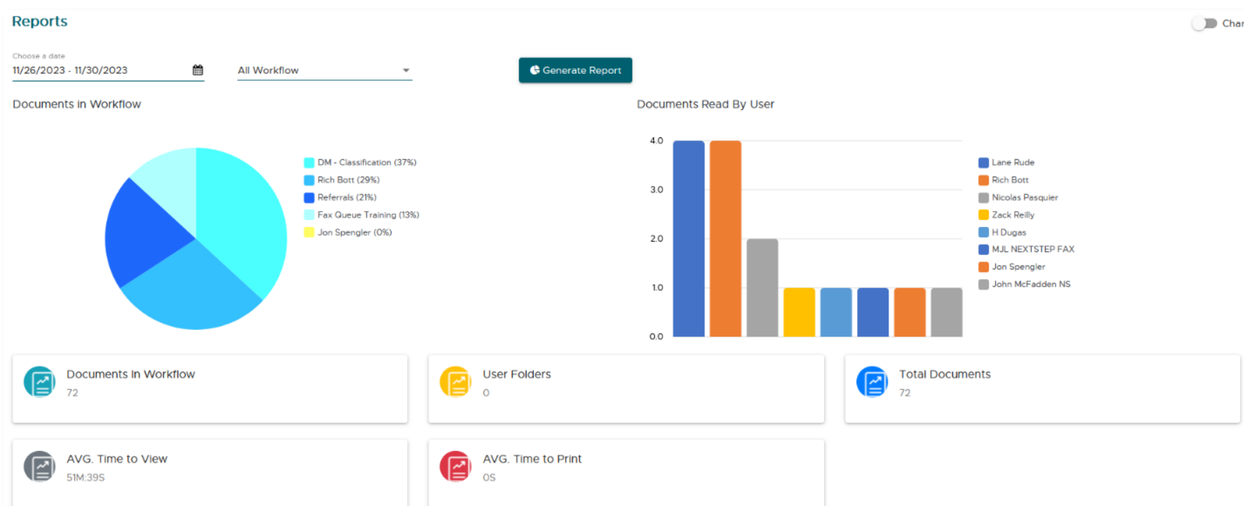
NEXTSTEP Reports

Aggregated and Share Queue Metrics

NEXTSTEP provides a series of **reports** pertaining to **activity** in **Shared Queues**. In this section, we'll review what **Reports** are available and how to produce them.

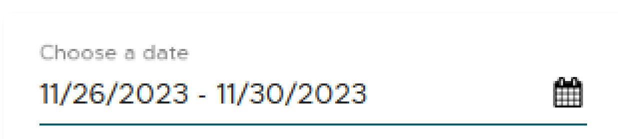
To access Reports in NEXTSTEP, click the **Reports** icon:

This will open the default Reports display, showing activity in **all** Shared Queues for the past **5 days** in **Chart** form:

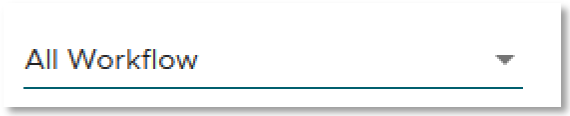


From this screen, you can select the **parameters** you would like to use to create a report.

First, choose a **Date Range:**



Next, choose whether you want to include **all Shared Queues** (Workflows) or select the **specific Shared Queue** you want to report on:

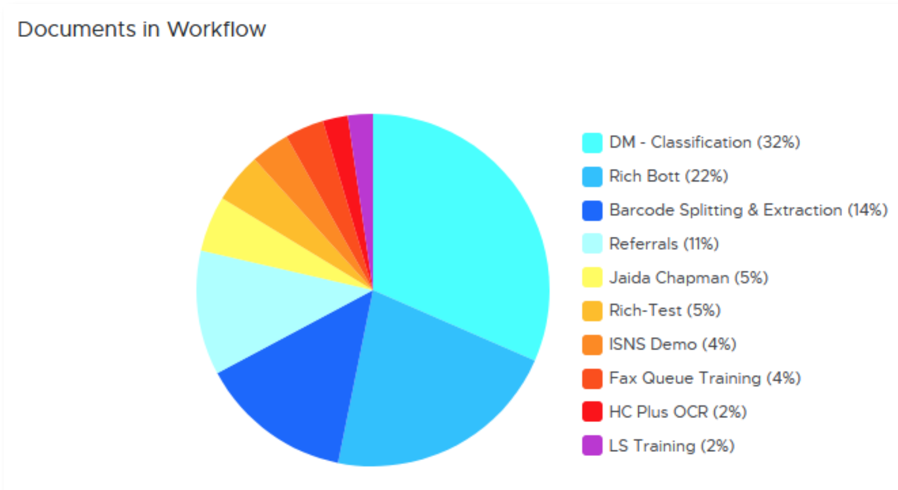


When you have entered your parameters, click **Generate Report**.

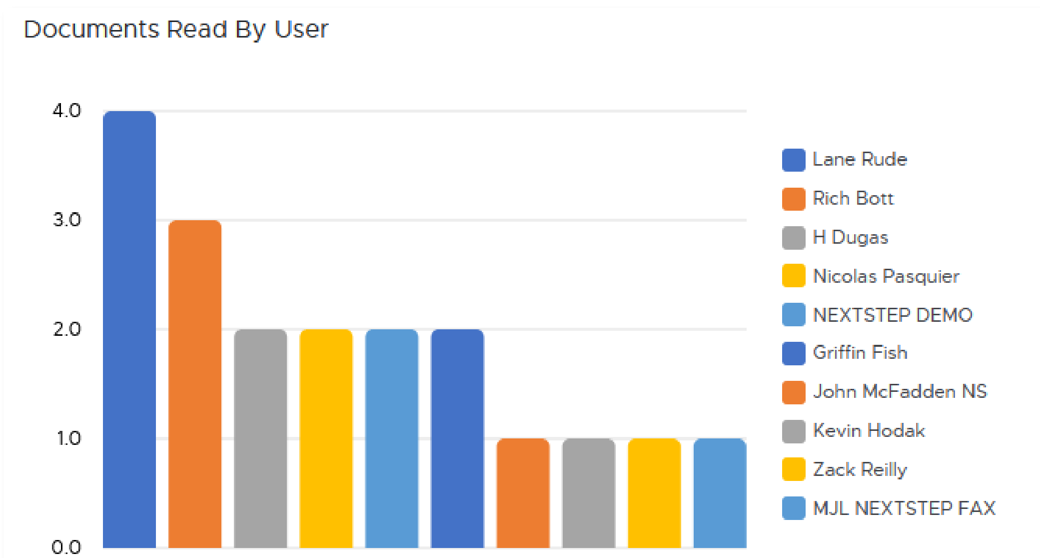
By default, the results will be displayed with the following **metrics**:

Documents in Workflow	The total documents **received** or **uploaded** into your selected **Shared Queue(s)** during the selected time period.
User Folders	The total documents **received** or **uploaded** into users' **Personal Folders** during the selected time period.
Total Documents	The total documents **received** or **uploaded** into your selected **Shared Queue(s)** and any **Personal Folders** during the selected time period.
Average Time to View	The average amount of **time**, based on all documents included in your results, that it took for documents to be first **viewed** by users working in your **Shared Queue(s).**
Average Time to Print	The average amount of **time**, based on all documents included in your results, that it took for documents to be **printed** by users working in your **Shared Queue(s).**

The **Documents in Workflow** results are also displayed in a separate chart, showing the breakdown of the **percentage** of documents in **Shared Queues** and user **Personal Folders** (if applicable) during the selected period:



An additional chart displays **Documents Read by Users** which provides a tally for the number of documents **viewed** by users during the selected period:



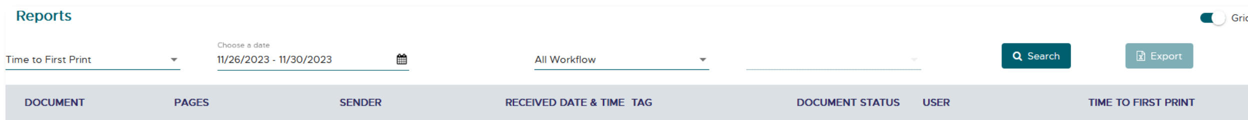
By **hovering** over each colored listing, you can see the **number** of documents handled by that user.

Grid Reports

The Reports module also allows you create **exportable**, table-based reports that allow for message-specific viewing of **status**, **user** and **timestamps**.

To access **Grid Reports**, shift the slider in the top-left of the screen from Chart to **Grid**:

This opens the **Grid Report** query screen where you can enter the **parameters** you wish to report on:



You have the option of pulling **four** report types:

Time to First Print	Document list indicating which user first printed each document and when.
Time to First View	Document list indicating which user first viewed each document and when.
Time to First View or Print	Document list that reports on first view or first print, the user and action taken, and the time the first print or view occurred.
Unread Report	List of documents that have not been viewed by any user within the time period requested.

Choose your **report type**, the **time period** you wish to search within and the required **Shared Queue / Folder** (or **All Workflows**) and click **Search** to generate your report.

To **export** a list of your results, click **Export** and an **XLSX** file will be generated for **download**.

NEXTSTEP User Audit Details

Auditing Users and Shared Queues for Admin Activity

The **User Audit Details** section allows NEXTSTEP admins to query the NEXTSTEP platform for **Admin activity** related to **mapping** and **un-mapping** NEXTSTEP Users to Shared Queues.

This can be helpful if there is a need to understand what users are mapped to what Shared Queue, when specific users were **added** or **deleted** from Shared Queue access, and/or what **Admins** are responsible for making **changes** to user/Shared Queue access.

User Audit Details activity can be queried for up to **12 months**, using pre-built and custom time period filters to hone results.

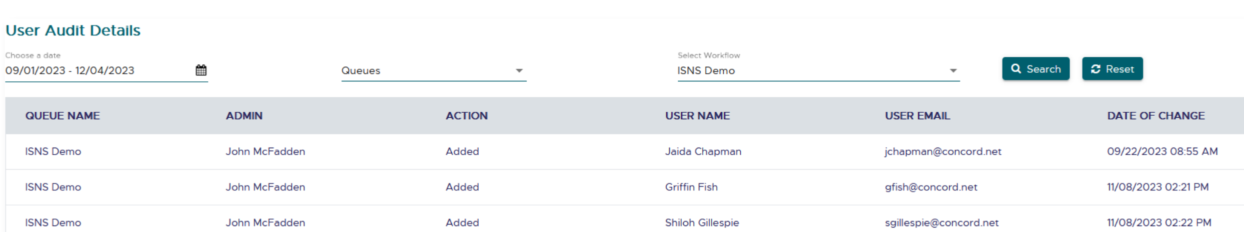
Note that **only activities** which took place **during the time** period used in the query will be displayed in the **results**.

To access User Audit Details, click the **User Audit Details** icon:

This opens the **User Audit Details** query screen:

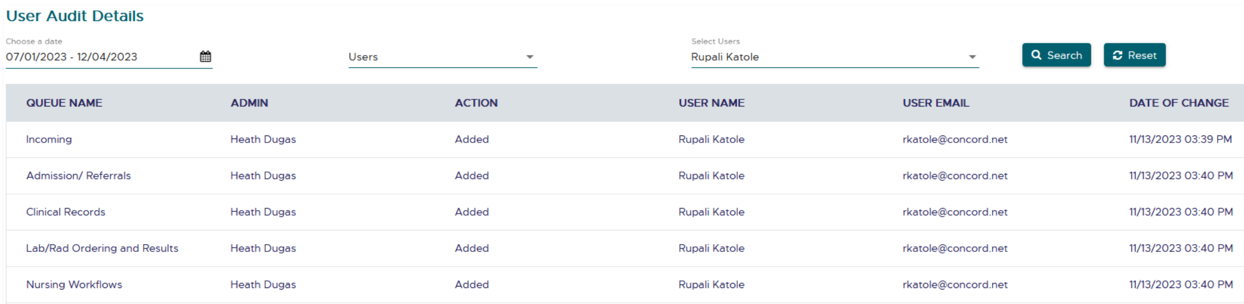
Here you have the option to search based on **Shared Queue** or **User**.

Searching based on **Shared Queue** will return results pertaining to Admin activity in that **queue**, and details regarding any **users** that were **added** or **deleted** from that Shared Queue, **when** that action took place and **what Admin** made the change:



QUEUE NAME	ADMIN	ACTION	USER NAME	USER EMAIL	DATE OF CHANGE
ISNS Demo	John McFadden	Added	Jaida Chapman	jchapman@concord.net	09/22/2023 08:55 AM
ISNS Demo	John McFadden	Added	Griffin Fish	gfish@concord.net	11/08/2023 02:21 PM
ISNS Demo	John McFadden	Added	Shiloh Gillespie	sgillespie@concord.net	11/08/2023 02:22 PM

Searching based on **User** will return results pertaining to Admin activity associated with that **user account**, any **Shared Queues** the user was **added** to or **deleted** from, **when** the action occurred and **what Admin** made the change:


User Audit Details

Choose a date 07/01/2023 - 12/04/2023 | Users | Select Users Rupali Katole | Search | Reset

QUEUE NAME	ADMIN	ACTION	USER NAME	USER EMAIL	DATE OF CHANGE
Incoming	Heath Dugas	Added	Rupali Katole	rkatole@concord.net	11/13/2023 03:39 PM
Admission/ Referrals	Heath Dugas	Added	Rupali Katole	rkatole@concord.net	11/13/2023 03:40 PM
Clinical Records	Heath Dugas	Added	Rupali Katole	rkatole@concord.net	11/13/2023 03:40 PM
Lab/Rad Ordering and Results	Heath Dugas	Added	Rupali Katole	rkatole@concord.net	11/13/2023 03:40 PM
Nursing Workflows	Heath Dugas	Added	Rupali Katole	rkatole@concord.net	11/13/2023 03:40 PM

Note that, when searching for activity based on either the **Shared Queue** or **User Account,** you have the option of selecting multiple search criteria to search by more than one queue or user, as needed.

To query **User Audit Details**, select your **time** period, enter the appropriate **Shared Queue** or **User** details and click **Search.**

To **clear** your query, click **Reset.**

Getting Help

Concord Premium Support

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

Phone: +1 (206) 441-3346

Email: psupport@concord.net

Web: https://concord.net/technical-support/