Concord
TECHNOLOGIES

NEXTSTEP

Folder Monitor

Installation and Configuration Guide

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Change History

Version	Date	Notes
1.0	2019	Initial Creation
2.0	4/1/2024	Branding Updates
2.1	4/15/2025	Minor Content Updates
2.3		Added support in Folder Monitor Configuration to automatically archive or delete documents after retrieval.
3.0	9/9/2026	• Added support for Document Type as a filename configuration option, improving document retrieval flexibility and control. • Security Upgrades.

Overview

This document describes the installation and Configuration of Concord's upload/download utility **NEXTSTEP Folder Monitor.** NEXTSTEP Folder Monitor can be used to upload documents of varying type to the NEXTSTEP platform and/or retrieve documents that have been processed by NEXTSTEP.

NOTE: Concord offers two different 'Folder Monitor' software installation downloads. One is used to manage file upload/download for NEXSTEP and the other is used to manage file upload/download for Concord's Care Intake platform. Please ensure you download the proper Folder Monitor installation file for your use case.

If you have any questions about this application, please contact premiumsupport@concord.net.

Disclaimer

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Introduction

Welcome to **NEXTSTEP Folder Monitor**, a Windows utility that provides document **upload** (intake) and **download** (return) capabilities to Concord's NEXTSTEP Document Processing platform.

The Folder Monitor **intake** process monitors network folders for new documents to be uploaded to the appropriate NEXTSTEP queues. The **return** process monitors NEXTSTEP queues for documents that are flagged for retrieval from the cloud and then downloads them to your network file system.

There are several use cases for Folder Monitor, including:

- **Individual users** can install Folder Monitor on their personal machines as an easy way to drag and drop documents into a folder and have those documents automatically appear in NEXTSTEP.

- Network admins can install Folder Monitor on a server to provide the same functionality to a **work group or department**, using a single installation of the tool. They would do this by providing shared access to the monitored folders.

- **Applications** can be integrated with NEXTSTEP in the same way: configure the applications to drop files into the monitored folder locations to submit items to NEXTSTEP automatically; or configure applications to pick up files in retrieval directories if they need to process documents released by NEXTSTEP following processing.

As many applications can utilize retrieval from a network folder to import documents, Folder Monitor is often used as a step in **integrating** with systems such as EMRs, where manual processes are offset via Concord's **Document Classification** and **Data Extraction** services.

Via Classification and Extraction, documents can be routed to the proper queue with key data points lifted from the document for import and indexing.

System Requirements

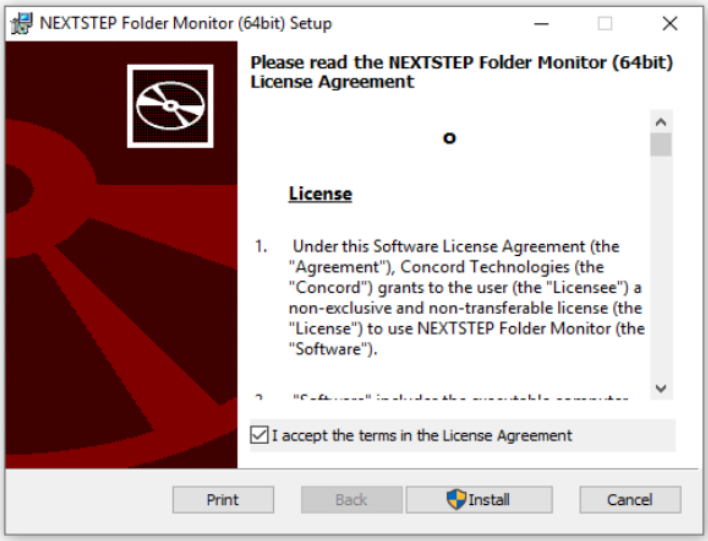
To use NEXTSTEP Folder Monitor, you must have a valid Concord **NEXTSTEP account** and conform to the following:

- Supported **operating systems**: Windows 10, Windows 2012, Windows 2016
- Folder Monitor requires at least 64 megabytes(MB) of **RAM**. 128MB is recommended.
- Folder Monitor requires at least 50 megabytes(MB) of available space on the **hard disk**. More may be required based on the level of traffic to handle.
- **Scaling** resources would be treated exactly as any network file server, as the utility mimics similar behaviors, and so uses similar resources:
    - Folder and file enumeration
    - Network transfer of files, both from users when using a monitored network share and to/from the NEXTSTEP platform
    - Web service calls to the NEXTSTEP platform

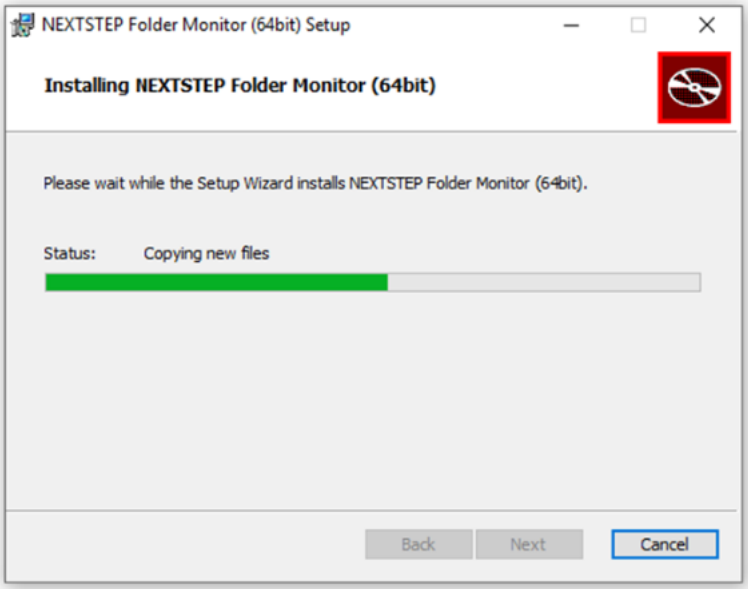
Installation Procedures

The following steps will be followed to **install** NEXTSTEP Folder Monitor:

- **Download** the Folder Monitor Installer
- **Disable** any anti-virus software before installing Folder Monitor
- **Run** the install setup by double clicking the *FolderMonitor.msi* file
- **Accep**t the License Agreement and click **Install** to initiate the installation:

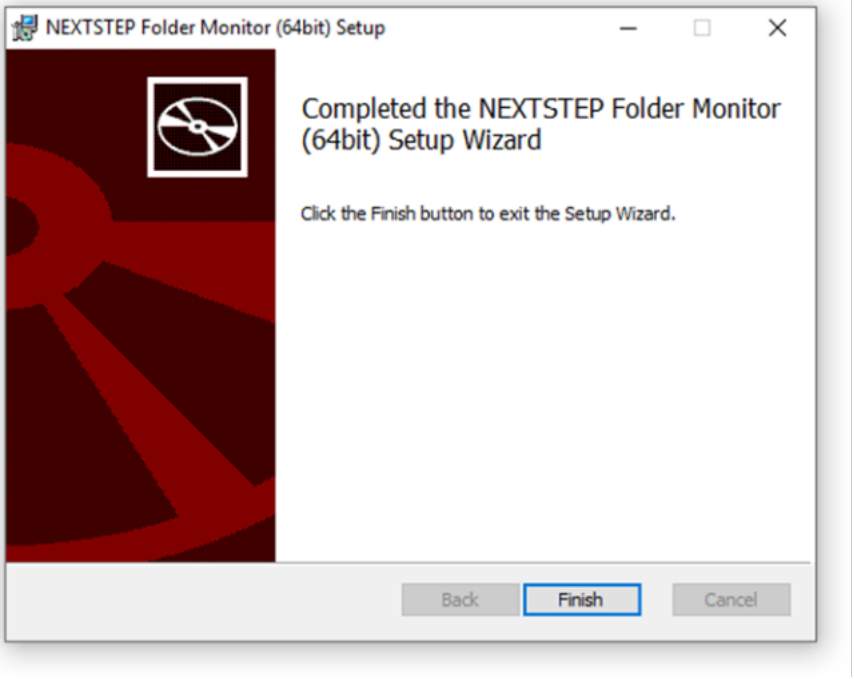


- A progress bar will display your installation **progress**:



Once **finished**, you will receive a successful installation notification.

Click **Finish** to exit the installer:

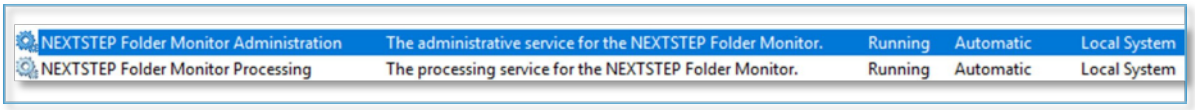


Windows Services Settings

When you are using Folder Monitor to upload or download faxes from network folders, the application will need **Windows permissions** to access those locations. You must set the permissions for the Windows services using an account that has access to the locations.

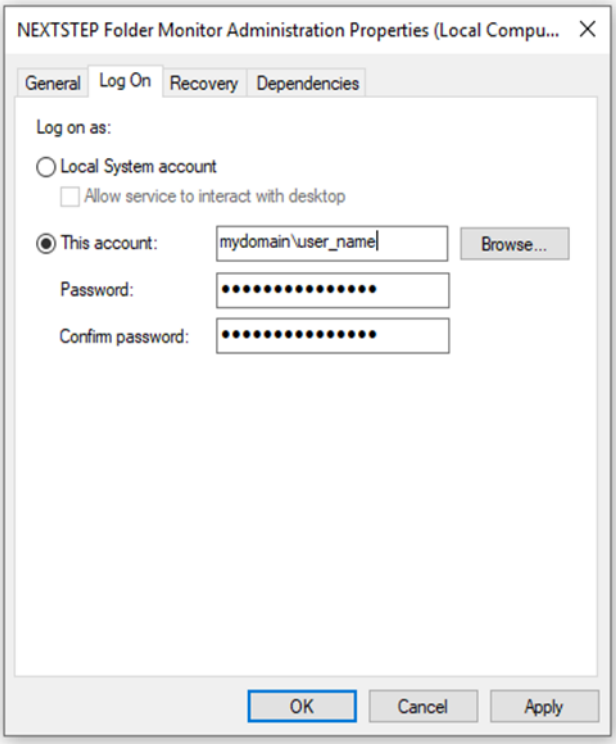
To set permission go to **Start > Control Panel > Administrative Tools** and open **Services**.

Find the **NEXTSTEP Folder Monitor** services as shown below:



Right click on the service and select **Properties**.

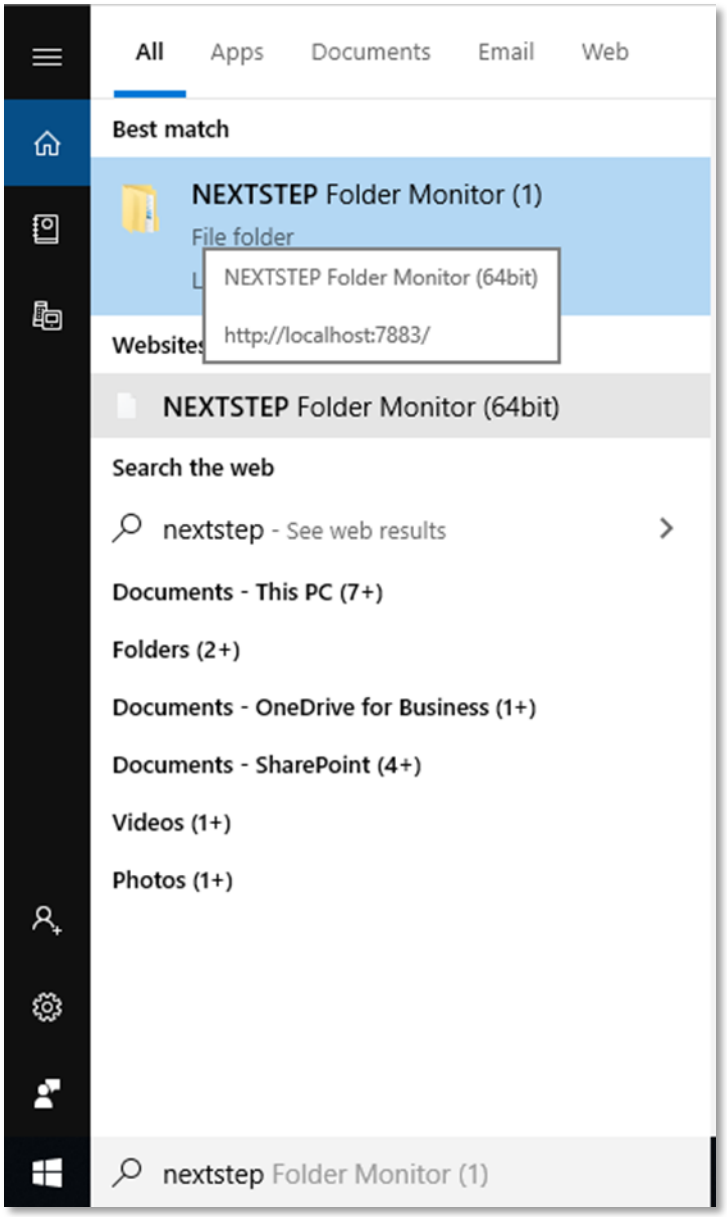
Click on the **Log On** tab and change the "Log on as" to "This account" and type in the windows account that is required to access the remote resources:



Note: This is only required if the remote resource requires Windows permissions to access.

Getting Familiar with the Interface

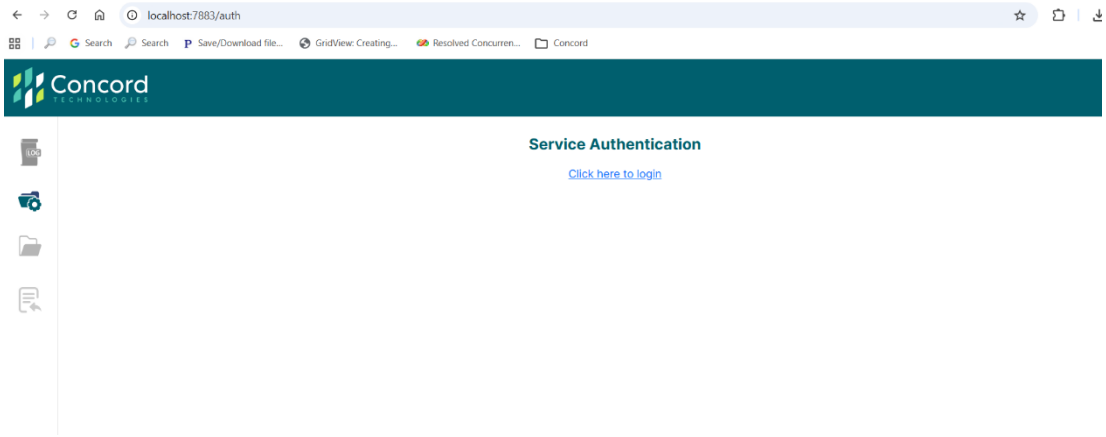
Launch the Folder Monitor user interface from the Start menu:

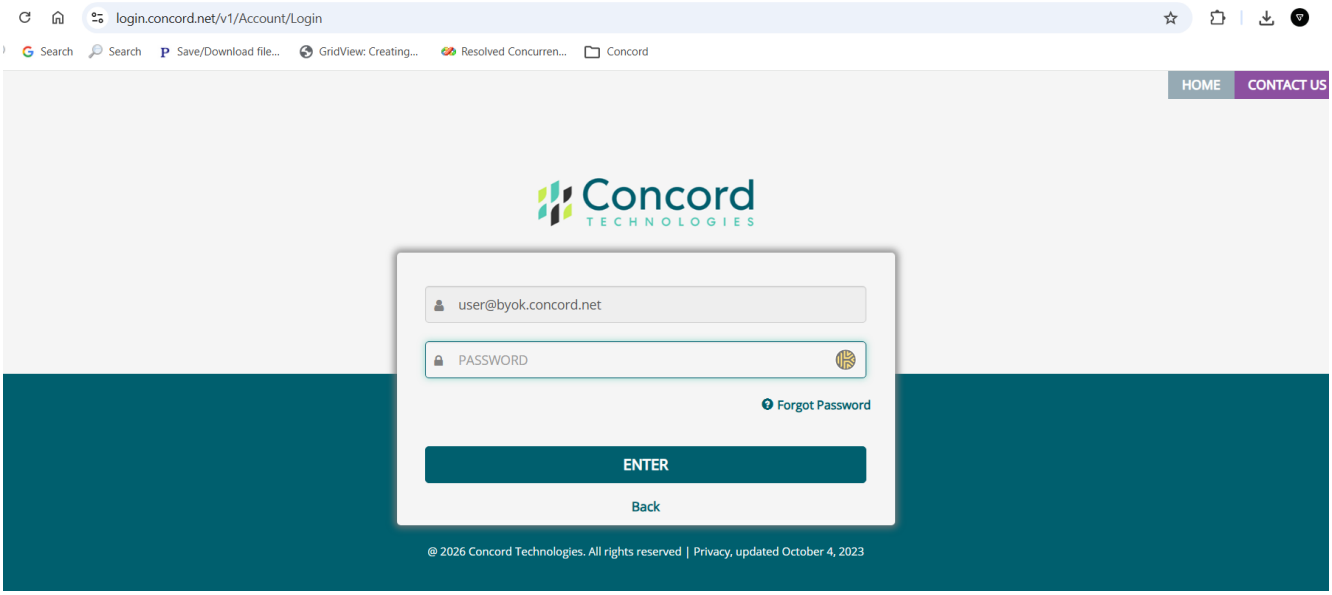


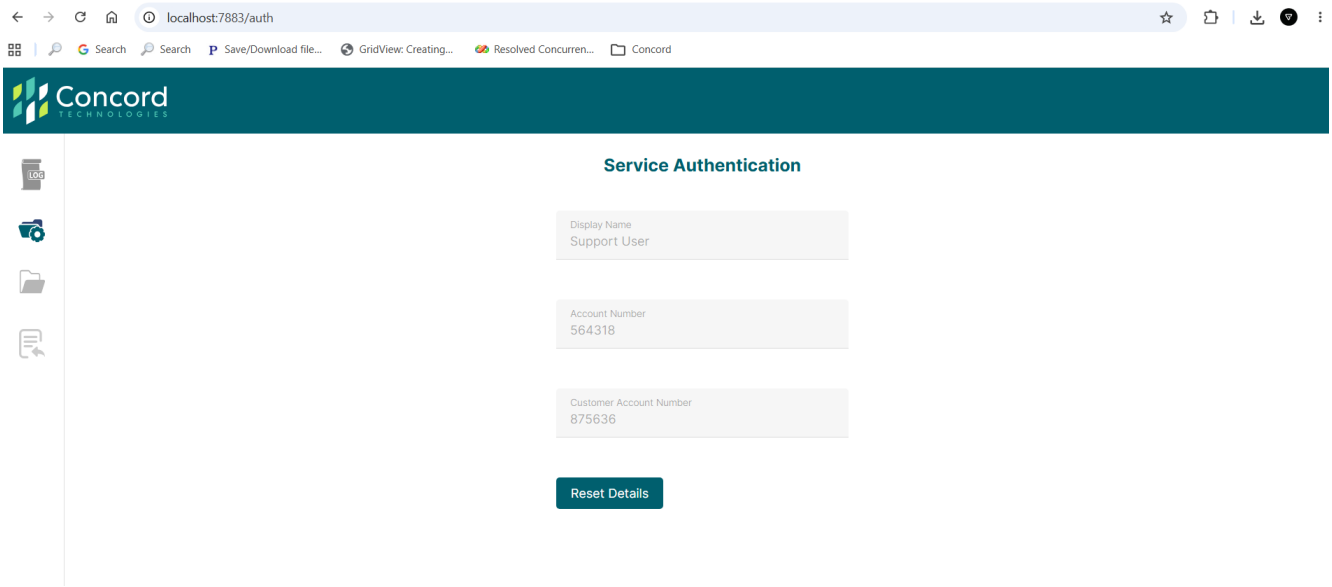
Authentication

The first step after launching the user interface is to navigate to Service Authentication and log in using Concord NEXTSTEP user credentials that have access to the shared queue(s) you wish to upload to or download from:

It is recommended that a **user account** be created specifically for the purpose of upload/download via Folder Monitor.







Once authenticated, these credentials will be **retained** for the operation of Folder Monitor.

Credentials can be reset by returning to the **Service Authentication** page.

To **reset** the password on a NEXTSTEP enabled Concord user account, you can enter the username here: https://login.concord.net/v1/Account/ForgotPassword

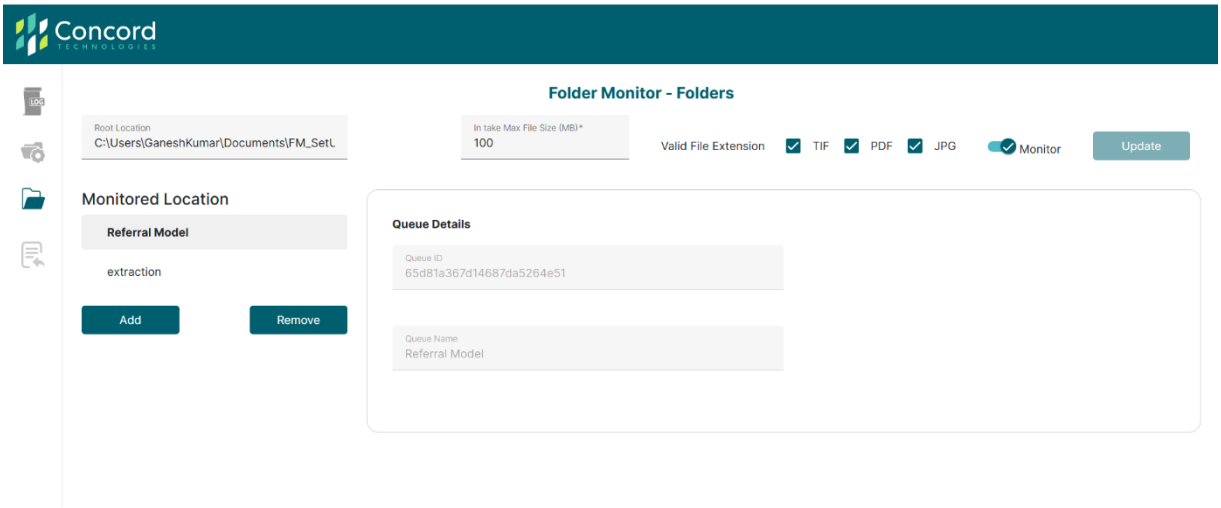
Configuring Upload via Document Intake

In **Root Location,** enter the path for the folder you want monitored for file upload. This will become the root path, and a series of upload folders will be created for each NEXTSTEP shared queue you connect.

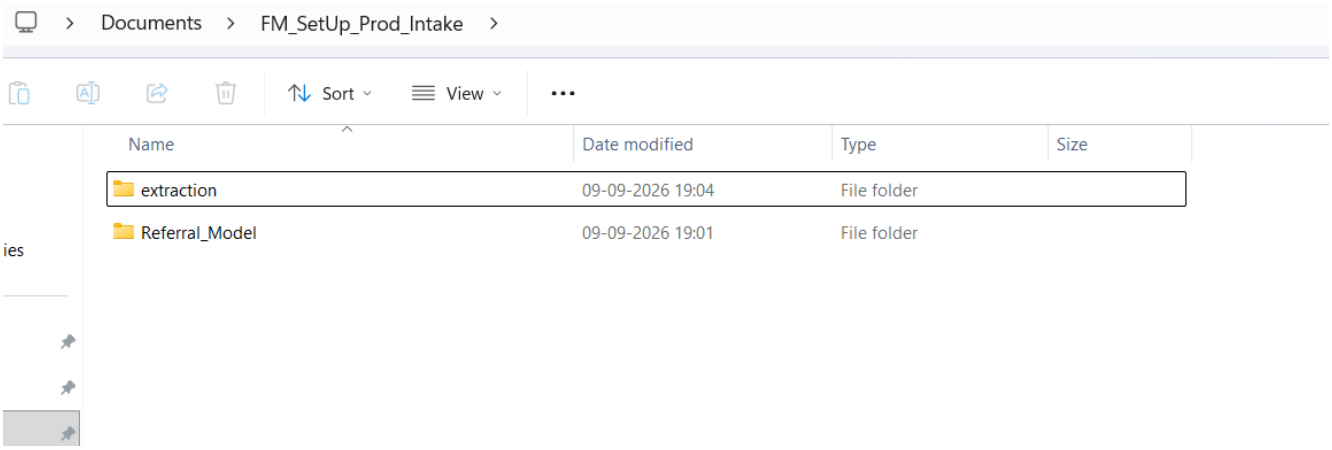
Click **Add** to choose the Concord NEXTSTEP shared queues that you wish to upload to.

Configure the maximum **file size** and **file types** for documents that will be uploaded to NEXTSTEP.

Toggle the **Monitor** switch to **On**, and click the **Update** button to apply changes:



Folder Monitor will automatically create a nested **folder structure** within the Root Location that mirrors the structure of the NEXTSTEP Shared Queue(s) you have connected to:



After the configuration is complete, users or applications can drop files into the monitored folder locations to submit them automatically to the appropriate NEXTSTEP queues.

Configuring Download via Document Retrieval

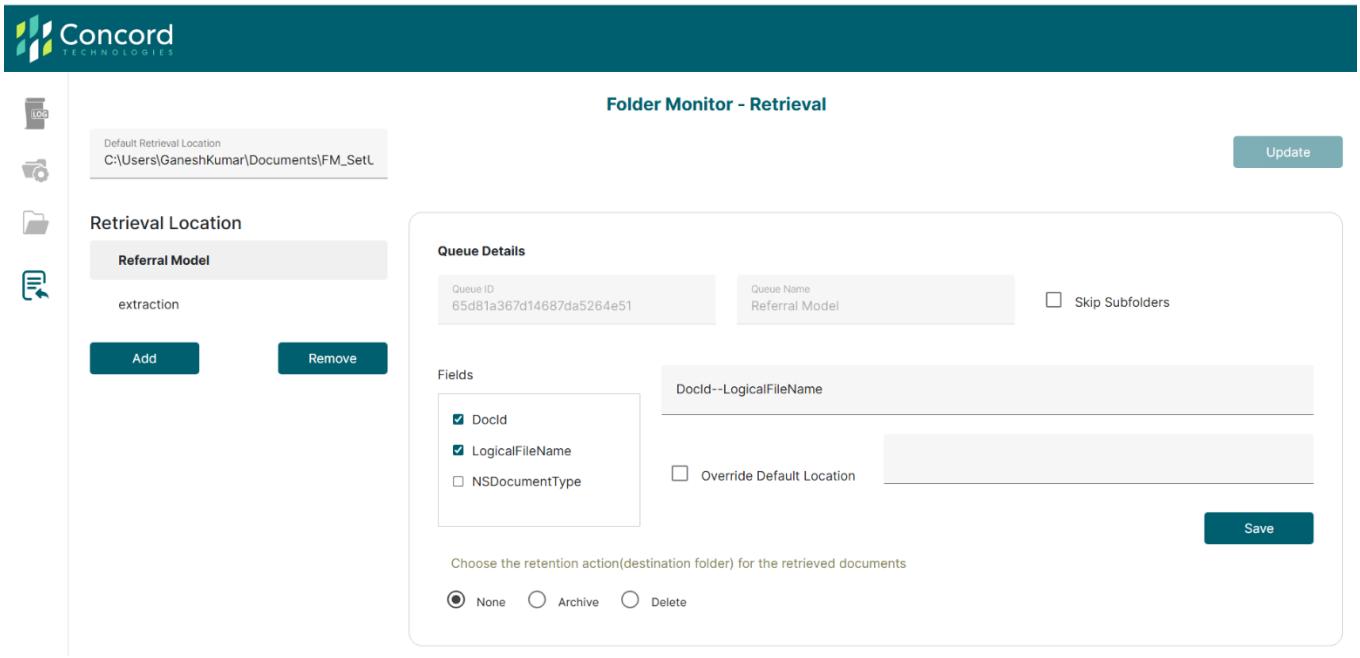
This section of the user interface allows for the configuration of the **document retrieval** (download) process.

Enter the **Root Location** file path to create the base location for NEXTSTEP export folders.

Click **Add** to choose the Concord NEXTSTEP shared queues that you wish to download from.

In **Queue Details, choose whether you want to include or skip export from within subfolders configured in your NEXTSTEP queue(s).**

Via **Fields**, configure the **file name format** using standard components and any **custom fields** associated with each shared queue:

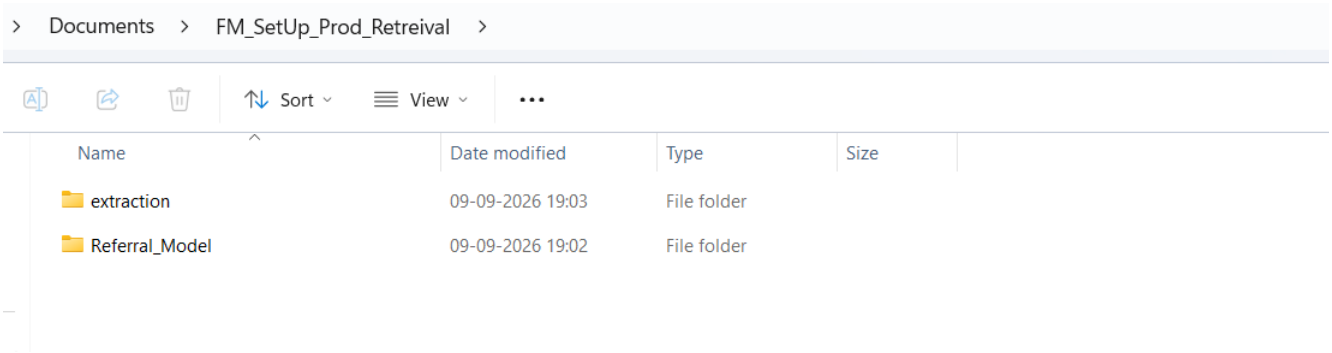


Standard file name components:

- **DocID:** The Concord issued 'NEXTSTEP Message ID' unique identifier for this item in NEXTSTEP
- **LogicalFileName:** Default file name that can be configured in the process associated with Document Retrieval and the export of items from NEXTSTEP
- **NSDocumentType:** NSDocumentType represents the document's configured Document Type (Document Classification Type) within NextStep.

Please contact Concord Technical Support for more information on configuring these fields and options for triggering the download process.

As with the Intake process, Folder Monitor will automatically create a **nested folder structure** within the Root Location, to represent each shared queue connected for download:



The structure of the folders will **mirror** the structure of the shared queue as configured via NEXTSEP administration. Documents that are exported from within subfolders in NEXTSTEP will be found in the corresponding subfolders in the file structure Folder Monitor has created.

Logging

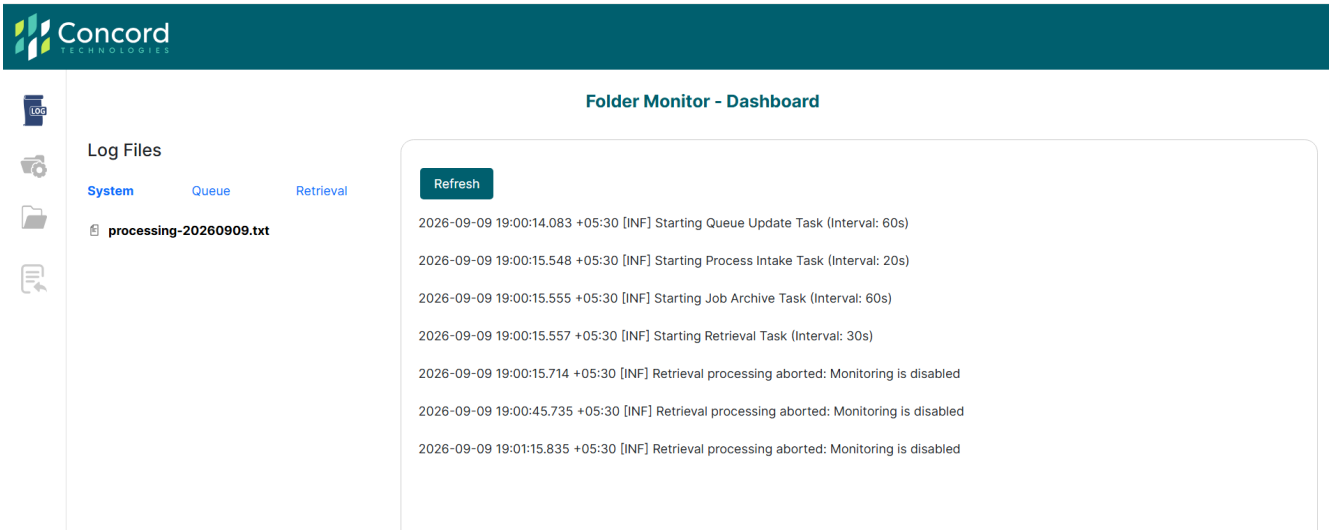
The Log Files section of NEXTSTEP Folder Monitor provides an interface for viewing text-based logs according to various levels of processing:

System: Logs pertaining to the overall system processing and HTTPS connectivity of Folder Monitor

Queue: Logs pertaining to activity associated with specific queues mapped for upload/download via Folder Monitor.

Retrieval: Logs pertaining to the retrieval/download of documents from NEXTSTEP and their routing to destination folders,

These logs allows you to **monitor** Folder Monitor application activity, **research** problems or provide Concord technical support with log extractions as needed to **diagnose** problems.



All logs are stored in the folders created by Folder Monitor for upload/download during configuration.

An additional **[Archive]** folder will be created for retaining uploaded documents and logs associated with successful or failed processing of documents during Intake.

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

Emergency After Hours Phone: +1 (206) 467-4068

Email: premiumsupport@concord.net

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