Optio™ Training Course Catalog
Bottomline maintains an active schedule of instructor-led classroom, instructor-led online and self-paced CD-based training programs for Optio Enterprise and Optio Healthcare™ users.

To register for an upcoming class, please complete the online form at http://www.bottomline.com/customer_support/Optio_training.html, or call 1-800-472-1321 to speak directly with a Bottomline sales representative.

Classroom training sessions in North America are held at Bottomline’s corporate training facilities in Portsmouth, NH; Alpharetta, GA (outside Atlanta); and Raleigh, NC. Directions to each office location can be found on the Bottomline web site at: http://www.bottomline.com/contact/directions.html.

Please note that registration is not a confirmation or a seat guarantee. Do not make final travel arrangements until you have received a seat confirmation via email from a Bottomline account executive or educational trainer.

A complete schedule of upcoming Optio training classes can be found on the Bottomline web site at http://www.bottomline.com/customer_support/Optio_training.html.

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Enterprise
Online Training (Self-Paced Education)

Optio Advanced Labeling for Document Designers
Course Description:
Self-paced, recorded training for the use of Optio's Advanced Labeling solution. This CD-ROM based course includes basic design instruction, three step-by-step practice exercises and a self-grading quiz.

Topics to be Covered:
- User Modes
- Set-up Wizard
- Introduction to Advanced Labeling
- Working with text, objects, barcodes, images and graphics
- Creating variable data fields
- Using variables to receive data from a database
- Creating Optio watch triggers to execute labels
- Printing and previewing labels using Optio Print

Who Should View:
DesignStudio document designers who have created and modified documents and need advanced labeling features for thermal or RFID-printed labels.

Prerequisite(s):
Introduction to DesignStudio or DesignStudio for Healthcare or a minimum of 6 months creating production documents in DesignStudio.

Notes:
This is a self-paced instructional CD. Please contact Bottomline sales at 800-472-1321 or email info@bottomline.com to purchase a copy.
Instructor-led Classroom

Optio DCL™ for Enterprise Users

Course Description:
In this course, participants will create and manipulate documents using Optio's Document Customization Language (DCL) and OptioDesigner. With a focus on DCL fundamentals, participants study Optio's component-based document architecture and apply those principles to document creation. A combination of lecture and hands-on exercises covers the entire document design process, including graphical formatting, data mapping, conditional logic and distributed output. This course covers both introductory and advanced topics.

Topics to be Covered:
- Document Customization Language (DCL) functional overview
- Document Customization Language (DCL) architecture
- Creating a simple document with DCL
- Developing a data map for static and variable elements
- Adding graphics, logos, objects and barcodes to a document
- Adding dynamic distribution and conditional processing
- Performing duplex printing and selecting multiple tag lines
- Using OptioDesigner to create custom documents
- Troubleshooting common errors
- Applying advanced conditional processing and looping
- Creating complex documents
- Adding dynamic formatting and data mapping to a document
- Working with user-defined functions using SmartSelect
- Dynamic document distribution to multiple destinations
- Advanced document design process and methodology

Who Should Attend:
Technically-proficient document developers and project managers who need a solid understanding of the document design process using DCL. Some programming experience is highly recommended.

Student Profile:
- Working knowledge of conditional logic
- Understanding of basic programming concepts
- Analytical/logical skill set
- Working knowledge of client/server environment
- Intermediate to advanced proficiency with the Windows O/S
- Working knowledge of your ERP platforms (UNIX, AS400 or Windows)
- Working knowledge of integration with your ERP/HIS applications
- Working knowledge of and hands-on experience with SQL

Prerequisite(s):
3 or more registered attendees. Please check with Bottomline sales for availability.

Duration:
4 Days
Optio DesignStudio™ for Enterprise Users

Course Description:
The primary goal of this course is to provide participants with the knowledge to create, enhance and troubleshoot custom business forms using Optio DesignStudio Version 7.x for Integrate 7.x servers. This course covers both introductory and advanced concepts necessary to create a business form, including all steps from data capture to final custom output. Students in this class will learn how to take full advantage of the product by applying proven design and testing methodologies to streamline form design time. This class is comprised of lecture, demo and hands-on lab exercises.

Topics to be Covered:
- Creating a document
- Adding images, objects and barcodes to a document
- Mapping static and dynamic data elements
- Configuring simple and advanced page condensing
- Enabling duplexing
- Using Expression Builder for advanced formatting
- Configuring look-up input flow items options
- Establishing parent-child relationships
- Working with Optio’s Flow tools
- Working with SmartSelect documents
- Configuring variable destination flow items
- Understanding and applying custom formatting
- Coding DCL within DesignStudio
- Writing functions in DesignStudio
- Working with AP checks, including the MICR line
- Best practices
- Processing completed documents through Integrate Version 7.x
- Creating and understanding trace, fatal and warning logs
- Troubleshooting common errors
- e.ComIntegrate (eCI) administration

Document Design Lab: (Day 5)
- Construct and test a document of your choice utilizing DesignStudio and e.ComIntegrate
- Create one proprietary document using your own customer-specific data with an Optio Instructor. The instructor will be available to help mentor you through any rough spots with planning, drawing, mapping, applied business logic and execution.
- Please bring one or more documents (time permitting), graphic files (such as your logo) and sample data.

Who Should Attend:
Document designers who will be responsible for creating Optio custom documents.
Student Profile:
- Analytical/logical skill set
- Basic understanding of conditional logic
- Basic understanding of client/server environment (to include basic networking)
- Basic understanding of elemental programming concepts
- Understands fundamentals of data mapping
- Intermediate to advanced experience in a Windows graphical environment to include:
  - Competency with mouse
  - Competency with Windows Graphic User Interfaces
  - Proficiency copying, pasting, renaming files in Windows Explorer
  - Knowledge of your e.ComIntegrate server platform (if other than Windows)
  - Basic understanding of your ERP or HIS application in your operating environment
- High-level understanding of how the Optio solution will be used in your environment

Prerequisite(s):
Students should view the Optio DesignStudio pre-course tutorial video presentation before attending class. This 25-minute video provides a functional overview of the DesignStudio product.

Duration:
5 days

Notes:
This class is delivered on a Windows platform.

Optio e.ComPresent™ Version 2.2 Administration

Course Description:
A hands-on, practical class teaching the fundamentals necessary to plan, install, configure, support and maintain eComPresent Version 2.2. This class includes administrative, end-user, and document considerations for DesignStudio knowledge transfer and is comprised of lecture, demo, and hands-on lab exercises.

Topics to be Covered:
- e.ComPresent Version 2.2 Installation
- Components of e.ComPresent Version 2.2
- Data flow within the e.ComPresent Version 2.2 environment
- e.ComPresent functionality
- Planning for e.ComPresent Version 2.2: pre- and post-installation considerations
- Administrative tasks
- End-user functionality
- DesignStudio document design considerations
- New document wizard for index and layout documents
- Enabling legacy DCS and e.ComIntegrate documents for e.ComPresent Version 2.2
- Troubleshooting
- Best practices
Who Should Attend:
Technically-proficient system administrators, document designers and project members responsible for configuring and maintaining e.ComPresent Version 2.2.

Student Profile:
The typical e.ComPresent Version 2.2 administrator is generally an IT administrator assigned to the product for configuration, maintenance and other post-installation technical functions. Requirements include:
- Experience or recent training in maintaining Web-based applications
- Understanding of the company's security procedures
- Familiarity with the company's integration to ERP/HIS application
- Familiarity with Web-based servers such as Microsoft IIS 4.0, Tomcat or Apache for UNIX
- Working knowledge of database architecture
- Analytical/logical skill set
- Knowledge of basic document design fundamentals to support special features of DesignStudio particular to e.ComPresent Version 2.2

Prerequisite(s):
DesignStudio for ENT Users or DesignStudio for Healthcare (document designers only).

Notes:
This class is delivered on a Windows platform.

Duration:
3 Days

Optio ProCentra™ IDC
Course Description:
This practical, hands-on class is designed for administrators who will support Optio’s ProCentra Intelligent Document Capture (IDC) Solution. This course covers system configuration, project creation, operator functions and integration with e.ComPresent or ProCentra Content Center (PCC). It is recommended that administrators attend this class prior to implementation.

ProCentra IDC's three-day training classes prepare students for the real-world implementation of document and data capture systems. Students will use ProCentra IDC products to solve challenges presented by a fictitious user. The work is project-oriented, and employs the techniques and methodologies of good project implementation.

Topics to be Covered:
- ProCentra IDC architecture
- Benefits of OCR technology and ways to take advantage of it
- Sample ProCentra IDC applications
- ProCentra IDC distribution and file naming conventions
- Software installation procedures
- Scanning considerations
- Network distribution of processing work
Rules-based recognition
New task development with ProCentra IDC RuleManager
Verification and field editing screen development
Configuration and integration with e.ComPresent or ProCentra Content Center
Troubleshooting
Best practices

Who Should Attend:
System administrators responsible for administration and support of the ProCentra IDC Enterprise Solution.

Student Profile:
The typical ProCentra IDC administrator is generally an IT administrator assigned to the product for configuration, maintenance and other post-installation technical functions. Programming experience using Visual Basic is recommended.

Prerequisite(s):
None. However, it is recommended that students take the e.ComPresent Administration or ProCentra Content Center (PCC) Administration courses. These two-day courses complement the implementation and integration of Optio’s archive solution.

Notes:
This class is delivered on a Windows platform.

Duration:
3 Days

Bottomline (formerly Optio) Print Manager™ Administration
Course Description:
A practical class providing hands-on experience with the Print Manager Server and user interfaces. Areas of discussion and knowledge transfer include planning, installation and configuration, as well as ongoing administrative and maintenance tasks. The class consists of lecture, demo, and hands-on exercises.

Topics to be Covered:
- Print Manager functional overview
- Planning for your Print Manager implementation
- Installation and configuration
- Print Manager server
- Print Manager output client
- Administrator functions
- Security
- Alerts
- Understanding the Request Status screen
- Enabling DesignStudio documents for use with Print Manager
- Print Manager and e.ComIntegrate
Print Manager and non-Bottomline applications
Troubleshooting
Best practices

Who Should Attend:
System administrators responsible for supporting print management operations.

Student Profile:
The typical Print Manager administrator is generally an IT administrator assigned to the product for configuration, maintenance and other post-installation technical functions.

Prerequisite(s):
None

Notes:
This class is delivered on a Windows platform.

Duration:
1 Day

OptioFAX™ Administration

Course Description:
A practical class providing hands-on experience with the OptioFAX administration and user interfaces. Installation, configuration, administration and ongoing maintenance tasks are discussed. End-user functions are also discussed to prepare administrators to support OptioFAX users. The class consists of lecture, demo and hands-on exercises.

Topics to be Covered:
- OptioFAX functional overview
- Server installation and initial configuration
- Client installation
- Fax architecture
- Working with modems and Brooktrout™ cards
- Database maintenance
- Phone books and OptioFAX
- Managing Inbox and Outbox
- Sending, viewing, printing and forwarding faxes from the FAX client
- Faxing documents directly from the e.ComIntegrate server
- Configuring fax routing
- Fax reporting
- Troubleshooting
- Best practices

Who Should Attend:
System administrators responsible for supporting enterprise implementations of OptioFAX.
Student Profile:
The typical OptioFAX administrator is generally an IT administrator assigned to the product for configuration, maintenance and other post-installation technical functions. Requirements include:

- Familiarity with integration to company ERP/HIS application
- Working knowledge of communication protocols
- General knowledge of fax technology

Prerequisite(s):
None

Notes:
This class is delivered on a Windows platform.

Duration:
2 Days

Optio Design Center™ for Enterprise Users

Course Description:
The course objective is to teach students how to create, enhance and troubleshoot customized business forms using Optio Design Center for form design and editing, using Optio Document Server™ as the processing tool. Steps covered will take students from the point at which the data is captured from the source to the final user-designed output. Participants will learn various design techniques and methodologies to help achieve the desired output in minimum time. This course is comprised of lecture, classroom demonstration, and hands-on lab exercises.

Topics to be Covered:
- Overview of the Optio document output management process
- Customizing the Optio Design Center environment
- Project and document package creation
- Creating a process flow and process flow object associations
- Creating server connections to Optio Document Server
- Setting up commonly used destinations and integrating these destinations into document packages
- Discussion of section types
- Form layout creation and design and a description of available Palette View tools
- Discussion of various input types and how to create an input for a document package
- How to use Expression Builder and Simple Expression Editor
- Differences between private and shared resources
- Server input sources, including virtual printers and monitored directories
- Preview of document packages and customization of execution plans
- Processing document packages through the Optio Document Server
- Using the Data Connections editor
- Basic and advanced page condensing
- Using gateways on the document package process flow
- Duplex printing of document package output
- Using SmartSelect document packages
- Working with checks and adding a MICR line to the document package output
- How to use a delimited input as a supplemental input source
- Using SQL as a supplemental input source
- Writing basic functions for use in a document package
- Using the “code before” and “code after” properties

**Document Design Lab (Day 5):**
The fifth and final day of class is devoted to allowing students to spend time constructing a document package of their choosing using their own data and document package specifications. The Optio instructor will be available to mentor and assist students, giving advice and guidance with drawing layouts, mapping data, applying business logic and executing the document package.

**Who Should Attend:**
Individuals who will be responsible for creating Optio Design Center document packages for their organization.

**Student Profile:**
- Analytical skill set
- Basic understanding of conditional logic
- Basic understanding of client/server environments including basic networking concepts
- Fundamental understanding of elemental programming concepts
- Competency working in a Windows-based environment including:
  - Use of a mouse
  - Proficiency in copying, pasting and renaming files in Windows Explorer
- Basic understanding of the ERP or HIS application that will be generating the data to be processed by the Optio Document Server
- High-level understanding of how the Optio solution will be used in the workplace

**Prerequisite(s):**
None

**Notes:**
This class is delivered on a Windows platform.

**Duration:**
5 Days

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**Instructor-led Online (Webinar)**

**Mapping and Importing Non-Repeating Data in DesignStudio for DCS Version 6.x**

**Course Description:**
This live, instructor-led session will review the concepts of mapping and importing non-repeating data in DesignStudio for DCS Version 6.x.
Topics to be Covered:
- Review basic document design concepts
- Create a non-repeating data map
- Map non-repeating data into multiple sections
- Import mapped sections into layout
- Use document preview to view final output

Who Should Attend:
Document designers requiring specific information on mapping and importing non-repeating data in DesignStudio. This webinar reviews the fundamental concepts covered in the Introduction to DesignStudio and DesignStudio for Healthcare resident courses.

Prerequisite(s):
Introduction to DesignStudio or DesignStudio for Healthcare or six months experience creating or maintaining DesignStudio documents in a production environment.

Duration:
2 Hours (approximate)

Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

- Windows 95, 98, NT, 2000, or XP
- Intel Pentium 166 MHz
- 32 MB RAM
- Microsoft Explorer 4, 5, 6, or Netscape Communicator 4
- JavaScript and cookies enabled in browser
- 56k or faster Internet connection (DSL or T1 highly recommended)

Log-in details for the webinar and the audio conference will be provided to each registrant upon or following confirmation of their space in the course. Please test your Webex connection PRIOR to the start of the webinar to ensure connectivity and to download any required software updates.

Mapping and Importing Non-Repeating Data Using DesignStudio for e.ComIntegrate
Course Description:
This live, instructor-led session will review the concepts of mapping and importing non-repeating data in DesignStudio Version 7.x.

Topics to be Covered:
- Review basic document design concepts
- Create a non-repeating data map
- Map non-repeating data into multiple sections
Import mapped sections into layout
Use document preview to view final output

Who Should Attend:
Document designers requiring specific information on mapping and importing non-repeating data in DesignStudio. This webinar reviews the fundamental concepts covered in the Introduction to DesignStudio and DesignStudio for Healthcare resident courses.

Prerequisite(s):
Introduction to DesignStudio or DesignStudio for Healthcare or six months experience creating or maintaining DesignStudio documents in a production environment

Duration:
2 Hours (approximate)

Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

- Windows 95, 98, NT, 2000, or XP
- Intel Pentium 166 MHz
- 32 MB RAM
- Microsoft Explorer 4, 5, 6, or Netscape Communicator 4
- JavaScript and cookies enabled in browser
- 56k or faster Internet connection (DSL or T1 highly recommended)

Log-in details for the webinar and the audio conference will be provided to each registrant upon or following confirmation of their space in the course. Please test your Webex connection PRIOR to the start of the webinar to ensure connectivity and to download any required software updates.

Mapping and Importing Repeating Data in DesignStudio for DCS Version 6.x
Course Description:
This live, instructor-led session will review the concepts of mapping and importing repeating data in DesignStudio for DCS Version 6.x.

Topics to be Covered:
- Mapping repeating data using Text Input Designer
- Importing repeating sections
- Concepts of page condensing
Who Should Attend:
Document designers requiring specific information on mapping and importing repeating data in DesignStudio. This webinar reviews the fundamental concepts covered in the Introduction to DesignStudio and DesignStudio for Healthcare resident courses.

Prerequisite(s):
Introduction to DesignStudio or DesignStudio for Healthcare or six months experience creating or maintaining DesignStudio documents in a production environment

Duration:
2 Hours (approximate)

Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

- Windows 95, 98, NT, 2000, or XP
- Intel Pentium 166 MHz
- 32 MB RAM
- Microsoft Explorer 4, 5, 6, or Netscape Communicator 4
- JavaScript and cookies enabled in browser
- 56k or faster Internet connection (DSL or T1 highly recommended)

Log-in details for the webinar and the audio conference will be provided to each registrant upon or following confirmation of their space in the course. Please test your Webex connection PRIOR to the start of the webinar to ensure connectivity and to download any required software updates.

Mapping and Importing Repeating Data Using DesignStudio for e.ComIntegrate
Course Description:
This live, instructor-led session will review the concepts of mapping and importing repeating data in DesignStudio Version 7.x.

Topics to be Covered:
- Mapping repeating data using Text Input Designer
- Importing repeating sections
- Concepts of page condensing

Who Should Attend:
Document designers requiring specific information on mapping and importing repeating data in DesignStudio. This webinar reviews the fundamental concepts covered in the Introduction to DesignStudio and DesignStudio for Healthcare resident courses.
Prerequisite(s):
Introduction to DesignStudio or DesignStudio for Healthcare or six months experience creating or maintaining DesignStudio documents in a production environment.

Duration:
2 Hours (approximate)

Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

- Windows 95, 98, NT, 2000, or XP
- Intel Pentium 166 MHz
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- 56k or faster Internet connection (DSL or T1 highly recommended)

Log-in details for the webinar and the audio conference will be provided to each registrant upon or following confirmation of their space in the course. Please test your Webex connection PRIOR to the start of the webinar to ensure connectivity and to download any required software updates.

Healthcare
Online Training (Self-Paced Education)

Quick End-User Training for MedEx version 1.2.x

Course Description:
This CD-ROM-based video is designed for nurses and provides a quick training session about the tasks required to use Optio MedEx. The video covers how to log-in and navigate the user interface, locate specific patient records using simple and complex search methods, locate specific forms and form sets in the Optio MedEx forms library, preview and print required forms for patients and set-up user preferences.

Topics to be Covered:
- MedEx login
- End-user interface overview
- Searching for patients in the MedEx database
- Searching for forms and form sets in the MedEx forms library
- Previewing and printing forms
- Setting user preferences
- What are locations and filters and how do they affect patient information access?

Who Should Attend:
All MedEx end-users, document designers and administrators.
Prerequisite(s):
Familiarity with the use of a mouse and software in a Windows GUI environment.

Notes:
This is a self-paced instructional CD. Please complete the online form available at http://www.bottomline.com/customer_support/Optio_training.html or contact Bottomline sales directly at 1800-472-1321 to purchase a copy.

Optio Advanced Labeling for Document Designers
Course Description:
This self-paced, recorded training session addresses the use of Optio's Advanced Labeling solution. The program includes basic design instruction, three step-by-step practice exercises and a self-grading quiz.

Topics to be Covered:
➢ User Modes
➢ Set-up Wizard
➢ Introduction to Advanced Labeling
➢ Working with text, objects, barcodes, images and graphics
➢ Creating variable data fields
➢ Using variables to receive data from a database
➢ Creating Optio Watch triggers to execute labels
➢ Printing and previewing labels using Optio Print

Who Should View:
DesignStudio document designers who have created and modified documents and need advanced label features for thermal or RFID-printed labels.

Prerequisite(s):
Introduction to DesignStudio or DesignStudio for Healthcare or a minimum of six months creating production documents in DesignStudio.

Notes:
This is a self-paced instructional CD. Please complete the online form available at http://www.bottomline.com/customer_support/Optio_training.html or contact Bottomline sales directly at 1800-472-1321 to purchase a copy.
Instructor-led Classroom

Design Studio for MedForms

Course Description:
The primary goal of this course is to provide the participant with the knowledge to create, enhance and troubleshoot custom business forms using Optio DesignStudio Version 7.x for MedForms 7.x Servers. This course covers both introductory and advanced concepts necessary to create a business form, including all steps from data capture to final custom output. Students in this class will learn how to take full advantage of this product by applying proven design and testing methodologies to streamline form design time. This class is comprised of lecture, demo and hands-on lab exercises.

Topics to be Covered:
- Creating a document
- Adding images, objects and barcodes to a document
- Mapping static and dynamic data elements
- Configuring simple and advanced Page Condensing
- Enabling duplexing
- Using Expression Builder for Advanced Formatting
- Configuring Delimited Look-up Input Flow items
- Establishing parent-child relationships
- Working with Optio’s Flow Tools
- Working with SmartSelect documents
- Configuring Variable Destination Flow Items
- Understanding and applying custom formatting
- Coding DCL within DesignStudio
- Writing functions in DesignStudio.
- Working with AP checks, including the MICR line
- Best practices
- Processing completed documents through MedForms Version 7.x
- Creating and understanding trace, fatal and warning logs
- Troubleshooting common errors
- MedForms administration

Document Design Lab: (Day 5):
- Construct and test a document of your choice utilizing DesignStudio and MedForms
- Create one proprietary document using your own customer-specific data with an Optio Instructor. The instructor will be available to help mentor you through any rough spots with planning, drawing, mapping, applied business logic and execution.
- Please bring one or more documents (time permitting), graphic files (such as your logo) and sample data.

Who Should Attend:
Document designers who will be responsible for creating Optio custom documents
**Student Profile:**
- Analytical/logical skill set
- Basic understanding of conditional logic
- Basic understanding of client server environment to include basic networking
- Basic understanding of elemental programming concepts
- Familiarity with fundamentals of data mapping
- Intermediate to advanced experience level in a Windows graphical environment to include:
  - Competency with mouse
  - Competency with Windows Graphic User Interfaces
  - Proficiency copying, pasting and renaming files in Windows Explorer
- Knowledge of your MedForms server platform if other than Windows
- Basic understanding of your HIS application in your operating environment
- High-level understanding of how the Optio solution will be used in your environment

**Prerequisite(s):**
Completion of the Optio DesignStudio Pre-Course Work Study Guide. A representative from the Educational Services team will provide students with these materials.

**Notes:**
This class is delivered on a Windows platform.

**Duration:**
5 days

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**DesignStudio for MedEx**

**Course Description:**
The primary goal of this course is to provide the participant with the knowledge to create, enhance and troubleshoot custom business forms using Optio DesignStudio Version 7.x for MedEx 1.2.x Servers. This course covers both introductory and advanced concepts necessary to create a business form, including all steps from data capture to final custom output. Students in this class will learn how to take full advantage of this product by applying proven design and testing methodologies to streamline form design time. This class is comprised of lecture, demo and hands-on lab exercises.

**Topics to be Covered:**
- Completing an existing forms library document
- Adding images, objects, and variable barcodes to a document
- Publishing the document to the MedEx Forms Library and printing from MedEx End-user GUI
- Creating a new MedEx Outbound Document in DesignStudio (the Facesheet)
- Publishing the document to MedEx Forms Library, establishing basic form classification
- Creating a new MedEx Inbound Document in DesignStudio
- Mapping static data elements for printstream MedEx input
- Adding a Printstream Input Source for the Facesheet within MedEx
- Adding an HL7 Input Source for the Facesheet within MedEx
- Configuring Complex Delivery Conditioning for auto-delivery documents
➢ Enabling duplexing; building the Duplex Consent Form using images (prn, tiff, bmp files)
➢ Using existing MS Word and pdf documents in layout design
➢ Scanning existing forms and using the tif images in form design
➢ Using Expression Builder for advanced formatting
➢ Creating Form Sets in MedEx
➢ Establishing and using MedEx Locations and Forms Classifiers
➢ Best practices
➢ Processing completed documents through MedEx Version 1.2.x
➢ Troubleshooting common errors
➢ MedEx administration

**Document Design Lab (Day 5):**
➢ Construct and test a document of your choice utilizing DesignStudio and MedEx
➢ Create one proprietary document using your own customer-specific data with an Optio Instructor. The instructor will be available to help mentor you through any rough spots with planning, drawing, mapping, applied business logic and execution.

➢ Please bring one or more documents (time permitting), graphic files (such as your logo) and sample data.

**Who Should Attend:**
Document designers who will be responsible for creating Optio MedEx custom documents.

**Student Profile:**
➢ Analytical/logical skill set
➢ Basic understanding of conditional logic
➢ Basic understanding of client server environment to include basic networking
➢ Basic understanding of elemental programming concepts
➢ Familiarity with fundamentals of data mapping
➢ Intermediate to advanced experience level in a Windows Graphical environment to include:
  o Competency with mouse
  o Competency with Windows Graphic User Interfaces
  o Proficiency copying, pasting, renaming files in Windows Explorer
➢ Knowledge of your MedEx server platform if other than Windows
➢ Basic understanding of your HIS application in your operating environment
➢ High-level understanding of how the Optio solution will be used in your environment

**Prerequisite(s):**
Completion of the Optio DesignStudio Pre-Course Work Study Guide. A representative from the Bottomline Educational Services team will provide all registrants with these materials.

**Notes:**
This class is delivered on a Windows platform.

**Duration:**
3 days of instruction; 1 day of lab
Instructor-led Online (Webinar)

Function and Setup of Locations and Classifiers in MedEx Version 1.2

Course Description:
This webinar session will illustrate the use and administration of locations and classifiers in a MedEx Version 1.2 environment.

Topics to be Covered:
- Understanding the importance of locations and classifiers to your organization
- Set-up and administration of locations
- Set-up and administration of classifiers

Who Should Attend:
System Administrators responsible for administering the MedEx 1.2 Server.

Prerequisite(s):
None

Duration:
2 Hours (approximate)

Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

- Windows 95, 98, NT, 2000, or XP
- Intel Pentium 166 MHz
- 32 MB RAM
- Microsoft Explorer 4, 5, 6, or Netscape Communicator 4
- JavaScript and cookies enabled in browser
- 56k or faster Internet connection (DSL or T1 highly recommended)

Log-in details for the webinar and the audio conference will be provided to each registrant upon or following confirmation of their space in the course. Please test your Webex connection PRIOR to the start of the webinar to ensure connectivity and to download any required software updates.

MedEx Version 1.2 Administration (Part 1)

Course Description:
Live, instructor led session reviewing the administration of MedEx Version 1.2. This is Part 1 of a 2-part series.
Topics to be Covered:
- Creating and administering users, roles and groups
- Working with and set-up of locations
- Working with and set-up of forms classifiers
- Creating and using filters
- MedEx system settings
- Setting user preferences
- Touring the user interface

Who Should Attend:
System Administrators responsible for administering the MedEx 1.2 Server.

Prerequisite(s):
None

Duration:
2 Hours (approximate)

Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

- Windows 95, 98, NT, 2000, or XP
- Intel Pentium 166 MHz
- 32 MB RAM
- Microsoft Explorer 4, 5, 6, or Netscape Communicator 4
- JavaScript and cookies enabled in browser
- 56k or faster Internet connection (DSL or T1 highly recommended)

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MedEx Version 1.2 Administration (Part 2 - MDX/MF)
Course Description:
Live, instructor-led session reviewing the administration of MedEx Version 1.2. This is Part 2 of a 2-part series.

Topics to be Covered:
- MedEx forms library and form sets
- MedEx destinations
- Overview of integration with MedForms documents
- Delivery configuration for MedForms and MedEx documents
- Building queries for the MedEx audit log
Who Should Attend:
System Administrators responsible for administering the MedEx 1.2 Server.

Prerequisite(s):
MedEx Administration Version 1.2 (Part 1)

Duration:
2 Hours (approximate)

Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

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- Intel Pentium 166 MHz
- 32 MB RAM
- Microsoft Explorer 4, 5, 6, or Netscape Communicator 4
- JavaScript and cookies enabled in browser
- 56k or faster Internet connection (DSL or T1 highly recommended)

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Working With the New Document Wizard for MedEx (HL7 Input)

Course Description:
Live, instructor-led session detailing the use of Optio's New Document Wizard for MedEx utilizing HL7 input. This session also encompasses the differences in working with MedEx document distribution.

Topics to be Covered:
- Creating documents using the New Document Wizard for MedEx
- Utilizing HL7 input for MedEx servers
- MedEx document distribution

Who Should Attend:
Document designers required to create or maintain documents on a MedEx server.

Prerequisite(s):
Introduction to DesignStudio, DesignStudio for Healthcare or six months experience creating or maintaining DesignStudio documents in a production environment.

Duration:
2 Hours (approximate)
Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

- Windows 95, 98, NT, 2000, or XP
- Intel Pentium 166 MHz
- 32 MB RAM
- Microsoft Explorer 4, 5, 6, or Netscape Communicator 4
- JavaScript and cookies enabled in browser
- 56k or faster Internet connection (DSL or T1 highly recommended)

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Working With the New Document Wizard for MedEx (Print Stream Input)
Course Description:
Live, instructor-led session detailing the use of Optio's New Document Wizard for MedEx utilizing print stream (PS) input. This session also encompasses the differences in working with MedEx document distribution.

Topics to be Covered:
- Creating documents using the New Document Wizard for MedEx
- Utilizing print stream input for MedEx servers
- MedEx document distribution

Who Should Attend:
Document designers required to create or maintain documents for processing on a MedEx server.

Prerequisite(s):
Introduction to DesignStudio, DesignStudio for Healthcare or six months experience creating or maintaining DesignStudio documents in a production environment.

Duration:
2 Hours (approximate)

Requirements and Notes:
Webinars are delivered "live" via web conferencing over the Internet. A broadband Internet and separate voice (phone) connection are required. Minimum system requirements to view the webinar on a Windows machine:

- Windows 95, 98, NT, 2000, or XP
- Intel Pentium 166 MHz
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- Microsoft Explorer 4, 5, 6, or Netscape Communicator 4
JavaScript and cookies enabled in browser
56k or faster Internet connection (DSL or T1 highly recommended)

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Bottomline Technologies (NASDAQ: EPAY) provides collaborative payment, invoice and document automation solutions to corporations, financial institutions and banks around the world. The company’s solutions are used to streamline, automate and manage processes and transactions involving global payments, invoice approval, purchase-to-pay, collections, cash management and document process automation. Organizations trust these solutions to meet their needs for cost reduction, competitive differentiation and optimization of working capital. Headquartered in the United States, Bottomline also maintains offices in Europe and Asia-Pacific. For more information, visit www.bottomline.com.