



Optio™ Training Course Catalog

Bottomline maintains a schedule of instructor-led on site classroom, instructor-led online and self-paced CD-based training programs for Optio Enterprise and Optio Healthcare™ users as well as an on site mentoring program.

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 are delivered on site at your facility. Call for information if you are interested in the on site training courses.

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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Call for more information if you are interested in one of these courses

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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 (On Site)

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.

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
- 32 MB RAM
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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 v1.2.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.

Instructor-led Classroom (On Site)

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 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 [Optio DesignStudio Pre-Course Work Study Guide](#). A representative from the Educational Services team will provide you with these materials.

Notes:

This class is delivered on a Windows platform.

Duration:

5 days

On site Training at Your Facility

Call for more information if you are interested in one of these courses

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 Ver 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 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:
 - Competency with mouse
 - Competency with Windows Graphic User Interfaces
 - 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 Optio DesignStudio Pre-Course Work Study Guide. [A representative from the Educational Services team will provide you with these materials.](#)

Notes:

This class is delivered on a Windows platform and is delivered on request. 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 for information.

Duration:

3 days of instruction; 1 day of lab

Function and Setup of Locations and Classifiers in MedEx Ver 1.2

Course Description:

This course 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

Notes:

This class is delivered on a Windows platform and is delivered on request. 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 for information.

MedEx Ver 1.2 Administration (Part 1)

Course Description:

This course reviews 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

Notes:

This class is delivered on a Windows platform and is delivered on request. 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 for information.

MedEx Version 1.2 Administration (Part 2 - MDX/MF)

Course Description:

This course reviews 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)

Notes:

This class is delivered on a Windows platform and is delivered on request. 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 for information.

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

Course Description:

This course details 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 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.

Notes:

This class is delivered on a Windows platform and is delivered on request. 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 for information.

Working With the New Document Wizard for MedEx (Print Stream Input)

Course Description:

This course details 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.

Notes:

This class is delivered on a Windows platform and is delivered on request. 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 for information.