Solus® Writer

User Guide

Version 3.15.5

HDClinical

A nexus company

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1. Introduction

The Solus Writer module is part of HD Clinical's Solus Clinical solution and provides clinical data where and when you need it. Built by technical experts and clinicians, it's a nationally compliant, paper-free solution with everything in one place. Solus is designed for medical, nursing and admin teams and will hold multiple departmental records in a secure and centralised source.

Solus Clinical is the next generation product from HD Clinical. The continuing evolution and growth of this product ensures the customer gets the most beneficial system, with the view to integrate other HD Clinical products into one. Solus Clinical can also be used on a Windows tablet to improve efficiency.

Solus Clinical incorporates Cardiology, Respiratory, Neurophysiology and other specialties. Please see our user guides for each of the Solus modules. These can be found on our online support hub or by request from HD Clinical's product team.

1.1. Symbols used in this guide

For ease of use this user guide has various recurring elements and symbols:

- Routes for navigation within the software are highlighted in blue in this manual: *Home > System Settings*

Information
General information is highlighted in these boxes

Notes
Notes marked in yellow indicate possible operating errors.

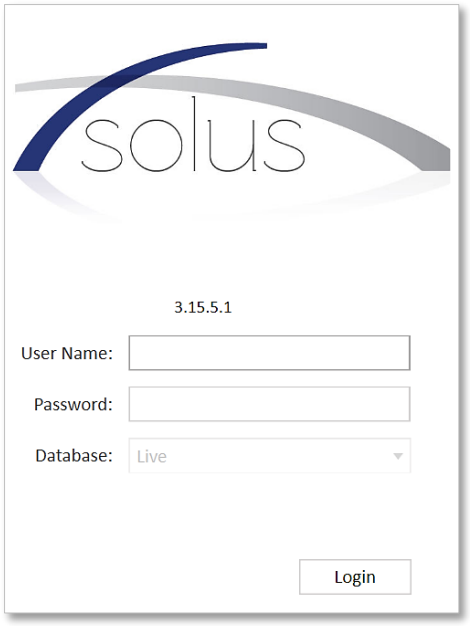
Tip
Advice on using the software is highlighted in green

Warning
Warnings marked in red must be observed, otherwise critical consequences may occur.

1.2. Logging into Solus®

The URL (website address) for access to our Solus system will be supplied to you by your System Administrator along with your unique username and password.

Active Directory or Active Directory Pass
If your region, trust or hospital use an Active Directory or Active Directory Pass then the user's standard username and password should be the same as their standard settings for other IT systems.

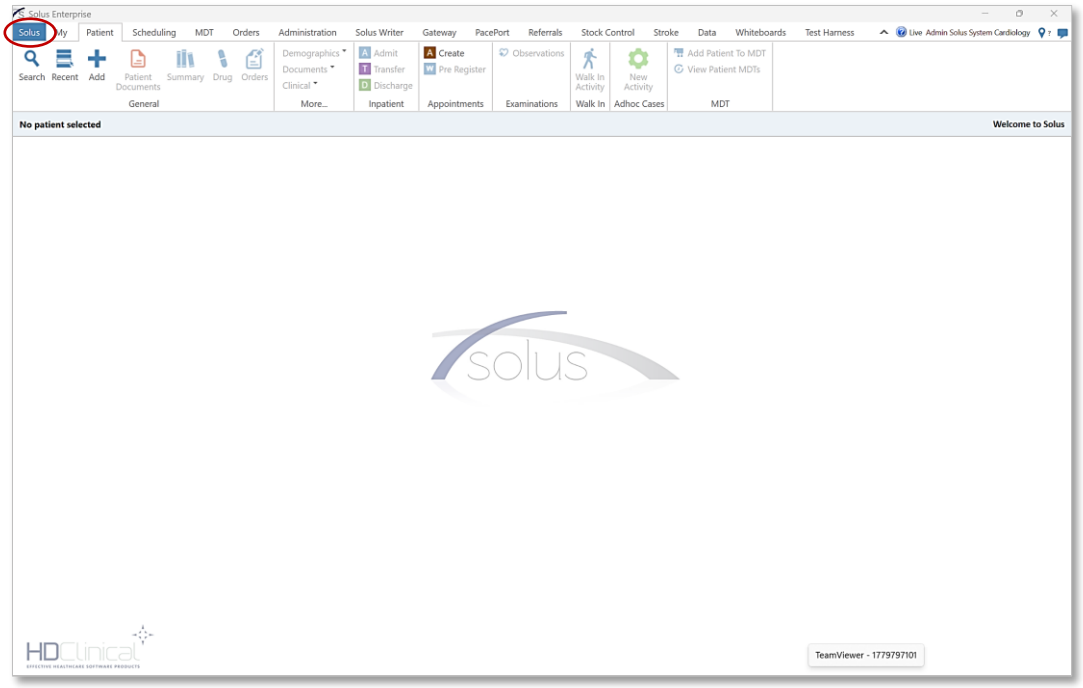


Note: Leave the database set to *Live.*

You will have been assigned a system role that will enable you to access the relevant areas of the software for you. This is a security feature enabled by your System Administrator.

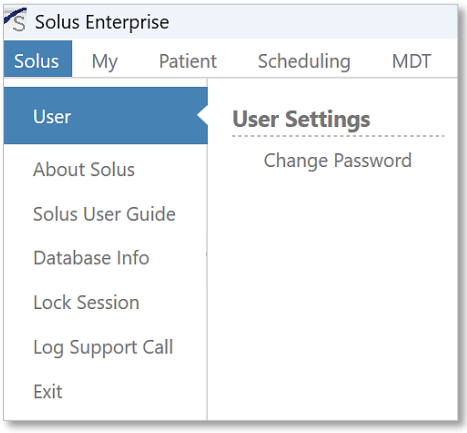
Warning
Please do not share or use anyone else's login information as this can cause auditing and permission errors.

1.3. Navigating Solus®



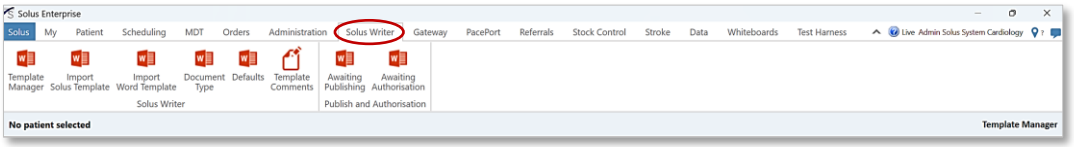
Once logged in you will see the dashboard for your hospital and modules, from here you can navigate to the area you require by selecting the required tab along the top navigation bar.

Further information about Solus can be found under the *Solus* tab as well as functions such as locking the session, logging a support call and exiting the application.



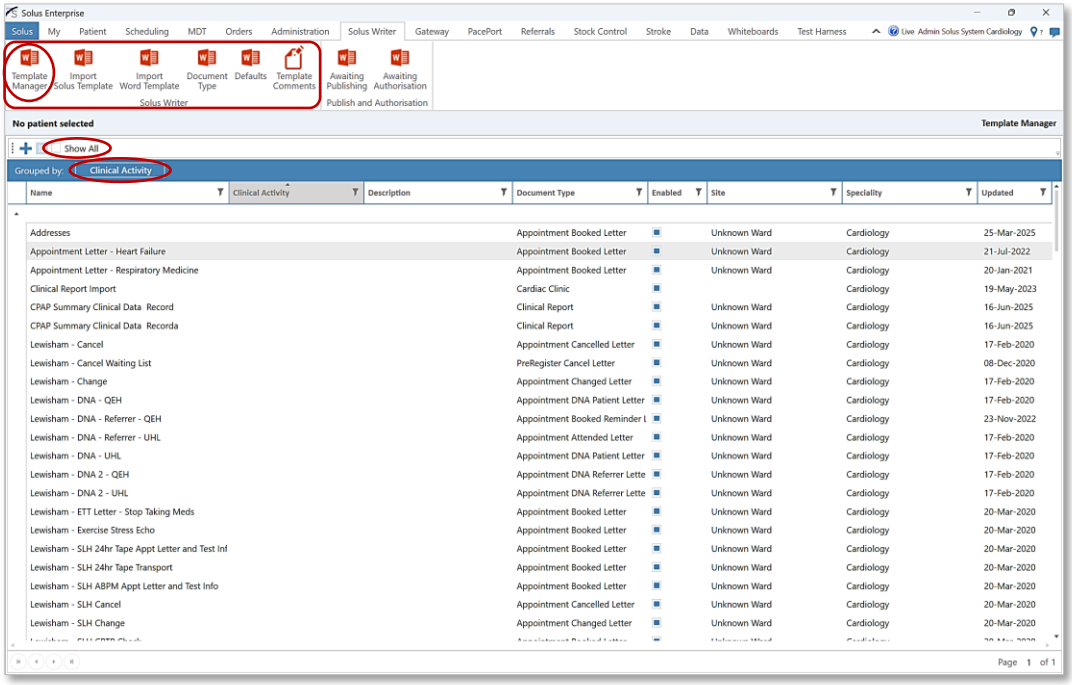
Solus will lock automatically after a period with no use, to protect the database, and will require you to re-enter your password to re-open. On logging back in Solus will re-open at the task you were last using. This can be done manually by selecting the *Lock Session* option.

1.4. Solus® Writer Module



This user guide will focus on *Solus Writer*. This module is designed as an in-house word processor and document storage application. The layout and use of these documents works in a similar way to Microsoft Word. In this application you can generate and manage your own documents, including clinical documents, appointment, GP and patient letters.

2. Solus® Writer



2.1. Template Manager

All document templates in Solus are designed and stored in the *Template Manager* section. By default, only the enabled templates will show grouped by clinical activity which makes them easier to identify. If a template is not linked to an activity, it will appear in a blank group.

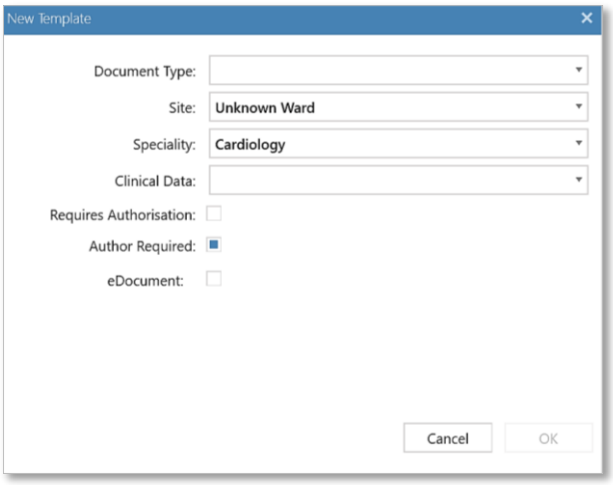
2.1.1. Viewing and Filtering the Template List

- To see a list of all documents, including disabled ones, ***toggle on*** the *Show All* box.
- To see the templates grouped by clinical activity then ***click*** the *Clinical Activity* box at the top of the page.
- Alternatively drag the column you want the templates to be listed by to the left of the screen.
- To filter a template list, use the *Filter* options at the top of each column.

2.1.2. Adding a new Template Document

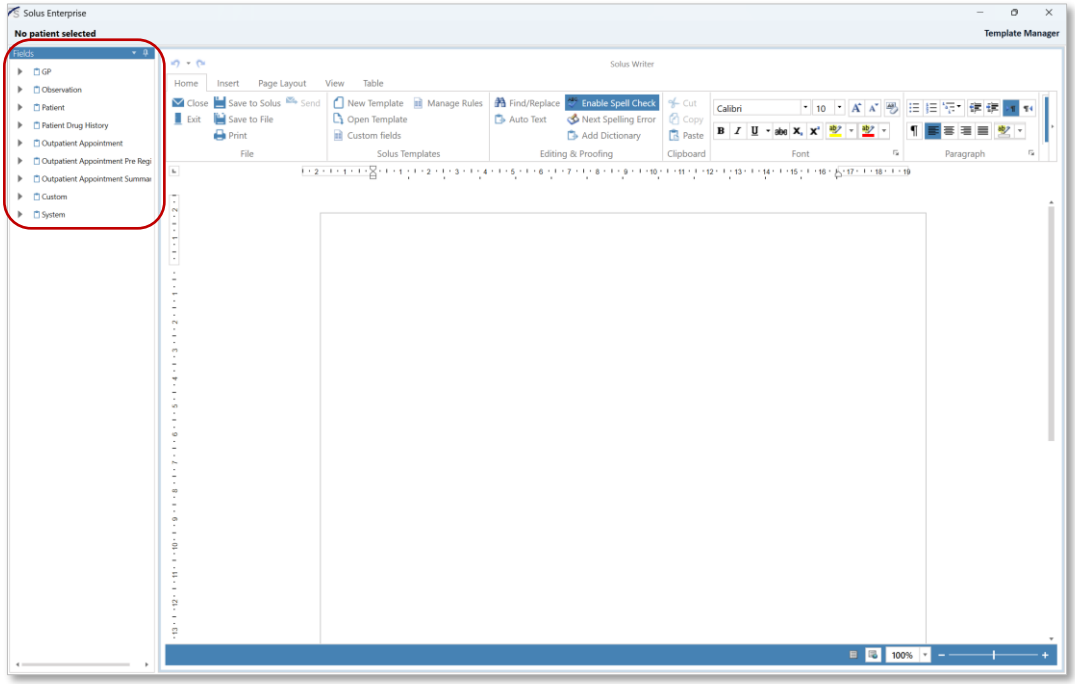
Document Type
Whilst some standard document types will be preloaded in Solus, to create bespoke document types please see *Solus Writer>Solus Writer>Document Types* below. These need to be set up before they can be applied to a new template document.

- To add a new template document, ***click*** the **+** *Add* button at the top of the screen. This will bring up a new pop-up screen.



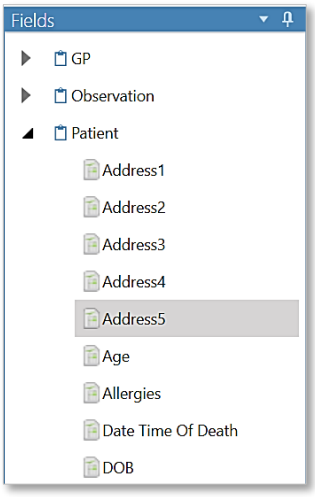
- Select the *Document Type*, *Site* and *Speciality* from the dropdown menus.
- If there is more than one site available, choose the relevant *Site* from the dropdown menu.
- If it is a Clinical Report, select the module from the *Clinical Data* dropdown, if it is not leave this field blank.
- By checking the *Requires Authorisation* box, when a document or report is used for a patient, it must be authorised by a user with the role Document Authoriser before it can be published to the patient record.
- If the template requires a care professional to author the document ***toggle on*** the *Author Required* box. This will add the author's name and position to the document. To set author rights please see *Administration>Personnel>Care Professionals*.
- ***Click*** *OK* to create the base of the template.
- You will be taken to a word processing screen with access to fields for the patient, GP and clinical activity data (if selected) on the left of the screen.

- Patient related fields are grouped in clear sections (e.g. patient, GP). If the template is linked to a module, the fields are grouped under page names.



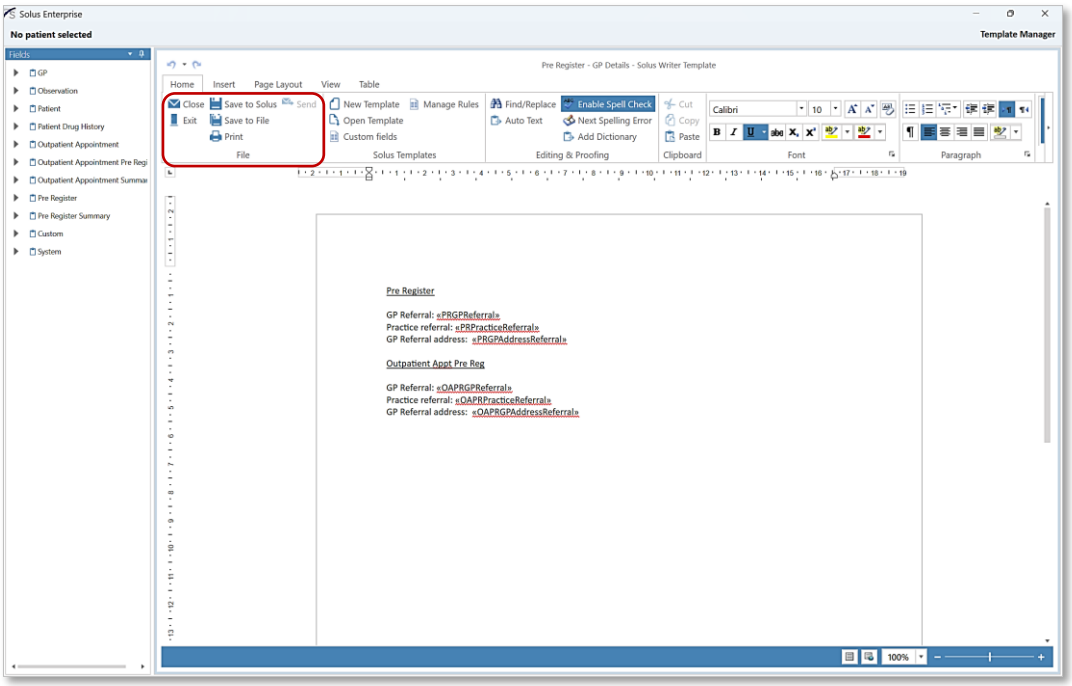
Format your Document
Set up the template as you would in Word, with headers and footers then you can start populating the document with the required fields.

- To see the fields available ***click*** on the section name.
- To select a field to add to the template document, ***double-click*** OR select and drag this across to the main page. The selected field(s) will now appear on the main page.



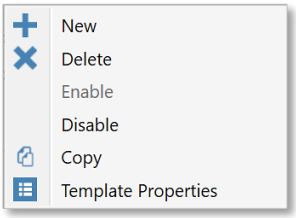
«PatientFullname»
«PatientAddressAddress1»
«PatientAddressAddress2»
«PatientAddressAddress3»
«PatientAddressAddress4»
«PatientAddressAddress5»

«PatientNHSNumber»



- Once complete ***click*** *Save to Solus* in the tool bar at the top of the screen.
- Enter the name of the new template and ***click*** *Save*. The template is then created and linked to a module.
- ***Click*** *Close* to close the current template, but remain in Solus Writer, or ***click*** *Exit* and the template will close
- The new template will then appear in the *Template Manager*.

2.1.3. Managing Template Documents

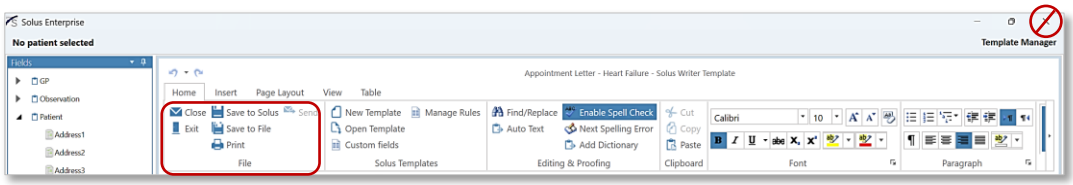


If you right-click on a selected template document, you will see the following options to create, delete, enable / disable, copy the template and view the template properties.

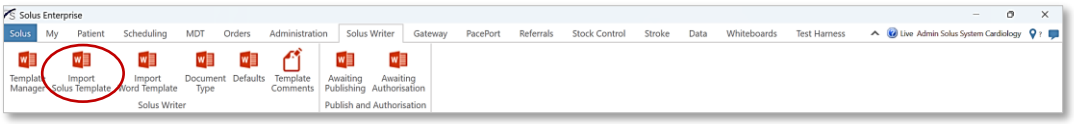
To reopen a document for editing, double-click the template to take you back to the word processing screen where you can make any required edits. When finished don't forget to *Save to Solus* before closing or exiting the document to avoid losing any edits.

Exit the Word Processor Using the Tool Bar

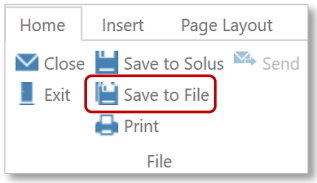
As this word processor is part of Solus, do not use the **x** in the top right-hand corner to leave the word processor or this will exit Solus. When finished with the word processor, use the save, close and exit functions in the *File* section of the tool bar to return to the *Template Manager*.



2.2. Import Solus Document

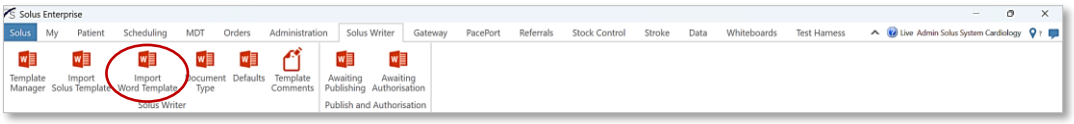


- Templates created in Solus can be saved as a file using the *Save to File* function in the *File* section of the word processing toolbar.



- These externally saved Solus template documents can be imported back later. This is helpful if there are reports which are similar across modules – these can be saved out and imported back in with just the required fields linked in the module to be updated.
- To import a Solus document, click on the *Solus Writer>Solus Writer>Import Solus Template* option. This will take you to your default file manager.
- Select the required file and ***click*** *Open*.
- This will take you to the *New Template* pop-up screen. Fill in the fields and continue to create a new template as described above.

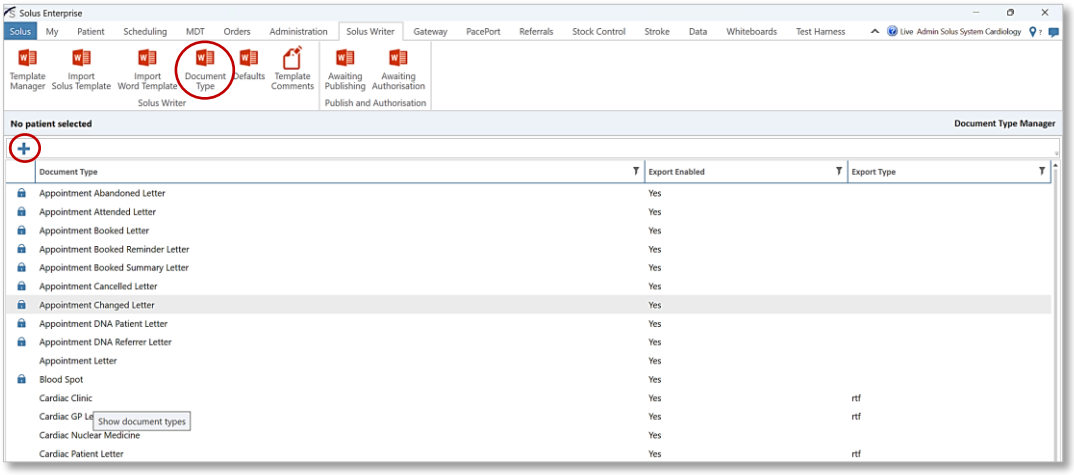
2.3. Import Word Template



If a report has been written as a Word document, this can also be imported into Solus and then updated to link the report to the module. For example, if you have an existing template it doesn't need to be recreated, although the fields will still need to be set up within Solus.

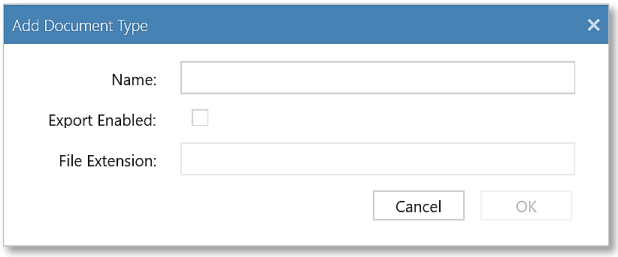
- To import a Solus document, click on the *Solus Writer>Solus Writer>Import Word Template* option. This will take you to your default file manager.
- Select the required file and ***click*** *Open*.
- This will take you to the *New Template* pop-up screen. Fill in the fields and continue to create a new template as described above.

2.4. Document Type



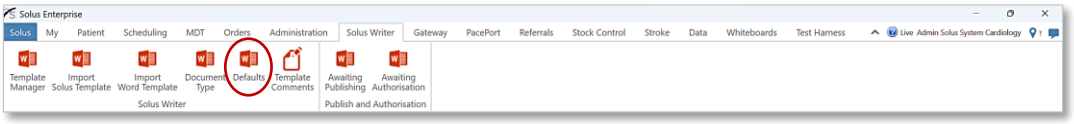
Each template created must have a document type. This helps users to group together templates into certain categories, e.g. Clinical report, Appointment letters, GP letters.

- To add a new document type, ***click*** the **+** *Add* button at the top of the screen. This will bring up a new pop-up screen.



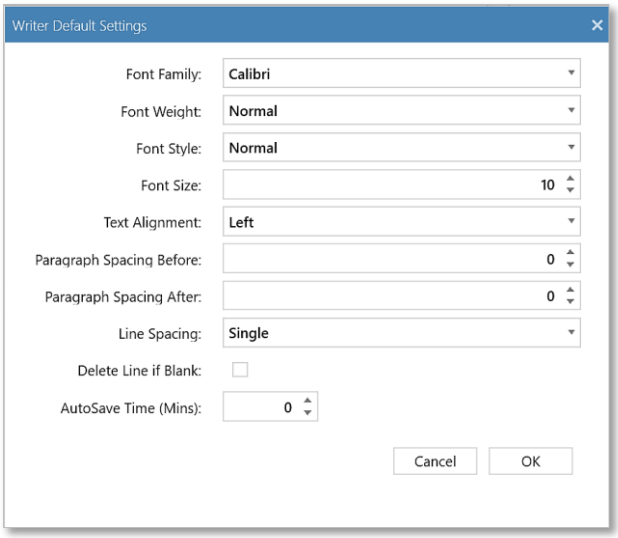
- Enter the *Name* of the document type.
- ***Toggle on*** the *Export Enabled* box if this document type is going to be exported
- Enter the *File Extension* for export, for example PDF or RTF.
- ***Click*** *OK* and the document type will now appear in the document type list and can be used for templates.
- Document types with a lock icon cannot be edited. To edit other document types, ***double-click*** the required document type and an editing pop-up screen (similar to the add screen above) will appear.
- Make any required changes and ***click*** *OK*.

2.5. Defaults

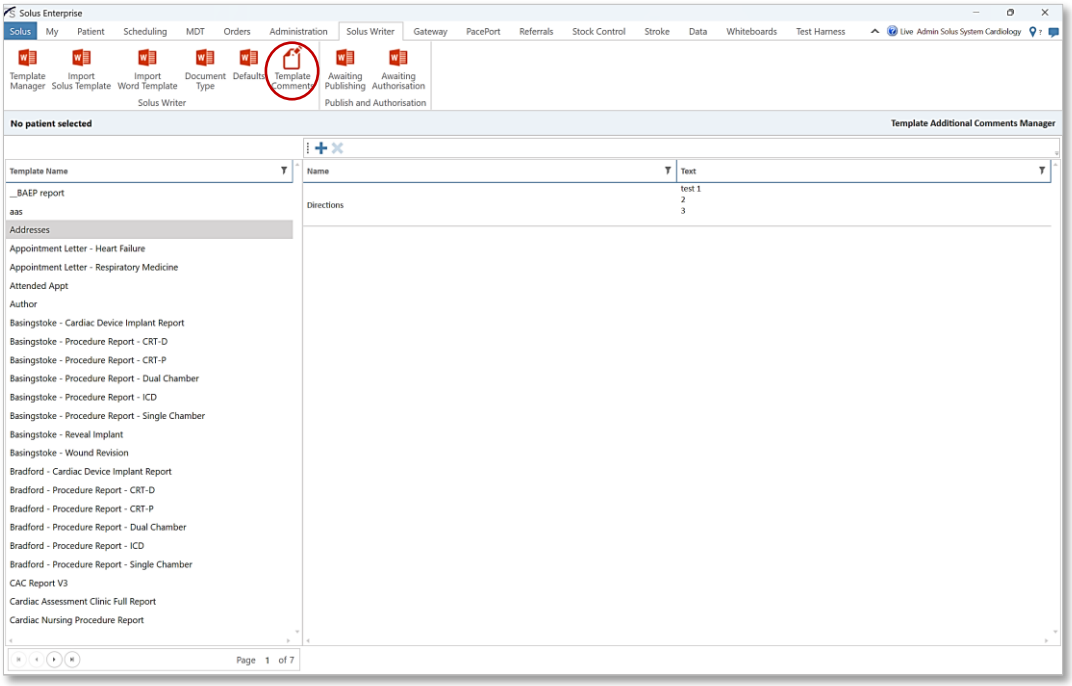


The default section enables users to set the default template document settings, including font, styles and paragraphs, for all template documents. These can be manually overwritten when creating templates but saves time when setting up documents and ensures all documents have a standard appearance.

- To view or edit these default settings, ***click*** on the *Solus Writer>Solus Writer >Defaults* option. This will take you to a pop-up screen.
- Make any required changes and ***click*** *OK*.

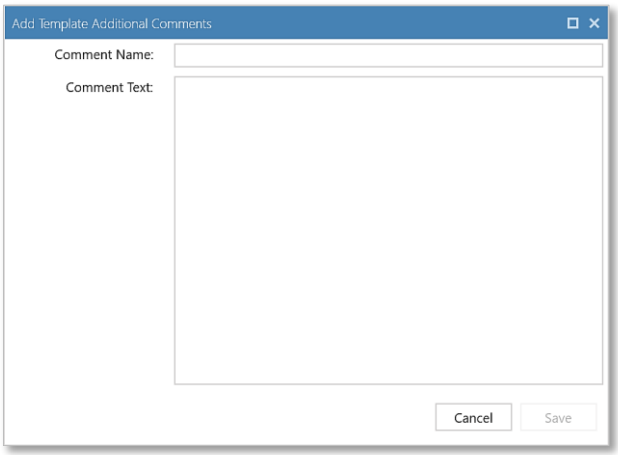


2.6. Template Comments



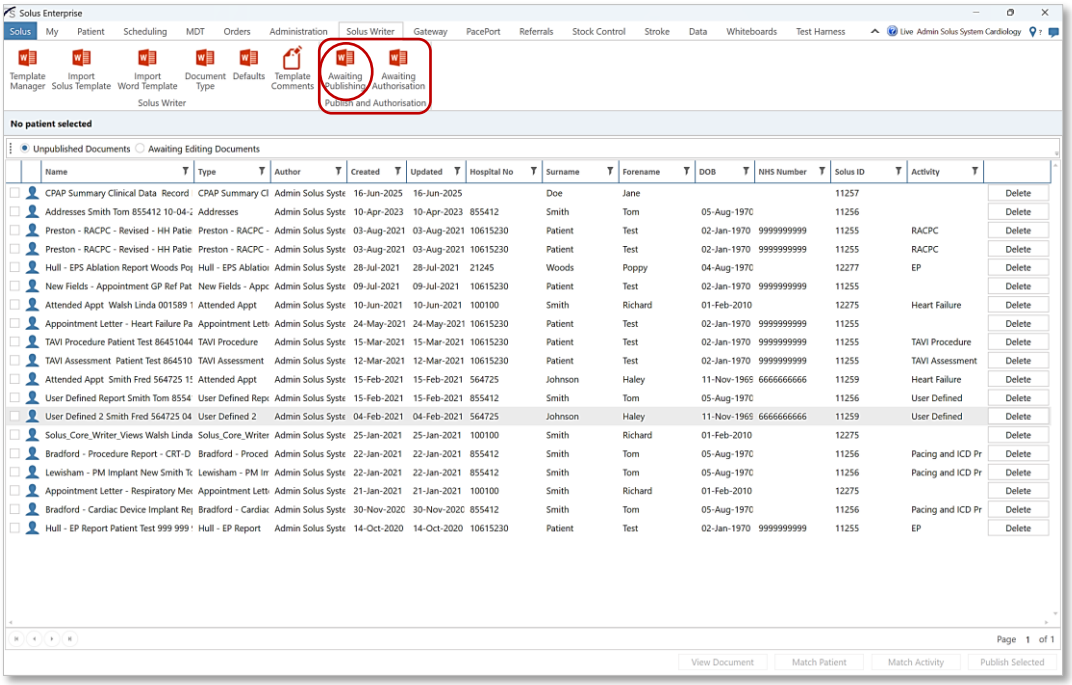
For each template created additional comments can be added if needed.

- To add additional comments to a template, select the required template and ***click*** the *+ Add* button at the top of the right-hand screen. This will bring up a new pop-up screen.



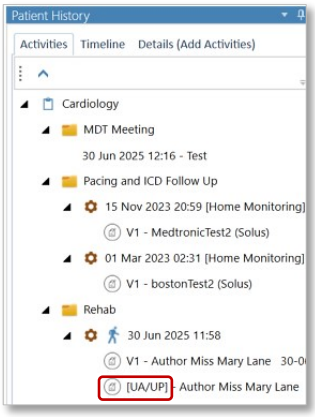
- Enter the *Comment Name* and any *Comment Text* and ***click*** *Save*.
- To edit a comment, ***double-click*** it and edit as required then ***click*** *Save*.

3. Publish and Authorisation



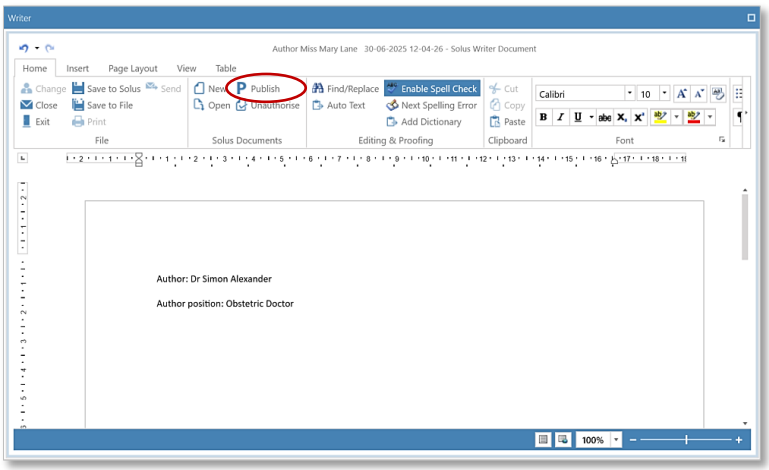
3.1. Awaiting Publishing

Patient documents that have been created and saved to Solus but have not been published can be seen on this screen. They will also appear in the individual patient's record under *Patient>General>Summary* where they will have the designation unpublished *[UP]* to the left of the document name. Published documents will have the designation *V* along with the version number of the document.

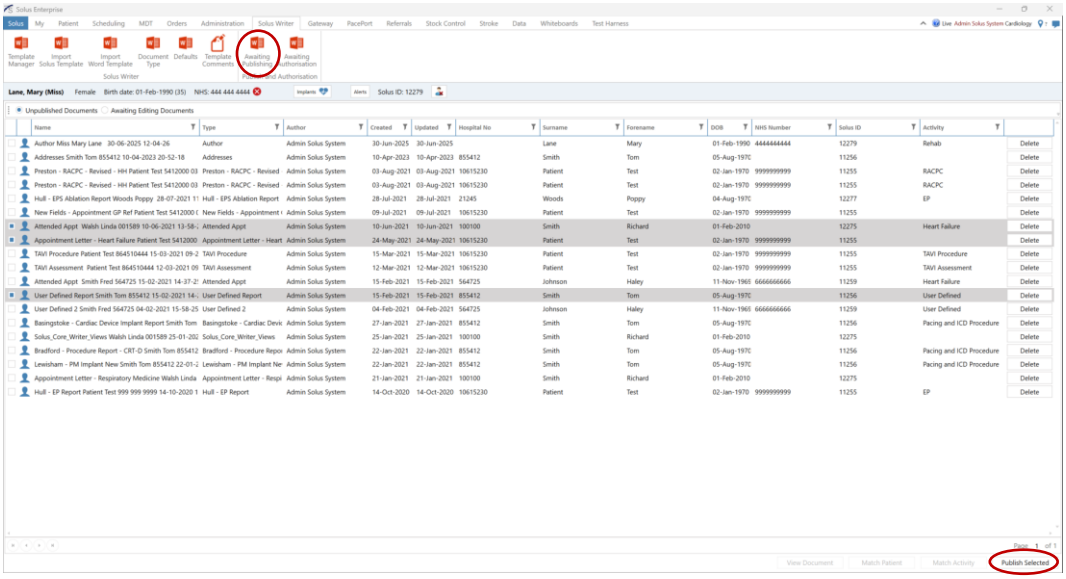


Note: Unpublished documents are only visible in Solus and have not been sent to the hospital's EPR system until they have been published.

- To publish a patient document, you can ***double-click*** the document from the patient's record to view the document in Solus Writer, then select *Publish* from the tool bar.

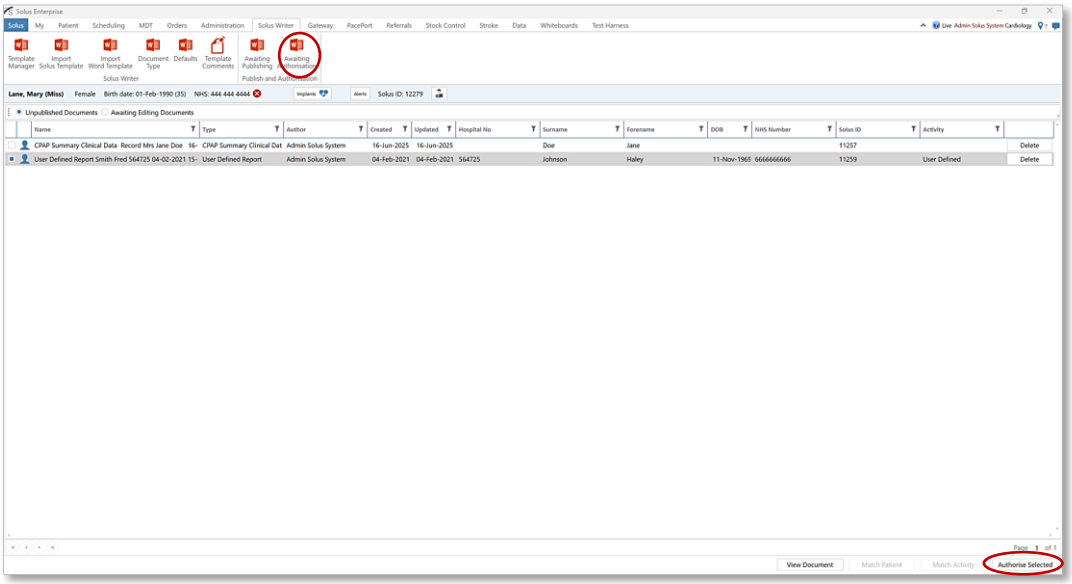


- To publish a group of documents, go to Solus *Writer>Publish and Authorisation>Awaiting Publishing,* select the required document(s) by ***toggling on*** the selecting boxes on the left of each document and ***click*** *Publish Selected*.



- Documents can also be viewed from this page by selecting the required document and ***clicking*** the *View Document* box at the bottom of the screen or ***double-clicking*** the document name.

3.2. Awaiting Authorisation

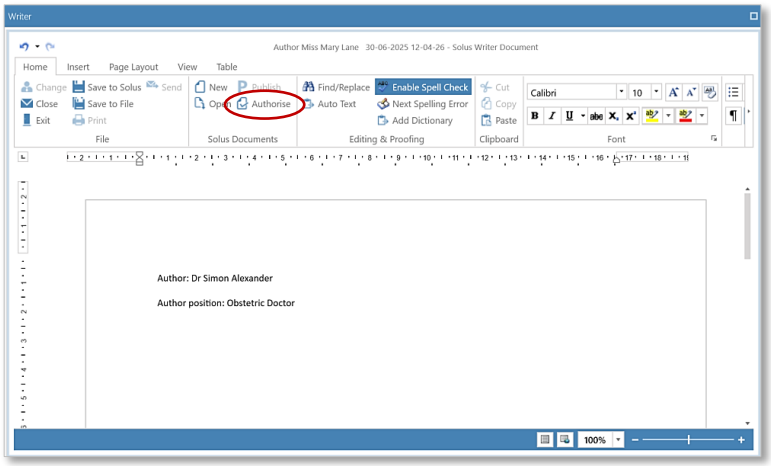


If a document template has been set up with *Authorisation Required* then only a user with the correct role rights will have the authority to authorise the document. A list of all documents which have been created but not authorised will be displayed in *Writer>Publish and Authorisation>Awaiting Authorisation*.

Authorising Documents
If a document requires authorisation this needs to be set up under *Template Properties* under the *Template Manager*. These documents cannot be published until they have first been authorised by the required care professional.

Unauthorised documents will also appear in the individual patient's record under *Patient>General>Summary* where they will have the designation unauthorised *[UA]* to the left of the document name. When viewed in Solus Writer these documents will have a DRAFT watermark written across the document.

- In *Patient>General>Summary* you can double-click a document to view it in Solus Writer then select *Authorise* from the tool bar.



- To authorise a group of documents, go to Solus *Writer>Publish and Authorisation>Awaiting Authorisation,* select the required document(s) by ***toggling on*** the selecting boxes on the left of each document and ***click*** *Authorise Selected*.
- Documents can also be viewed from this page by selecting the required document and ***clicking*** the *View Document* box at the bottom of the screen or ***double-clicking*** the document name.

Document Summary

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HDC Document Information			
Title:	Solus® Writer – User Guide		
Author:	HDC Clinical Training Team		
Version:	3.15.5	Date Issued:	22.07.2025
Updated by:	LS	Last update:	

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