

## Applying tags and toggles to RDS toolkits in RDS content management system (CMS): User guide

### 1. Important note: Only the RDS team can apply tags and toggles

**It is imperative that tags and toggles are applied consistently in order for retrieval of RDS content via search and browse to work reliably. For this reason, only the RDS team is allowed to apply or edit tags and toggles.**

We ask that all other editors use the [request form](#) to request addition of tags or amendments to tags.

**Editors should propose and get approval for tags and toggles prior to publication of new toolkits.**

Tactuum will be restricting permissions to apply tags and toggles in the CMS as a priority over the coming months.

### 2. Definitions

**Tags** are keywords used to categorise RDS toolkit content. They enable us to build a detailed, organised index that maps all toolkits to relevant tags. This supports efficient and rapid retrieval and filtering of relevant toolkits during searching and browsing, much like using a book's index to find specific topics without reading every page.

The index created by the tags is presented in the Filters panel on the left hand side of Search and Browse results lists – see Figure 1 below.

Filters	
Organisations	▼
Local NHS Boards	▲
Health & Social Care Partnerships	▼
National	▼
<b>Topics</b>	▲
Conditions & specialties	▼
Health & social care delivery	▼
Lifestyle & wellbeing	▼
Population groups	▼
Resource types	▼
Self-management & shared decisions - patients/public	▼
Staff groups	▼

Figure 1: Organisation and Topics tags in Filters panel.

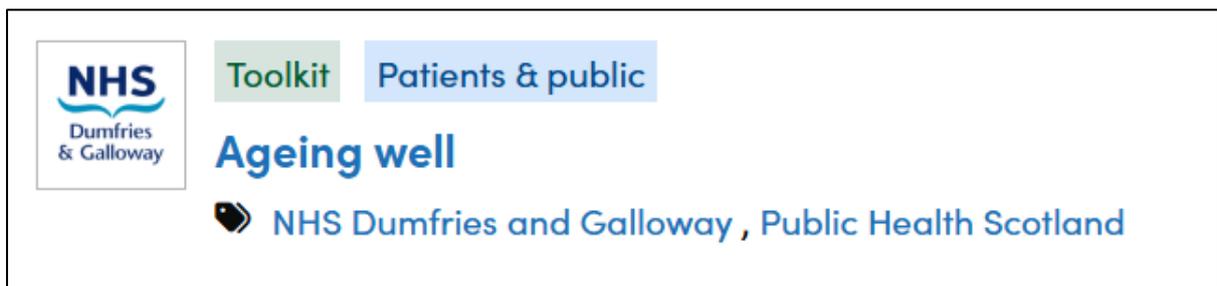
The tags list reflects the areas of focus of the toolkits published on the RDS at any one time. It will grow and adapt as we learn more about how users search and browse for existing toolkits and as new toolkits are added.

**Toggles** are switches used to flag whether RDS content is from a nationally relevant toolkit and/or from a toolkit with content aimed at patients and the public. When a toggle is switched on for a toolkit, the content from that toolkit appears under the 'National' and/or 'Patients & public' tabs in the search and browse results listing as shown in Figure 2 below.



Figure 2: National and Patients & public tabs on search results – determined by toggles

Application of a toggle to toolkit content also results in a 'National' or 'Patients & public' flag appearing above the content title in search and browse results – see below:



### 3. Tags menu in RDS content management system

The Tags menu is available at Toolkit level within the RDS content management system, as illustrated in Figure 3 below.

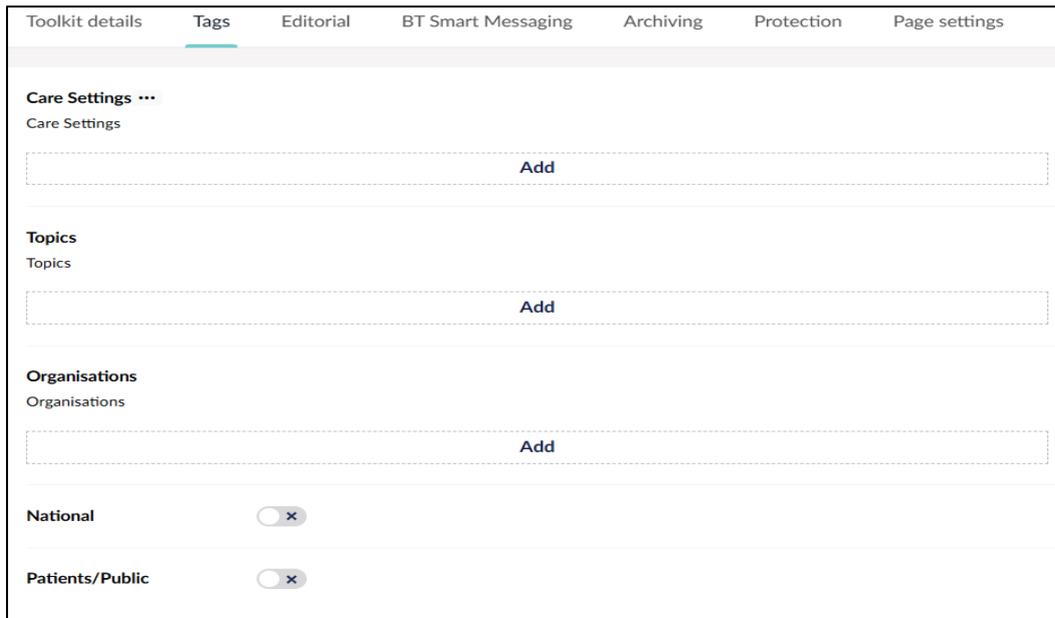


Figure 3: Tags and toggles menu in RDS content management system (toolkit title level)

This menu offers the following options:

### Care settings

Please ignore, this should never be used. It is a legacy element, now superseded by headings within 'Topics'

### Topics

This section enables application and removal of the Topics tags which are grouped under headings in the Topics section of the Shared content library as shown in Figure 4 below. This list also appears when editors click on "Add" beneath the Topics heading within the Tags menu.

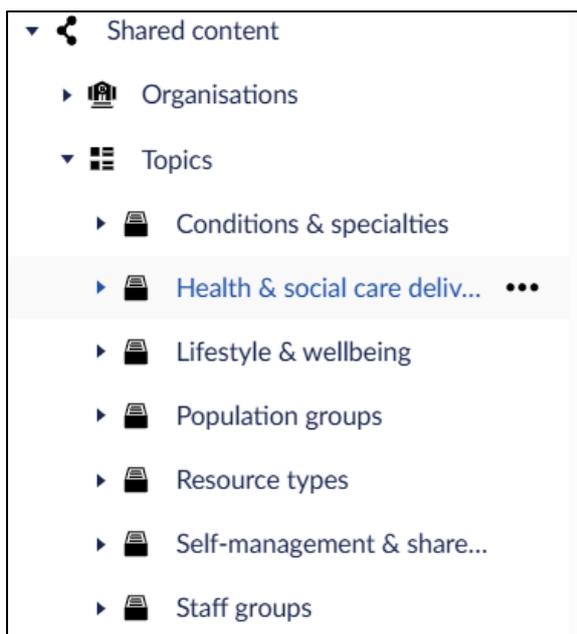
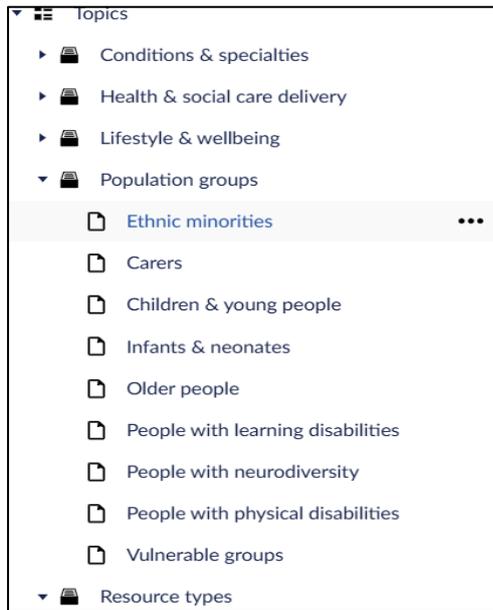


Figure 4: Headings for topics tags in shared content library

As shown below, each topic heading expands to show a list of tags with checkboxes that can be used to apply tags to a toolkit. One or more topics can be selected under each heading.



At the foot of the Topics categories you will see a further list of tags – see Figure 5 below. These are legacy tags that were used in the first version of the RDS to create Collections. These Collections can still be accessed from the Topics menu in the RDS main navigation.

Some are effectively superseded by the new tags under Topic headings. If you wish to replace an old Collections tag with a new Topics tag so that your group of toolkits is always available in the Filter panel, please contact the RDS team using the [Tags and topics form](#).

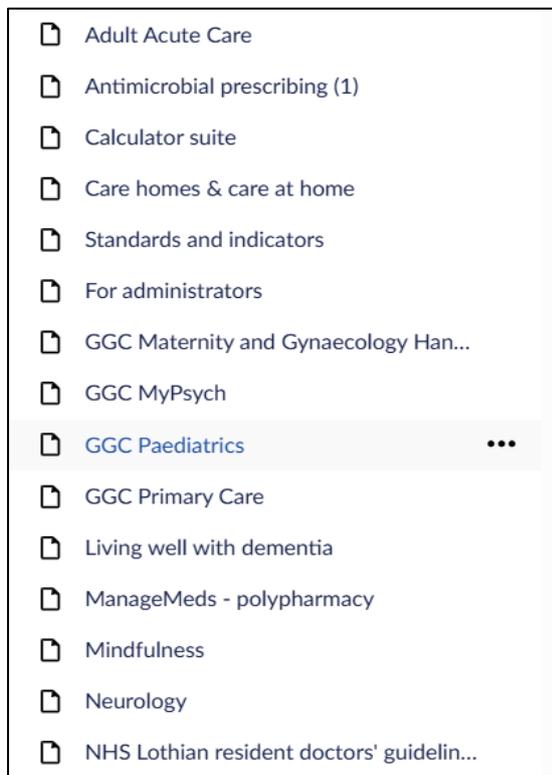


Figure 5: Additional tags – used for Collections in previous RDS system.

## Organisations

This section enables application and removal of the Organisations tags. Organisation tags are defined within the Shared content library under three headings – Local NHS Boards, Health and Social Care Partnerships, and National, illustrated in Figure 6 below. This list also appears when editors click on “Add” beneath the Organisations heading within the Tags menu.

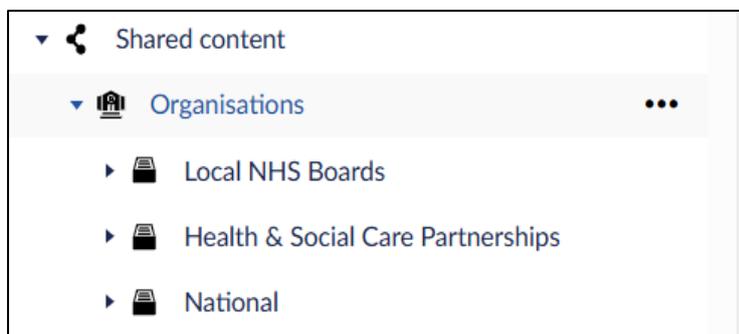


Figure 6: Organisation headings.

Each organisation heading expands to show a list of individual organisations. One or more organisations can be selected under each heading.

### National and Patients/Public toggles

These can be switched on or off in the content management system. As noted above they determine:

- Presentation of content under National and Patients & public tabs in search and browse results lists.
- Display of the National or Patients & public flag above the content title in search and browse results lists.

## 4. Checking tags and toggles applied to your toolkits

Toolkit editors will see the tags and toggles applied so far to their toolkits within the Tags menu in the CMS. You can review the appropriateness of the tags and toggles here and suggest any changes using the [Tags and toggles form](#).

A few points to check to ensure consistency:

- Where a ‘National’ organisation tag has been selected, the National toggle should usually (there are a few exceptions) be switched on, and vice versa – ie when the National toggle is switched on a ‘National’ organisation tag should usually be selected.
- All the following Topic tags and toggles should be applied consistently to all toolkits which contain content for patients and the public:
  - Health and social care delivery > Self-management and shared decisions
  - Resource types > Patient / public information
  - Self-management & shared decisions > Self-management & shared decisions - patients/public
  - Patients/public toggle switched on.

Table 1 below shows other correspondences across Topics tags which should be checked for consistency:

<b>Health &amp; social care delivery</b>	<b>Conditions &amp; diseases</b>	<b>Lifestyle &amp; wellbeing</b>	<b>Population groups</b>	<b>Resource type</b>	<b>Staff groups</b>
Adult social care					Social work & social care
Emergency & trauma care	Emergency & trauma care				
Care homes & care at home	Older people's care		Older people		
Children & young people's healthcare			Children & teenagers		
Children & young people's social care			Children & teenagers		Social work & social care
End of life care	Palliative & end of life care				
Genetics	Genetic conditions				
Health visiting					Nursing & midwifery
Maternity services	Care of newborns		Infants & neonates		Nursing & midwifery
Maternity services	Obstetrics & gynaecology				Nursing & midwifery
Mental health	Mental health				
Nutrition & dietetics					Allied health professionals
Occupational therapy					Allied health professionals
Older people's services	Older people's care				
Oral & dental health	Oral & dental health				Dental
Orthotics					Allied health professionals
Pain management	Chronic & neuropathic pain				
Palliative care	Palliative & end of life care				
Pharmacy & prescribing				Medicines & medicines management	Pharmacists
Physiotherapy					Allied health professionals

Podiatry					Allied health professionals
Self-management & shared decisions				Patient/public information	
Tissue viability					Nursing & midwifery
Women's health	Obstetrics & gynaecology				Nursing & midwifery

**In addition:**

- 'Dementia' and 'Frailty' as conditions should always have 'Older people's services' applied under the 'Delivery of care' heading' and 'Older people's care' as an additional Conditions & diseases tag.
- 'Asthma' as a condition should always have 'Respiratory' applied as an additional Conditions & diseases tag.

## 5. Requesting changes and additions to tags and toggles

Please use the [tags and toggles form](#) to request:

- Changes in the tags or toggles applied at present to a toolkit.
- Changes or additions to the existing tags lists

## 6. Proposing tags and toggles for new toolkits prior to publication

The RDS team needs to approve tags and toggles for all new toolkits prior to publication.

Please complete the [tags and toggles form](#) to propose the organisation and topics tags and the toggles you wish to apply to your toolkit. The RDS team will review your proposals and contact you to discuss any amendments.