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PolicyPal Plugin

PolicyPal Policies User Guide

This guide covers the **Policies** area of the Policy Pal WordPress plugin. It explains how to add new policies, replace existing files, and manage the main policy fields.

Open The Policies Page

1. Log in to WordPress.
2. In the left-hand admin menu, select **PolicyPal**.
3. Open the **Policies** page.

This page shows all existing policies and the upload area for new ones.

What You Can Manage

Each policy row includes the following fields:

- **Label:** the text shown to website visitors.
- **Slug:** the last part of the policy web address.
- **Category:** used to group policies on the website. Read more about categories [here](#)
- **Expiry:** an internal review date used for reminders.
- **Version:** an optional document version.
- The action buttons on each row let you replace the file, copy the link, delete the policy, and lock or unlock it.

Add a New Policy

If you are looking to update an existing policy, please see follow the "Replace/Update an Existing Policy Document" instructions

1. Open **Policy Pal > Policies**.
2. In the **Upload New Policies** section, select **Select PDF files**.
3. Choose one or more PDF files from your computer.
4. If needed, select a **Category**.
5. If you want the system to try to fill in the expiry date and version automatically, tick **Use AI to populate expiry and version**.

6. Select **Upload Policies**.

Each uploaded PDF creates a published policy entry automatically.

Notes

- Only PDF files are accepted.
- If you upload multiple files together, the selected category is applied to all of them.
- If AI is enabled and available on the site, the plugin may populate the expiry date and version for you.

Replace or Update an Existing Policy Document

1. Open **Policy Pal > Policies**.
2. Find the policy you want to update.
3. Select the **Replace file** button on that policy row.
4. Choose the new PDF file from your computer.
5. Wait for the upload to complete.

The existing policy entry stays in place, but the attached PDF is replaced with the new file.

When To Replace Instead Of Add

- Use **Replace file** when the policy is the same policy but has a newer version.
- Use **Upload New Policies** when you are adding a completely new policy that does not already exist in the list.

Edit Policy Details

You can update the policy information directly from the policy row.

- **Label:** change the displayed name of the policy.
- **Slug:** change the public URL ending for the policy. If you edit the slug, you will get a pop-up which asks if you would like to create a redirect from the old slug to the new one. We recommend you select yes to this.
- **Category:** move the policy into a different category.
- **Expiry:** select the month the policy expires.
- **Version:** enter or update the version number.

If a policy is locked, some fields cannot be changed until it is unlocked.

Copy A Policy Link

1. Find the policy in the list.
2. Select the **Copy link** button.
3. Paste the copied link wherever you need it.

This copies the live public URL for that policy.

Delete a Policy

1. Find the policy in the list.
2. Select the **Delete** button.
3. Confirm the action if prompted.

Use this only when the policy should be removed completely from the site. This action is irreversible

Lock or Unlock a Policy

A locked policy has restricted editing for non-admin users. An unlocked policy can be edited normally. Select the padlock button on the policy row to change its lock status.

Troubleshooting

The file will not upload

- Check that the file is a PDF.
- Try uploading the file again.
- If AI was enabled, try again without AI to rule out an AI extraction issue.

I cannot edit a policy

- Check whether the policy is locked.
- If the policy is managed from the portal, some fields may be read-only on the WordPress site.

The wrong policy was updated

- Use **Replace file** only when updating an existing policy.
- If you accidentally replaced the wrong policy, replace it again with the correct PDF.

Summary

For most day-to-day work:

- Use **Upload New Policies** to add new policy documents.
- Use **Replace file** to upload a newer version of an existing policy.
- Use the policy row fields to keep labels, categories, expiry dates, and versions up to date.

PolicyPal Categories

This guide covers the **Categories** area of the Policy Pal WordPress plugin. It explains how to create categories, assign them to policies, and use them when displaying policies on the website.

What Categories Are For

Categories help group related policies together. This makes the policy list easier to manage in WordPress and easier for visitors to browse on the website.

Examples of categories might include:

- Safeguarding
- Curriculum
- Health and Safety
- Behaviour

Open The Categories Page

1. Log in to WordPress.
2. In the left-hand admin menu, select **Policy Pal**.
3. Open **Categories**.

This page shows all available categories and their shortcode examples.

Create A New Category

1. Open **Policy Pal > Categories**.
2. In the **Add Category** field, enter the category name.
3. Select **Save Category**.

The new category will then appear in the categories table.

What You Will See In The Categories Table

- **Category:** the category name and slug.
- **Source:** whether the category is local or synced from the portal.
- **Policies:** how many policies are currently assigned to it.
- **Shortcode:** the shortcode to show only policies related to that category on the website.
- **Action:** delete option for local categories.

Assign A Category To A Policy

1. Open **PolicyPal > Policies**.
2. From this page, you can either assign a category to an existing policy or upload a new one

Display Categories On The Website

Policy Pal provides shortcodes that can be added to pages, posts, or supported page builder areas.

Show All Policies

Use this shortcode to display all published policies:

```
[policy_pal_list]
```

This shows uncategorised policies first, followed by policies grouped under category headings.

Show One Category Only

Use this shortcode to show only one category:

```
[policy_pal_list category="safeguarding"]
```

Replace `safeguarding` with the actual category slug shown in the Categories page.

Show A Category In A Single Column List

```
[policy_pal_list category="safeguarding" columns="1"]
```

This is useful if you want a simpler list layout instead of the default grouped display.

Delete A Category

1. Open **Policy Pal > Categories**.
2. Find the category in the list.
3. Select **Delete** on that row.
4. Confirm the deletion if prompted.

Only local categories can be deleted from the WordPress site. Categories synced from the portal are managed in the portal and are read-only in WordPress.

Portal-Synced Categories

If the site uses PolicyPal Management Portal and categories are synced from the portal:

- some categories may appear as **Portal synced**
- those categories may be read-only in WordPress
- some policies may have categories controlled by portal rules

If a category is managed from the portal, changes may need to be made in the portal rather than in WordPress.

Best Practice

- Keep category names clear and consistent.
- Use categories to group policies by topic rather than by file name.
- Before creating a new category, check whether a similar one already exists.
- Use the shortcode shown on the Categories page to avoid typing mistakes.

Troubleshooting

The category does not appear on the website

- Check that at least one policy has been assigned to that category.
- Check that the shortcode uses the correct category slug.
- Make sure the policies in that category are published.

I cannot delete a category

- The category may be synced from the portal.
- Portal-synced categories are managed outside the WordPress site.

I cannot change a policy's category

- The policy may be locked.
- The category may be controlled by a portal rule.
- The policy may be managed from the portal.

Summary

- Use **Categories** to organise related policies.
- Create categories in **PolicyPal > Categories**.
- Assign categories from the **Policies** page or during upload.

- Use the category shortcode to show specific policy groups on the website.