

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.
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