KNOWLEDGE BASE ARTICLE

How to Browse and Search the Policy Library

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Policy Library is a catalogue of published policies and policies under review. It helps employees find reference material beyond their personal task list. My Policies answers what you have been assigned; the library answers what policy cards are available in this configured catalogue.

Browse the catalogue

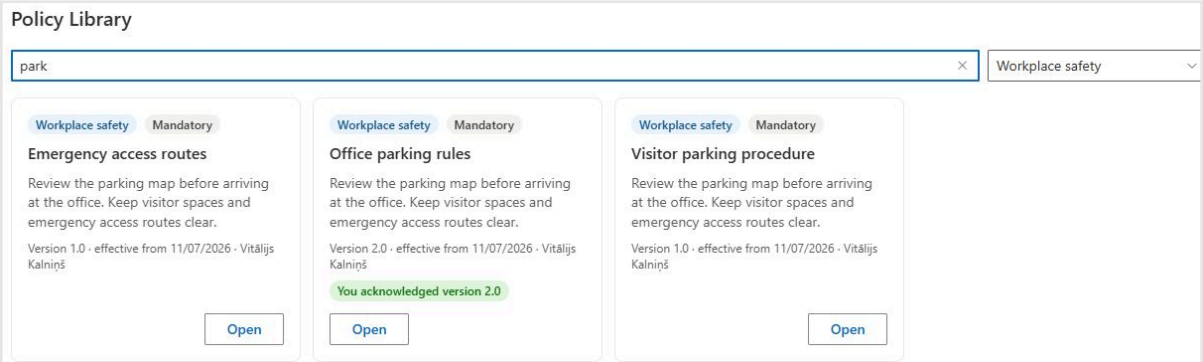
Open the library page provided by your organization. Each card can show the policy's category, importance, title, description, current version, effective date and owner. Select **Open** to continue to Policy Reader.

Draft and archived policies are not loaded into this catalogue. A policy under review remains included, so its presence does not imply that every owner-review task is complete. The page can also be restricted to a configured set of category names, which narrows the cards even before your own search is applied.

Search and filter

1 If the search controls are visible, enter a distinctive word or phrase.
2 Choose a category or **All categories**.
3 Review the matching cards and clear the search or category to broaden the result.
4 Open the intended policy and check its version and source before relying on it.

Search is case-insensitive and matches substrings in the title, description and regulatory tags. It does not search the full text inside the source document, owner name or a SharePoint search index. Try a known title word or tag when a phrase from the document body returns no results.



Searching policy metadata and reviewing personal status

Interpret personal badges

The library loads your assignments to annotate cards. If you have an acknowledged assignment matching the policy's current version, it shows that acknowledgement first. Otherwise it can show acknowledgement required for an assigned or overdue

item. The link then includes the relevant assignment identifier.

A badge is not a complete history of all your campaigns. A current-version acknowledgement takes display priority, and a missing badge does not prove that no exemption, review-required item or other historical assignment exists. Check My Policies for the detailed personal list.

Opening a catalogue policy does not create an assignment automatically. Policy Reader can identify an existing personal assignment or show that no assignment is present. Browsing and formal acknowledgement are separate operations.

Configure a focused library page

A page editor can connect the web part to the intended hub and reader page, set **Categories** and enable or disable **Show the search box**. Category settings are comma-separated exact category names; leave them empty for the full loaded catalogue. A mismatch in spelling or case can exclude expected cards.

The search-display switch controls both the search field and the user category selector in this implementation. Hiding it does not remove a configured category restriction. Test the published page as an employee after editing settings.

Warning

Catalogue filters are presentation settings, not data-permission boundaries. They neither grant access to a source document nor guarantee that excluded records cannot be reached through SharePoint. Configure effective permissions separately using KB10500. How to Configure Policy Acknowledgement Roles and Permissions.

If a policy is missing or will not open

Clear personal filters, verify the configured hub and categories, and ask the owner to check publication status. If the card appears but its source fails, test source access separately from hub access. For a missing personal assignment use KB10536. Troubleshooting Missing Policies, Employees and Assignments; for preview problems use KB10537. Troubleshooting Policy Preview and a Disabled Acknowledge Button.