

Central Hawke's Bay District Council: Building Trust with a Smarter Approach to Controlled Documents



Central Hawke's Bay District Council (CHBDC) needed a better way to manage critical documents like policies, procedures, and emergency plans across its teams. Outdated versions and scattered copies were slowing audits, increasing risk, and making it harder for staff to do the right thing.

Our Approach

We partnered with CHBDC to deliver **iWorkplace Controlled Documents** solution in Microsoft 365. Together, we focused on making it easy for people to find, use, and trust the right document – every time.

The Challenge

- Staff sometimes used old procedures, risking inconsistent actions and compliance headaches.
- Audits dragged on because it was hard to prove which version was current.
- Uncontrolled copies meant more risk and less confidence – internally and with the public.

The Solution

One source of truth, built for people.

We set up a central register in SharePoint, so every controlled document is tracked with clear ownership and permissions. No more hunting for the latest version.

Automation that works for you.

Approvals and publishing are streamlined – drafts move smoothly through review, publishing, and archiving. Reminders prompt owners to keep content fresh, so nothing slips through the cracks.

Visibility and control, without the clutter.

Staff see only the current, approved version. Published libraries are read-only and searchable, making it simple to find what you need. Owners can control downloads, reducing the risk of uncontrolled copies.

"Our new controlled documents solution has been a game-changer. It saves us time, reduces risk, and makes document reviews effortless. Most importantly, it ensures we always access and publish the most up to date document, building trust within our business and with the public."

— Ana Deckard, Records Management Officer

How it Works

Controlled Document Register: The heart of the system – manage metadata, security, and ownership in one place.

Working Library: Where contributors update drafts and kick off approval workflows.

Published Library: Read-only access to approved documents, so staff always get the right version.

Archive Library: Keeps superseded versions for reference and compliance.

Templates Library: Stores organisational templates for easy access.

Landing Page: A friendly, searchable workspace for everyone.

Real-World Impact

Emergency Management: Field teams access the latest emergency procedures on mobile, ensuring everyone's on the same page during a crisis.

Health & Safety: Updated protocols roll out instantly – no more confusion about which version to use.

Audit Confidence: Auditors see a clear approval history and know staff only accessed the right documents.

The Results

Reduced risk: Outdated or unauthorised documents are a thing of the past.

Time saved: Staff find what they need, fast.

Clear audit trails: Easy to show who created, reviewed, and approved each document.

Public trust: The Council can stand behind every published policy and procedure.

Ready for the future: The solution lays the groundwork for AI-powered search and automation.

This case study shows how Information Leadership brings confidence and control, as well as ease and flexibility to complex information – the same trusted approach we use for high-stakes digital workplaces.