Customer Use Case:

The First Nations Technology Council is a public service organization located in British Columbia, Canada. Its mandate is to support the use of Information Technology by First Nations (Indian Bands) to better manage their affairs and server their memberships.

Within British Columbia any organization wanting to use or develop lands or natural resources is obliged by law to consult with the First Nation on whose traditional territory the project is intended. The First Nation has the right and ability to object to developments where such development may infringe on the First Nation's sacred sites or other aboriginal rights protected by federal law.

Projects which have been 'referred' to the First Nation must be assessed for legal compliance and responded to in a legally defensible way. Keeping track of these 'referrals' and the assessment process includes the requirement to bill back any assessment costs to the proponent.

The First Nations Technology Council has created a web application, titled 'LCRM', using SharePoint 2010 Foundation, to help First Nations to manage their Land Use Referrals and to prepare, issue and track invoices for this process issued to proponents.

One challenge in designing LCRM was the minimal formatting control available in SharePoint pages and another is the inability to produce well formatted PDF files that can be emailed to proponents. There are a number of 3-rd party solutions that can be installed which will address each of these limitations, but each of these is expensive and requires modification to the SharePoint installation – something we wanted to avoid for this project...

To meet the needs of this project we have used SharePoint Data Doc Pro as a means of preparing well formatted invoices from a SharePoint Document Library. Using the SPDD table and dataset / query features we were able to create an invoice document, insert the detail lines from another SharePoint list and update the Subtotal value in the document by applying a SUM function to a column in the inserted list. Changes made to the properties fields in Word are saved back to the metadata in the Document Library.

The resulting invoice in MS Word displays logo, all of the text formatting anyone could want and the ability to easily save the result as a PDF file.

Screen shot of Invoice in Microsoft Word 2010 prepared using Document Metadata and SharePoint Data Doc Pro. Annotations in red indicate SP Data Doc supplied data.

LAND USE REFERRAL

I N V O I C E

DATE: 2/5/2013	Project ID: RGTP0001	Invoice No.: 20130208-001

To: Gtek Pacific Developments

60 Cottonwood Rd.
PO Box 248
Alert Bay, BC
Canada V0N1A0

Terms: On Receipt   Reference: Project 2013-012DA

ProjectID	Date	Resource Used	Units	Item Rate	Item Total
RGTP0001	02/03/2013	Research Worker	16	$40.00	$640.00
RGTP0001	02/03/2013	Referral Worker	26	$30.00	$780.00
RGTP0001	02/03/2013	GIS Technician	6	$35.00	$210.00
RGTP0001	02/03/2013	Mapsheets - printed	5	$125.00	$625.00

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SUBTOTAL	2255.00
TAX	315.70
TOTAL	**$2570.70**

Note: Sample invoice for Help System

This invoice is payable on the terms identified above. Thank you