



Run a site appraisal

One site, one record. Draw the boundary first: every check, map and search keys off it. Eight tabs, worked in any order, and a PDF at the end with your name and logo on it.

1. Add the site Site Appraisals, then New Site

- 1 Open **Site Appraisals** and tap **New Site**.
- 2 Start typing a postcode or an address and pick it from the list. The map centres there.
- 3 Give the site a name (required) and, if you like, a client. You can draw the boundary now, on this map, or press **Create Site (boundary later)** and draw it on the site's Map tab.

2. Draw the boundary New Site map, or the Map tab

- 1 Tap **Draw Boundary** and tap each corner of the site in turn. Tap the first corner again, or **Done**, to close the red line. The area shows in hectares.
- 2 Other land in the applicant's ownership or control goes in blue: tap **Draw Blue Land** and trace it the same way. It never drives the site's location.
- 3 To move a corner later, tap **Adjust**. Drag a corner, tap a faint dot between two corners to add one, or select a corner and nudge it with the arrows. **Done** keeps the change, **Cancel** puts the line back as it was. **Redraw Boundary** starts again.

Every constraint check measures from this line, not from a centre point. A constraint that touches the boundary is reported as within or partly within the site.

3. Check the constraints Constraints tab

- 1 Press **Check Constraints**. Heritage, landscape and environment, flooding and transport each fill in, with a map and a checklist. Allow up to half a minute; the data comes live from the government sources named on each card.
- 2 Read the amber rows first. Each names its source, and the link opens the source record. Green rows are clear; transport rows are points to note, never a constraint in themselves.
- 3 Press **Re-check Constraints** after you move the boundary, or when a check is more than a few weeks old.

4. The rest of the record

- 1 **Photos:** on site, use **Camera** and wait for the green GPS fix before you shoot; each photo is pinned on the photo map. Existing photographs go in with **Upload**.
- 2 **Planning History:** the council register for this site and anything you drop in, read into the record. There is a separate guide for this tab.
- 3 **Development Plan:** the plan position and housing land supply for this authority, dated.
- 4 **Appeals:** every appeal decided around the site on a map, nearest first, with the Inspector's letter a tap away wherever one was published. Widen the ring from one kilometre to two, five or ten.
- 5 **Supporting Maps:** location and context plans for the submission.

5. Export the appraisal Site Appraisal tab

- 1 Open the **Site Appraisal** tab. The report assembles from everything above: the boundary on an aerial base, the constraint findings with their dates and sources, the plan position, the appeals and the photographs.
- 2 Export the PDF. It carries your name as author and your logo top-left. On an iPad it opens in Files or Books; on a Mac it downloads.

The judgement stays yours

The appraisal gathers the material and dates it. It states what the record holds; what it means for the proposal is your professional judgement, and the report says so.

On site without a signal

Photographs and notes are saved to the device first and sync when the signal returns. Open the site before you lose signal; the checks need a connection.

The trial

Fourteen days and up to five site appraisals in total. Archiving or deleting a site does not free a slot.

Where the location comes from

The site's location follows its red line: move the boundary and every check, the plan position and the appeal ring move with it.