

COMPLETE USER GUIDE · SPATIAL EDITION

How to use FieldWise Heritage Pro

Record, assess and report on heritage places with mapped, defensible field evidence — built on the new FieldWise spatial model, offline-first, and published through your organisation's Professional Core GIS in the Pro Hub.

ORIENTATION

The app, the spatial model & the Pro Hub

FieldWise Heritage Pro records, assesses and reports on heritage places with **mapped, defensible field evidence**. You do all your capture in the app on iPad or iPhone — fully offline in the field — and everything is built on the new FieldWise **spatial model**, so every place, boundary and observation is located, provenanced and review-tracked. Your organisation's **Pro Hub** (Professional Core) provides accounts and the shared GIS your approved place geometry publishes into.

The app

Capture places, significance, condition, assessments, actions, surveys, sources and evidence — offline.

The spatial model

One versioned Spatial Feature Contract behind every mapped feature — geometry with full provenance and cultural rules.

The Pro Hub / Core

Accounts, and the Professional Core GIS project your approved place geometry publishes into.

What's in this guide

1 Getting started

Signing in, organisations, projects and how to navigate.

2 The spatial model

The Spatial Feature Contract, the map and geometry capture.

3 Pro Hub & Core GIS

Mapping your project to Core and publishing geometry.

4 Places & assessment

Significance, condition monitoring, impact & risk.

5 Actions, surveys & evidence

Management actions, field & archaeology surveys, sources.

6 Governance, reports & delivery

Cultural protocol, reports, GIS exports & secure packages.

Note. Heritage-owned records are always the source of truth and the app is offline-first — nothing in the capture path waits on a connection. Publishing to Core and controlled delivery sit on top, gated by approval and cultural protocol.

SECTION 1

Getting started

Signing in

Heritage Pro uses the **same account as the rest of the FieldWise Professional suite** — one login across every Pro app your organisation licenses.

- 1 On first launch, sign in with your work email and password through **Professional Core**.
- 2 The app connects your account to your organisation's Heritage Pro workspace automatically.
- 3 Accounts are invitation-only — an administrator at your organisation invites you; the app does not create new accounts.

Organisations and projects

Everything you record lives inside a **project** — a heritage assessment, a conservation management plan, a monitoring program, an archaeological study, and so on. Every place, source, assessment, action and survey belongs to exactly one project, so switching projects changes what you see everywhere.

Tip. Choose the project you're working in before you start capturing — it is the container everything lands in, and it's what maps to a Core GIS project later.

Finding your way around

On iPad the main areas sit in a sidebar; on iPhone they're on the tab bar:

Dashboard Projects Places Map Assessments Actions Surveys Archaeology Sources People Claims
Interviews Governance Reports

Note. Heritage Pro is offline-first. Capture anywhere with no signal; records persist safely on the device and sync when you reconnect.

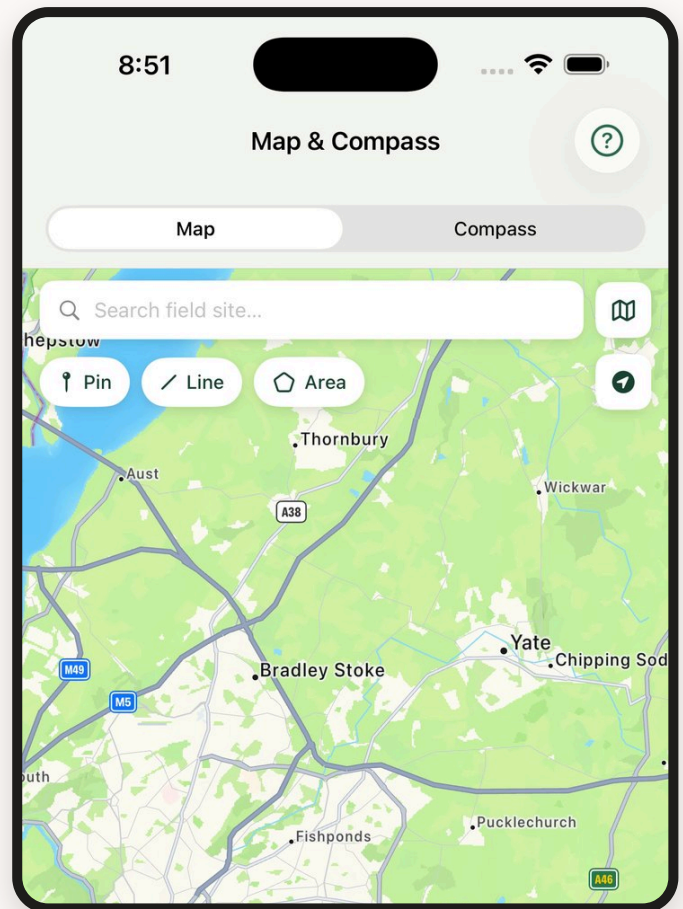
SECTION 2 · THE SPATIAL MODEL

Mapped, defensible evidence

Heritage Pro's spatial upgrade puts one **Spatial Feature Contract** behind every mapped feature. It's what makes your geometry defensible: every point, line or polygon carries its full story, not just a shape on a map.

What every feature carries

- Stable **feature and project identifiers**, and one of six approved **feature classes**.
- **Geometry** — point, line or polygon — with a CRS identifier (WGS 84) and optional transformation record.
- **Provenance** — source, capture method, evidence links, observer, confidence and accuracy.
- **Cultural rules** — sensitivity, location-display rule and cultural-protocol reference.
- **Lifecycle** — revision, review state, timestamps and tombstone (deletion) state.



The shared FieldWise map canvas — capture point, line and polygon geometry, switch basemaps, all offline. (Shown in a FieldWise reference build.)

Capturing geometry

Open the **Map** and use the **Geometry Capture** editor to draw a place's extent — drop a point, trace a line, or draw a polygon boundary — then attach it to the place record with its capture method and accuracy.

Spatial upgrade. Validation is strict by design. A feature is rejected if it lacks provenance or a CRS, has an invalid revision or accuracy, carries coordinates outside WGS 84 bounds, or has malformed geometry — so bad data never reaches a report or the shared GIS.

Tip. Record the capture method and accuracy honestly (e.g. handheld GNSS vs sketched) — confidence and accuracy travel with the geometry into every export and the Core GIS.

The Pro Hub & Professional Core GIS

The Pro Hub (Professional Core) is your organisation's shared backbone. Heritage Pro keeps its own records as the source of truth, and publishes approved place geometry into a linked Core GIS project so it sits alongside the rest of your organisation's spatial data.

Mapping your project to Core (admin)

A one-to-one link between a Heritage project and a Core GIS project must be set up before any geometry can publish.

- 1

A permanent Heritage administrator who is also a Core organisation owner or administrator creates the mapping — no one else can.
- 2

Both projects must belong to the linked Heritage and Core organisations; the identity and creation record of the mapping are fixed once made.
- 3

Once mapped, publishing a place's geometry writes **only** to that approved Core organisation and project, resolved server-side.

Important. If a project isn't mapped to Core yet, place geometry doesn't publish — it stays safely in the durable offline queue rather than partially syncing. An administrator must create and approve the correct Core project link first.

What flows to the Hub

From Heritage Pro...	...into the Pro Hub / Core	Gated by
Approved place geometry	The linked Core GIS project (points, lines, polygons)	Project mapping + cultural masking
Review decisions	Shared review state visible across the org	Record review status
Report exports & delivery packages	The protected cultural export audit ledger	Current-revision approval

Note. Everything here is additive and offline-safe: publishing and Hub writes queue when you're offline and never block field capture or review.

SECTION 3

Dashboard & Projects

The Dashboard

The Dashboard is your project home — an overview of the current project and quick ways to start capturing places, assessments and evidence.

Projects & workspaces

Open **Projects** to switch project — everything else immediately scopes to it. Heritage Pro adds several project-level workspaces for professional delivery:

Workspace	What it's for
Project Home	The project's overview, places and activity.
Screening	Early screening of a project or area before detailed work.
Offline Field Package	Prepare an encrypted, self-contained package to take a whole project into the field offline (Section 6).
Release Readiness	Check a project is complete and consistent before delivery or publication.
Pilot Workspace	Run and track a pilot deployment of the project.

Tip. Prepare an Offline Field Package before heading somewhere with no coverage — it bundles the project, its evidence and an approved basemap so you have everything on the device.

Note. Create a project with a clear name and scope up front — it maps one-to-one to a Core GIS project and frames every report and export that follows.

SECTION 4 · PLACES & ASSESSMENT

Places & significance

A **Place** is a heritage site, building, monument, precinct, landscape or archaeological location — the central record everything else attaches to.

Adding a place

- 1 From **Places**, tap **+** and give the place a name and feature type.
- 2 Capture its **geometry** on the map (Section 2) — a point, or a boundary polygon for an extent or curtilage.
- 3 Attach photos and link the sources, people and events it relates to.

Significance assessment

Open a place and use **Significance Assessment** to record its heritage significance in a structured way — the assessment that underpins a statement of significance and everything downstream.

Fabric elements

Use **Fabric Elements** to break a place into its individual components (a wall, a fence, a headstone, a machine) so condition and actions can be recorded against each element, not just the place as a whole.

Spatial upgrade. Because a place's geometry carries its own sensitivity and location-display rule, a culturally restricted site is automatically generalised or hidden on the map and in every export — see Section 6.

Tip. Assess significance and break out fabric elements early — condition monitoring and management actions are far more useful when they attach to specific elements.

SECTION 4 · PLACES & ASSESSMENT

Condition & monitoring

Heritage Pro is built for repeat monitoring over time, not just one-off recording.

Condition inspection

Use **Condition Inspection** on a place (or a fabric element) to record its condition on a visit — so a site's condition history builds up across inspections rather than being overwritten.

Photo-point comparison

Photo Point Comparison lets you re-shoot from the same fixed photo points on each visit and compare images side by side — the clearest way to show change (erosion, decay, vegetation, vandalism) over time.

Monitoring hub

The **Monitoring Hub** brings a place's monitoring activity together in one view, so you can see what's been inspected, what's due, and how condition is trending.

- Record condition against the whole place or an individual fabric element.
- Re-use fixed photo points for like-for-like comparison across visits.
- Build a longitudinal record that stands up in a conservation report.

Tip. Set up photo points on the first visit and re-use them every time — consistent framing is what makes photo-point comparison persuasive.

SECTION 4 · PLACES & ASSESSMENT

Impact, threat & risk assessments

The **Assessments** area is where you evaluate what could affect a place and how seriously.

Assessment hub

The **Assessment Hub** is the entry point to a project's assessments, bringing impact and threat/risk work together.

Impact assessment

Use **Impact Assessment** to evaluate the effect of a proposal, development or activity on a place's heritage values — the assessment a statutory or advisory report is built around.

Threat & risk

Use **Threat & Risk** to record the threats a place faces and rate their risk, so mitigation and management actions can be prioritised against the most serious.

Note. Impact and threat/risk assessments link back to the place and its significance, so a report can trace a recommendation from a value, to a threat, to an action.

Tip. Rate threats consistently across a project — a shared risk scale makes it easy to prioritise actions and defend the ranking in a report.

SECTION 5 · ACTIONS, SURVEYS & EVIDENCE

Management actions, surveys & archaeology

Management actions & conservation policy

Turn assessment into a plan. Use **Actions** to record management actions against places and fabric elements, and **Conservation Policy** to set the policies that govern how a place is looked after.

- Create and edit actions with the **Action Editor**; see them all in the **Action List**.
- Actions carry into a report's obligation schedule (the **actions.csv** in a delivery package).

Field surveys

The **Field Survey Workspace** supports structured survey work across a project — recording observations methodically against a survey rather than one place at a time.

Archaeology

The **Archaeology Survey** captures archaeological fieldwork — surveys, features and finds — within the same project, geometry and governance model as everything else.

Tip. Link actions to the specific place, fabric element or assessment that justifies them — it makes the obligation schedule in your delivery package self-explaining.

SECTION 5 · ACTIONS, SURVEYS & EVIDENCE

Sources, people, claims & interviews

Sources — your evidence

A **Source** is any piece of evidence: a document, photograph, plan, newspaper item, physical object or oral account. From **Sources**, tap **+**, add its title, type and repository details, and a photo. Use **Photo Capture** for on-site imagery, and link the source to the places, people and events it relates to.

People & claims

People records the actors in your research. **Claims** lets you state a research proposition and attach sources as supporting, contradicting or contextual evidence — the basis of a defensible argument in a report.

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Field Sheet Survey Forms Report Outline

Field Data Sheet

Untitled Trip Jul 8, 2026 1 site

Site 1 0/11 +

Site details

Site 1

Site number

Grid reference / GPS

Structured, checklist-style record capture with photo evidence and comments. (Shown in a FieldWise reference build.)

Oral history interviews

Important. Interviews are consent-first — set consent before recording. Record the participant and interviewer, capture the audio as a permanent original, then work the transcript segment by segment in **Transcript Review**, marking segments restricted or approved as excerpts.

Tip. Fill in citations and link records at capture time — linked evidence flows automatically into claims, assessments and reports.

SECTION 6 · GOVERNANCE, REPORTS & DELIVERY

Cultural protocol & governance

Cultural governance runs through the whole app — the same system protects any sensitive or restricted record, not only Aboriginal cultural material.

Cultural protocol on a record

Open any record and use its **Cultural Protocol** section to turn governance on and set how it's handled:

Setting	Controls
Sensitivity & access	How restricted the record is, and who may see it.
Location display	Whether a place's coordinates show exactly, generalised, offset, region-only or hidden.
Approvals	Independent approvals for viewing, reproducing, publishing and exporting.
Review state	Where the record sits in the review process.

Cultural Authority Workspace

The **Cultural Authority Workspace** in **Governance** is where culturally-governed records are managed together — the place to check the state of sensitive material across a whole project.

Spatial upgrade. Governance is enforced on geometry, not just text. A restricted place is masked — generalised, offset or hidden — everywhere its location could appear: the map, the Core GIS publication, and every GIS export. You never mask it by hand.

Important. A record without export/publish approval is automatically excluded from exports, reports and Core publication, and every export records how many records were held back.

SECTION 6 · GOVERNANCE, REPORTS & DELIVERY

Reports, GIS exports & controlled delivery

Reports

Build a report in **Reports** from your places, assessments, actions and sources, and generate a finished PDF. Reports are revision-controlled — export and delivery are gated against the **current approved revision**.

Managed GIS exports

Beyond the PDF, Heritage Pro produces professional GIS deliverables:

Format	Notes
Shapefile / GeoPackage	Managed exports built through an authenticated conversion service; require an approval decision for the current report revision; output is checksum-verified before it's saved.
GeoJSON / KML	Permission-safe place geometry after cultural masking.
CSV / RIS	Place and action schedules, and authorised source citations.

The delivery package

An approved FieldWise **delivery ZIP** is a single, reproducible hand-off bundle containing a report snapshot, permission-safe place geometry (CSV, GeoJSON, KML), an action schedule, citations, a deterministic map figure, a README and a **manifest** with approval, revision, layer/style state and SHA-256 checksums.

Important. Every export attempt is written to a protected cultural export audit ledger — actor, role, purpose, format, geometry-disclosure level, decision and timestamp — so there's a complete record of who exported what, and how much was redacted.

SECTION 6 · GOVERNANCE, REPORTS & DELIVERY

Encrypted evidence packages, sync & offline

Encrypted offline evidence packages

A **.fieldwise** package is a single, **encrypted** container for taking a whole project offline or handing it over securely.

- Protected with authenticated encryption and a **protection phrase** you supply (at least 12 characters) — the phrase is never stored in the package.
- Contains the project and every record type — places, sources, people, claims, interviews, field & archaeology surveys, actions and reports — plus deduplicated, checksum-verified evidence media.
- Bundles an approved, licensed basemap with its licence and coverage, so the map works offline too.
- Import verifies everything first and **fails closed** on a wrong phrase, altered contents or mismatched records — nothing half-imports.

Sync & offline work

Heritage Pro is offline-first. Capture everything with no connection; records persist safely on the device and sync when you reconnect. Deletions are handled cleanly across devices, so a record removed on one device doesn't reappear from another.

Tip. For a remote job with no coverage, prepare an Offline Field Package before you leave and keep your protection phrase safe — you'll need it to open or import the package.

Note. Because the app is offline-first and record-authoritative, a lost connection never costs you data — publishing and Hub writes simply queue until you're back online.

BEST PRACTICE

A recommended end-to-end workflow

A dependable order of work for a heritage project, from setup to delivery:

1 Set up & map the project

An admin creates the project and, when ready to publish, maps it one-to-one to the Professional Core GIS project.

2 Prepare for the field

Build an Offline Field Package (with basemap and protection phrase) so you can work fully offline.

3 Record places & geometry

Add places, capture point/line/polygon geometry with honest capture method and accuracy, and break out fabric elements.

4 Assess

Record significance, then impact and threat/risk assessments against the place and its values.

5 Monitor condition

Log condition inspections and re-shoot fixed photo points for like-for-like comparison over time.

6 Plan actions

Record management actions and conservation policies, linked to the places and elements that justify them.

7 Apply governance

Set cultural protocol and location display on sensitive records so masking is automatic everywhere.

8 Review, report & deliver

Approve the current revision, generate the report, and produce GIS exports or an approved delivery package — every export audited.

Tip. Two habits pay off most: capture **geometry with accurate provenance**, and set **cultural protocol at capture time** — together they make every export permission-safe and defensible automatically.

REFERENCE

Troubleshooting & glossary

Quick troubleshooting

If...	Then...
You can't sign in	An organisation admin must invite you — the app can't create accounts. Check your email/password and connection.
A place's geometry won't publish to Core	The project probably isn't mapped to a Core GIS project yet — an admin (Heritage admin + Core owner/admin) must create the mapping. Until then it waits in the offline queue.
Geometry is rejected on capture	It may be missing provenance or CRS, have an invalid accuracy, or sit outside valid coordinate bounds — check the capture method, accuracy and location.
A place is generalised or missing on the map / export	It carries a cultural location-display rule (generalised, offset or hidden) or lacks export approval — check its Cultural Protocol section.
A GIS export or delivery package is blocked	Exports are gated to the current approved report revision — approve the revision first.
You can't open a .fieldwise package	The protection phrase must be exactly right and at least 12 characters; a wrong phrase or altered file fails closed.

Glossary

Term	Meaning
Spatial Feature Contract	The versioned rule set every mapped feature follows — geometry plus provenance, cultural rules and lifecycle.
Place	A heritage site, building, precinct, landscape or archaeological location.
Fabric element	An individual component of a place (a wall, headstone, machine) that condition and actions attach to.
Significance assessment	The structured evaluation of a place's heritage values.
Location display	How a governed place's coordinates appear — exact, generalised, offset, region-only or hidden.
Core GIS project	The Professional Core project a Heritage project is mapped to, where approved geometry publishes.
Delivery package	An approved, reproducible ZIP of report, permission-safe geometry, schedules, citations and a checksummed manifest.
.fieldwise package	A single encrypted container of a whole project and its evidence, opened with a protection phrase.

Need more help?

Your organisation administrator manages accounts and the Core GIS project mapping. For product information visit fieldwiseeducation.com.au/professional. Heritage Pro is offline-first — keep capturing; it syncs when you reconnect.