

Checklane — Specifications and Scope of Work

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1. Purpose

Checklane is a web-based tool for planning, reviewing, running, and reporting user acceptance testing (UAT) for research administration systems such as Grants, Agreements, IRB, and COI. It's designed so people who are new to UAT can upload scripts and get started with very little setup. It also keeps two kinds of problems separate: problems with a *script* (unclear instructions) and problems with the *system* (failures).

2. Goals

- Make it possible to start testing in minutes, without setting everything up by hand.
- Keep script-quality review separate from system test results.
- Track system, process, data, access, and wording problems through to a confirmed fix.
- Keep an automatic audit trail with very little typing.
- Give each group of users a simpler view of only what they need.
- No sign-in, no end-user AI features, and no cost to users.

3. In scope

3.1 Workspace and setup

- Multiple separately saved workspaces per browser, with one active workspace at a time, a free-text title, and an optional free-text "Environment under test" note naming the system or release being checked (exports only, not shown in the workspace header).
- A guided setup helper that asks questions, which users can skip or run again.

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- Editable lists: active and future modules (default active modules: Grants, Agreements, IRB, COI), UAT types with definitions, prerequisites, priorities, and focus areas (cross-cutting tags). SSO and Workday are focus areas, not modules; workspaces saved before this split are corrected automatically on load, and the Overview never shows them as modules.
- Each script belongs to exactly one module, so no script appears in more than one queue.

3.2 Test scripts

- Import from Excel, CSV, and Word, with a preview before anything is saved. The original wording and labels are kept.

Import pre-selects each test case's UAT type using keyword matching on the case action, then the script title; a type supplied in the source file is kept, unmatched cases use the script default, and users can change the type afterward.

Import rule: spreadsheet rows that name a Task but leave Expected Result blank are imported as confirmation checks (flag confirmOnly) with generated action and expected-result wording, and they carry a "Confirmation check" import note. Original source fields are preserved unchanged.

Checklane numbers test cases itself (Case 1, Case 2, and so on) in the order they appear. Step numbers typed by script authors, including typos, gaps, or repeats, are ignored and never create review tasks.

- Spreadsheet layouts Checklane doesn't recognize can be mapped to its fields by hand.
- A script creation wizard and a test case wizard (action, expected result, evidence, review). UAT type, priority, severity, and likelihood are set on each test case, and UAT type choices show a short description.
- Drag-and-drop for files, photos, list items, and test steps.
- Inline edits that save automatically, one-click wording suggestions when an action or expected result is blank, version comparison, and revert.

3.3 Roles and assignments

- Seven standard roles are always present: Subject Matter Expert, Scenario Developer, Test Engineer, UAT Reviewer, End User, Vendor, and Triage Admin.
- Named people are optional, with an optional email address. Each person can have multiple roles.

- Scripts and individual test cases can be assigned to people, but only if the user turns that on.
- Scripts, script reviews, and individual cases can have several assignees at once (named people only; roles can no longer be picked). Older role assignments still count for everyone who holds that role and appear as "Earlier role assignments" in the checklist so they can be unchecked. Older single-assignee saves and backups load unchanged.
- Assignment emails are drafted in the user's own email program.

3.4 Review workflow

- Review combines the summary and test library under one header with Import, New test script, and Report issue actions. The review-needed count toggles the case filter. The open-issues count displays the issue list in place of the board, with a return action; the execution-ready count links to Testing when the selected audience permits it. Review and Testing retain the flat "All test cases" board, Table/Cards switch, filters, checkbox bulk marking, and "By script" option. Each case gets a review result — Passed, Failed, Blocked, or Not applicable — separate from its system test result. Issue owner and validator actions remain available in the issue list.
- Review results never change system test outcomes or risk scores.

3.5 Testing workflow

- Outcomes: Passed, Failed, Blocked, N/A, or Not started. When a case is marked Passed, the actual result defaults to the expected result.
- Screenshots and documents can be attached as evidence for each case.
- Completing a test lists any unfinished cases, saves the attempt, and returns the user to the Overview. Testing offers confirmed resets for the current case, entire script, and entire workspace (full view only). Resets clear current status, actual result, notes, and evidence while retaining imported instructions/source metadata, expected results, reviews, assignments, risk choices, issues, and completed attempt history. Script date and ticket reference clear when no current results remain. Assignment-scoped testers can clear their visible case, but cannot reset an entire partially assigned script. Each test case screen leads with an outlined box showing the section name and action, followed by the expected result.

3.6 Issues and validation

Issues and triage cases include a "Did the system show an error?" radio choice; choosing "Yes" reveals an optional field for the exact error text or code. The answer appears on support-case cards, in the issues export, and is copied into the generated test script when a triage case is converted.

- Users can report an issue with the requested change. The owner records the resolution and requests validation, and the validator confirms the fix and closes the issue.

Issues are grouped by category — System doesn't work, Process doesn't work, Data looks wrong, Access or sign-in, Wording or content, Connected system, Slow or hard to use, and Something else — each with a plain-language description in the report form. Script wording problems belong to script review, so “Script” is no longer an issue category; older workspaces that stored it are relabelled “Wording or content” when they load.

The report form optionally links an issue to a script. The choice defaults to “No script · just an issue”, the list is built from the whole workspace so a filtered tab still shows every script, and the field is hidden when there is nothing to link.

- One work queue lists all open items, sorted by urgency, with the next action for each.

3.7 Risk and reporting

- Risk score = priority × testing status × likelihood, using each test case's own values. Each heat map cell counts test cases at their highest risk. Cells stay gray until something is marked, and N/A is gray.
- Reports opens with two side-by-side summaries: Script review (purple) and System testing (green), each with its own counts and a button that opens that workflow. Below them, an open-issue follow-through line (open issues and those awaiting validation) links to the work queue, and three figures report completed scripts, pass rate, and saved screenshots. The per-script results table was removed; script-level detail stays in Test scripts, Review, and Testing and in the exports.
- Overview, module readiness, and attention lists. Testers and reviewers get their own Overview showing the work assigned to them. Work queue numbers can be clicked to filter the list.
- Overview shows a Triage panel whose state counts filter the case list below them.
- Excel, CSV, and PDF reports, including an audit and change log sheet. Formula injection is blocked in exported files.

- A due-diligence export package.

3.8 Data, sharing, and views

- Data is stored in the browser on the user's own computer. Undo and redo are available. Result-only resets are distinct undo steps and sync through existing shared-workspace saving; they do not delete scripts. Clear data remains a separate confirmed action that removes workspace scripts, results, issues, and added people.
- Upload workspace offers a confirmation preview and adds work without replacing the destination workspace. Script matching uses module, title, and original step wording in the same order, never the test number alone. It carries review decisions and results only into empty work with identical current wording; existing wording, assignments, and work stay intact. It remaps added IDs and links, avoids exact duplicates, preserves completed history, and supports Undo/Redo. The role is now named Triage Admin; existing assignments remain valid.
- An optional shared link syncs one workspace across computers without sign-in. If two people edit at the same time, their changes are combined so neither overwrites the other.
- Shared links can be limited to a view (Coordinator, Reviewer, Guest reviewer, Tester, or Guest tester), to selected modules, and to one person's assignments. A view only applies in that browser tab, so it can't hide Review for the coordinator.

3.9 Design

- Built for laptops and desktops first. Phones can still be used, with a collapsible menu.
- Workflow colors: Review uses light purple, Testing uses light green, and Triage uses soft red. Triage navigation, page heading, case buttons, Overview filters, and issue forms share its red accents. Buttons that open Review or Testing retain the destination color.
- Help text on every field.

4. Out of scope

- User accounts, sign-in, or password-protected access.
- AI features for end users.
- Automatic emails sent by the system. Email is draft-based only.

- Integration with ERP or ticketing systems such as Jira or ServiceNow.
- The earlier grant-management screens. That data is preserved but no longer shown.

5. Known limitations and assumptions

- Views are not security for share links or this-computer-only workspaces: anyone with a shared link can technically reach all of that workspace's data. In the signed-in team workspace, only people on the team list can open it at all; within the team, roles choose pages and every member can technically read the whole team workspace.
- Shared workspaces are stored online. Confirm this meets your organization's data rules before sharing sensitive information.
- A workspace that isn't shared lives in one browser. Clearing browser history or site data erases it. Users are responsible for downloading backups, and a backup file is the only way to move it to another computer.
- Browser storage has practical limits. Very large evidence collections — hundreds of screenshots or long videos — can slow the workspace down or fill the space the browser allows.
- One workspace is active at a time per browser. New workspace creates a separate blank workspace; Workspaces switches between saved workspaces without deleting their data. Switching does not merge them.
- Undo and redo are local and limited to recent changes in the current session. A result reset can be undone or redone before that history is lost on page reload. Reset changes sync to the shared workspace; confirmations warn participants about this. Completed attempt history remains unchanged by result-only resets.
- Concurrent edits are combined, not perfect. If two people change the same field at nearly the same time, one person's wording may need to be reapplied.
- Views filter, they don't protect. A Tester or Guest tester can change or clear their view filter and see the full workspace.

- Email is draft-only. Nothing is sent automatically; drafts open in the user's own email program and must be sent manually. There are no scheduled reminders or notifications.
- No integrations. Checklane does not connect to ERP, HR, ticketing, or test-management systems such as Jira or ServiceNow.
- Imports cover Excel, CSV, and Word only. PDF scripts must be retyped or copied, and spreadsheet layouts Checklane doesn't recognize need manual field mapping.
- Exports are snapshots. Excel, CSV, and PDF reports reflect the moment they were created and don't update on their own.
- Desktop first. Phones and tablets work, with more scrolling; the design targets laptops and desktops.
- An internet connection is required. The app loads from the web. Shared-workspace syncing pauses when the connection drops; changes save locally and merge when it returns.
- Starter content is illustrative. The built-in examples are not official vendor scripts.
- Risk scores are a planning aid. They combine the priority, status, and likelihood values people enter; they don't replace judgment about what to test first.

6. Acceptance criteria

1. A new user can complete setup and run one test without outside help.
2. An imported script keeps all of its rows and original wording.
3. Review findings never change pass/fail results.
4. An issue can go from reported to validated within the app.
5. Two computers on the same shared link see each other's changes within a few seconds.
6. A guest tester link shows only the Testing page for the chosen modules.
7. Reports open correctly in Excel and as PDF.
8. Restore backup replaces the current workspace with the saved scripts, results, issues, and evidence. Upload workspace instead combines work after a preview. Ambiguous or changed scripts are added separately;

conflicting existing decisions/results are not overwritten and are listed for comparison. Keep the original backup to inspect skipped work. Prior approvals must be present in a Checklane backup; Checklane cannot infer historical approval from an ordinary spreadsheet. Additions made inside a shared workspace sync for everyone using its link. Convenience role views are not security boundaries.

7. Technical summary

- Runs entirely in a modern web browser. Data is stored locally in the browser's built-in storage (IndexedDB).
- Optional sync uses a protected online database that can only be reached with a link token. Saves are version-checked so concurrent edits are combined safely.
- 132 automated checks cover the business rules (risk, outcomes, imports, merging, review results, and views).

Overview dashboard

Overview (v1.4): Dual-stage summary of script review and testing counts; per-module review and testing progress bars that open Review or Testing filtered by module; a role and person work table whose counts open Review or Testing filtered by assignee (including Unassigned). Review and Testing pages accept module and assignee filters from these links.

Board labeling: script rows pair the case-count and reviewed-count in matching workflow-colored badges; flat case rows and cards display the script's module tag and focus area.

Issue linking (v1.6): script linking is optional in the issue form and never asked for on a triage case; the picker lists every script with its module regardless of the current filtered view, and is hidden when no scripts exist.

Module picker (v1.7): the issue and triage case form chooses the module from a dropdown built from the same choices as the script wizard (active modules, future modules, and modules already used by scripts); a value saved earlier that is not in those lists is kept and shown.

Script review and system testing: separate progress

Checklane supports two equally important activities: reviewing and improving test scripts, and testing the system. A completed script review does not mean the

system has been tested. An untested system does not mean the script review is unfinished.

On Review, the By script table shows Script review first, with the Review result and number of cases reviewed. System testing is a separate column labeled Test result. Review filters use review results and reviewers; Testing filters use test results and testers.

On Overview, Needs attention has separate Script review and System testing choices. Script review shows unreviewed cases and scripts needing changes or information; System testing shows high-risk test cases. Each listed script shows both review and test results, its module, and a link to the selected activity. Selecting a risk heat-map cell shows the matching testing queue. Review & testing progress has separate clickable percentages and case counts for each activity; neither is presented as overall completion.

Triage

Triage: A standalone soft red section, separate from Testing, tracks system failures without a test script. Existing Triage links continue to open the new section, and tester views keep their access to triage cases. Each starts as an issue (flagged as a triage case). A "Create test script" action generates a one-case draft script linked to the issue, which then follows the normal Review then Testing workflow. Converting does not record any review or test result. The triage case form does not offer a script picker; a note explains that the script is created later from the case.

v2.5: The Overview includes a Triage panel: an open-case count, state filter chips (All, Open, In progress, Awaiting validation, Closed) that filter the list, one row per case showing its number, module, state, linked script, and owner or validator, and a link to the Triage page. The panel renders even when no test scripts exist, because a triage case begins as an issue.

v2.4: Triage Admin is added as a seventh standard role with plain-language help; workspaces saved earlier gain the role automatically the next time they open.

v2.3: Triage case cards display the module as a tag and include an inline Module dropdown using the same choices as the issue form; the selection saves immediately, so a case can be tagged or retagged without opening it.

v2.2: The roster page is renamed User roles in the sidebar and page title. Vendor is added as a sixth standard role with plain-language help; workspaces saved earlier gain the role automatically the next time they open.

v2.1: Issue and support-case forms accept drag-and-drop and clipboard-pasted screenshots/documents (5 MB each, browser-local) with image previews.

Version 2.6 changes

Grouped (parent/child) case view: script, then section, then steps, all collapsed by default, with expand/collapse all and per-level progress. Shared-link Welcome page: workspace title, assigned view, name check-in (stored on that computer; narrows assignment-based work for participant views), remaining work counts, start actions, and team activity derived from saved review, completion, and issue dates. Check-in is a convenience, not sign-in or access control.

Version 2.8 changes

v2.8: The top bar gains a New workspace button beside Workspaces, so starting a separate workspace is one click instead of opening the chooser first. On narrower windows the top bar shows icons with hover names and keeps the New workspace label visible.

Creating and switching workspaces

New workspace and Workspaces: two buttons in the top bar handle workspaces. New workspace starts a separate blank workspace on this computer: type a title and it opens with the standard roles and default lists, leaving your current work untouched. Workspaces lists every workspace saved here with its script and issue counts, and Open switches to it. Your previous scripts, reviews, results, evidence, and triage cases stay in the previous workspace. Each workspace is stored on this computer in this browser; download a backup of each before clearing browser data. Switching does not merge workspaces. Shared work finishes syncing before switching; teammates retain the old workspace and link. Reopening that saved workspace reconnects its shared link. Undo/Redo stays within the workspace you currently have open. On a narrower window some top-bar buttons show an icon only; hover the mouse over one, or tab to it, to read its name.

Renaming a saved workspace: every row in the Workspaces dialog has a pencil button that opens an inline title edit (Enter or the check button saves, Escape or the cross cancels). Renaming writes only the workspace title; scripts, reviews, test results, triage cases, people, and share metadata are untouched. Renaming the

workspace that is open goes through the normal edit history and can be undone; renaming a closed workspace writes directly to its saved slot. For a shared workspace the title is also pushed to the team copy, with one retry when a teammate saved first, and a warning when the team copy cannot be updated.

Shared workspace — step-by-step help

Operational instructions and limitations: the following procedure describes the current shared-workspace experience. It does not add accounts, private role permissions, automatic email delivery, or guaranteed conflict-free/offline collaboration to scope.

Before the team starts

Coordinator: choose one workspace as the team copy. Open Workspaces, open the workspace you want to share, and check its title in Workspace settings. Do not create separate shared links from different copies if you intend everyone to work on the same set of scripts.

If teammates already have work on their own computers, ask each to download a Checklane JSON backup. Keep those files. In the chosen team workspace, use Workspace settings → Upload workspace. Read the preview and skipped items before clicking Add to workspace. This adds compatible work without replacing existing decisions or results. Restore backup is different: it replaces the current workspace.

For scripts approved before Checklane, retain the original approval record. Upload workspace can carry approvals recorded in a Checklane backup into empty reviews when the wording matches. It does not read approvals out of an email or an ordinary spreadsheet. If approvals exist only outside Checklane, the coordinator or reviewer should record the appropriate Review results and notes; do not mark a system test Passed just because a script was approved.

On User roles, add each person by name with their roles and optional email. Work is assigned to named people only; each person's view follows their roles. Assign the reviewer separately from the tester. A case normally follows its script's tester assignment unless you enable a separate case assignment. Adding a person or opening an email draft does not send a workspace invitation automatically.

Coordinator: make and send the link

1. Click Share workspace in the top bar of the full workspace.

If the open workspace has no scripts, the Share window warns that the link would open blank for everyone. It lists any saved workspace on this computer that has scripts, with a button to open it so you can share from there. Your work is kept per computer and per Checklane address, so if it is not listed, share from the computer and address where you see your work. Tick "Share this empty workspace anyway" only when a blank team copy is what you want.

2. Choose Coordinator (full) only for trusted people who need setup and all work. Choose Reviewer or Guest reviewer for script review. Choose Tester (Subject Matter Expert) or Guest tester for system testing. A role on User roles does not automatically choose the link's view.

3. For a slimmed-down link, choose Assigned person if you want only that person's work. Leave Everyone in the selected modules when the whole group should see those modules. A person's assigned-role work is included as well as direct assignments.

4. Tick modules such as IRB or COI if you want to focus the link. Leave all modules unchecked to include every module. These choices simplify the view; they do not protect confidential data.

5. Click Copy link. Paste the complete link into your email or team message. Include the workspace title, the recipient's name or role, whether they should review or test, and who to contact if they cannot find their work. Keep the full coordinator link for yourself.

6. Confirm the top bar says Synced with team before closing. Once shared, changes to that workspace are shared changes, including edits, result clearing, imports, and issue updates.

New participant: open the team workspace

1. Use the exact link your coordinator sent. Opening only checklane.lovable.app on a different computer does not identify the team workspace.

2. If you already have local work to keep, download its backup before opening a different team's link. Opening a shared link loads that team's copy; it does not combine files.

3. Wait while the top bar says Connecting or Syncing. When the welcome window appears, check the workspace title. Under Who are you?, choose your own name. This is a check-in, not a secure sign-in or proof of identity.

4. Check Your view and any module names. Select Start reviewing for script review, Start testing for system testing, or Go to overview for your assigned progress and work. Do not choose someone else's name to make an empty list disappear.

5. If your name is missing, or the workspace title or assignments look wrong, ask the coordinator to check the roster, assignments, and link. If you close the welcome window, click Welcome to open it again when that control is available.

6. Keep the team link somewhere you can find it. Your browser remembers the active shared connection, but a different browser, computer, or cleared browser storage may require the link again.

Do the right kind of work

Review — purple: check the instructions and expected result. Expand a grouped script, then its sections and steps, or switch to Table or Cards. Passed means the script is ready as written; Failed means changes are needed; Blocked means more information is needed; Not applicable means no review is needed. Review result and Test result are separate.

Testing — green: open your test, perform the action in the actual system, and compare what happened with the expected result. Passed, Failed, Blocked, and Not applicable record the system outcome. Passed fills a blank Actual result from Expected result. Add notes or evidence when useful. Complete test returns to Overview; unfinished cases must be addressed first.

Triage — soft red: log a system or process problem that has no test script. Click New triage case, choose an issue category (including System showed an error), enter an Issue title and Observation, choose its module, and attach screenshots or documents if useful. A script can be created later for Review and Testing; reporting an issue does not itself mark a test failed.

Issue ownership: the owner records the completed fix under Resolution — what was changed, then clicks Fix done — request validation. The validator rechecks the fix, records the Validator's check, ticks I confirm the fix works as expected, and clicks Mark as validated. If it still fails, describe what does not work and send it back. Validation does not change a recorded test outcome.

Saving, syncing, and finishing your session

No Save button is needed for normal edits. Saving... means your browser is saving locally. Synced with team means the shared connection is up to date as last

checked. Syncing... means a team update is in progress. Changes from other people are checked automatically; they may take several seconds to appear.

Wait for Synced with team before closing or switching workspaces. If you see Sync problem — retrying or Not saved, keep the page open, check your connection, and download a backup when available. Do not assume work reached teammates while there is an error. Checklane is not a guaranteed offline collaboration tool.

Agree who edits each script or case. Checklane blends many changes, but two people changing the same answer can still conflict. Use the team's agreed answer and keep a backup when resolving disputed changes. The welcome Team activity list is a summary of recorded work, not a complete live attendance or security audit.

Use Workspaces in the full view to create another blank workspace or reopen a saved one on this computer. Switching preserves the previous workspace; it does not combine copies. Shared edits must finish syncing before switching. A new workspace is not shared until you create its own link. Reopening a saved shared workspace reconnects its link.

Leave stops syncing on this computer and keeps your local copy; it does not close the team workspace or revoke anyone else's link. Return to full workspace restores the full view in this tab without disconnecting sync. Neither button is a security permission change.

If something looks wrong

No work appears: confirm the workspace title, your name, the link's modules, and your assignments with the coordinator. Clear a list filter or click All where available. An empty list can mean no work is assigned; it does not mean the team's work was deleted.

Review is missing: a tester link intentionally hides Review. Use the coordinator's review link, or Return to full workspace when available. A participant link should not permanently remove coordinator access.

A teammate cannot see your change: confirm both of you opened links from the same team workspace and wait for syncing. Separate copies or links created from separate workspaces do not automatically combine. Use Upload workspace in the agreed team workspace for pre-existing work.

Before using Clear data, Clear workspace results, Restore backup, or Upload workspace in a shared workspace, coordinate with the team and download a backup. Those changes can affect everyone. Undo/Redo is available in the current session but is not a substitute for a backup or a private edit.

Never include patient, participant, employee, financial, or other confidential information unless your organization permits it here. There is no sign-in and anyone with a link can use it. Names, roles, and module filters are conveniences, not authentication or privacy boundaries. Do not forward a link beyond the intended team.

Workspace downloads and checkbox selections — October 29, 2026

To send your workspace to a coworker: click Download workspace in the left panel under Saving, or use the same button in Workspace settings. Your browser saves Checklane-backup.json. Send that file through your approved email or file-sharing service. It includes the currently open workspace's scripts, reviews, test results, triage cases, people, and attached evidence, including work outside your filtered view; it does not include your other saved workspaces. Your coworker opens their Checklane, clicks Upload workspace (in the left panel under Saving, or in Workspace settings), chooses your JSON file, checks the preview and skipped items, and clicks Add to workspace. This keeps their existing work. Restore backup replaces their current workspace instead: use that only in a new blank workspace or when replacement is intended. Keep the original files, and download a backup of the receiving workspace first. Backups can contain sensitive evidence; share them only with trusted coworkers through approved channels.

Select all and Deselect all buttons are available for script imports (all files or one file), script lists, and Review/Testing case boards in Grouped, Table, and Cards views. Board controls select only cases matching the current view and filters, including steps inside collapsed groups; an opened script or section also has its own controls. Selection alone does not mark a result: choose a separate bulk result or assignment action afterward. Prerequisites have separate controls for inclusion and reusable choices. Module choices in setup and Share workspace also have bulk controls. In Share workspace, leaving every module unchecked still means include every module. For a person's roles, Select all assigns every standard role; Deselect all is disabled because each person must retain at least

one role. Uncheck unwanted roles individually. Single checkboxes such as fix confirmation or optional case assignment are not bulk selections.

Upload and download sit together — October 29, 2026

The two Saving rows in the left panel now look and sit exactly like the rows under Documents: same height, same plain style, with an even gap between them and before the next heading. Nothing moved and nothing changed about what each one does — Download workspace still saves a file to send to someone, and Upload workspace still adds a file to your work after showing you what will be added.

The left panel now has a Saving area with both directions: Download workspace saves a copy of the workspace you have open, and Upload workspace adds a file someone sent you. Upload workspace is the new name for Add from backup and works exactly as before — choose the JSON file, read the preview of what will be added, then click Add to workspace. Your existing scripts, wording, reviews, and results stay in place, and the addition can be undone.

Workspace settings → Saving & backups now shows three cards side by side, each with a plain-language description: Download workspace (keep a copy or send one), Upload workspace (combine someone's file with your work, nothing replaced), and Restore backup (throw away everything currently open and put the chosen file in its place). Restore backup is shown in red because it is the only one that deletes your current work — use it only in a blank workspace or after downloading your current one.

A participant or tester link keeps the download button but hides Upload workspace, so someone opening a filtered link cannot merge a file into the team's workspace. A coordinator can always open the full workspace to add one.

Reports page simplified — October 29, 2026

The Reports page dropped its per-script table (test script, system result, script review, author follow-ups, date tested, defect reference, attempts) because it restated the script library rather than summarising the cycle, and it grew longer with every import.

Reports now leads with a Script review box and a System testing box, each carrying its own counts and a link into that workflow, followed by the open-issue follow-through line and the completed-scripts, pass-rate, and saved-screenshot figures. Export due diligence, CSV, and PDF are unchanged.

Workspace names can be changed — October 29, 2026

Every workspace in the Workspaces dialog now has a pencil button. Click it, type the new title, then press Enter or click the check button. Click the cross or press Escape to leave the name as it was.

Renaming changes only the title. Scripts, reviews, test results, triage cases, people, and the share link stay exactly as they were, and the new title carries into Workspace settings, reports, and exports.

You can rename the workspace you are working in, or one that is closed. Renaming the open workspace can be undone with Undo.

If the workspace is shared, Checklane also updates the copy your teammates open so everyone sees the same name. If that update cannot be made, you are told and only your own copy changes.

Role-based views (v3.5)

Version 3.5 adds role-based views without accounts.

- New standard role: UAT Coordinator (full workspace).
- A checked-in person's roles choose their view: Coordinator/Scenario Developer full; UAT Reviewer review; Test Engineer, Subject Matter Expert, Triage Admin testing; reviewer plus tester combined "Reviewer and tester"; End User/Vendor guest tester.
- A view set in a share link takes priority over the person's roles. The left panel shows the person and view with a Switch button.
- Limitation: identity is self-selected on each computer; it is not authentication and does not hide data from someone determined to see it.

Developer access (v3.6)

Version 3.6 adds a Developer access control.

- Workspace settings includes a Developer access section with an On/Off status and a single button to turn it on or off.
- When on, the browser always shows the full workspace; share-link views and the checked-in person's role view are ignored.
- The setting is stored in the browser's local storage, so it survives refreshes, closing the browser, and opening new links. It is per browser and per computer.
- Clearing browser data removes it; the user turns it on again from Workspace settings. The ?developer=on and ?developer=off link options remain as a recovery path.
- Limitation: this is a convenience switch, not authentication; anyone with access to the browser or the link can turn it on.

Profile sign-in and personal links (v3.7)

Version 3.7 adds profile sign-in without passwords.

- The Share window lists one-click personal links for every named person. Each link carries the person (me=) and opens the shared workspace already checked in as them; their roles choose the view.
- A "Who are you?" prompt appears once per day per browser for people who joined by link or have a remembered name; it is pre-filled from the link or memory.
- Identity is remembered in the browser and survives refreshes. Verified with two separate browsers: a Test Engineer saw only Testing pages, a UAT Reviewer saw only Review pages, each saw only their assigned script, and blocked pages returned them to their overview.
- Limitation: personal links are not passwords; anyone with a link can open it, and anyone can switch names.

Large rosters (v3.8)

Version 3.8 makes the people experience work for teams of any size rather than a handful of named people.

- Roster search by name, email, or role, requiring every word typed, applied to the Share personal-links list, the assignment checklist on scripts and cases, the daily "Who are you?" picker (shown once the roster has more than eight people), and the People list on User roles.
- Bulk handout: "Copy all links" places one "Name — link" line per person on the clipboard; "Download list" saves checklane-links.csv with quoted Name, Email, Roles, and Link columns. Both follow the current search, so a coordinator can issue links one role at a time.
- Long lists scroll and carry counts ("30 people · 5 with more than one role", or "12 of 30" while searching) instead of stretching the window.
- Verified with a 30-person roster across two separate browsers: searching narrowed 30 people to 1, a role search copied five links at once and returned five lines, the downloaded sheet held one row per person, and a mid-list person opening their own link saw only their Testing pages and their own script, still remembered after a refresh.
- Unchanged limitation: personal links are not passwords; anyone holding a link can open it, and anyone can switch names.

Team and email alerts (v3.9)

Version 3.9 adds a Team section in Settings and assignment email alerts.

- Team: add teammates (name, email, roles), edit roles, search, remove, and copy per-person invite links.
- Alerts: after a shared save, cases whose assignee, script title, action or expected result changed send an email to each assigned person with an email, including people who hold a role on an older role assignment. Results and notes never trigger alerts.
- Recipients and content are read from the saved shared copy on the server; the browser cannot choose recipients. Repeat sends of the same change are de-duplicated.

- Sender: notify@checklane-testing.com, active once the domain finishes verification. Unsubscribe is handled automatically.

Workspace wording (v3.10)

Version 3.11 removes the environment label from the workspace header.

Version 3.12 guards against sharing a blank workspace.

- When the open workspace has no scripts and is not already shared, the Share window hides its link options, offers one-click switching to saved workspaces on this computer that have scripts (most scripts first), and requires an explicit "Share this empty workspace anyway" tick before a blank team copy is created.

Version 3.13 adds a signed-in team workspace.

- The regular address opens a sign-in page (emailed one-time link, no password). Access is granted when the signed-in email is a coordinator or matches an email on the workspace's team list; anyone else is told they are not on the team.
- One team workspace is stored online and read and written only through database functions that check the caller's email. Saves are version-checked with the existing three-way merge; non-coordinators cannot change the team list (the stored list is kept on their saves).
- The signed-in email is matched to a team-list entry; that person's roles choose the view automatically and cannot be switched or bypassed from the page. Coordinators see the full workspace.
- Assignment email alerts in the team workspace are sent by a signed-in server function that re-reads the team copy; links open the regular address.
- Team mode hides Share, Workspaces, and Leave and never writes over the browser's own saved workspaces. "Work on this computer only" keeps the previous browser-local mode and old share links working.
- The initial team workspace was loaded from the coordinator's CORE COI UAT 2026 backup (10 scripts).
- The top bar no longer shows an environment pill, so nothing on screen reads as if Checklane itself is a test environment.

- Workspace settings replaces the Production/Stage/Sandbox dropdown with an optional free-text "Environment under test" field, described as naming the system or release your team is checking — not Checklane.
- The setup helper asks three questions (title, modules, scripts) instead of four; the environment question is removed.
- Tester and reviewer overview pages no longer repeat the environment in their page description; exports and the PDF header show "Not set" when the field is blank.
- Saved workspaces keep any environment text already recorded, and a blank environment still loads and saves normally.

19. Copyright and ownership

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