

Checklane — How to Use It

Plain-language instructions for user acceptance testing (UAT)

© 2026 Anna Evatt. All rights reserved.

What Checklane is

Checklane is a website for two equally important activities: reviewing and improving test scripts, and testing the system. You write or upload scripts, review their instructions, then people run them and record what happened. You can track script, system, and process issues until they are fixed. There is no sign-in. Your work saves in your own web browser on your own computer.

Open it at **<https://checklane.lovable.app>**. It works best on a laptop or desktop.

The bar along the bottom of every screen shows the workspace name, the current cycle, the number of scripts, and the copyright notice.

Signing in to the team workspace (v3.13)

Open the regular Checklane address (checklane-testing.com). Type your work email and click "Email me a sign-in link". Open the email on the same computer and click the link — you come straight back, signed in. There is no password, and you stay signed in on that browser.

Everyone on the team works in the same team workspace at the same time. Changes save automatically and appear for everyone within seconds. No share links, no files to send.

Only people the coordinator has added can get in. The coordinator adds each teammate on the User roles page with their name, work email, and roles, then clicks "Copy invite" to paste the address and email into a message. A person whose email is not on the list sees "that email isn't on the team yet".

Your roles decide what you see: everyone with the same roles sees the same pages and their own assigned work. Coordinators see everything. Only coordinators can change the team list.

Use "Sign out" at the bottom of the sidebar to switch people on a shared computer. "Work on this computer only, without signing in" on the sign-in page

© 2026 Anna Evatt. All rights reserved.

still opens a private, this-browser-only workspace; Share, Workspaces, and Leave appear only there.

Getting started (coordinator)

1. **Answer the helper's questions.** The checkmark helper in the bottom-right corner asks a few setup questions: a title for this round of testing, and which modules you're testing. You can skip any question and come back to it later.
2. **Check your settings.** Under **Workspace settings** you can change the title, note what you're testing under **Environment under test** (optional), and edit the built-in lists: modules, UAT types, prerequisites, and focus areas. To turn a module on or off, drag it between **Active** and **Future**. **SSO** and **Workday** are focus areas (cross-cutting tags), not modules — if an older workspace still lists them as modules, Checklane moves them to focus areas automatically. The environment note appears in your exports only — Checklane does not show it at the top of the screen.
3. **Add test scripts.** Go to **Test scripts** and either:
 - o click **Import** and drag in an existing Excel, CSV, or Word script, orWhen you import scripts, Checklane pre-selects a likely UAT type for each test case from the script name and action (for example, "Log in" suggests Security, "Export report" suggests Reporting). You can change it any time; cases with no clear match keep the script default.

Confirmation checks: when an imported spreadsheet step only names a task (for example "Site closure") and leaves the activity and expected result blank, Checklane labels it "Confirmation check". The action reads "Perform: <task>" and the expected result reads "<task> works as intended with no errors." Just do the task and confirm it works.

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.

- o click **New test script** and let the wizard walk you through it one question at a time.
4. **Add people (optional).** On **User roles**, add each teammate by name and tick their roles. You assign work to these named people. A person can

have more than one role, and Email role & assignments opens an email draft telling them what they've been given.

The standard roles

- **Subject Matter Expert:** uses the system every day. Runs tests, records outcomes, and checks fixes.
- **Scenario Developer:** writes and updates test scripts.
- **Test Engineer:** prepares environments and data, and fixes reported issues.
- **UAT Reviewer:** checks that scripts are clear and complete before anyone runs them.
- **End User:** tests the system the way a regular user would, with standard access.

Vendor: works for the company that supplies the system or a connected service. Confirms fixes on their side and explains how the product is meant to behave.

Triage Admin: keeps triage cases moving — sorts new cases, assigns an owner, tracks the fix, and confirms the case can be closed.

Reviewing scripts (purple pages)

Open Review to check scripts before they're run. One header contains Import, New test script, Report issue, and the summary counts. Click Cases needing script review to filter the board; click it again to show all cases. Click Open issues to work through to show the issue list in the same space; Back to test cases returns to the board. Scripts ready for execution opens Testing. Switch between Table and Cards, or tick several cases to mark them at once. For each case choose Passed, Failed, Blocked, or Not applicable. "Review result" shows your decision; "Test result" shows what happened when it was run. If an action or expected result is blank, click a suggested wording to fill it in. Script review never changes a test result. On each test case screen, the section name and the action to perform appear together in a bold outlined box at the top, with the expected result shown beneath it.

Running tests (green pages)

1. Open Testing. The Grouped view shows scripts first, with sections and steps underneath when expanded. You can also switch to Table or Cards.

2. Follow each step and choose **Passed**, **Failed**, **Blocked**, or **N/A**. If you choose Passed, the actual result fills in with the expected result for you.
3. Drag in screenshots or documents as evidence if you have them.
4. If something is wrong, click **Report issue** and describe the change you're asking for. The form can link the issue to a test script if you want, or leave it on "No script · just an issue".
5. Click **Complete test**. Notes are optional, and you'll go back to the Overview.

Priority, Severity, Likelihood, and UAT type belong to each test case. Change them on the case or its card and the risk heat map updates straight away.

Fixing and checking issues

If the system displays an error, choose System showed an error as the issue category. Paste the exact error wording or code into Observation; there is no separate Yes/No error question.

When you report an issue, pick the category that fits: System doesn't work (a button, page, calculation, file, or save behaves incorrectly), Process doesn't work (the system works, but the real-world handoff or approval doesn't line up), Data looks wrong (records, numbers, names, or statuses are missing, duplicated, or incorrect), Access or sign-in (you can't sign in, or you can see or do things you shouldn't), Wording or content (labels, instructions, emails, or messages are confusing, outdated, or wrong), Connected system (information didn't move correctly between this system and another one), Slow or hard to use (it works, but takes too long or is easy to get wrong), or Something else. Problems with a script's own wording are handled in Review, so they are not an issue category.

When you report an issue, you can link it to the test script it belongs to. The list shows every script with its module so you can find the right one; leave it on "No script · just an issue" when the problem is not part of a test script. A triage case never asks for a script — it starts as an issue and gets its script later from Create test script.

Choose the module from the dropdown — it offers the same modules the rest of Checklane uses: the modules you have turned on, the ones held for later, and any module a script already uses. To add or rename a module, open Workspace settings and edit Active modules.

1. Whoever owns the issue makes the fix, writes what changed, and clicks **Request validation**.
2. The validator opens the issue on the Testing page, confirms the fix works, and marks it **Validated**.

The Work queue puts everything waiting on someone in one list, with the most urgent items first. Click any number at the top to show just those items.

Sharing with other people

Click **Share workspace**, choose a view, and optionally tick one or more modules:

View	What they see
Coordinator (full)	Everything
Reviewer	Their own Overview, Review, and Work queue
Tester (SME)	Their own Overview, Testing, and Work queue
Guest tester	Only their tests to run. Good for someone new, such as a PI
Guest reviewer	Only the scripts they've been asked to review

Click **Copy link** and send it. Their changes sync back to your workspace automatically. **Treat the link like a password.** Views keep things simple for each person, but they aren't a security lock.

Saving, backups, and undo

- Your work saves automatically in this browser.
- **Undo** and **Redo** are at the top of every page.
- **To start testing over without re-importing, use Clear case results beside the result buttons, Clear script results at the top of an open test, or Clear workspace results at the top of any page (full workspace view). Confirm to clear current test selections, actual results, notes, and evidence. Instructions, expected results, review decisions, assignments, risk choices, issues, and completed attempt history stay. The date and ticket reference clear when a script has no current results left. Undo restores the cleared entries; Redo clears them again. Clearing results in a shared workspace also syncs to other participants. Clear data is different: it deletes scripts and imported data after confirmation.**

- Before you clear your browser history or switch computers, go to **Workspace settings → Download workspace**. Restore backup replaces the whole workspace. Upload workspace combines a teammate's Checklane JSON backup with your current work after a preview. Matching uses module, title, and original ordered step wording, not the test number. Reviews carry over only into empty reviews with identical current wording; results fill only empty test work. Existing wording, assignments, decisions, and results stay intact. Unmatched or ambiguous scripts are added separately with new numbers where needed. Check the preview and skipped items before choosing Add to workspace. Cancel changes nothing; Undo reverses the addition and Redo brings it back. Add inside the team's shared workspace to share the additions. Keep the backup to compare skipped work.

Reports

Open Reports for a quick read on both kinds of work. Two boxes sit side by side. Script review (purple) shows how many test cases have been reviewed and how many checks still await your decision, with an Open review button. System testing (green) shows how many test cases have a result and how many are not started, with an Open testing button. Below them, System & process follow-through counts open issues and those awaiting validation, and links to the work queue. Three figures close the page: completed scripts, pass rate (passed ÷ passed and failed), and saved screenshots. Use Export due diligence, CSV, or PDF at the top to download the full package, including the audit and change log. Reports no longer repeats every test script in a table at the bottom — that detail lives in Test scripts, Review, and Testing, and in the exports.

Overview dashboard

Overview dashboard: The Overview now shows Step 1 · Script review and Step 2 · Testing side by side, so review work counts even before any tests are run. "Module progress" gives each module a purple review bar and a green testing bar; click either bar to open Review or Testing filtered to that module. "Open work by role or person" lists what each role or person still has to review, test, or fix; click any number to open exactly those cases.

Matching color badges: on the Review and Testing boards, a script's "test cases" count and its "reviewed" count share the same colored badge so you can see they

describe the same set of cases. Every test case row and card also shows its module (for example COI or IRB).

Triage on the Overview: the Overview has a Triage panel. It shows how many cases are still open and a row for each recent case — its number, module, state, and who owns or validates it. Click a state number (All, Open, In progress, Awaiting validation, Closed) to filter the list, or click Open Triage to work on them. The panel appears even before any test scripts exist, because a triage case starts as an issue.

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 (standalone soft red section): Use this when something fails and there is no test script for it. Click New triage case and describe the problem — it starts as an issue only. When you are ready, click Create test script: Checklane makes a one-case script from the issue (the change you asked for becomes the expected result) and opens it in Review. Once reviewed, run it in Testing and validate the fix as usual. The triage case form does not ask you to pick a script; it explains that the script comes later from Create test script.

Triage case module tag: every triage case card shows its module as a tag, and a Module dropdown under the card lets you set or change the module without opening the case. The change saves straight away.

Triage case evidence: drag screenshots, photos or documents onto the Evidence box in a triage case or issue, or click the box and paste a screenshot snip with Ctrl+V / Cmd+V. Each file can be up to 5 MB and shows as a preview you can remove.

Grouped testing view

Testing and Review now open in a Grouped view. Each test script shows as one row with its module, step count, and a progress bar. Click a test to fold out its sections, then click a section to see its steps. Everything starts closed so the list stays short. Use Expand all or Collapse all for long scripts, or switch to Table or Cards to see every step at once. Start test jumps to the first unfinished step.

Opening a shared link

When someone opens a shared link, a Welcome page appears first. It shows the workspace title and the view they were given, and asks "Who are you?" so they can pick their name. It then shows how many steps they have to test or review and how many issues are open, with a Start button. It also shows recent team activity and when the copy last synced. Anyone can reopen it with the Welcome button at the bottom of the left panel.

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.

You can change a workspace's name at any time: open Workspaces in the top bar, click the pencil on any row, type the new title, and press Enter or click the check button. Renaming changes only the title — scripts, reviews, results, triage cases, people, and the share link stay exactly as they were — and the new name carries into Workspace settings, reports, and exports.

Shared workspace — step-by-step help

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.

Assigning more than one person: every Assigned to and Assigned reviewer box is a checklist. Only named people are listed — roles can't be picked. Check as many people as you need — adding one never removes another — and the box has a search field for long rosters, so type part of a name, an email, or a role to find people. Checking a role (for example Test Engineer) assigns the work to everyone who holds that role, and it shows on their User roles row and Overview counts.

Whoever records a result is the one credited with it. To assign many scripts at once, select them, check the people in the bar, then click Assign selected.

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

Reports no longer lists every test script in a table at the bottom. That table repeated what Test scripts, Review, and Testing already show, and it grew with your library instead of staying a summary.

The page now leads with two boxes side by side: Script review (purple) and System testing (green). Each one shows its own count — cases reviewed and checks awaiting your decision, or cases with a result and cases not started — and a button that opens the right place. The System & process follow-through line and the three figures (completed scripts, pass rate, saved screenshots) stay, as do the Export due diligence, CSV, and PDF buttons at the top. Nothing about your data changed; only the page layout did.

Workspace names can be changed — October 29, 2026

Open Workspaces in the top bar. Every row 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 alone.

Renaming only changes the workspace's title. Scripts, reviews, test results, triage cases, people, and the share link stay exactly as they were, and the new title appears in Workspace settings and in exports and reports.

You can rename the workspace you are in (that change can be undone with Undo) or one that is closed. If the workspace is shared, Checklane also updates the copy your teammates open so everyone sees the same name; if that cannot be done, you are told and only your own copy changes.

Choosing who you are and what you see

Checklane has no passwords. When you open a shared workspace, pick your name under "Who are you?". Checklane remembers you on that computer and shows only the pages and work that match your roles.

- UAT Coordinator or Scenario Developer: everything, including setup, sharing, and settings.
- UAT Reviewer: Review overview, Review, and the Work queue.

- Test Engineer, Subject Matter Expert, or Triage Admin: Testing overview, Testing, Triage, and the Work queue.
- Someone who both reviews and tests: Review, Testing, Triage, and the Work queue together.
- End User or Vendor: a simple testing view.

To give someone their view, go to User roles, add them with their name and the roles they hold, and assign scripts or test cases to them by name. Give yourself the UAT Coordinator role so you keep full access.

Using someone else's computer? Click Switch at the bottom of the left panel and choose your name. "Return to full workspace" also clears the chosen person.

This is a convenience, not security: anyone with the link can switch names.

Developer access

Developer access is for the person who builds or runs Checklane. When it is on, your browser always shows the full workspace, even when a shared link or a chosen name would normally show a smaller view.

To turn it on: open Workspace settings (bottom of the left panel), scroll to Developer access, and click "Turn on Developer access". The page says "On for this browser".

To turn it off: click "Turn off Developer access" in the same place.

Keeping it on: it stays on after you refresh, close the browser, or open new shared links. It is saved only in this browser on this computer, so turn it on once in every browser and computer you use.

After clearing browser history or data: Developer access is erased along with other site data. Go back to Workspace settings and turn it on again. Download your workspace before clearing browser data.

If you are stuck in a smaller view and cannot see Workspace settings: click "Return to full workspace" at the top, or open the site address ending in ?developer=on (for example <https://checklane.lovable.app/?developer=on>). Adding ?developer=off turns it off.

This is not a password. Anyone using that browser gets the full view.

Personal links and daily check-in

Personal links (the easiest way to invite someone): open Share, look under "One-click personal links", and click Copy link next to the person's name. Send that link to them. When they open it, Checklane already knows who they are and shows only the pages and work for their roles. For example, a Test Engineer sees Testing overview, Testing, Triage, and the Work queue; a UAT Reviewer sees Review overview, Review, and the Work queue. On a long roster, type in the search box to find someone, or hand links out to everyone at once with "Copy all links" and "Download list" (see Running with a large team).

Who is working today: each day, the first time someone opens a shared workspace on their computer, Checklane asks "Who are you?". Their name is already picked if they used a personal link, so they just close the box or click Start. With more than eight people on the roster, the box also has a search field so you can find your name instead of scrolling.

Checklane remembers the name on that computer after refreshes. To change it, click Switch at the bottom of the left panel. Clearing browser data forgets the name; open your personal link again.

Add people first under User roles, with the roles they hold, so they appear in the personal links list.

Running with a large team

Checklane is built for a whole team, not just two or three people. Add everyone who will take part under User roles, each with the roles they hold; the roster can hold hundreds of people.

Every list of people has a search box: the personal links list in Share, the assignment checklists on scripts and test cases, the daily "Who are you?" box, and the People list on User roles. Type any part of a name, an email, or a role, and the list narrows to everyone who matches.

Handing links out to the whole team: open Share, then click "Copy all links" to put one name-and-link line per person on the clipboard, ready to paste into an email. "Download list" saves checklane-links.csv with each person's name, email, roles, and link, so you can keep track of who has been invited. Search first to copy links for part of the team only, for example everyone with one role.

The list shows how many people there are (for example "30 people · 5 with more than one role") and scrolls, so a long roster stays readable instead of pushing the window open.

Each person only needs their own link — nothing else to remember. If someone is missing, add them under User roles and they appear in the personal links list straight away.

Team and email alerts

Settings now has a Team section where you add teammates, tick their roles and copy their invite link, all in one place.

- Add a teammate: type their name and email, tick one or more roles, then click Add teammate.
- Change roles: tick or untick roles on their row. Their roles choose which pages they see.
- Copy invite link: copies a link that opens the shared workspace already set to that person. Send it however you like.

Email alerts: when a test case assigned to someone changes in a shared workspace, they get an email from notify@checklane-testing.com with an "Open the test case" button. This happens when the case is assigned or reassigned, or its wording changes, including work assigned to a role they hold. Recording test results does not send an email. People without an email on the team list get no alerts.

Each email has an unsubscribe link at the bottom. Alerts only work for shared workspaces.