

THREADSOVEREIGN

Manual Testing Guide

Generated: 16 June 2026

Test environment URL: <https://portal.threadsovereign.io>

Building Safety Act 2022 — functional test pack

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1 — Introduction

What is THREADSOVEREIGN?

THREADSOVEREIGN (shown as Threadsovereign in the product) is a website that helps UK organisations meet building safety law after the Building Safety Act 2022 (BSA 2022).

It stores building and project information (the golden thread), supports gateway submissions during design and construction, and supports safety duties once people live in a higher-risk building.

What is the Building Safety Act 2022?

The BSA 2022 is UK law that changed how higher-risk residential buildings are designed, built, and managed. It created new duty-holders, the Building Safety Regulator (BSR), and new rights for residents.

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

GOV.UK — Building Safety Act overview

<https://www.gov.uk/guidance/building-safety-act-2022>

Duty-holders (plain English)

People and organisations with legal jobs under the BSA include:

- Principal Designer (PD) — leads design safety during the project.
- Client — commissions the work.
- Accountable Person (AP) — legally responsible for building safety when occupied.
- Building Safety Manager (BSM) — day-to-day safety management for the AP.
- Contractor — construction work and information supply.
- Residents — live in the building; have information and complaint rights.

Higher-risk buildings (HRBs)

An HRB is a residential building that meets height or storey thresholds in regulations (often 18 m or more, or at least 7 storeys). Many BSA duties apply only to HRBs.

GOV.UK — Register a high-rise building

<https://www.gov.uk/guidance/register-a-high-rise-residential-building>

Gateway regime

Gateway 1 is at planning; Gateway 2 is before construction; Gateway 3 is at completion before occupation. THREADSOVEREIGN tracks checklists and status — it does not replace the official BSR portal.

SI 2023/909 (Gateway regime)

<https://www.legislation.gov.uk/uksi/2023/909/contents>

Golden thread

The golden thread is the living record of building information so safety can be proved over the building's life.

Occupied phase and resident rights

After residents move in, the AP and BSM maintain a safety case, Key Building Information (KBI), engagement, and reporting of serious occurrences where required. Residents receive safety information and can raise concerns.

[SI 2023/907 \(Occupied buildings\)](https://www.legislation.gov.uk/ukxi/2023/907/contents)

<https://www.legislation.gov.uk/ukxi/2023/907/contents>

[SI 2024/41 \(Resident information\)](https://www.legislation.gov.uk/ukxi/2024/41/contents)

<https://www.legislation.gov.uk/ukxi/2024/41/contents>

How to read highlighted tests

Tests marked PENDING IMPLEMENTATION or PARTIAL are highlighted in this PDF. They describe planned or incomplete work. Pass them by confirming the label matches reality — do not count them as product failures.

2 — How to use this guide

The in-app checklist

On every page, click the teal clipboard button (bottom-right). Notes and checkmarks save automatically to the shared server workspace — no login required. Download the Guide PDF first for test accounts and instructions.

Each item ID (for example ST-042) matches this PDF.

Pass and fail

- Pass: actual result matches expected result.
- Fail: wrong data, crash, or broken workflow on a COMPLETE feature.
- PENDING IMPLEMENTATION / PARTIAL: pass if behaviour matches the highlight — note in Notes.

When something breaks

- Screenshot the screen (Section 3).
- Write the exact steps you followed.
- `Copy any error message (F12 ! Console if needed)`.
- Add notes on any test — saved notes appear as amber cards; tap to edit. Use the Has notes filter to review failures quickly.

Public pages vs signed-in pages

- Legal, pricing, and demo-hub pages: open the URL directly — no login.
- Login, forgot password, and sign-up (onboarding): sign out first if needed — do not use Section 4 credentials before opening the screen.
- Reset password, magic link, and team invite: follow the email/link instructions in the test steps.
- All other page-load tests: log in with the role shown (Section 4), then open the URL.

No technical setup for testers

You do not run commands, scripts, or database tools. You only use a web browser and the logins in Section 4.

3 — Test environment setup

Platform URL

Base URL for this test run: <https://portal.threadsovereign.io>

Your test lead will give you the website address (for example <https://app.example.com> or <http://localhost:3000> for local UAT).

Browsers

Latest Google Chrome or Microsoft Edge. Use Firefox only for spot checks.

Sign in

- Open <https://portal.threadsovereign.io/login> (full address is on the cover and in Section 4).
- Enter the email and password from Section 4 for the role you are testing.
- Click Sign in.

Clear cache (if pages look wrong)

- Chrome/Edge: Settings ! Privacy ! Clear browsing data ! Cookies and cache
- Close all tabs for the site and open a fresh window.

Screenshots

- Windows: Win+Shift+S.
- Mac: Cmd+Shift+4.

Console errors (optional)

- Press F12 ! Console. Red lines are errors — copy the text if reporting a

4 — Test users and credentials

For manual testers

Use only the login cards below (one block per account). Every password is printed in full. Demo project reference for project-specific screens: RST-001.

If login fails for every account, stop and ask your test lead — the environment is not ready. Do not run seed scripts yourself.

For administrators only (testers skip)

Administrator only (not for manual testers): The demo database must be seeded before testing. Use your internal deployment process (for example the `/api/seed` endpoint or dev-seed page in development). Testers

must not run commands — they only use the printed logins below.

Optional: invite a PD user (browser only)

Only needed if you must test the pd_user role separately from emma.davies@buildright.co.uk:

- Sign in: sarah.chen@buildright.co.uk / Demo123!
- Open: <https://portal.threadsovereign.io/team>
- Click Invite member, enter an email you control, choose role PD User, send invite.
- Open the invite email and complete: <https://portal.threadsovereign.io/accept-invite>

Change subscription tier (browser only)

- To test Starter vs Professional vs Enterprise: log in as Platform admin! 'BuildRight Construction Ltd' Edit! 'change Subscription tier' Save. Then user.
- Sign in: adam.admin@threadsovereign.co.uk / Admin123!
- Open: <https://portal.threadsovereign.io/admin/organisations>
- Click BuildRight Construction Ltd (or your test organisation).
- Click Edit, change Subscription tier, Save.
- Sign out and sign in again as a BuildRight user to test that tier.

Primary demo accounts — one card per role (email, password, and full sign-in URL each on their own lines):

Principal Designer (PD lead)

Email:

sarah.chen@buildright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/dashboard>

PD user (team member)

Email:

emma.davies@buildright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/dashboard>

Project manager (PD portal)

Email:

emma.davies@buildright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/dashboard>

Organisation admin

Email:

sarah.chen@builddright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/dashboard>

Building Safety Manager (BSM)

Email:

james.wilson@builddright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/occupied>

Accountable Person (AP)

Email:

sarah.chen@builddright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/occupied/ap>

Platform admin

Email:

adam.admin@threadsovereign.co.uk

Password:

Admin123!

First page after login:

<https://portal.threadsovereign.io/admin>

Resident

Email:

jane.smith@residents.co.uk

Password:

Resident123!

First page after login:

<https://portal.threadsovereign.io/resident>

Client representative

Email:

harriet.green@builddright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/client>

Contractor

Email:

marcus.brick@builddright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/contractor>

Compliance CMS (organisation admin)

Email:

sarah.chen@builddright.co.uk

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/compliance>

Alternate accounts (only if your administrator enabled them):

Platform admin (alternate)

Email:

admin@threadsovereign.demo

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/admin>

PD lead (alternate)

Email:

pdlead@threadsovereign.demo

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/dashboard>

BSM (alternate)

Email:

bsm@threadsovereign.demo

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/occupied>

Resident (alternate)

Email:

resident@threadsovereign.demo

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/resident>

Client (alternate)

Email:

client@threadsovereign.demo

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/client>

Contractor (alternate)

Email:

contractor@threadsovereign.demo

Password:

Demo123!

First page after login:

<https://portal.threadsovereign.io/contractor>

5 — Tier overview

Starter

Starter includes full BSA statutory workflows on Starter tier in code: golden thread, gateways, all 16 KBI categories (SI 2023/396 regs.3–18), safety case, occurrences, engagement, resident rights, and occupied statutory routes.

Not on Starter: /occupied/maintenance, /occupied/settings, analytics, automation, integrations, Compliance CMS (Professional read), Compliance CMS settings write (Enterprise).

Professional

More projects/buildings, analytics, automation, integrations catalogue, DocuSign handover (when configured), maintenance schedules, compliance CMS read.

Twilio SMS notifications (when TWILIO_* env is set): /settings for mobile number, /notifications/preferences for per-event SMS toggles.

Browser push notifications (when VAPID env is set): /notifications/preferences enables per-device subscription and per-event push toggles.

Calendar: /calendar — iCal export, tokenized subscribe feed (064, Professional+, org admin), env-gated Google/Outlook OAuth on integrations detail pages.

Teams/Slack: incoming webhook URL + test message on <https://portal.threadsovereign.io/settings/integrations/teams> or /slack.

Companies House verification: /settings/organisation and supplier profiles; integration status at <https://portal.threadsovereign.io/settings/integrations/companies-house>.

Enterprise

SSO, white label (auth pages + custom domain email URLs + auto Vercel/Supabase provision on DNS verify), API keys, advanced audit export, multi-org hierarchy (billing sync, group portfolio, hierarchy CSV), compliance CMS settings write.

Test order

Complete Section 6 (Starter), then Section 7 (Professional), then Section 8 (Enterprise).

Work through Section 6 (Starter) first, then Section 7 (Professional), then Section 8 (Enterprise).

6 — Starter tier tests

ST-001 — Page load: Login

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/login>

Steps:

1. If you are already signed in, sign out first so the login form is visible.
2. Open <https://portal.threadsovereign.io/login> in the address bar.
3. Sign-in form loads; invalid credentials show friendly error.
4. On Enterprise custom domain (or localhost dev seed), header and card copy use org white-label platform name.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-002 — Page load: Sign up (onboarding)

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/onboarding>

Steps:

1. Optional: use a private/incognito window for a clean new-organisation sign-up.
2. Open <https://portal.threadsovereign.io/onboarding> — no existing account login is required.
3. Portal selection step visible.

4. Auth layout header reflects white-label branding when custom domain is configured.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-003 — Page load: Forgot password

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/forgot-password>

Steps:

1. If you are already signed in, sign out first (user menu ! Sign out).
2. Open <https://portal.threadsovereign.io/login> and click "Forgot password?" — or open <https://portal.threadsovereign.io/forgot-password> directly in the address bar.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-004 — Page load: Pricing

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/pricing>

Steps:

1. Open the full URL for /pricing (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-005 — Page load: Accessibility statement

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/accessibility>

Steps:

1. Open the full URL for /accessibility (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-006 — Page load: Privacy policy

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/legal/privacy-policy>

Steps:

1. Open the full URL for /legal/privacy-policy (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-007 — Page load: Terms of service

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/legal/terms-of-service>

Steps:

1. Open the full URL for /legal/terms-of-service (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-008 — Page load: Cookie policy

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/legal/cookie-policy>

Steps:

1. Open the full URL for /legal/cookie-policy (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-009 — Page load: Data processing agreement

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/legal/data-processing-agreement>

Steps:

1. Open the full URL for /legal/data-processing-agreement (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-010 — Page load: Accept team invite

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/accept-invite>

Steps:

1. Ask an org admin to send a team invite (/team ! Invite) or use a staging invite UI
2. Open the invite link (lands on <https://portal.threadsovereign.io/accept-invite>) and follow the on-screen steps.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-011 — Page load: Reset password

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/reset-password>

Steps:

1. From /forgot-password, request a reset for a demo account (Section 4) and open the link in the email.
2. Or open <https://portal.threadsovereign.io/reset-password> with a valid reset token if your admin provides one.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-012 — Page load: Change password (signed in)

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/change-password>

Steps:

1. Log in as a user with role: any (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /change-password
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-013 — Page load: Magic link verification

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/login/verify>

Steps:

1. MFA only: sign in with password, then complete TOTP at <https://portal.threadsovereign.io/login/verify> when prompted.
2. Email confirmation and magic links land on <https://portal.threadsovereign.io/auth/callback> (not this page).
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-014 — Page load: Demo hub

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/demo-hub>

Steps:

1. Open the full URL for /demo-hub (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-015 — Page load: Demo hub — user manual

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/demo-hub/user-manual>

Steps:

1. Open the full URL for /demo-hub/user-manual (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-016 — Page load: Demo hub — investor pitch

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/demo-hub/investor-pitch>

Steps:

1. Open the full URL for /demo-hub/investor-pitch (printed in this PDF or shown in the checklist). No login required.
2. Wait until the page finishes loading (no endless spinner).
3. Check the page heading and main content area are visible.
4. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-017 — Page load: PD dashboard

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/dashboard>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /dashboard
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-018 — Page load: Projects list

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/projects>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /projects
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-019 — Page load: New project wizard

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/projects/new>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /projects/new
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-020 — Page load: Documents (golden thread)

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/documents>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /documents
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-021 — Page load: Tasks

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/tasks>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /tasks
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-022 — Page load: Risks

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/risks>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /risks
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-023 — Page load: Sign-off queue

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/sign-off-queue>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /sign-off-queue
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-024 — Page load: Gateway submissions hub

BSA context: BSA gateway regime — SI 2023/909

[Building Safety Act 2022](https://www.legislation.gov.uk/ukpga/2022/30/contents)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-025 — Page load: Gateway 1

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g1>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/g1
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-026 — Page load: Gateway 2 preparation

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g2>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/g2
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-027 — Page load: Gateway 3 completion

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g3>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/g3
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-028 — Page load: BSR registration tracking

BSA context: SI 2023/315

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/registration>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/registration
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-029 — Page load: BSR correspondence

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/correspondence>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/correspondence
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-030 — Page load: Suppliers

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/suppliers>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /suppliers
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-031 — Page load: Team

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/team>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /team
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-032 — Page load: Activity log

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/activity>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /activity
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-033 — Page load: Notifications

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/notifications>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /notifications
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-034 — Page load: Help hub

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/help>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /help
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-035 — Page load: Platform manual

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/help/manual>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /help/manual
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-036 — Page load: Help — evidence index

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/help/evidence>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /help/evidence
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PARTIAL IMPLEMENTATION — Route guides + optional NEXT_PUBLIC_HELP_VIDEO_* embeds; set env URLs for hosted walkthrough videos.

ST-037 — Page load: Help — videos

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/help/videos>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /help/videos
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.
6. PARTIAL FEATURE: If you see Coming Soon or a stub message, pass this test — note it in Notes.

Expected result: Page loads; partial features clearly labelled. Stub/Coming Soon is acceptable.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-038 — Page load: Help — platform status

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/help/threadsovereign-status>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /help/threadsovereign-status
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-039 — Page load: Settings hub

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /settings
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-040 — Page load: Organisation settings

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/organisation>

Steps:

1. Log in as a user with role: org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /settings/organisation
3. Billing tab shows live storage used vs quota from GET /api/organisations/mine/storage (warns at 80%).
4. Data tab export downloads JSON via GET /api/organisations/mine/export.
5. Enterprise retention tab shows category overrides and retention dashboard counts.
6. Organisations tab (Enterprise) lists linked child orgs, members/projects console, invite, and hierarchy activity CSV export.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-041 — Page load: Notification preferences

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/notifications/preferences>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /notifications/preferences
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-042 — Page load: Gateway 2 — change control

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g2/changes>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/g2/changes
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-043 — Page load: Gateway 2 — submission preview

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g2/preview>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/g2/preview
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-044 — Page load: Gateway 2 — submitted state

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g2/submitted>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/g2/submitted
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-045 — Page load: Gateway submission history

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/history>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /gateway-submissions/history
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-046 — Page load: CDM 2015 — client duties, CPP, F10

BSA context: CDM 2015 / BRAE 2023 — all projects

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/gateway-submissions/cdm?projectId=\[projectId\]](https://portal.threadsovereign.io/gateway-submissions/cdm?projectId=[projectId])

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4 — full email and password table).
2. Projects ! open a project ! Gateway submissions ! CDM, or append ?projectId=
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-047 — Page load: Supplier approval queue

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/suppliers/approval-queue>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /suppliers/approval-queue
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-048 — Page load: Supplier certifications

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/suppliers/certifications>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /suppliers/certifications
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-049 — Page load: Competency declarations list

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/suppliers/competency-declarations>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /suppliers/competency-declarations
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-050 — Page load: Competency framework

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/suppliers/competency-framework>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /suppliers/competency-framework
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-051 — Page load: Supplier profile

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/suppliers/\[supplierId\]](https://portal.threadsovereign.io/suppliers/[supplierId])

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Suppliers !' open any supplier card.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-052 — Page load: Competency declaration review

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/suppliers/competency-declarations/\[declarationId\]](https://portal.threadsovereign.io/suppliers/competency-declarations/[declarationId])

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Suppliers !' Competency declarations !' open a declaration.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-053 — Page load: Project detail (tabs)

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]](https://portal.threadsovereign.io/projects/[projectId])

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4 — full email and password table).
2. From /projects open project reference RST-001.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-054 — Page load: Project handover hub

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover](https://portal.threadsovereign.io/projects/[projectId]/handover)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 !' Handover tab.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-055 — Page load: Handover checklist

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover/checklist](https://portal.threadsovereign.io/projects/[projectId]/handover/checklist)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Handover ! Checklist.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-056 — Page load: Formal handover / DocuSign

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover/formal](https://portal.threadsovereign.io/projects/[projectId]/handover/formal)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Handover ! Formal.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-057 — Page load: Handover drawings

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover/drawings](https://portal.threadsovereign.io/projects/[projectId]/handover/drawings)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Handover ! Drawings .
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages .

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-058 — Page load: Handover O&M manuals

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover/om-manuals](https://portal.threadsovereign.io/projects/[projectId]/handover/om-manuals)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Handover ! O & M .
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages .

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-059 — Page load: Handover package preview

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover/preview](https://portal.threadsovereign.io/projects/[projectId]/handover/preview)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Handover ! Preview .
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-060 — Page load: Project settings

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/settings](https://portal.threadsovereign.io/projects/[projectId]/settings)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Settings .
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-061 — Page load: Project team

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/settings/team](https://portal.threadsovereign.io/projects/[projectId]/settings/team)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Settings ! Team .
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-062 — Page load: Project gateway checklist config

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/settings/gateway-checklist](https://portal.threadsovereign.io/projects/[projectId]/settings/gateway-checklist)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Settings ! Gateway checklist .
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-063 — Page load: Document permissions

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/settings/document-permissions](https://portal.threadsovereign.io/projects/[projectId]/settings/document-permissions)

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Settings ! Document permissions .
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab . Confirm there are no red error messages .

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-064 — Page load: Occupied hub

Role(s): building_safety_manager, accountable_person, org_admin, pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied>

Steps:

1. Log in as a user with role: building_safety_manager or accountable_person or org_admin or pd_lead (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab . Confirm there are no red error messages .

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-065 — Page load: AP dashboard

BSA context: B3.3 — common-parts notice PDF download; AP posts physically

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/ap>

Steps:

1. Log in as a user with role: accountable_person or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/ap
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-066 — Page load: BSR submissions & SPOC

Role(s): accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/bsr-submissions>

Steps:

1. Log in as a user with role: accountable_person (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/bsr-submissions
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-067 — Page load: Duty-holder competence (PAS 8673)

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/duty-holder-competence>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/duty-holder-competence
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-068 — Page load: BSR insolvency notification

Role(s): accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/bsr-insolvency>

Steps:

1. Log in as a user with role: accountable_person (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/bsr-insolvency
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-069 — Page load: Resident access (48h notice)

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/resident-access>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/resident-access
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-070 — Page load: BSM dashboard

Role(s): building_safety_manager, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/bsm>

Steps:

1. Log in as a user with role: building_safety_manager or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/bsm
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-071 — Page load: Safety case

BSA context: SI 2023/907 reg.5

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager, pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/safety-case>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager or pd_lead (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/safety-case
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-072 — Page load: Key Building Information

BSA context: SI 2023/396 regs 3–18 — 16 categories in app

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/kbi>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/kbi
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-073 — Page load: Safety issues / occurrences

BSA context: SI 2023/907 reg.6

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/issues>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/issues
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-074 — Page load: Engagement strategy

BSA context: SI 2023/907 reg.10

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/engagement-strategy>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/engagement-strategy
3. Wait until the page finishes loading (no endless spinner).

4. Check the page heading and main content area are visible.

5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-075 — Page load: Residents dashboard

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/residents>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/residents
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-076 — Page load: Registration changes

BSA context: SI 2023/315 reg.4 — 14-day BSR notify

[Building Safety Act 2022](https://www.legislation.gov.uk/ukpga/2022/30/contents)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/registration-changes>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/registration-changes

3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-077 — Page load: Contravention notices

BSA context: BSA s.96

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/contravention-notices>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/contravention-notices
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-078 — Page load: BSR compliance notices

BSA context: BSA s.99

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/bsr-compliance-notice>

Steps:

1. Log in as a user with role: `accountable_person` or `building_safety_manager` (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: `/occupied/bsr-compliance-notice`
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-079 — Page load: BSR annual return

BSA context: BSA s.88

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): `accountable_person`, `building_safety_manager`

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/bsr-return>

Steps:

1. Log in as a user with role: `accountable_person` or `building_safety_manager` (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: `/occupied/bsr-return`
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-080 — Page load: Occupied documents / BAC

BSA context: SI 2023/907 reg.3 BAC application

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/documents>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/documents
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-081 — Page load: Remediation — relevant defects, orders, landlord certs

BSA context: BSA Part 5 ss.116–125

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/remediation>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/remediation
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-082 — Page load: Qualifying lease register

BSA context: BSA Part 5 ss.119–121 / Schedule 8

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/qualifying-leases>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/qualifying-leases
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-083 — Page load: FRA lifecycle, fire door inspections, EEIS & PEEP register

BSA context: s.156 BSA 2022 / FSO 2005 Art.9A; FSA 2021; FSER 2022 reg.3A (EEIS/PEEP tab); FSER 2022 reg.10–11 (quarterly/annual cadence)

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): accountable_person, building_safety_manager, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/fra>

Steps:

1. Log in as a user with role: accountable_person or building_safety_manager or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/fra
3. Wait until the page finishes loading (no endless spinner).

4. Check the page heading and main content area are visible.

5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-084 — Page load: Resident home

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident>

Steps:

1. Log in as a user with role: resident (see Section 4).

2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /resident

3. Wait until the page finishes loading (no endless spinner).

4. Check the page heading and main content area are visible.

5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-085 — Page load: Building safety information

BSA context: SI 2024/41 Schedule 2

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/safety>

Steps:

1. Log in as a user with role: resident (see Section 4).

2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /resident/safety

3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-086 — Page load: Submit request / complaint

BSA context: SI 2023/907 reg.12 / reg.6(4)

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/request>

Steps:

1. Log in as a user with role: resident (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /resident/request
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-087 — Page load: Resident documents

BSA context: SI 2024/41 Schedule 3

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/documents>

Steps:

1. Log in as a user with role: resident (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /resident/documents
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-088 — Page load: Messages

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/messages>

Steps:

1. Log in as a user with role: resident (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /resident/messages
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-089 — Page load: Resident help

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/help>

Steps:

1. Log in as a user with role: resident (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /resident/help
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-090 — Page load: Resident profile

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/profile>

Steps:

1. Log in as a user with role: resident (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /resident/profile
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-091 — Page load: Resident settings

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/settings>

Steps:

1. Log in as a user with role: resident (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /resident/settings
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-092 — Page load: Client dashboard

Role(s): client_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/client>

Steps:

1. Log in as a user with role: client_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /client
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-093 — Page load: Client approvals

Role(s): client_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/client/approvals>

Steps:

1. Log in as a user with role: client_user (see Section 4).

2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /client/approvals
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-094 — Page load: Client documents

Role(s): client_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/client/documents>

Steps:

1. Log in as a user with role: client_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /client/documents
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-095 — Page load: Client settings

Role(s): client_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/client/settings>

Steps:

1. Log in as a user with role: client_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /client/settings

3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-096 — Page load: Client project detail

Role(s): client_user

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/client/projects/\[projectId\]](https://portal.threadsovereign.io/client/projects/[projectId])

Steps:

1. Log in as a user with role: client_user (see Section 4 — full email and password table).
2. From /client open the RST-001 project card.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-097 — Page load: Contractor dashboard

Role(s): contractor_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/contractor>

Steps:

1. Log in as a user with role: contractor_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /contractor
3. Wait until the page finishes loading (no endless spinner).

4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-098 — Page load: Contractor RFIs

Role(s): contractor_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/contractor/queries>

Steps:

1. Log in as a user with role: contractor_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /contractor/queries
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-099 — Page load: Contractor certifications

Role(s): contractor_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/contractor/certifications>

Steps:

1. Log in as a user with role: contractor_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /contractor/certifications
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.

5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-100 — Page load: Contractor documents

Role(s): contractor_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/contractor/documents>

Steps:

1. Log in as a user with role: contractor_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /contractor/documents
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-101 — Page load: Contractor tasks

Role(s): contractor_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/contractor/tasks>

Steps:

1. Log in as a user with role: contractor_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /contractor/tasks
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-102 — Page load: Contractor notifications

Role(s): contractor_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/contractor/notifications>

Steps:

1. Log in as a user with role: contractor_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /contractor/notifications
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-103 — Page load: Contractor settings

Role(s): contractor_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/contractor/settings>

Steps:

1. Log in as a user with role: contractor_user (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /contractor/settings
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-104 — Page load: Contractor project detail

Role(s): contractor_user

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/contractor/projects/\[projectId\]](https://portal.threadsovereign.io/contractor/projects/[projectId])

Steps:

1. Log in as a user with role: contractor_user (see Section 4 — full email and password table).
2. From /contractor open RST-001.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-105 — Page load: Platform admin

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/admin>

Steps:

1. Log in as a user with role: platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /admin
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-106 — Page load: Organisations

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/admin/organisations>

Steps:

1. Log in as a user with role: platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /admin/organisations
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-107 — Page load: Users

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/admin/users>

Steps:

1. Log in as a user with role: platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /admin/users
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-108 — Page load: Billing

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/admin/billing>

Steps:

1. Log in as a user with role: platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /admin/billing
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-109 — Page load: Audit log

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/admin/audit-log>

Steps:

1. Log in as a user with role: platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /admin/audit-log
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-110 — Page load: Platform admin settings

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/admin/settings>

Steps:

1. Log in as a user with role: platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /admin/settings
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-111 — Page load: Create organisation

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/admin/organisations/new>

Steps:

1. Log in as a user with role: platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /admin/organisations/new
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-112 — Page load: Organisation detail

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/admin/organisations/\[orgId\]](https://portal.threadsovereign.io/admin/organisations/[orgId])

Steps:

1. Log in as a user with role: platform_admin (see Section 4 — full email and password table).
2. Admin !' Organisations !' open BuildRight Construction Ltd.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-113 — Page load: Edit organisation (tier, limits)

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/admin/organisations/\[orgId\]/edit](https://portal.threadsovereign.io/admin/organisations/[orgId]/edit)

Steps:

1. Log in as a user with role: platform_admin (see Section 4 — full email and password table).
2. Use to switch Starter / Professional / Enterprise for tests.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-114 — Page load: Home — role redirect

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/>

Steps:

1. Part A — signed out: sign out if needed, then open / in the address bar.
2. Part B — signed in: log in with a demo account from Section 4, then open / again.
3. Part A: URL should redirect to /login and the login form should be visible.
4. Part B: URL should redirect to your portal home (e.g. PD !' /dashboard, resident !' /demo-hub).
5. Press F12 !' Console — no red errors on the page you land on.

Expected result: Unauthenticated visitors redirect to /login; authenticated users redirect to the correct portal home without console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

ST-WF-001 — Golden thread — upload a document

BSA context: The golden thread is the living record of building information required under the Building Safety Act.

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/documents>

Steps:

1. Log in as sarah.chen@buildright.co.uk (PD).
2. Open <https://portal.threadsovereign.io/documents>.
3. Use Upload (or add document) and attach a small PDF.
4. Fill required fields (name, category, project).
5. Save/submit the form.

Expected result: Document appears in the list with correct metadata.

Already partly automated: tests/e2e/authenticated/golden-thread-documents.spec.ts — still verify visually.

Pass

Fail

Notes: _____

ST-WF-002 — Occupied — submit safety issue (mandatory occurrence path)

BSA context: Safety occurrences that meet the statutory threshold must be reported to the BSR within 10 days with required fields.

[SI 2023/907 \(Occupied buildings\)](#)

<https://www.legislation.gov.uk/ukxi/2023/907/contents>

Role(s): building_safety_manager, accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/issues>

Steps:

1. Log in as james.wilson@buildright.co.uk or use PD with occupied access.
2. Open <https://portal.threadsovereign.io/occupied/issues>.
3. Create a new issue; set severity and mark BSR reportable if applicable.
4. Save and confirm deadline fields appear on the issue.

Expected result: Issue is created; BSR reporting deadline/banner shown when bsr_reportable is set.

Already partly automated: tests/e2e/authenticated/occupied-phase.spec.ts — still verify visually.

Pass

Fail

Notes: _____

ST-WF-003 — Resident — submit safety concern

[SI 2023/907 \(Occupied buildings\)](#)

<https://www.legislation.gov.uk/ukxi/2023/907/contents>

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/request>

Steps:

1. Log in as jane.smith@residents.co.uk.
2. Open <https://portal.threadsovereign.io/resident/request>.
3. Submit type safety-concern with subject and description.

Expected result: 201 response; reference number shown (RR-...).

Already partly automated: tests/e2e/authenticated/resident-request-lifecycle.spec.ts — still verify visually.

Pass

Fail

Notes: _____

PR-WF-001 — Gateway 2 — advance checklist and submit

BSA context: Gateway 2 is the point before construction when design and fire safety information go to the Building Safety Regulator.

SI 2023/909 (Gateway regime)

<https://www.legislation.gov.uk/ukxi/2023/909/contents>

GOV.UK — Building Safety Act overview

<https://www.gov.uk/guidance/building-safety-act-2022>

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g2>

Steps:

1. Log in as PD; open an HRB project with gateways seeded.
2. Open <https://portal.threadsovereign.io/gateway-submissions/g2>.
3. Complete checklist items and submit gateway (follow on-screen states).

Expected result: Gateway status advances; no 500 errors.

Already partly automated: `tests/e2e/authenticated/gateway-submissions.spec.ts` — still verify visually.

Pass

Fail

Notes: _____

PR-WF-002 — KBI — complete categories and Submit to BSR

BSA context: Key Building Information must be held and submitted electronically (16 categories — SI 2023/396 regs.3–18).

SI 2023/396 (Key Building Information)

<https://www.legislation.gov.uk/ukxi/2023/396/contents>

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/kbi>

Steps:

1. Log in as accountable person or BSM (see Section 4 — e.g. sarah.chen@buildright.co.uk).
2. Open <https://portal.threadsovereign.io/occupied/kbi> with HRB building selected.
3. Fill all 16 categories until badge shows 16/16.

4. Click Submit to BSR (B2.11/B2.12).
5. Note trace reference in toast if shown.

Expected result: Submit succeeds; kbi_submitted_at recorded.

Already partly automated: tests/e2e/authenticated/bsa-phase4-compliance.spec.ts — still verify visually.

Pass

Fail

Notes: _____

PR-WF-003 — Safety case — ten principles and submit

SI 2023/907 (Occupied buildings)

<https://www.legislation.gov.uk/ukxi/2023/907/contents>

Role(s): pd_lead, accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/safety-case>

Steps:

1. Log in as accountable person or BSM (see Section 4).
2. Open <https://portal.threadsovereign.io/occupied/safety-case>! Structured tab.
3. Attest all 10 risk management principles.
4. Complete SMS policies, testing schedule, and emergency plan (equipment, contacts, resident expectations, evacuation routes).
5. Ensure engagement point with linked communication exists (seed).
6. Submit safety case to BSR.

Expected result: Submit succeeds when principles, SMS (C3.5), and emergency plan (C3.6) validation pass.

Already partly automated: tests/e2e/authenticated/bsa-phase4-compliance.spec.ts — still verify visually.

Pass

Fail

Notes: _____

PR-WF-009 — AP governance — BSR SPOC, competence, insolvency, resident access

BSA context: Migration 061 — product support for GOV.UK AP governance workflows.

Role(s): accountable_person, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/bsr-submissions>

<https://portal.threadsovereign.io/occupied/duty-holder-competence>

<https://portal.threadsovereign.io/occupied/bsr-insolvency>

<https://portal.threadsovereign.io/occupied/resident-access>

Steps:

1. Log in as sarah.chen@builddright.co.uk! open <https://portal.threadsovereign.io/occupied/bsr-insolvency>
2. Open <https://portal.threadsovereign.io/occupied/bsr-submissions> — set BSR single point of contact; record a manual HSE reference on a submission row if listed.
3. Open <https://portal.threadsovereign.io/occupied/duty-holder-competence> — add or update a competence record for an AP/BSM area.
4. Open <https://portal.threadsovereign.io/occupied/bsr-insolvency> — create an insolvency notification record (test data).
5. Open <https://portal.threadsovereign.io/occupied/resident-access> — create access proposed access.

Expected result: Each page saves without error; resident access blocks submit if notice is under 48 hours.

Pass

Fail

Notes: _____

PR-WF-011 — Companies House — verify supplier

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/suppliers>

[https://portal.threadsovereign.io/suppliers/\[supplierId\]](https://portal.threadsovereign.io/suppliers/[supplierId])

Steps:

1. Open <https://portal.threadsovereign.io/suppliers> and select a supplier with a Companies House number.
2. On supplier profile click Verify with Companies House.
3. Refresh — confirm verification message and status.

Expected result: Supplier verification_status becomes verified when CH API succeeds.

Pass

Fail

Notes: _____

PR-WF-004 — Gateway 3 — completion submission

BSA context: Gateway 3 is the completion checkpoint before residents occupy — wrong information can block occupation.

[SI 2023/909 \(Gateway regime\)](#)

<https://www.legislation.gov.uk/ukSI/2023/909/contents>

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g3>

Steps:

1. Open <https://portal.threadsovereign.io/gateway-submissions/g3> for an HRB project past G2.
2. Complete required checklist items and submit.

Expected result: Gateway 3 status updates; submission history visible on <https://portal.threadsovereign.io/gateway-submissions/history>.

Already partly automated: `tests/e2e/authenticated/gateway-submissions.spec.ts` — still verify visually.

Pass

Fail

Notes: _____

PR-WF-006 — Contravention notice — create and track

BSA context: BSA section 96 — contravention notices from the BSR.

[Building Safety Act 2022](#)

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): `accountable_person`, `building_safety_manager`

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/contravention-notices>

Steps:

1. Open <https://portal.threadsovereign.io/occupied/contravention-notices>.
2. Add a notice with reference, dates, and status.
3. Save and confirm it appears in the list.

Expected result: Notice persisted and editable.

Pass

Fail

Notes: _____

PT-001 — KBI — all 16 SI 2023/396 categories

[SI 2023/396 \(Key Building Information\)](#)

<https://www.legislation.gov.uk/uksi/2023/396/contents>

Role(s): `building_safety_manager`

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/kbi>

Steps:

1. Open <https://portal.threadsovereign.io/occupied/kbi>.
2. Confirm regs.3 through reg.18 cards are present and saveable.

Expected result: All 16 categories editable with completion indicators per reg.

Pass

Fail

Notes: _____

PT-002 — Safety case SMS + emergency structured fields

Role(s): building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/safety-case>

<https://portal.threadsovereign.io/occupied/kbi>

Steps:

1. Open <https://portal.threadsovereign.io/occupied/safety-case>! Structured tab — c routes save.

2. Open <https://portal.threadsovereign.io/occupied/kbi> — confirm per-floor fire and structural measure rows.

Expected result: Structured fields persist; safety case submit blocked until SMS and emergency plan complete.

Pass

Fail

Notes: _____

ST-WF-004 — Create task — required fields validation

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/tasks>

Steps:

1. Open <https://portal.threadsovereign.io/tasks>.

2. Start creating a task; leave title empty; attempt save.

3. Fill title and save.

Expected result: Validation message on empty required fields; task saves when complete.

Pass

Fail

Notes: _____

ST-WF-005 — Empty state — projects list (new org)

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/projects>

Steps:

1. Optional: platform admin sets a test org to Starter with zero projects.
2. Log in as that org user; open <https://portal.threadsovereign.io/projects>.

Expected result: Friendly empty state with call-to-action (not a crash). Skip if demo always has RST-001.

Pass

Fail

Notes: _____

PT-009 — KBI reg.4(c) — outbuilding principal uses

Role(s): building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/kbi>

Steps:

1. Open <https://portal.threadsovereign.io/occupied/kbi> reg.4 card.
2. Either check no site outbuildings or add outbuilding rows with principal use.
3. Save and refresh — values persist.

Expected result: Submit to BSR blocked until reg.4(c) satisfied alongside other categories.

Pass

Fail

Notes: _____

7 — Professional tier tests

Professional-only features to spot-check

- /analytics/project, /analytics/portfolio, /automation — tier-gated dashboards.
- /occupied/maintenance and /occupied/settings — not on Starter.
- /settings/integrations — Companies House, DocuSign, SMS, and calendar/push related entries.
- /notifications/preferences — email, SMS, and browser push channel toggles.
- /calendar — Export iCal (.ics), org-admin subscribe URL (copy HTTPS/webcal to Google/Outlook/Apple), optional OAuth on integrations.
- /activity — organisation activity log (PD sidebar).

- Analytics submenu: project, portfolio, compliance, platform, reports.
- DocuSign formal handover: project !' Handover !' Formal (when DOCUSIGN)
- Handover package download on project Handover tab hits export API (audit trail).

Gateway 2 is the BSR checkpoint before construction. Gateway 3 is at completion. Wrong or missing submissions can delay construction or occupation and may breach the law. Test each checklist item on <https://portal.threadsovereign.io/gateway-submissions/g2> and [/gateway-submissions/g3](https://portal.threadsovereign.io/gateway-submissions/g3) with an HRB project.

PR-001 — Page load: Automation run log

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/automation/log>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /automation/log
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 !' Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-002 — Page load: Analytics — organisation overview

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /analytics
3. Open <https://portal.threadsovereign.io/analytics> while signed in as a PD lead.
4. Organisation snapshot stat cards and quick-link cards to sub-sections should load.
5. Press F12 !' Console — no red errors.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-003 — Page load: Analytics — occupied phase (BSO)

Role(s): pd_lead, org_admin, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics/occupied>

Steps:

1. Log in as a user with role: pd_lead or org_admin or building_safety_manager (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /analytics/occupied
3. Open <https://portal.threadsovereign.io/analytics/occupied> — building health matrix or empty-state for orgs without HRB buildings.
4. Occurrence trend and statutory backlog charts should render without console errors.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-004 — Page load: Analytics — project

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics/project>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /analytics/project
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-005 — Page load: Analytics — portfolio

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics/portfolio>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /analytics/portfolio
3. Portfolio RAG and gateway charts render without console errors.
4. When multi-org hierarchy is linked (Enterprise), Group portfolio overview table appears with per-org metrics.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-006 — Page load: Analytics — client reports

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics/reports>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /analytics/reports
3. Select a project and at least one report section.
4. Click Export PDF — browser should download a server-generated PDF (not print dialog).
5. Schedule Recurring opens dialog; saved schedules appear in the list.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-007 — Page load: Automation rules

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/automation>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /automation
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-008 — Page load: Integrations

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/integrations>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /settings/integrations
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-009 — Page load: Integration detail (Companies House, DocuSign, etc.)

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/settings/integrations/\[integrationId\]](https://portal.threadsovereign.io/settings/integrations/[integrationId])

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4 — full email and password table).
2. Settings ! Integrations ! open Companies House or DocuSign.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-010 — Page load: Calendar

Role(s): pd_lead, pd_user, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/calendar>

Steps:

1. Log in as a user with role: pd_lead or pd_user or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /calendar
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-011 — Page load: Analytics — compliance

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics/compliance>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /analytics/compliance
3. Select a project — gateway G1–G3 checklist sections load.
4. HRB projects with occupied buildings also show SI 2023/907 occupied sections.
5. Export PDF downloads server-generated compliance report; Export for BSR downloads CSV.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-012 — Page load: Analytics — platform

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics/platform>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /analytics/platform
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-013 — Page load: Maintenance schedules

Role(s): building_safety_manager, accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/maintenance>

Steps:

1. Log in as a user with role: building_safety_manager or accountable_person (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/maintenance
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-014 — Page load: Occupied settings

Role(s): building_safety_manager, accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/settings>

Steps:

1. Log in as a user with role: building_safety_manager or accountable_person (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /occupied/settings
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-015 — Page load: Compliance CMS dashboard

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-016 — Page load: Compliance checklists CMS

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/checklists>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/checklists
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-017 — Page load: Competency CMS

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/competency>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/competency
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-018 — Page load: Compliance documents CMS

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/documents>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/documents
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-019 — Page load: Compliance sources

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/sources>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/sources
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-020 — Page load: Compliance content versions

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/versions>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/versions
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-021 — Page load: Horizon register — emerging BSA obligations

BSA context: Grenfell Phase 2 recommendations; Construction Products Regs 2025; BSL

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

Role(s): org_admin, platform_admin, pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/horizon>

Steps:

1. Log in as a user with role: org_admin or platform_admin or pd_lead (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/horizon
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-022 — Page load: Regulations library

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/regulations>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/regulations
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-023 — Page load: Compliance alerts

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/alerts>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/alerts
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PR-WF-010 — Companies House — verify organisation

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/organisation>

<https://portal.threadsovereign.io/settings/integrations/companies-house>

Steps:

1. Confirm BuildRight is Professional tier.
2. Log in as sarah.chen@buildright.co.uk.
3. Open <https://portal.threadsovereign.io/settings/organisation> — enter a valid UK o
4. Confirm legal name and status appear; Save organisation.
5. Open <https://portal.threadsovereign.io/settings/integrations/companies-house> — confirm API configured banner.

Expected result: Verify returns company name; save persists companies_house_verified_at (or shows success).

Pass

Fail

Notes: _____

PR-WF-005 — Automation rule — create and verify trigger

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/automation>

Steps:

1. Log in on a Professional-tier organisation.
2. Open <https://portal.threadsovereign.io/automation> and create a rule (e.g. on task overdue).
3. Save and confirm the rule appears in the list.

Expected result: Rule saved without error; visible in automation list.

Pass

Fail

Notes: _____

PARTIAL IMPLEMENTATION

PT-003 — Analytics — platform dashboard (secondary series)

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics/platform>

Steps:

1. Log in on Professional tier.
2. Open <https://portal.threadsovereign.io/analytics/platform>.
3. Check for 'Coming Soon' labels on charts.

Expected result: PARTIAL: Core page loads; some widgets may show Coming Soon — pass if labelled, not broken.

Pass

Fail

Notes: _____

PARTIAL IMPLEMENTATION — Requires administrator DocuSign env on production.

PT-004 — DocuSign handover sign-off (code vs production)

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover/formal](https://portal.threadsovereign.io/projects/[projectId]/handover/formal)

Steps:

1. Open project RST-001 !' Handover !' Formal checklist.
2. Use Send for signature if available.

Expected result: PARTIAL on staging: UI and API exist; live envelope may fail without DocuSign env — note error, do not fail if documented.

Pass

Fail

Notes: _____

PT-010 — Twilio SMS notification preferences + delivery

Role(s): org_admin, pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/notifications/preferences>

<https://portal.threadsovereign.io/settings>

Steps:

1. On Professional org: open <https://portal.threadsovereign.io/settings> and set mobile E.164 (e.g. +447911123456).
2. Open <https://portal.threadsovereign.io/notifications/preferences> — enable SMS for Resident request alerts.
3. Trigger a resident request or RF1; confirm activity_log sms_delivered or Twilio message received.

Expected result: SMS toggles enabled on Pro+; texts sent only when pref on, phone valid, and TWILIO_* env set.

Pass

Fail

Notes: _____

PT-011 — Companies House — organisation and supplier verify

Role(s): org_admin, pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/organisation>

[https://portal.threadsovereign.io/suppliers/\[supplierId\]](https://portal.threadsovereign.io/suppliers/[supplierId])

<https://portal.threadsovereign.io/settings/integrations/companies-house>

Steps:

1. Verify org company number on <https://portal.threadsovereign.io/settings/organisation>.
2. Verify a supplier from its profile page.
3. On <https://portal.threadsovereign.io/settings/integrations/companies-house> run Sync (re-verifies suppliers with CH numbers).

Expected result: CH API returns legal name; supplier verification_status updated; sync completes without 503.

Pass

Fail

Notes: _____

8 — Enterprise tier tests

EN-001 — Page load: Project audit trail export

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/settings/audit-trail](https://portal.threadsovereign.io/projects/[projectId]/settings/audit-trail)

Steps:

1. Log in as a user with role: org_admin (see Section 4 — full email and password table).
2. Project RST-001 ! Settings ! Audit trail.
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

EN-002 — Page load: API keys — key list, rotate, revoke, usage log, expiry, OpenAPI link

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/api>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /settings/api
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12 ! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

EN-003 — Page load: SSO providers — add SAML/OIDC IdP, attribute mapping, JIT provisioning toggle

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/sso>

Steps:

1. Log in as a user with role: org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /settings/sso
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

EN-004 — Page load: White label

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/white-label>

Steps:

1. Log in as a user with role: pd_lead or org_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /settings/white-label
3. Set platform name, logo URL, brand colour, and custom domain.
4. Save settings, then open <https://portal.threadsovereign.io/login> on the custom domain (or localhost in dev) — header and sign-in copy should reflect branding.
5. Verify DNS (CNAME! portal.threadsovereign.io) — Platform provisioning section when server tokens are configured.

6. Send invite or reset email — link host should use custom domain when verified.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

EN-005 — Page load: Compliance CMS settings (write)

Role(s): org_admin, platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance/settings>

Steps:

1. Log in as a user with role: org_admin or platform_admin (see Section 4).
2. In the address bar, open the full URL printed in this PDF or shown in the checklist for: /compliance/settings
3. Wait until the page finishes loading (no endless spinner).
4. Check the page heading and main content area are visible.
5. Press F12! Console tab. Confirm there are no red error messages.

Expected result: Page loads with correct heading and no critical console errors.

Already partly automated: Partial — see tests/e2e for many occupied and gateway flows — still verify visually.

Pass

Fail

Notes: _____

PARTIAL IMPLEMENTATION

PT-005 — SSO — sign in with Microsoft/Google

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/login>

<https://portal.threadsovereign.io/settings/organisation>

Steps:

1. On <https://portal.threadsovereign.io/login>, use Sign in with Microsoft or Google (if shown).
2. On Enterprise org, check SSO settings under organisation settings.

Expected result: PARTIAL unless administrator configured IdP: buttons may appear but redirect fails without env —

document behaviour.

Pass

Fail

Notes: _____

EN-WF-004 — Advanced audit export

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/settings/audit-trail](https://portal.threadsovereign.io/projects/[projectId]/settings/audit-trail)

Steps:

1. On Enterprise tier, open project RST-001 !' Settings !' Audit trail.
2. Use export/download control if present.

Expected result: Export downloads or shows clear Enterprise-only messaging on lower tiers.

Pass

Fail

Notes: _____

EN-WF-005 — Multi-organisation hierarchy

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/organisation>

Steps:

1. Log in as sarah.chen@buildright.co.uk (Enterprise org admin).
2. Open <https://portal.threadsovereign.io/settings/organisation> !' Organisations tab.
3. Confirm BuildRight Regional Ltd appears as a linked child org.
4. Select the child org — members and projects tables load.
5. Use Export hierarchy activity CSV and confirm download.

Expected result: Hierarchy links persist; child inherits parent tier; consolidated audit CSV includes Organisation column.

Pass

Fail

Notes: _____

EN-WF-006 — Group portfolio analytics (multi-org)

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/analytics/portfolio>

Steps:

1. With at least one linked child org, open <https://portal.threadsovereign.io/analytics/portfolio>.
2. Confirm Group portfolio overview section lists parent and child org metrics.

Expected result: Cross-org totals and per-organisation table visible (gateways, occurrences, BSR deadlines).

Pass

Fail

Notes: _____

EN-WF-007 — White-label login and auth pages

Role(s): any

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/white-label>

<https://portal.threadsovereign.io/login>

<https://portal.threadsovereign.io/onboarding>

<https://portal.threadsovereign.io/forgot-password>

Steps:

1. On Enterprise tier, set platform name and logo on <https://portal.threadsovereign.io/settings/white-label>.
2. Set custom domain and verify DNS (production) or use localhost in dev seed.
3. Open <https://portal.threadsovereign.io/login> — header logo and sign-in copy use org branding.
4. Open <https://portal.threadsovereign.io/onboarding> and [/forgot-password](https://portal.threadsovereign.io/forgot-password) — auth layout header matches branding.
5. Send invite — email uses logo, accent colour, footer; hide Powered by when enabled.
6. Export PDF from [/risks](#) or [/analytics/compliance](#) — header band and footer use org branding.

Expected result: Auth pages show org platform name/logo; default Threadsovereign branding when no custom domain match.

Pass

Fail

Notes: _____

EN-WF-008 — Custom domain email and redirect URLs

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/white-label>

<https://portal.threadsovereign.io/settings/organisation>

Steps:

1. Configure verified custom domain on Enterprise org (/settings/white-label).
2. Verify DNS — confirm Platform provisioning shows Vercel domain + Supabase redirect merge (or manual allowlist if tokens unset).
3. Send invite or password reset — link host should use custom domain, not threadsovereign.io.

Expected result: Email auth links use org custom domain origin; Vercel maps domain to app; Supabase accepts callback on customer origin.

Pass

Fail

Notes: _____

9 — Cross-portal workflow tests

XP-001 — Resident concern visible to AP/BSM

Role(s): resident, building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/request>

<https://portal.threadsovereign.io/occupied/issues>

Steps:

1. As resident, submit a safety concern on <https://portal.threadsovereign.io/resident/request>.
2. Log out. Log in as BSM/AP.
3. Open <https://portal.threadsovereign.io/occupied/issues> and locate the new issue.

Expected result: Same issue visible in occupied portal with matching subject/reference.

Pass

Fail

Notes: _____

XP-002 — Client sees project after PD creates it

Role(s): pd_lead, client_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/projects/new>

<https://portal.threadsovereign.io/client>

Steps:

1. As PD, create a project and link client organisation if required.
2. Log in as client user.
3. Open <https://portal.threadsovereign.io/client> and confirm project appears.

Expected result: Client dashboard lists the project.

Pass

Fail

Notes: _____

XP-003 — Handover package available after PD completion

Role(s): pd_lead, building_safety_manager

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover](https://portal.threadsovereign.io/projects/[projectId]/handover)

<https://portal.threadsovereign.io/occupied/documents>

Steps:

1. As PD, open a project!' Handover tab and complete checklist items.
2. As BSM/AP, open <https://portal.threadsovereign.io/occupied/documents> and verify handover documents appear.

Expected result: Handover artefacts visible in occupied phase golden thread.

Pass

Fail

Notes: _____

XP-004 — Gateway status visible to client

Role(s): pd_lead, client_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/gateway-submissions/g2>

[https://portal.threadsovereign.io/client/projects/\[projectId\]](https://portal.threadsovereign.io/client/projects/[projectId])

Steps:

1. As PD, advance Gateway 2 on a client-linked project.
2. As client, open the project in /client and check gateway/status display.

Expected result: Client sees updated gateway status matching PD portal.

Pass

Fail

Notes: _____

10 — Security tests

SEC-001 — Starter org blocked from /occupied/maintenance

Role(s): platform_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/maintenance>

<https://portal.threadsovereign.io/pricing>

Steps:

1. Set test organisation tier to Starter (admin !' organisation edit).
2. Log in as BSM/AP on that org.
3. Navigate to <https://portal.threadsovereign.io/occupied/maintenance>.

Expected result: Redirect to pricing/tier upgrade — not the maintenance UI.

Already partly automated: tests/e2e/authenticated/tier-limits.spec.ts — still verify visually.

Pass

Fail

Notes: _____

SEC-002 — Resident cannot access /admin

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/admin>

Steps:

1. Log in as jane.smith@residents.co.uk.
2. Manually open <https://portal.threadsovereign.io/admin> in the address bar.

Expected result: Redirect away from admin (e.g. /resident or login).

Already partly automated: tests/e2e/authenticated/portal-access-isolation.spec.ts — still verify visually.

Pass

Fail

Notes: _____

SEC-003 — Professional blocked from Enterprise API keys

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/api>

<https://portal.threadsovereign.io/pricing>

Steps:

1. On Professional tier, open <https://portal.threadsovereign.io/settings/api> directly in the address bar.

Expected result: Upgrade prompt or redirect — not the API key management UI.

Pass

Fail

Notes: _____

SEC-004 — Cross-organisation data isolation

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/projects>

Steps:

1. Log in as user from organisation A.

2. Note a project ID from the URL.

3. Log in as user from organisation B (if available) and try to open organisation A project URL directly.

Expected result: 403 or redirect — no data from other organisation shown.

Pass

Fail

Notes: _____

SEC-005 — Starter org blocked from Compliance CMS

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/compliance>

<https://portal.threadsovereign.io/pricing>

Steps:

1. Set test organisation tier to Starter (platform admin! organisation edit).
2. Log in as sarah.chen@buildright.co.uk (org admin).
3. Navigate to <https://portal.threadsovereign.io/compliance> in the address bar.

Expected result: Redirect to pricing or upgrade messaging — not the Compliance CMS dashboard.

Pass

Fail

Notes: _____

SEC-006 — Starter org can access statutory KBI (not paywalled)

Role(s): building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/kbi>

Steps:

1. Confirm BuildRight (or test org) is on Starter tier.
2. Log in as james.wilson@buildright.co.uk.
3. Open <https://portal.threadsovereign.io/occupied/kbi>.

Expected result: KBI page loads with 16 category cards — not blocked by tier (statutory floor).

Pass

Fail

Notes: _____

11 — BSA 2022 statutory compliance

Scope of BSA 2022 testing in this guide

Section 11 tests check that THREADSOVEREIGN supports key Building Safety Act 2022 workflows in software. They help your team find defects before go-live. They are not legal advice, a conformity assessment, or a substitute for official BSR portal submissions.

Work through Sections 6–10 first (by tier and role), then complete every item in Section 11 that applies to your deployment.

- Gateway 2 and Gateway 3 readiness (SI 2023/909)
- Golden thread / project and building records (BSA 2022)
- Key Building Information and safety case when occupied (SI 2023/396, SI 2023/907)
- Resident information and engagement (SI 2024/41, SI 2023/907)
- BSR registration, serious occurrences, contravention notices, annual return

Building Safety Act 2022

<https://www.legislation.gov.uk/ukpga/2022/30/contents>

SI 2023/909 (Gateway regime)

<https://www.legislation.gov.uk/uksi/2023/909/contents>

SI 2023/907 (Occupied buildings)

<https://www.legislation.gov.uk/uksi/2023/907/contents>

SI 2023/396 (Key Building Information)

<https://www.legislation.gov.uk/uksi/2023/396/contents>

Safety case — SMS and emergency plan (C3.5 / C3.6)

On <https://portal.threadsovereign.io/occupied/safety-case> open the Structured tab. Complete all ten risk-management principles, then fill SMS policies (maintenance, works, competence), testing schedule rows, and emergency plan fields (equipment list, emergency services contact, resident expectations, evacuation routes).

Submit to BSR only when validation passes — incomplete SMS or emergency sections block submit.

KBI — 16 categories including reg.4(c) outbuildings

On <https://portal.threadsovereign.io/occupied/kbi> complete every card (SI 2023/396 regs.3–18). For reg.4(c), either declare no site outbuildings or add each outbuilding principal use.

Submit to BSR when the badge shows 16/16 complete.

Resident Schedule 3 information requests (D3.1 / D3.2)

Resident: `/resident/request!` type `information-request`.

AP/BSM: `/occupied/issues!` open the `request!` Record fulfilment or refusal. items ticked, fulfilment method, and linked documents where applicable.

Complaints — substantive response (E2.9)

Resident submits a complaint on <https://portal.threadsovereign.io/resident/request>.

AP/BSM records a substantive response on <https://portal.threadsovereign.io/occupied/issues> (address all points, reasons, actions taken) before closing.

Common-parts notice PDF (B3.3)

On <https://portal.threadsovereign.io/occupied/ap> download the common-parts notice PDF. Confirm AP and PAP contact details appear.

Physical posting in the building is the AP's responsibility — the platform does not track posting.

BSR submissions, SPOC, competence, insolvency, resident access (061)

- `/occupied/bsr-submissions` — record HSE portal refs; set BSR single point of contact.
- `/occupied/duty-holder-competence` — PAS 8673 competency areas per AP/BSM.
- `/occupied/bsr-insolvency` — insolvency details for BSR notification.
- `/occupied/resident-access` — 48h written notice before access; court order if refused.
- NEW (2026-06-08): `/occupied/residents` — Engagement points panel (separate from

/occupied/engagement-strategy).

- NEW (2026-06-08): /occupied/duty-holder-competence — edit row + Mark reviewed (PAS 8673 PATCH).

Companies House verification (integration 062)

- Org admin: /settings/organisation — enter company number! Verify! Save verified timestamp).
- Platform admin: /admin/organisations/new — verify before creating an organisation.
- PD: open a supplier on [https://portal.threadsovereign.io/suppliers/\[supplier\]](https://portal.threadsovereign.io/suppliers/[supplier]) House.
- Integrations: /settings/integrations/companies-house — status banner; Sync re-verifies all suppliers with CH numbers.

SMS notifications (Twilio — Professional+)

- /settings — add E.164 mobile on your profile.
- /notifications/preferences — enable SMS per event type (disabled on Starter).
- Trigger resident request or contractor RFI; check activity log for sms_delivered or Twilio console.

STAT-001 — Verify BAC application API validation

BSA context: SI 2023/907 reg.3 — BAC application fields.

[SI 2023/907 \(Occupied buildings\)](#)

<https://www.legislation.gov.uk/ukxi/2023/907/contents>

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/documents>

Steps:

1. Open <https://portal.threadsovereign.io/occupied/documents> BAC section.
2. Try submit BAC with empty required fields.
3. Complete fields and submit draft, then submit to BSR.

Expected result: 422 on incomplete submit; success when complete.

Already partly automated: [tests/e2e/authenticated/bsa-phase4-compliance.spec.ts](#) — still verify visually.

Pass

Fail

Notes: _____

STAT-002 — Mandatory occurrence — 10-day deadline fields

BSA context: SI 2023/907 reg.6 — mandatory occurrence reporting to BSR.

[SI 2023/907 \(Occupied buildings\)](#)

<https://www.legislation.gov.uk/ukxi/2023/907/contents>

Role(s): building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/issues>

Steps:

1. Create issue with bsr_reportable true.
2. Confirm reporting deadline and required fields are enforced.

Expected result: Deadline calculated; cannot submit incomplete BSR reportable issue.

Pass

Fail

Notes: _____

STAT-003 — Resident information rights — safety page

BSA context: SI 2024/41 Schedule 2 — resident safety information.

[SI 2024/41 \(Resident information\)](#)

<https://www.legislation.gov.uk/uksi/2024/41/contents>

Role(s): resident

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/safety>

Steps:

1. Log in as resident.
2. Open <https://portal.threadsovereign.io/resident/safety> and confirm prescribed information sections display.

Expected result: Building safety information shown per building assignment.

Pass

Fail

Notes: _____

STAT-004 — BSR registration change — 14-day notification

[SI 2023/315 \(BSR registration\)](#)

<https://www.legislation.gov.uk/uksi/2023/315/contents>

Role(s): accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/registration-changes>

Steps:

1. Create a registration change record.
2. Confirm BSR notification deadline is shown.

Expected result: Change saved with deadline tracking.

Pass

Fail

Notes: _____

STAT-005 — BSR annual return submission

BSA context: BSA section 88 — annual report to BSR.

Role(s): accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/bsr-return>

Steps:

1. Open <https://portal.threadsovereign.io/occupied/bsr-return>.
2. Complete return fields and submit.

Expected result: Return submitted; reference or confirmation recorded.

Pass

Fail

Notes: _____

12 — Known issues and limitations

NEW tests (2026-06-08 — routes, nav & API wiring)

The checklist items NEW-001 through NEW-013 below were added after the missing-routes implementation pass. They cover BSA API/UI gaps (engagement points, duty-holder edit, document archive, handover export), nav discoverability, calendar subscribe feed, Teams/Slack webhooks, env-gated OAuth, and checklist note persistence.

Each item name is prefixed NEW. Pass/fail rules are the same as other COMPLETE features unless marked PARTIAL (OAuth without server credentials).

- NEW-001 — Engagement points log on <https://portal.threadsovereign.io/occupied/residents>
- NEW-002 — Duty-holder competence edit (PAS 8673 PATCH)
- NEW-003 — Document archive (soft delete, not blob delete)
- NEW-004 — Handover export via API (generated_reports audit)
- NEW-005 — Occupied engagement strategy nav + cross-link
- NEW-006 — Resident/contractor mobile account links
- NEW-007 — PD sidebar: Calendar, Activity, Analytics, Automation
- NEW-008 — Calendar subscribe feed token
- NEW-009 — Microsoft Teams webhook + test message
- NEW-010 — Slack webhook + test message

- NEW-011 — Google / Outlook Calendar OAuth (env-gated)
- NEW-012 — Autodesk APS (Revit) OAuth pilot + hub sync
- NEW-013 — Testing checklist Add note persists (blur/close/reload)

Items marked PENDING IMPLEMENTATION (or PARTIAL) are not product failures — confirm the label matches what you see.

NC-001 — Browser push notifications

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/notifications/preferences>

Steps:

1. Log in as sarah.chen@buildright.co.uk.
2. Open <https://portal.threadsovereign.io/notifications/preferences>.
3. Look for browser push / web push enablement.

Expected result: Browser push can be enabled on <https://portal.threadsovereign.io/notifications/preferences>, test push can be sent, and subscribed events trigger browser notifications.

Pass

Fail

Notes: _____

NC-002 — Calendar — iCal export and subscribe feed

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/calendar>

Steps:

1. Open <https://portal.threadsovereign.io/calendar>.
2. Use Export iCal or Generate subscribe URL (org admin).

Expected result: Download iCal returns a .ics file. Full subscribe/OAuth steps in NEW-008 and NEW-011.

Pass

Fail

Notes: _____

NC-003 — Microsoft Teams integration (live webhook)

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/integrations/teams>

Steps:

1. Open <https://portal.threadsovereign.io/settings/integrations/teams>.
2. Save webhook URL and send test message.

Expected result: Test message in Teams channel. Full steps in NEW-009.

Pass

Fail

Notes: _____

NC-004 — Slack integration (live webhook)

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/integrations/slack>

Steps:

1. Open <https://portal.threadsovereign.io/settings/integrations/slack> and configure webhook.

Expected result: Full steps in NEW-010.

Pass

Fail

Notes: _____

PARTIAL IMPLEMENTATION — APS OAuth pilot (NEW-012). Asite/Procore: Contact support only.

NC-005 — Autodesk Revit / Asite / Procore CDE connectors

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/integrations>

Steps:

1. Revit: OAuth + Sync when APS_* env set.
2. Asite/Procore: Contact support messaging.

Expected result: Revit pilot when configured. Asite/Procore: no fake OAuth.

Pass

Fail

Notes: _____

NEW-001 — NEW — Engagement points log (residents page)

BSA context: BSA s.91 / SI 2023/907 reg.10 — engagement points separate from strategy doc.

[SI 2023/907 \(Occupied buildings\)](#)

<https://www.legislation.gov.uk/ukxi/2023/907/contents>

Role(s): building_safety_manager, accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/residents>

<https://portal.threadsovereign.io/occupied/engagement-strategy>

Steps:

1. Log in as james.wilson@buildright.co.uk.
2. Open <https://portal.threadsovereign.io/occupied/residents> — scroll to Engagement points panel.
3. Confirm GET loads events; add a manual point if safety case ID is available.
4. Follow link to Engagement strategy (reg.10) — confirm separate page loads.

Expected result: Points table distinct from strategy; POST validates safety case; cross-link to /occupied/engagement-strategy works.

Pass

Fail

Notes: _____

NEW-002 — NEW — Duty-holder competence edit + mark reviewed

Role(s): accountable_person

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/duty-holder-competence>

Steps:

1. Open <https://portal.threadsovereign.io/occupied/duty-holder-competence>.
2. Click a row !' edit dialog prefilled.
3. Update competency areas and save (PATCH).
4. Use Mark reviewed — confirm lastReviewedAt and nextReviewDue update.
5. Try invalid data — confirm 422 PAS 8673 message surfaces.

Expected result: PATCH persists; review rolls dates; validation errors shown in UI.

Pass

Fail

Notes: _____

NEW-003 — NEW — Document archive (golden thread soft delete)

BSA context: Golden-thread documents must be archived, not blob-deleted.

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/documents>

Steps:

1. Open <https://portal.threadsovereign.io/documents> on a non-approved draft document.
2. Use row menu or detail sheet!' Archive!' confirm dialog.
3. Verify toast and document status becomes Archived.
4. On an approved golden-thread document, confirm Archive is hidden/blocked.

Expected result: Soft archive via DELETE /api/documents/[id]; approved golden-thread cannot be archived.

Pass

Fail

Notes: _____

NEW-004 — NEW — Handover package export via API

BSA context: Gateway 3 export must write generated_reports + activity_log.

[SI 2023/909 \(Gateway regime\)](#)

<https://www.legislation.gov.uk/ukxi/2023/909/contents>

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

[https://portal.threadsovereign.io/projects/\[projectId\]/handover](https://portal.threadsovereign.io/projects/[projectId]/handover)

Steps:

1. Open project RST-001!' Handover tab.
2. Complete at least one checklist item if empty.
3. Click Download package / export control.
4. Confirm JSON file downloads (not client-only static data).

Expected result: Download triggers POST .../handover/export; export reflects live checklist from database.

Pass

Fail

Notes: _____

NEW-005 — NEW — Occupied engagement strategy in sidebar

Role(s): building_safety_manager

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/occupied/engagement-strategy>

<https://portal.threadsovereign.io/occupied/residents>

Steps:

1. Open occupied sidebar — confirm Engagement Strategy link.
2. Open <https://portal.threadsovereign.io/occupied/engagement-strategy> — page loads.
3. From /occupied/residents confirm cross-link to strategy.

Expected result: Statutory strategy page reachable from nav and residents page.

Pass

Fail

Notes: _____

NEW-006 — NEW — Resident & contractor mobile account links

Role(s): resident, contractor_user

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/resident/profile>

<https://portal.threadsovereign.io/contractor/settings>

Steps:

1. Resident (mobile width): open hamburger menu ! Account block ! My Details, Sett
2. Contractor (mobile width): open menu ! Account Settings link.

Expected result: Account routes reachable on mobile without desktop user dropdown.

Pass

Fail

Notes: _____

NEW-007 — NEW — PD sidebar Calendar, Activity, Analytics, Automation

Role(s): pd_lead

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/calendar>

<https://portal.threadsovereign.io/activity>

<https://portal.threadsovereign.io/analytics/project>

<https://portal.threadsovereign.io/automation>

Steps:

1. On Professional tier, open PD sidebar.
2. Confirm Calendar, Activity, Analytics (expand sub-links), Automation entries.
3. Open each route — pages load without 404.

Expected result: All secondary PD routes discoverable from sidebar.

Pass

Fail

Notes: _____

NEW-008 — NEW — Calendar subscribe feed token

Role(s): pd_lead, org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/calendar>

Steps:

1. Open <https://portal.threadsovereign.io/calendar> on Professional tier as org admin.
2. Click Generate subscribe URL — copy HTTPS and webcal URLs when shown.
3. Open HTTPS URL in a private window (no login) — confirm .ics calendar body.
4. Rotate and Revoke — old URL should 404.

Expected result: Org admin mint/revoke works; public GET `/api/calendar/feed/[token]` returns ICS; token shown once after generate.

Pass

Fail

Notes: _____

NEW-009 — NEW — Microsoft Teams webhook + test message

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/integrations/teams>

Steps:

1. Open <https://portal.threadsovereign.io/settings/integrations/teams>.
2. Paste Teams incoming webhook URL! Save webhook.
3. Click Send test message.
4. Trigger a document/task activity — confirm MessageCard in channel (optional).

Expected result: Test message delivered; webhook URL persisted in integration_config.

Pass

Fail

Notes: _____

NEW-010 — NEW — Slack webhook + test message

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/integrations/slack>

Steps:

1. Open <https://portal.threadsovereign.io/settings/integrations/slack>.
2. Save Slack incoming webhook URL.
3. Send test message — confirm blocks/text in Slack channel.

Expected result: Slack payload uses blocks format; test succeeds.

Pass

Fail

Notes: _____

PARTIAL IMPLEMENTATION — NEW (2026-06-08): ROUTE-MISS-01 — full OAuth only when GOOGLE_* / MICROSOFT_* env set.

NEW-011 — NEW — Google / Outlook Calendar OAuth

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/integrations/google-calendar>

<https://portal.threadsovereign.io/settings/integrations/outlook-calendar>

Steps:

1. Open Google Calendar integration !' Connect with OAuth.
2. If env missing: expect 503 or configure-credentials messaging — pass as PARTIAL.
3. If env set: complete OAuth redirect and confirm connected status.
4. Repeat spot-check for Outlook Calendar.

Expected result: PARTIAL without env: clear 503/configure message. COMPLETE with env: tokens stored; iCal/subscribe remain primary.

Pass

Fail

Notes: _____

PARTIAL IMPLEMENTATION — NEW (2026-06-08): ROUTE-MISS-03 — APS_* env required.

NEW-012 — NEW — Autodesk APS (Revit) OAuth + hub sync

Role(s): org_admin

Full URL(s) to open (type or scan on paper):

<https://portal.threadsovereign.io/settings/integrations/revit>

Steps:

1. Open <https://portal.threadsovereign.io/settings/integrations/revit>.
2. Connect with OAuth (or note configure-credentials if APS_* missing).
3. Click Sync Now — confirm hub list or hubCount in response when connected.
4. Open Asite/Procore — confirm Contact support (no fake OAuth).

Expected result: APS pilot: OAuth + read-only hub list when configured. Asite/Procore: support stub only.

Pass

Fail

Notes: _____

NEW-013 — NEW — Testing checklist Add note persists

Role(s): pd_lead, building_safety_manager, org_admin

Steps:

1. On any page, open the Testing Checklist (clipboard icon, bottom-right).
2. Pick any item !' click Add note !' type a short observation.
3. Click outside the note field (blur) or close the sheet.

4. Reopen the checklist — confirm the note is still visible.

5. Optional: filter With notes; signed-in users reload page and confirm sync.

Expected result: Notes visible as amber preview cards; survive reload from shared DB (manual_testing_shared_state). Filter Has notes works.

Pass

Fail

Notes: _____

- Production auth smoke (AUTH-P1-05): After each production deploy, administrators run `pnpm audit:auth-production`, then manually verify signup confirm, team invite accept, password reset, and magic link (if enabled). Not part of standard UAT — deploy gate only.
- Enterprise custom domain auto-provisioning: On <https://portal.threadsovereign.io/settings/white-label>, DNS verify (CNAME ! portal.threadsovereign.io) auto-adds the domain to V Auth redirect URLs when VERCEL_* and SUPABASE_ACCESS_TOKEN are set on the server. Platform provisioning status shown in UI.
- DocuSign production cutover: DocuSign code exists (Professional+). Production Go Live and webhooks need administrator configuration. See docs/DOCUSIGN_GO_LIVE.md.
- BSR live API connector: Use /occupied/bsr-submissions to record manual HSE portal references and BSR single point of contact. Live HSE API requires administrator BSR_API_* env — not the public GOV.UK form alone.
- Twilio SMS (TIER-GAP-21): Professional+ tier. Set TWILIO_* on server, E.164 mobile on profile, opt-in on <https://portal.threadsovereign.io/notifications/preferences>. Statutory crons send bsr_deadline_alert, fra_review_due, bac_renewal_due, peep_review_due, remediation_order_deadline. BSA safety-case SMS fields are regulatory text — not text messages. Verify: pnpm sms:test and docs/SMS_EVENTS.md staging checklist.
- Companies House API: Verify on <https://portal.threadsovereign.io/settings/organisation>, supplier profiles, and /settings/integrations/companies-house. Requires COMPANIES_HOUSE_API_KEY on the server.
- Browser push notifications: Implemented. Requires Professional+ tier, VAPID env vars, browser permission, and per-event opt-in on <https://portal.threadsovereign.io/notifications/preferences>.
- Calendar — subscribe feed and OAuth (NEW 2026-06-08): Professional+: iCal download (/api/calendar/ics), tokenized subscribe URL on <https://portal.threadsovereign.io/calendar> (org admin generates once), and env-gated Google/Outlook OAuth on <https://portal.threadsovereign.io/settings/integrations>. OAuth returns 503 until GOOGLE_* / MICROSOFT_* env is set — pass if documented.
- Manual testing checklist — shared workspace (066): All checkmarks and notes save to manual_testing_shared_state via the in-app checklist — no login required. One shared record for the whole team on this environment. Export PDF before Reset all.
- Microsoft Teams / Slack webhooks (NEW 2026-06-08): Save incoming webhook URL on <https://portal.threadsovereign.io/settings/integrations/teams> or /slack; Send test message; activity events use MessageCard/blocks adapters. Requires Professional+ and USE_WEBHOOK_INTEGRATIONS tier.
- Production integrations smoke (Twilio, Resend, Stripe, webhooks, SSO): Follow docs/PRODUCTION_INTEGRATIONS_TESTING.md after deploys touching auth, billing, or third-party connectors. CLI: pnpm audit:auth-production, pnpm sms:test, pnpm audit:webhooks.
- CDE integrations — APS pilot (NEW 2026-06-08): Autodesk APS OAuth connect on <https://portal.threadsovereign.io/settings/integrations/revit> when APS_* env is set; Sync lists ACC/BIM 360 hubs (read-only). Asite and Procore show Contact support — no fake OAuth.
- PAP physical notice posting (B3.3): The platform generates a common-parts notice PDF on <https://portal.threadsovereign.io/occupied/ap> (GET /api/occupied/pap-notice/pdf). The Accountable Person must print and display it physically in common parts — not automated by software.

- Analytics platform/compliance charts: Some secondary chart series use aggregated stubs — verify PARTIAL tests.
- Signup URL: New organisations use /onboarding (there is no /signup page).
 - Handover nav shortcut: PD sidebar Handover links to /projects; open a package must use Download on Handover tab (POST /api/.../handover/export) — see NEW-004.
 - Golden thread document archive (NEW 2026-06-08): Documents! Archive /api/documents/[id] (status archived). Approved golden-thread documents cannot be archived — use supersession instead.
- Engagement points vs strategy (NEW 2026-06-08): Statutory engagement strategy (/occupied/engagement-strategy) is separate from the engagement points event log on <https://portal.threadsovereign.io/occupied/residents> — do not merge in testing.

13 — Test completion sign-off

I confirm that I completed all applicable tests in this guide, recorded pass/fail results, and reported failures to the development team.

Tester name: _____

Date completed: _____

Browser and device: _____

- All applicable tests passed
- Failures documented with screenshots and steps