Website and Portal Review Workbook

Find obstacles in an important digital journey and give each improvement an owner and a recheck.

How to use these four pages

1. Choose a visitor, editor or learner task.
2. Agree the test boundary and use fictional data.
3. Record the journey on page 3 and observations on page 4.
4. Prioritise findings, assign actions and recheck the same task.

A practical working aid

Use the blank records for your own discussion. Examples are fictional, not client case studies. Print to complete by hand or adapt the prompts in your own document; this PDF is not a fillable form.

Keep completed records confidential. Use references to protected evidence rather than passwords, customer records or sensitive system details.

Online instructions and companion article

Read the guide

Read the article

Source guidance

W3C WAI: Easy Checks - A First Review of Web Accessibility

Resource content reviewed 19 November 2026. The source material informs the approach; no endorsement is implied. This worksheet supports planning and record-keeping. It does not authorise testing, certify compliance or replace an agreed specialist review.

Free to use and adapt within your business with the GRCPreneur acknowledgement retained.

A fictional worked example

Illustrative entries only. No real client, vendor result or completed implementation is claimed.

Record	Illustrative entry
Journey	Fictional learner completes a lesson and opens the next activity.
Test context	Phone-sized layout in an authorised test portal; sample learner account.
Expected result	Learner can identify the next activity after finishing the lesson.
Observation	An unrelated promotion appears before the next activity link.
Interpretation / limit	The route is unclear in this exercise; no completion-rate impact has been measured.
Proposed improvement	Place a clearly labelled next activity beside the lesson completion information.
Recheck	Repeat the same task after the layout change and record the result.

Before using the blank pages

Agree who will review the record and what decision it supports. Mark assumptions, proposed actions and unverified claims clearly. Copy pages 3 and 4 when you need more space.

Your working record

Project / record ID: _____ Date: _____

Task and user

Visitor, editor or learner? What are they trying to accomplish?

Context and test boundary

Page, device/browser, account role, sample data and authorised actions.

Steps and expected result

Where does the journey start? What should happen at each key step?

Observed result and evidence

Record facts, evidence reference and anything not checked.

Operational ownership

Who handles enquiries/content/learner help, maintenance and follow-up?

Use protected evidence references. Do not enter credentials or confidential customer details.

Findings and improvement log

Related record / requirement: _____ Review date: _____

Finding / affected task	Consequence / priority	Action / owner	Recheck / evidence

Review before the next decision

- Observed behaviour is separated from assumptions.
- Essential tasks receive attention before cosmetic preferences.
- Initial accessibility checks are not labelled a complete evaluation.
- The same journey has a named recheck owner and date.

Decision, authority and next checkpoint

Proceed / revise / defer / stop. State the decision scope, conditions, approver and date.

A completed record documents a review. Approval applies only to the stated scope and does not establish that untested work has succeeded.