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08

**Fall**

FCB Chicago QA

Email and Banner

Master Test Plan and Rate Card

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# Document Control

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# Revision history

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| Version | Date | Author/editor | Description/Summary of changes |
| 4.1 | 08/04/2016 | Carl Arndt | Updated Email Checklist |
| 4.0 | 10/08/2015 | Carl Arndt | New Template, Simplified Rate Cards |
| 3.0 | 03/13/2015 | Carl Arndt | List of Checklist Updates: Conditional Unsubscribe link check, Consolidated some steps, added check for Litmus/EOA Screenshot, Removed Spam Test, Subject Line Test checks |
| 2.2 | 08/06/2014 | Carl Arndt | Adjusted rate of 1 email and 1 banner in example |
| 2.1 | 07/30/2014 | Carl Arndt | Added “Tester” in place of iBeta verbiage & Added Email and Banner section headers |
| 2.0 | 06/19/2014 | Carl Arndt | Updated Banner section following meeting discussing Banner Testing Strategy |
| 1.1 | 05/05/2014 | Carl Arndt | Added 3D section for Emails – Describes links with href = # |
| 1.0 | 03/10/2014 | Carl Arndt | Created Email and Banner Master Test Plan and Rate Card |

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# Overview

## Introduction

FCB Chicago Digital creates and supports Email Campaigns and Banner ads. As the development team creates these banner and email files, the QA department performs tests on these files to ensure specific requirements and industry standards are met.

Requirements are delivered from the Account team through Project Management to the Quality Assurance team. Banner dimensions, file size, link matrices, are examples of the requirements QA receives. Now, if QA doesn’t receive any requirements, QA can still test. QA works with a set of default (or as Google/DoubleClick calls them, LCD tests – Lowest Common Denominator tests) tests that are run in all cases for each project.

The default tests for HTML5 Banners are found in List 1 below. Emails have their own default test list too, including what and where the tests are run. Review the approved checklists below to learn what is tested when and where.

Project Management can always ask that additional tests be run on any of their projects. All tests run on a project will be included in the Test Summary Report or Test Certificate document at the completion of the project.

## Purpose

The following outline summarizes the purposes of this document. This Email and Banner MTP:

1. Describes exactly what is verified when an email is tested
   1. What is in and out of scope
   2. Tools used for testing
2. Estimates how much testing time can be estimated when testing is required for banners or emails
3. Acts as an agreement between Producers/Project Managers and QA for expectations in planning for and testing emails and banners
4. Serves as a starting point for the testing team in creating a test plan that may be required for any large banner or email project

## Responsibilities

The QA Manager will own and be responsible for updating and distributing this document.

The Project Managers are responsible for reviewing and approving this document.

All other team members of FCB Chicago that work on teams that develop Emails or Banners can act as consultants for this document, offering their input to the checklists where needed.

# Emails

## Emails – In Scope

All items on this checklist must be verified or have a description of why it is not needed in testing.

Testing Direction: If an item doesn’t need to be tested (Unsubscribe link on Cox for example) use strikethrough font on the text and check the box, showing that the item is done. All checkboxes need to be checked for QA to be complete.

|  |  |
| --- | --- |
| **Done** | **Email Testing Checklist (What are we testing?)** |
|  | 1. Internal / Functional Test Blast |
|  | * 1. Verify email can be successfully test blasted |
|  | * 1. Verify email is displaying correctly in the Mailchimp preview screen prior to blasting the email |
|  | * 1. Verify email is received by test email clients |
|  | 1. Test All Links |
|  | * 1. Verify that links match link-matrix if provided |
|  | * 1. If no link matrix provided, verify no broken links |
|  | * 1. Unsubscribe Link |
|  | * 1. Verify that unsubscribe link sends the user to a page where they can change settings or otherwise unsubscribe from future emails. |
|  | 1. Spam Filter Testing (Litmus) |
|  | * 1. A Pass or Fail is needed when this type of testing is required |
|  | * 1. Spam Tests that failed need to include the failing score, what the passing score threshold was, and an explanation on why it had a low score |
|  | 1. Subject line testing (Litmus) |
|  | * 1. If subject line testing is requested, inspect how the subject line displays across clients. Different clients display subject lines differently so this is a needed check in some campaigns. |
|  | 1. Coding Verifications |
|  | * 1. JavaScript – (No <script>s anywhere in the HTML) |
|  | * 1. No Embedded Videos |
|  | * 1. Default Responsive Breakpoints      1. 600px Desktop      2. 480px Mobile Landscape View      3. 320px Mobile Portrait View |
|  | 1. Images |
|  | * 1. No background images |
|  | 1. Testing Standards |
|  | * 1. Email project tracked with Jira ticket |
|  | * 1. All defects should be entered and tracked in Jira |
|  | * 1. FCB QA standards followed |
|  | 1. Delivery Standards |
|  | * 1. Every email separately zipped |
|  | * 1. Every email zip file contains 1 HTML file and 1 IMG folder |
|  | 1. CAN-SPAM Act Compliance |
|  | * 1. No false or misleading header information |
|  | * 1. No deceptive subject lines |
|  | * 1. Identify message as an ad |
|  | * 1. Tell recipients where you’re located |
|  | * 1. Tell recipients how to opt-out for future emails |

The following checklist describes where the email testing will be taking place. All items on this checklist must be verified or have a description of why it is not needed in testing.

|  |  |
| --- | --- |
| **Done** | **Email Client Checklist (Where are we Testing?)** |
|  | 1. All In Scope Browsers – Verify web version of email is displaying correctly |
|  | * 1. Formatting of web version on IE11 |
|  | * 1. Formatting of web version on Chrome (latest) |
|  | * 1. Formatting of web version on Safari (latest) |
|  | * 1. Formatting of web version on Firefox (latest) |
|  | * 1. The following email clients are verified for how the email is formatted and rendering across email clients\* |
|  | * 1. Email Client Verification |
|  | * 1. Desktop Email Clients: |
|  | * + 1. Apple Mail 7.0, 8.0 |
|  | * + 1. Outlook 2007, 2010, 2013 |
|  | * 1. Mobile Client Verification |
|  | * + 1. Android 4.4 |
|  | * + 1. Android / Gmail App |
|  | * + 1. iPad iOS 8 |
|  | * + 1. iPhone 5s iOS7 |
|  | * + 1. iPhone 5s iOS8 |
|  | * + 1. iPhone 6, iOS8, iPhone 6 Plus, iOS8 |
|  | * + 1. iPhone 6S iOS9, iPhone 6S Plus, iOS9 |
|  | * + 1. iPad Mini |
|  | * 1. Web-based Client Verification |
|  | * + 1. AOL Mail (Explorer, Firefox, Chrome) |
|  | * + 1. Gmail (Explorer, Firefox, Chrome) |
|  | * + 1. Outlook.com (Explorer, Firefox, Chrome) |
|  | * + 1. Office 365 (Explorer, Firefox, Chrome) |
|  | * + 1. Yahoo! Mail (Explorer, Firefox, Chrome) |

\* All emails will be tested against approved creative / pdf’s.

## Emails – Out of Scope

Not everything is included in testing emails. Here is a list of the items that QA is not responsible for while emails are being tested.

* Copy / Proofreading – Proofreading team (copyrighters) will be checking all copy to ensure its accuracy
* Legalese – Legal text is out of scope
* Tracking / Tagging – The SA team will be verifying tracking with emails

## Emails Rate Card

The following are the estimated/planned hours for the given activities.

|  |  |  |
| --- | --- | --- |
| **Time per email** | **Testing with no issues found** | **Test Time with Issues found** |
| **QA Tester Time** | 45 minutes | 90 minutes |
| **QA Management Time** | 15 minutes | 30 minutes |

I simplified the testing chart above from previous versions based on email testing history. I also removed the ‘New Template / New Version’ wording as email files are tested identically across email types and thus require similar testing times regardless.

Naturally, if QA finds defects with the emails more time will be required to spend on testing. Writing defects takes time, and after development fixes the defects, the process of retesting the emails to ensure the files are indeed fixed also adds some time.

Also, please note that emails can be tested in less time than estimated above in some iterations of testing, but in the spirit of erring on the side of caution, the above numbers should be used for planning.

# Banners

The FCB Chicago Digital Department creates hundreds of banner ads per year across almost all clients. Banners are tested following standard QA processes and procedures. Included in the process of testing banners, checklists are also implemented. Which banner checklist is used for testing is dependent on the banner type under test.

For example, if the banner is a simple one, checklist one is used. If the banner has an expandable section, checklist two is used. If the banner has video, checklist 3 is executed. Below you will find the checklists we use in testing banners.

## Banners – In Scope

|  |  |
| --- | --- |
| **Banner Testing Checklist #1** | |
|  | Banner click Banner |
|  | Browser Compatibility: IE11 |
|  | Browser Compatibility: Microsoft Edge |
|  | Browser Compatibility: Firefox |
|  | Browser Compatibility: Chrome |
|  | Browser Compatibility: Safari |
|  | ClickTag - Banner Exit Click / ClickTag Check |
|  | Other Links - Verify links |
|  | Format - Verify Formatting / Images |
|  | Animation - Verify animation is smooth and speed is appropriate |
|  | Animation - Verify the non-user-initiated animations do not exceed 15 seconds (Initial load) |
|  | File Size - Verify the size of the initial or primary file doesn't exceed spec (150kb guideline) |
|  | Verify CPU Usage is below 50% viewing the creative - Task Manager or Activity Monitor |
| **Banner Testing Checklist #2** | |
| **☐** | Border - Verify the creative has a border |
| **☐** | Expanded - Verify that closing an expanded panel should register a 'close' event |
| **☐** | Expanded - Verify all the Expanding units have close buttons |
| **☐** | Expanded - Verify the creative collapses after you click through on the expanded section |
| **☐** | Audio - Verify a creative with audio has a mute control |
| **☐** | Audio - Verify a user-initiated click action turns on the audio in a creative |
| **☐** | Expanded - Verify the creative that starts expanded collapses automatically after 15 seconds without interaction |
| **☐** | Exit - Verify if an exit or counter is triggered |
| **☐** | Exit - Verify that all exits are user-initiated |
| **☐** | Expanded - Verify if the creative is set to roll over to expand, it collapses when you roll off |
| **Banner Testing Checklist #3** | |
| **☐** | Exit - Verify all exits that use the DoubleClick Studio Exit function |
| **☐** | Exit - Verify that on all exits only one new browser window or tab opens |
| **☐** | Exit - Verify the events panel is counting exits correctly |
| **☐** | File Size - Verify the subsequent uninitiated load doesn’t exceed 4 MB |
| **☐** | File Size - Verify the video file size meets specifications |
| **☐** | Video - Verify the final frame of a video creative is not blank |
| **☐** | Exit - Verify that pop-up blockers are not being triggered on exit for all browsers |
| **☐** | Video - Verify a replay button appears after a video's finished playing, if it fits the creative concept |
| **☐** | Video - Verify the creative that contains click-to-play video includes controls to play, pause, mute, and restart the video |
| **☐** | Video - Verify the Events tab includes DoubleClick video tracking metrics if the creative is using video |
| **☐** | Video - Verify the non-user-initiated video doesn't exceed 30 seconds |
| **☐** | Video - Verify the video pauses when you click through while a video is playing in the creative |
| **☐** | Video - Verify any Videos are played through YouTube or the video player |

The preceding three lists are for testing HTML5 banners. The trends in the digital space have been moving away from Flash and building HTML5 banners instead. On occasion QA will still need to test Flash banners. Here is the checklist for testing Flash banners.

|  |  |
| --- | --- |
|  | Size of Banner file |
|  | File size must match or be lower than what is specified in the Scope Document |
|  | If there is no Scope Document, file size must be 40k or less |
|  | If the Banner is a 300 X 600 pixel banner, maximum static jpg file size is 50k |
|  | All other banners have a static jpg file size limit of 40K |
|  | Verify Max Flash player to publish meets specification in Scope Document |
|  | Verify Roll-over state (pointer changes into a clickable pointer) – This is ensuring the clickTag is present. |
|  | Verify that the clickTag is spelled “clickTag” |
|  | If the Banner is clickable, verify that clicking the banner navigates the user to the desired location. (Most banners are coded with click-tags and will not be clickable.) |
|  | Verify that the animation of the banner doesn’t exceed the 15 second limit (or other number set established in the Scope Document) |

## Banners – Out of Scope

The following is a list of the items that will not be tested by QA in banner testing. Typically these areas are covered by other groups within the FCB organization.

* Copy / Proofreading – Proofreading team (copyrighters) will be checking all copy to ensure its accuracy
* Legalese – Legal text is out of scope
* Tracking – The SA team will be verifying tracking Banner click-through

## Banner Rate Card

|  |  |  |  |
| --- | --- | --- | --- |
| **Per Banner** | **Checklist 1** | **Checklist 2** | **Checklist 3** |
| **QA Tester Time (per Banner)** | 15 minutes | 30 minutes | 60 minutes |
| **QA Management Time (Total)** | 30 minutes | 45 minutes | 60 minutes |

Examples:

1. One Banner on Checklist 1:
   1. Tester time: 15 minutes
   2. Management time: 30 minutes
   3. Total QA time: 45 minutes
2. Four Banners on Checklist 2:
   1. Tester time: 2 hours
   2. Management time: 45 minutes
   3. Total QA time: 2 hours, 45 minutes
3. 12 Banners on Checklist 3:
   1. Tester time: 8 hours
   2. Management time: 60 minutes
   3. Total QA time: 9 hours