**Deployment whiteboard – explanation of whiteboard tasks**

1. **Initial Set up and In-house test**

Once the HTML files have been completed and signed off and text versions have been created ‘inital set up and in-house test’ should be selected for the deployment team to set the creative’s up in the platforms. The CRF will need to be complete at this stage as the CRF is required to instruct the EDS team on set up. In-house tests will then be sent which will be tested accordingly (refer to testing whiteboard doc) Please use the ‘to so sheet’ on the CRF to brief these jobs in along with the task request on the whiteboard

When completed the EDS to email notification to the CM client alias and QA

1. **Test OK – Send for approval to clients**

Once tests have been approved by the in-house testing team and you the CM are happy that all render issues/faults/SL have been fixed and proofs can be sent the client ‘Test OK – send for approval to clients’ should be selected.   
Ensure the approval list is on the CRF as the deployment team use this to identify who should receive the proofs.

1. **Re-grab HTML and/or text**

If a creative has already been set up but amends have been made to the version on the server (this could have been through the client requesting amends or the HTML team fixing render issues) the creative will need to be re-grabbed and uploaded to the ESP so the most up-to-date version is being used. In-house tests would then be resent internally for you/testing team to check. Please use the ‘to so sheet’ on the CRF to brief these jobs in along with the task request on the whiteboard

When completed the EDS to email notification to the CM client alias and QA

1. **Data upload and counts**

To be used when counts are to be attached to the relevant segment/mailing and run on the ESP. Please use the ‘to so sheet’ on the CRF to brief these jobs in along with the task request on the whiteboard

1. **DM Rendering**

If HTML files are to be supplied to the client which we have built (when they are deploying) we are require to render test those to ensure the codes are correct and there are no render issues.

1. **Approved and to be deployed**

Once approved by testing and the client the emails can be deployed/scheduled (based on the client instructions). The ‘Approved and to be deployed’ action would be requested for this step, CRF MUST be up to date and contain all information for this process.

1. **General queries**

To be used for investigative type queries/ issues with ESP’s or mailings, to be accompanied by either a full brief on the to do sheet on the CRF or an email to the EDS team with the project no in the subject line

1. **Other**

To be selected if there is no option above that fits into your request – must be accompanied by an email brief and/or meeting with a deployment representative.