



## The Project

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The Indiana Secretary of State is responsible for maintaining all the State's records, including the chartering of new businesses. In 2015, the Business Services Division of the Indiana Secretary of State sought to develop a software solution, INBiz, to make the process of registering to start a business in the state of Indiana more transparent and streamlined for both in-state and out-of-state entities. This initiative was essential to a larger, state-wide push to adopt more business-friendly policies to drive economic growth.

Beyond its original aim to simply make forming an Indiana business easier, today INBiz allows users to view their entity's information securely, in real-time. It also provides a secure and convenient way for businesses to pay for their transactions performed online. To date the adoption rate of the most common transactions are:

- Online Business Formations of all business types are at 88%
- Business Entity Reports, the most common transaction within INBiz, are at 97%

The overall rejection rate for submissions in the customer-facing online INBiz application is 1.83%, compared to 15% in the old online portal that didn't integrate with the department's back-end processes. Not only have these metrics improved, so has the departmental workflow.

## The Justification

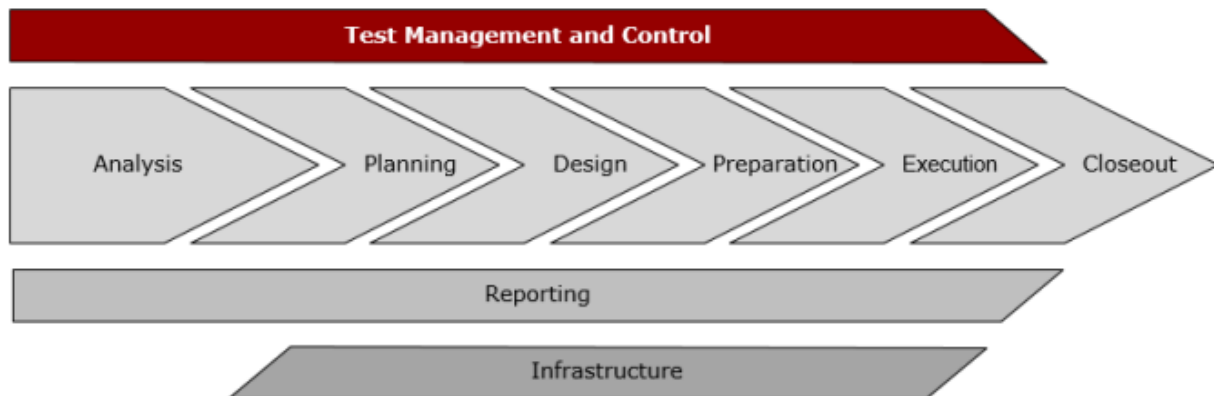
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At the time, the Secretary of State decided to develop this software, Indiana's business owners could submit their information online, but that led to a very manually intensive process on the Secretary of State's back-end when it came to record-keeping. Furthermore, even though businesses and entrepreneurs could register with the Secretary of State online, they then had to register separately with the Department of Revenue for taxation, and the Department of Workforce Development to employ others. The Secretary of State realized that these requirements could be prohibitive to new businesses forming in the state, simply due to the multi-step, lengthy, and possibly inconvenient process. Therefore, they decided to develop INBiz as a solution.

This website would offer a one-stop-shop where businesses could file, register, launch, and maintain their enterprises. Out-of-state businesses who wish to expand into Indiana would also use INBiz. But before this vision could be a reality, one essential step needed to be completed: quality assurance testing.

# The Process

In fall of 2015, the Indiana Office of the Secretary of State needed to develop User Acceptance testing practices for the INBiz project. The following model was adopted to ensure a consistency across all the project aspects:



*Below is a description of the phases and activities that take place:*

- **Analysis** of requirements
  - ✓ Gathering project requirements and In-depth analysis to finalize the scope of testing.
  - ✓ Understanding the current business workflows by partnering with Subject Matter Experts at the Indiana Secretary of State.
  - ✓ Identify non-testable requirements and highlight discrepancies.
- **Design** of UAT Test Cases
  - ✓ Impact analysis completed of project requirements and detailed test cases and scripts were created which also served the purpose of future regression test asset.
  - ✓ Test cases were linked to requirements to ensure proper test coverage
  - ✓ Internal reviews and sign-off conducted with Subject matter experts at Indiana Secretary of stat
- **Planning** User Acceptance Testing (UAT)
  - ✓ Establishing timeframe for UAT based on:
    - Project scope and requirements
    - Anticipated impact of changes, new functionality, etc.
    - Availability and capacity of team
  - ✓ Developing and implementing User Acceptance Test strategies and plans to include:
    - Owners and participants
    - A clear scope of work and instructions for how to test
    - Entry / Exit criteria
    - Test Cases
      - Verifying implementation of requirements as well as integration with other applications
      - Primarily focused on Business-process
    - Necessary templates
    - Requirements for sign-off
- **Test Preparation**
  - ✓ Finalization of the documentation issues
  - ✓ Confirming test suite and environment-readiness
  - ✓ Identifying test data for test execution
  - ✓ Test case execution planning
  - ✓ Ensuring that the relevant sign-offs have been received
- **Managing Test Execution**
  - ✓ Testing of end-to-end scenarios
  - ✓ Testing of scenarios required by the business stakeholders
  - ✓ Verify that the software's functionality meets specified business and technical requirements
  - ✓ Supported the development vendor in both identifying issues and retesting the improved software after those issues were addressed by the vendor.
  - ✓ Provided detailed defect metrics to the project management team at Indiana Secretary of State
- **Closeout** of UAT phase
  - ✓ Evaluate the test effort and confirm that the test objectives were met
  - ✓ Provide project implementation (go/no-go) recommendation

Alongside functional testing of INBiz, we also tested how the program integrated with both the customer-facing website and the division's in-house software application for maintenance and approval workflows.

## The Outcomes

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Prior to executing this process, development was trending behind schedule. This systematic, strategic approach to information-gathering and testing helped the development vendor restore their equilibrium and meet the deadline. More important than the timeline, we ensured a solution was created that was successfully adopted by both internal and external end-users to improve Indiana's business environment.

Eventually, the Secretary of State was able to bring both the Department of Revenue and the Department of Workforce Development into the project to develop a Phase II offering. This software enabled entrepreneurs to register with all three agencies at once through the INBiz portal, and helped all of the agencies, and the State itself, get closer to achieving their vision of a business-friendly Indiana. In ensuing phases, the team analyzed and tested INBiz's inclusion of those interdepartmental resources and services for Indiana's employers and businesses.

This process has been instituted as part of continuous improvement. The Business Services Division team works to continually test monthly production and enhancement releases. We test both the System Integration and User Acceptance of these monthly updates, though those occur in separate testing environments.

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### **ABOUT iLAB**

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