

# Allegion's Overtur™ UQC Event

## Overview

On August 30-31, 2017, Allegion conducted a Usability and Quality Control (UQC) conference and workshop for furthering the development of what has now been named Overtur. This is a cloud-based suite of tools where architects and door hardware consultants can come together to collaborate on specifications and the security design of doors and openings.

The event was held at the Renaissance Hotel in Carmel, Indiana over two days. It brought together Architects, Allegion hardware specification writers, and software. There were eight usability groups, each of which included an Architect<sup>1</sup>, a hardware spec writer, and a developer. There were 33 main attendees, plus multiple Allegion "Observers" for a total of about 50.



The agenda and list of primary attendees are attached as appendices to this report.

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<sup>1</sup> The 'Architect' in some cases was actually a BIM Manager for the Architectural firm. In some cases there were two people in the 'Architect's' seat.

## Purpose

Allegion is developing a cloud-based portal that will greatly facilitate collaboration between Architects and our hardware spec writers, ensuring far better accuracy and speed of project delivery. This platform is integrated with Building Information Modeling (BIM), meaning we pass critical data from our spec writing database to the Architect's model (BIM, a 3D database), using the cloud portal as a clearinghouse and temporary storage place. The site also provides innovative tools to review plans and door hardware information outside of either database, expanding the flexibility and value of the site.

The purpose of this event was to bring these groups together – Architects, hardware spec writers, and the software developers – in a 2-day usability lab to ensure the tools we create truly align with the user needs and workflows. The hands-on sessions were critical; at each of 8 tables an Architect, hardware spec writer, and developer huddled and focused on the details of a given tool or set of tools to assess workflow, click sequences, even icons on the buttons.



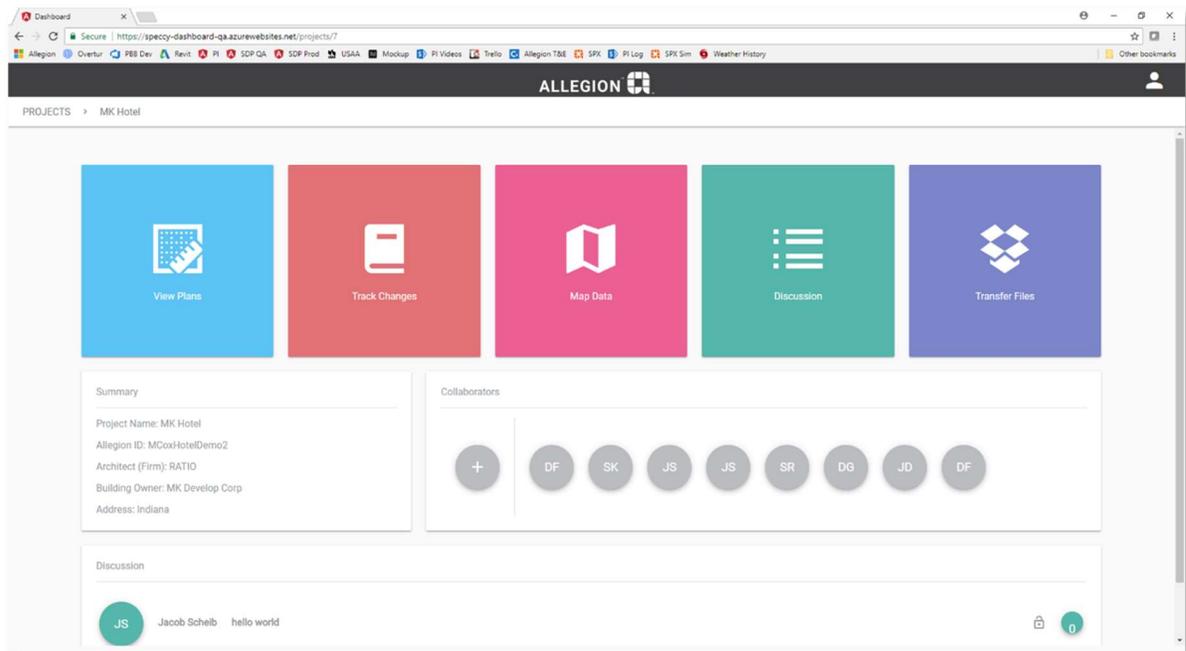
The feedback we received from these sessions is critical to proper development of the tools. Also, with this event we officially launched the BETA program.

Some key themes of this project, and this event:

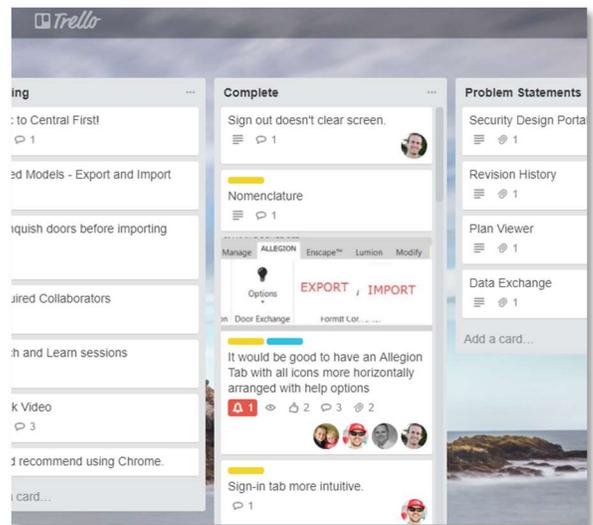
- Hardware is a complicated business, and it is one of Allegion's top goals to make it simple on the people who are responsible for selection – the Architects. This site aims to do that by providing all the right information up front and in ways that make it easy to filter and review that data.
- It was critical that these groups - Architects, hardware spec writers, and software developers – were in the same room in this design charrette, to ensure the tools will hit the mark.
- We are greatly appreciative to all the Architects who took time out of their busy schedules to attend. We are committed to making sure both Architects and Allegion see a healthy ROI on this effort.

## Sessions

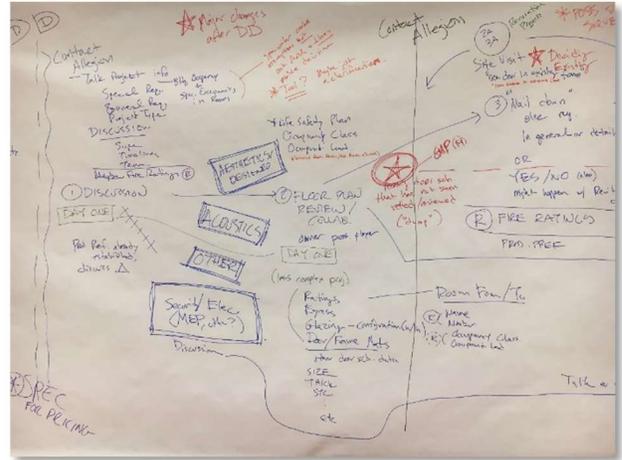
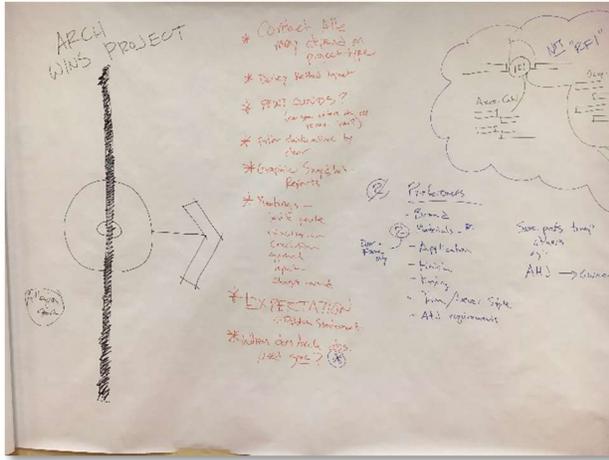
1The conference began with an overview demonstration of the current state of development, including all tools and features to date. An open discussion was held, validating that the overall offering appeared to be on target for our first release this November 10.



This was followed by a short usability lab on Trello, a website that allows all team members to post feedback while viewing feedback and comments from others. Trello team members create cards on a virtual board; these cards can consist of questions, comments, or solutions addressing any aspect of the project. Trello also allows the team to indicate which issues have been completed and/or implemented, as well as items that are still in development. Attendees were encouraged to include positive feedback (not just constructive criticism), so that we are aware of what works well as well as what doesn't. During this session all attendees signed into Trello with their accounts and walked through the process of creating a new card, while exploring the site and reviewing the current feedback.



After a short break, the group left their individual tables to face a long roll of white paper mounted on the back wall. A two-hour discussion was held on the processes and workflows that are used today to get the hardware specifications and sets completed. The group discussed people involved, driving forces, project complexities, and the various time-related issues.



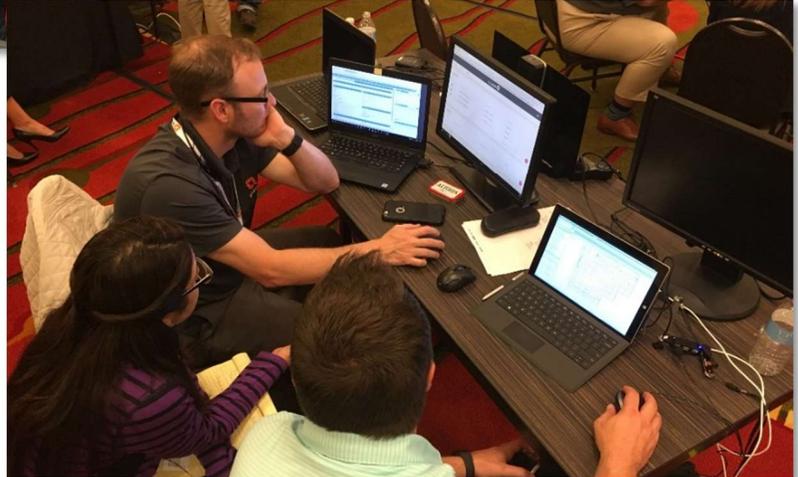
Specific attention was given to the “pain points” in the process, of which 5 main ones were identified:

1. Gathering of requirements (and getting owner to make decisions)
2. Pricing out of sequence with design (not enough detail to price properly)
3. Transfer of door schedule prematurely (not enough data, data not vetted or reviewed holistically and in detail)
4. Iterative cycle of design (generating iterations of door hardware specs and sets, with not enough time or project money available)
5. Existing conditions (assessing existing conditions and determining what needs replacing)

Another major pain point that was identified but that falls outside of the current scope (Design) was the GC submittal review process. We will address that next year.

At the end of this session, attendees were encouraged to grab sharpie markers and add their own thoughts and concerns. The final “process map” was photographed in detail for further use in design and development of the Overtur applications.

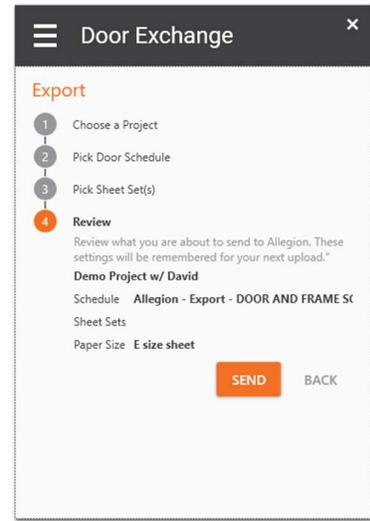
After lunch attendees returned to their usability stations and spent time walking through the Overtur apps in direct response to the process maps outlined before lunch, to begin the assessment of how well Overtur addresses the needs. Considerable time was spent doing a complete “round-trip” of the door data, from Revit to Overtur to SpeXtra – where hardware product was chosen and hardware sets assigned – then back to the portal again, and then to Revit. This exercise was critical since this data flow is the baseline for all other automation. Real project data was used, as the Architects brought with them projects currently active in their firms to test the Overtur process. The groups reviewed detailed workflows, click sequences, dialog verbiage and even individual graphic icons. All user feedback was captured in Trello.



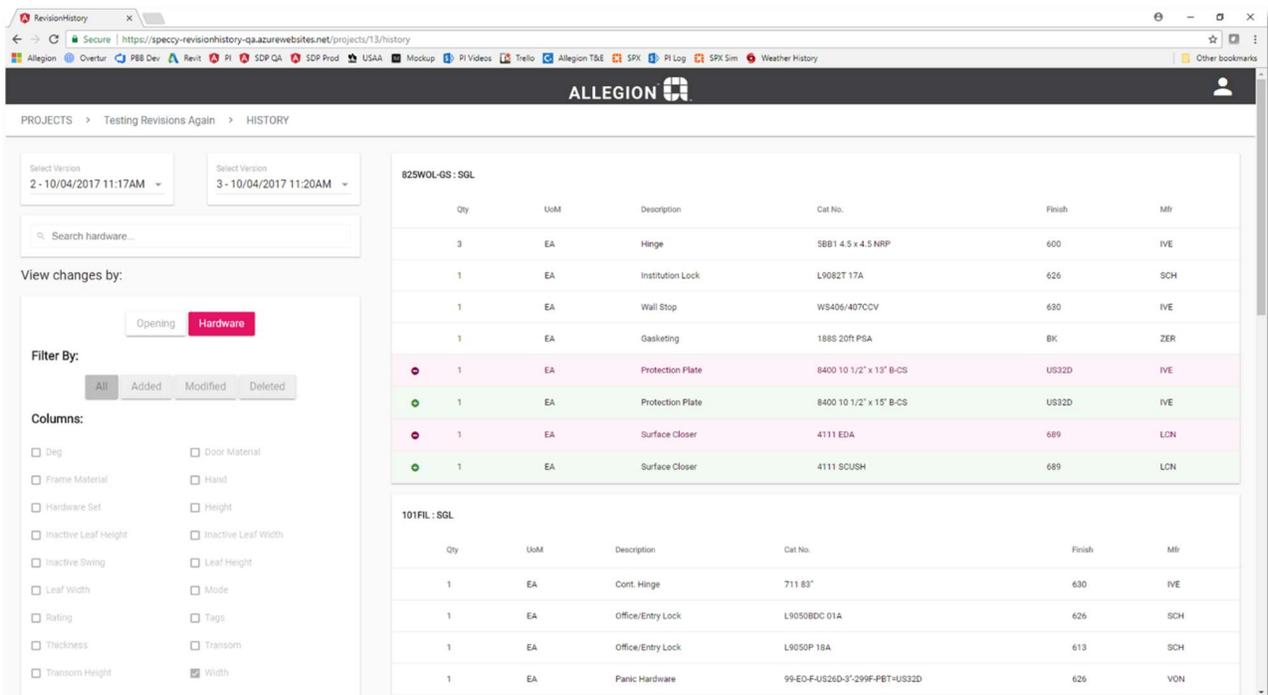
The last session of the day focused on the Plan Viewer, a specific application that is at the crux of our collaboration solution. In this tool, various team members can come together to review the plans with special focused attention to doors and door hardware. Users were asked to consider each button, each feature, and each bit of information displayed, for optimal design and use. Feedback was captured in Trello.

The end of the first day was capped off by a relaxed dinner at Biaggi’s, a nearby restaurant that accommodated the roughly thirty people who were able to join for dinner. This allowed the group to unwind from the day’s work, socialize and also keep the discussions going regarding the event and the day’s accomplishments; it was a great end to a productive day in a setting that elevated the level of camaraderie among the attendees.

The second day of the event began with a short review of the items covered the previous day, followed immediately by another usability lab exploring the Revit plugin. This plugin is a small piece of software that is installed on the end user's machine, providing the interface and functionality needed to transfer door schedule data and drawings sheets to Overtur. As with other usability sessions, attendees considered every step in the dialog, every icon, and user interface verbiage, as well as the overall functionality. Feedback was captured in Trello.



After a short break, the group focused on another usability exercise that emphasized tracking hardware changes in a project projects using the Track Changes app in Overtur. Feedback was captured in Trello.



Just before lunch the group was asked to list out their top items for development by writing these down on paper. The papers were collected, categorized into themes, and tallied into priorities.

After lunch a general discussion was conducted on how (and with what) to best train new users to be able to fully utilize the Allegion Overtur tools and platform. The general consensus was to create short videos that address specific workflows, as well as an overview of the Overtur site that follows a general standard workflow. These videos would be made available within the site, preferably as context-sensitive help. Videos within Revit, for the plugin, would be helpful as well.

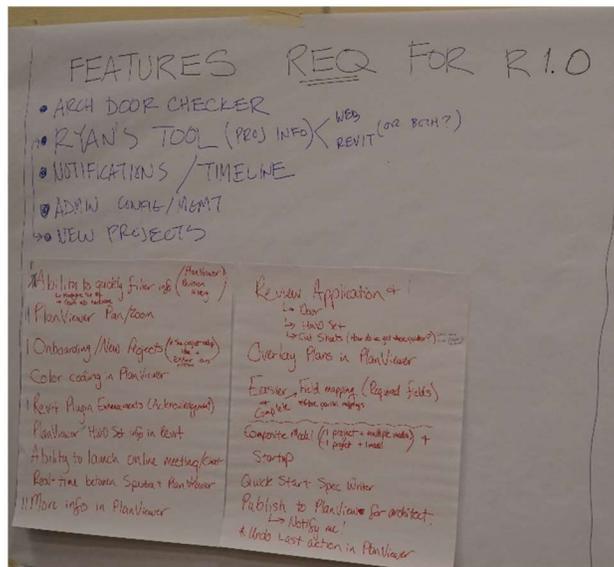
The group was asked very specifically about Allegion’s current offering of CTC’s “SuperDoor”<sup>2</sup>, a Revit-based application to build and manage door libraries. We have been struggling as to whether to:

1. Continue providing SuperDoor free of charge to Allegion clients (Architects)
2. Develop our own new door builder
3. Not address the 3D door modeling needs at all and focus development time elsewhere.

The overwhelming response (unanimous) was option 3.

The Allegion dev team then presented the results of the before-lunch prioritization exercise. The prioritized list was as follows:

1. Architectural Door Checking (version of Plan Viewer)
2. New Project Information / Requirements app
3. Notifications / Timeline
4. Admin / Configuration Management (for people, groups, firms)



The last two sessions of the day were demonstrations of some proof of concept work, mostly involving 3D models/graphics of doors and door hardware. Surprisingly to Allegion, this user group (Architects and spec writers) found little value in these ideas, and discouraged our pursuing them into real tools for Design. It was noted that these may have far greater value for owners and general contractors.

<sup>2</sup> CadTechnologyCenter (CTC), is an Autodesk reseller that develops the Revit plugin ‘SuperDoor Configurator’.

## Takeaways

Any way you look at it, this event was extremely successful and valuable to Allegion and to the Architectural firms represented. Of special note are the team members that attended the event, their inputs into the process of creating this new portal, and the outstanding results of this collaborative effort. Feedback from the participants was beyond outstanding; refer to the Participant Quotes section below. Practically a dozen architects representing eight firms took time out from their typically busy schedules to join this amazing two-day effort. All attendees are used to communicating by numerous digital means, but rarely have the opportunity to engage others in person so that information is processed in actual real time, analog fashion.

All of the architectural firms gladly offered real projects for Beta testing when they saw what significant amounts of time they were able to save – and the product has not even been released yet. Further, the architects involved are eager to continue their participation through weekly conference calls, especially since they are getting to design the software that they (along with their firms) will be using. Two user councils have been formed, the Architectural User Council, and the Specification writers' User Council; these councils will be managed independently while functioning as a single group.

The group decided that another event should be held in the near future, possibly in as little as six months. The quality of both input and output from the conference was enhanced by the immediacy of feedback and tangible results: the BETA program, which was kicked off at the end of the event, now includes:

- Two professional sports stadiums
- A hospital
- A multi-family housing project
- An airport
- An intermediate school
- Two college housing projects

The team plans to continue to simplify use of the platform while increasing the abilities of the software. More automation along with further developments in hardware and software will increase speed and efficiency of data exchange, and we are pushing to maintain the momentum of these improvements. At present, Overtur is lightning fast compared to our previous offerings (e.g. SpecExchange); information that used to take an hour to complete transferring between team members can now be accomplished in minutes, even seconds. Overtur is also far faster than our competition; one user at the event indicated that a data transfer to ASSA-ABLOY that took almost an hour took less than 3 minutes with Overtur.

Future events will continue to improve the existing products and explore ways to improve value to our customers by adding features and apps. The opportunity for the team to directly interact with one another proved that the forum was a success and accelerated the product development process. While much of the overall direction was validated, several course-corrections were made. For example, major findings from this event demonstrated a need for the platform to have an enhanced architectural review and checking tool, which would represent a completely different version of the Overtur Review Plans app. One of the most important findings was that the group realized that there was no need to create or support a Revit plugin for creating graphic representations of doors and door frames (e.g. SuperDoor). The architects and specification writers will keep this process ongoing and work to improve existing features and develop new ways to address both the present and future goals of the team and clients.

This must remain a continuous operation for Allegion to stay ahead of the competition. The entire team will continue testing products for maximum usability and value.

Overtur is eagerly anticipated and the team is looking forward to its release. This platform will alter how firms address their hardware specifications quickly, as word gets out. As one attendee said:

“This is gonna be an AWESOME product!”

## Participant Quotes

Video testimonials were solicited from various attendees. Following quotes are excerpts from those testimonials.

Kevin Stuhrenberg, ArcDesign Architects

*It's a great thing, we've used Spec Exchange in the past at our firm; we've really enjoyed the communication tool you guys designed- for us to share information digitally and quickly is a step in the right direction...including the web browser component- being able to go somewhere else to discuss things and mark things as well... it's exciting being a part of it early on, to see how it works, so thanks.*

*The collaborative effort right now that we're experiencing is a great thing. We've been able to share things, you know, pretty openly and kind of hear things from both sides of the world (architects and spec writers) along with the third side (app developers) to understand how difficult that may be to do or, a better solution for that, so it's nice having everyone there. I don't think it would have worked had you left a party out, as much as you are expecting it to work- as far as how do you make it work for everybody 'cause I think we talked about the circle involved in sharing that information so it is a complete circle; so it's good that you have everybody involved.*

Brad Brown, BSA Life Structures

*Probably what's the most exciting is it will help bridge the gaps between us (architects) and owners.*

About Plan Viewer:

*Being able to see that info together at the same time- get same info live- is invaluable, plus we don't have to have some cumbersome Revit model. Some of these models get large and they're hard to navigate.*

*The event's been awesome. Being able to interact with like-minded individuals who want to have (the) same goal but completely different backgrounds, completely different experiences, bring all those together, we'll probably get an end product to market faster. You're live problem solving on the fly, it's probably gonna take months off the project.*

*It's been a great experience. Again, I love working with you guys and thanks for the opportunity, it's been a blast.*

Ryan Benson, Schmidt Associates

*I like the idea of having (the portal) hosted in the cloud so that it can be accessed by both the spec writers and architects. We can collaborate between the two of us or potentially even with a security consultant or other consultants, or even the owner.*

*...interaction's been good, collaboration's been good. Seeing it from everyone's side has been eye-opening.*

*Yes, yes, it'll help us (our firm) as we-just that process- it will potentially shorten that feedback loop between the spec writer and the architect. I think it'll help on the quality of the sets and even the turnaround time communicating, and then it'll help in the end give the owner really what they want in their projects.*

Jennifer Weaver, FKP Architects

*I think the event has been good...it takes us away from our desks. It takes us away from those distractions and forces us all to work together. It puts us in that zone of figuring out a problem and how to solve it without those distractions of our office.*

*I like that it's cloud-based, and we are in multiple offices, so it works really nicely and it means that I can send something out, and possibly assign some people in my office and they can also get that information...*

*(With) Plan Viewer...I can quickly go through and review, and click what's been reviewed or not reviewed...matching of door hardware sets, especially for those big projects I have is imperative to have because it's a daunting task.*

Stacy Wiggins (IT) and Paula Neal (Architect), Corgan Architects

Paula:

*I think we've been a really great team because I come from the architect's side at Corgan, she (Stacy) from the design applications (IT side) at Corgan, so together we are able to have a holistic view of how this software is gonna work within our firm, both the user and IT maintenance side.*

Stacy:

*And end user perspective, completely holistically around as far as usability and experience going forward.*

Paula, regarding working with spec writer at event:

*Well, we've been working with Steven for some years now, so it was nice having a perspective from somebody that we know and we've worked with- versus somebody that's new to us and will have a different perspective as far as how we work and what kind of projects we work on.*

Stacy, regarding collaborating with developer:

*It was nice talking to Paige. Paige is really intuitive and is a great listener, so she took down a million notes and we're able to get a lot of our opinions across as far as the process for installation, the process for usability...and it was also great that I had never used it (Overtur) before today's meeting, so I came with a fresh perspective of everything.*

Paula:

*I think it's going to be a good addition because it allows us to use our current door families without having to start over and coordinate with our door schedule...*

Stacy:

*And our door families are massive, so perfect!*

Farah Baig, Allegion (Dubai)

*Oh, it's been beyond expectations (the conference), it was amazing, especially when you (David Fouche') and Tim (Eckersley) opened the session, and the reason behind it, and how it could help the specwriter, the architect, the collaboration, the tools, it was amazing...*

*It gives an insight how they (architects) work (and) where we get involved, what are their pain points, and how are we coming together to solve them? That's really amazing.*

*...now when we are sitting with the architect, we are trying to figure out...what information we need from them, what submission(s) they need from us, and what type of delivery they need. All of this stuff is like avoiding the- avoiding the repetition, the emails, contacts...all this is avoided we are directly on a job, so the tool helps...*

*(At our table) Our architect is Jennifer Weaver, she's from FTP and I'm a spec writer, and another spec writer Joe, and the developer is Steve, amazing, we are all teamed up and every question, like every step, like...now this dialog box comes up. How would an architect want this to be, and how a spec writer wants to see it. You know, each click is like (results in) a ten to twenty minute discussion... we are making it. It's not like we are getting a ready-made tool and then we struggle with it.*

Responding to the question 'So that process- that'll result in a better set of tools?':

*Yes, yes, definitely. That's the way we want it, right? Like this whole meeting or conference is set up like, ah, we wanted to design a tool tailored according to the architect's needs and according to the specwriter's needs... I think the output will be great.*

Responding to the question 'Will this make the specwriter's job easier and better and more accurate?':

*Yes, definitely, right from the first step, like what documents we're receiving, like what we want to see in a door schedule, that's what we are discussing with the architect.*

Regarding Spec Mapper and Plan Viewer:

*...Everything's available in one screen. We can sort it in different levels, things like hardware, access control, fire rating, we can see the hardware set, we can see the schedule, we can choose the project...it will save a lot of time.*

Tom Kemp, Architect, RATIO Architects

*...so the value that we see in this is making our staff more efficient in the long run, helping to build the tool that we're gonna use on projects is gonna make our projects and staff more efficient, so investing my time in that effort up front we feel like it's gonna pay off in the next 1, 3, 5 years in efficiency gains on our projects.*

*I think the development team's done a great job with kind of getting a framework in place, there's a number of things that can be fine-tuned so that it makes it easier for users on our end to interact with the system and with the spec writers.*

*From my perspective, my main role is as a BIM specialist, so I'm supporting our users and our architects and designers, training, promoting standards or whatever, so having a cloud solution for something like hardware- I don't want all of that data in my Revit model, but I want my users to be able to get to it and know the information that we're accessing's up-to-date and accurate, so having that cloud portal we can push the information we need into the Revit model, but then the spec writers on our end can still get to the information and the people handling construction administration can still get to the information... that's a huge benefit to us.*

Aaron Owens, Allegion:

*(We're) just really listening to the customer this time-what it is that's valuable to them.*

*So, from a perspective of everything being based in the cloud (portal), it's accessible, it teaches you to create collaboration teams on projects and be able to share that information from anywhere...*

*Using the cloud platform lets us communicate with the architects and see what they're doing more real-time and see what we're doing more real-time.*

*The other benefit that I see to us going to the cloud-based solution, the plug-in itself is much lighter than previous plug-ins.*

Yogi Ishwar, IBI (Canada):

*Yes, I feel that this particular implementation on this plug-in is probably over the long run (going to) help a lot of architectural firms because this is one part of our business where we really don't spend too much time, and time and resources, but if a company like Allegion can help us with this, I think it would relieve us from a lot of- our internal spec information, writers, stuff like that.*

Regarding Plan Viewer:

*For (sic) what I've seen, I think for an initial start that it's a great interface. There's a few touch-ups we need to do on cost estimating part but overall it's a great way to start; and in our sessions we have also kind of given our thoughts in it and I hope to see all those get incorporated.*

Justin Scheitlin, Allegion

*I think this is different for us (from what we've done before) because we get to interact with the spec writers and the architects. Just having the ability to see how they interact with the system and give us quality feedback, like real-time, that we can interact and ask questions...*

Regarding capturing feedback:

*Right now, we're capturing feedback in Trello (an online discussion and info-sharing site) which allows us to also ask questions as well.*

Regarding the benefit of having an IT/ developer at each table:

*Absolutely, yeah, 'cause I think all of us have different perspectives and when we can come together and hear those again it's going to help us prioritize the features.*

*Oh yeah, this is gonna be an awesome product; mainly because I think, you know, we are creating software. And we're creating software people will actually use.*

*...how can we provide a tool that will help them interact with us, and provide value they might not have gotten somewhere else?*

Steve Richardson, Allegion

*I think (the portal) it's fantastic for the spec writing community. I think it's a pivotal moment in our organization...we're taking feedback, we're taking honest answers, collaborative answers, and we're finding a solution that works for everybody- so I think the- what's been presented here is pivotal, it's different, it's outside the box thinking and I think it's gonna be a game changer for our company.*

Regarding the individual collaboration group:

*My table's great. I've got Paula Neal, architect from Corgan, one of our largest clients we have in the Dallas area; really, around the country, and she's on the production side of it, then Stacey Wiggins who's in their IT (head of) department right there, so we have a really good collaboration of user and developer and so it's really a cool mesh between people who are gonna interact with this portal... on a daily basis...*

Regarding the event:

*It's been worth everybody's time, it's phenomenal. There's been buy-in from developing and everybody. I mean everybody's contributing in this room...allows them to feel like they're part of the experience.*

Responding to the question 'Is the feedback high level or detail?':

*It's both. It starts very high level, 30,000 feet and people start developing these ideas as they kind of dive into them deeper you find that the detail behind it- they start- you know, the wheels are constantly turning in their head, not only the architects, but the spec writers as well; and there's collaboration back-and-forth...*

Responding to the question 'Is the Plan Viewer a good tool?':

*Absolutely! Plan Viewer is what I envisioned as one of the pivotal coordination pieces for what we were trying to develop here. The reason being is we want one place where somebody can sit down for coordination. That coordination needs to be not only the architect and Allegion, but also we're thinking third parties and contractors, security consultants, basically any related trade. This tool can be used to sit down with an owner; and it just shows value, value to the architect, it adds value to us at Allegion, and where we stand in the market and how we do production.*

*(With) Plan Viewer...I can quickly go through and review, and click what's been reviewed or not reviewed...matching of door hardware sets, especially for those big projects I have is imperative to have because it's a daunting task.*