



Exchanger Industries designs and manufactures heat transfer equipment – in diameters up to 14 ft., lengths to 100 ft. and with 4 in. plates – in support of the oil, gas and petrochemical industries. They operate a 70,000 sq. ft. fabrication and design facility with \$45 million in annual sales.

## Automatic Project Generation at Exchanger Industries

### Rapidly Generating Projects in P3 with Updating and Progress Feedback

**Using historical data, Emerald created evergreen templates – resulting in better project management, quicker turnaround and larger sales.**

Exchanger Industries are not, in fact, manufacturers in the normal sense but rather fabricators and assemblers of 'engineered to order' packages. There are, on average, 40 projects delivered per month as a result of three times that number of quotations. Different project types have different seasonal cycles with severe peaking of demand.

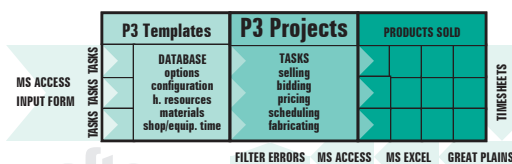
The challenges to Exchanger were to:

- manage resources, including shop space and equipment;
- maintain quality while meeting commitments;
- quickly develop bids that evaluate commitments of time, resources and costs realistically;
- use that same bid basis for the project when it becomes a sold job; and
- capture accumulated corporate knowledge in a way that automatically feeds back in a process of continuous improvement, keeping the Company ahead of its competition.

Emerald analysed the situation and determined that many projects had the same basic sequences, differing only in the combination of options chosen, the configuration and the scale. Two years of historical information allowed resource usage per task to be closely estimated.

The approach adopted was to create a library of resource-loaded templates in P3, accessed by a simple input form in MS Access. This captured all the required parameters of the project such as: type, configuration, options, materials, scale, shipping, etc. As the project progresses it is updated by exporting time card information from Great Plains Accounting to MS Excel, and then to a simple MS Access input form. From there the data can be verified, modified and supplemented before exporting it to update P3.

Exchanger accrued significant advantages by generating quotations economically and rapidly with confidence in their delivery promises. The same data kicks off a sold project and enables them to fulfill their commitments. Corporate memory is captured in the templates which are constantly refined in the light of experience.



after



before

Emerald Associates, Inc. is a leader in integrating and implementing project management, computer, accounting, and maintenance solutions. Emerald is a Primavera Authorized Partner as well as a Primavera Solution Provider.

**Software Tools Used:**

- Primavera P3®
- Great Plains Accounting®
- MSAccess®
- MSEXcel®

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