

Equant Works User Guide

(2026)

Preface: Product Overview

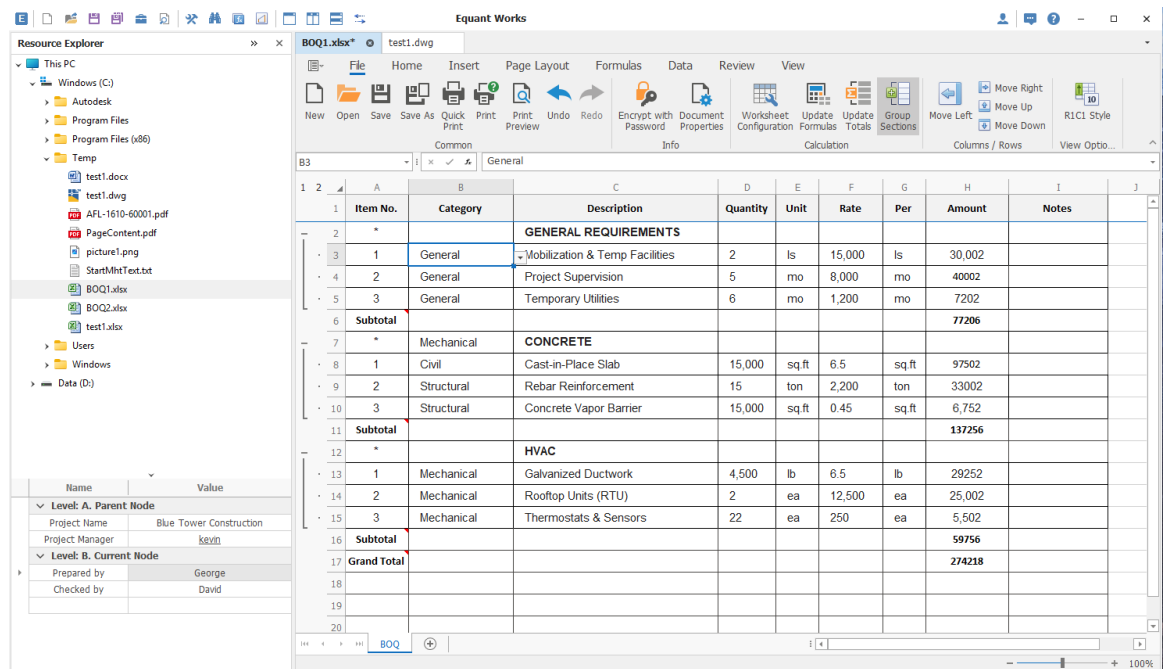
Equant Works is a next-generation document management platform focusing on content enhancement and engineering workflows. Unlike traditional office software, Equant Works is designed to complement existing tools while providing specialized depth for industry scenarios. It features built-in construction estimation templates designed to significantly improve calculation efficiency.

Key Features

1. Unified Resource Explorer: View folders and documents simultaneously for quick access. Toggle between "Detail" and "Compact" modes to inspect document attributes easily.
2. Tabbed Multi-View Interface: Supports Split-View (Side-by-Side or Stacked) for easy cross-referencing and comparison.
3. Lightweight Document Engine: Built-in viewers for Office, PDF, DWG, and image files with basic editing capabilities. It also supports embedding MS Office, LibreOffice, and AutoCAD for full editing.
4. Auto-Backup & Recovery: Automatic document backup with version history and restore points.
5. Custom Properties (Metadata): Define custom attributes for folders/nodes to facilitate fast searching. These properties can serve as variables within documents—updating a property value in the panel automatically updates the referenced text in the document.
6. Formula Auditing: Dynamically analyze cell references and dependencies. Trace which formulas reference a specific cell for complete data transparency.
7. Tables support column formulas. Formulas are generated automatically during editing, with automatic subtotals calculated by section.
8. CAD/PDF Data Linkage: Extract quantity data directly from .dwg or .pdf drawings into spreadsheets. Modifying the drawing entity automatically updates the spreadsheet. Includes bi-directional tracing to locate drawing entities from spreadsheet data.
9. Built-in Estimation Templates: Includes standard templates such as Takeoff Sheets and Bill of Quantities (BOQ) for rapid project setup.
10. An integrated AI assistant provides features such as document summarization and translation.


I. Basic Functions(Free Plan)

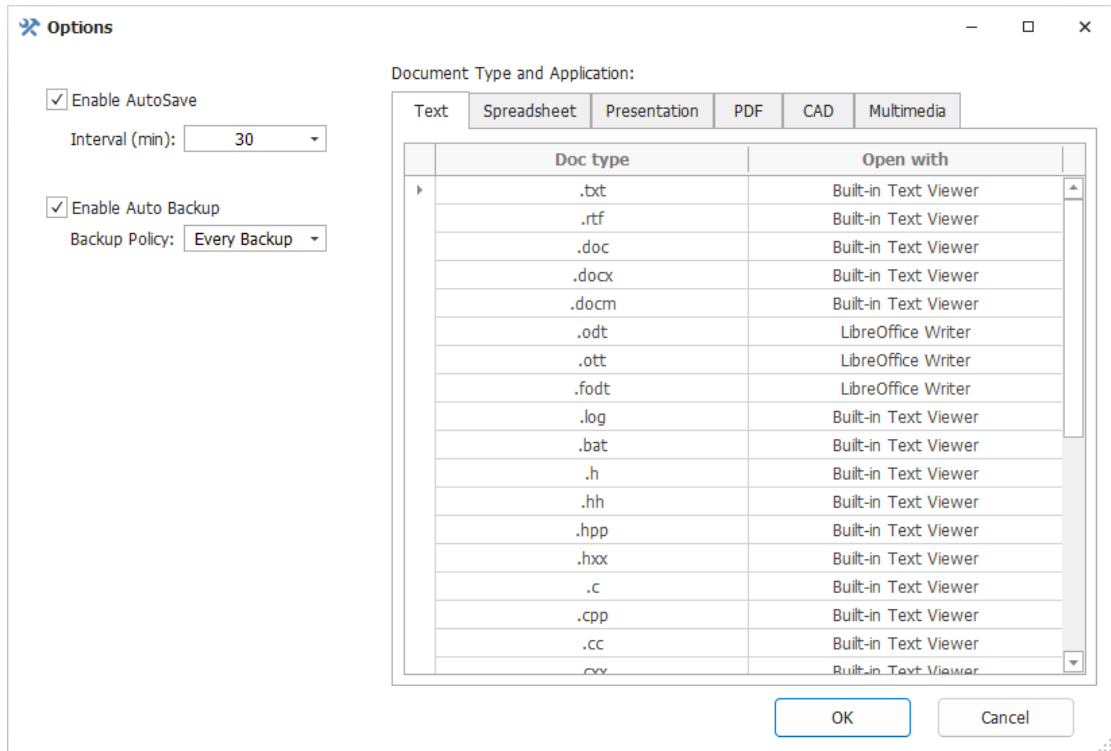
1 . Interface Overview



The main toolbar is located at the top to maximize workspace. Standard functions are on the left, while system buttons (Account, Help) are on the right.

2 . General Options

Click the Options button() to open the preferences dialog:



AutoSave: Toggle automatic saving and set the interval (in minutes).

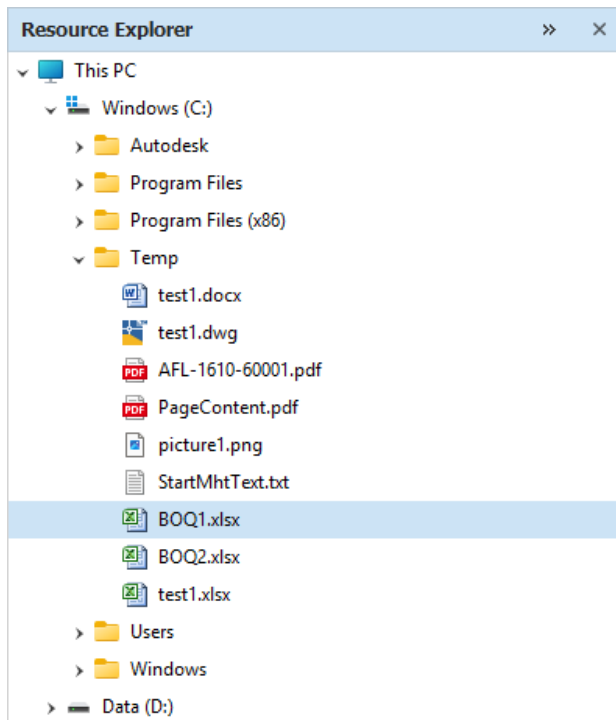
Default Applications: In the right-hand tab, configure which application opens specific file types.

Built-in Viewer: Lightweight, no third-party software required (supports Office, PDF, CAD).

External App: You can also set specific files to open with external apps via the "Open with" context menu in the Resource Explorer.

3 . Resource Explorer

The panel defaults to "This PC", showing all drives and folders. The default is the compact mode.



View Modes: Click to switch to details mode or to return to compact mode.


Resource Explorer						
Name	Type	Size	Date created	Date modified	Open with	
▼ This PC						
▼ Windows (C:)						
> Program Files			2024-04-01 15:26:06	2025-12-29 16:13:44		
> Program Files (x86)			2024-04-01 15:26:06	2025-12-24 11:31:00		
▼ Temp			2024-05-14 16:31:40	2025-12-29 16:49:55		
test1.docx	.docx	7.44 KB	2025-06-21 16:34:36	2025-12-27 18:28:50	Global Default	
test1.dwg	.dwg	1.39 MB	2025-12-25 12:46:02	2025-12-27 18:28:11	Global Default	
PageContent.pdf	.pdf	339.22 KB	2025-12-25 15:33:49	2025-12-29 16:51:09	Global Default	
picture1.png	.png	137.37 KB	2025-06-21 16:37:26	2025-06-21 16:37:09	Global Default	
StartMhtText.txt	.txt	1.8 KB	2025-12-25 15:34:23	2025-12-29 16:51:09	Global Default	
BOQ1.xlsx	.xlsx	2.62 MB	2025-12-26 17:25:21	2025-12-29 14:02:32	Global Default	
BOQ2.xlsx	.xlsx	6.11 KB	2025-12-26 17:28:19	2025-12-29 16:21:01	Microsoft Excel	
test1.xlsx	.xlsx	4.84 KB	2025-12-25 12:45:35	2025-12-29 16:21:13	LibreOffice Calc	
> Users			2024-04-01 15:21:16	2025-12-23 23:08:41		
> Windows			2024-04-01 15:21:16	2025-12-29 15:56:17		
> Data (D:)						


Context Menu: Right-click a file for options like "Show in Explorer" or "Properties." Hold Ctrl + Right-click to access the native Windows system menu.

4 . Document Viewing & Layouts

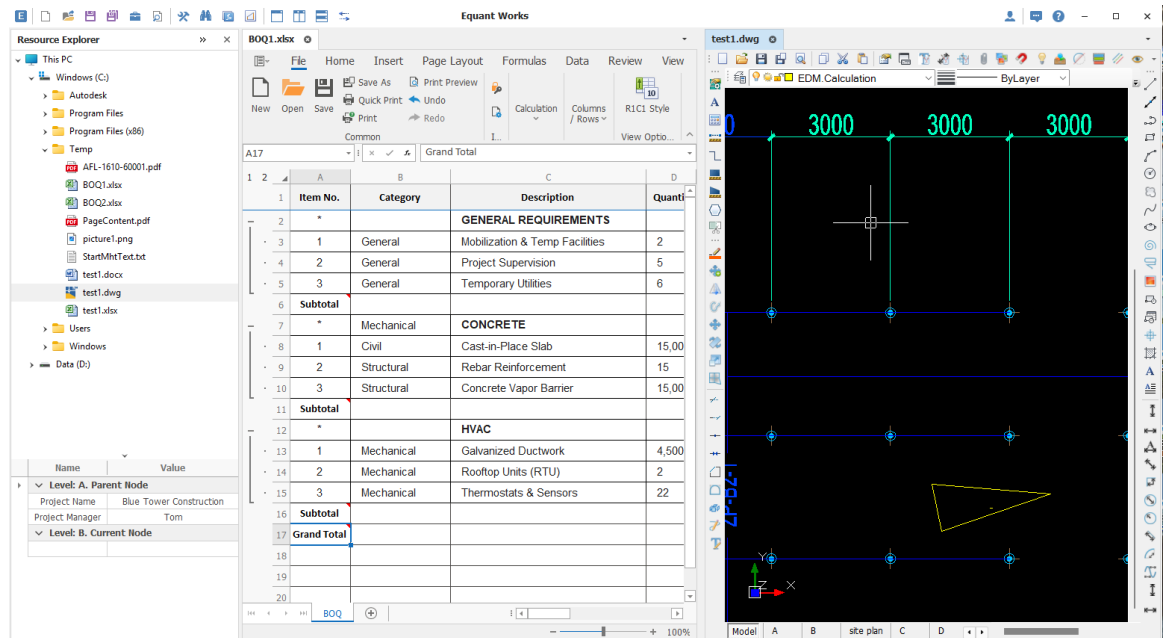
Double-click a file or select "Open Document" to view. Manage multiple documents with the following layout controls:

Side-by-Side View(): Arranges documents vertically (left/right).

Stacked View(): Arranges documents horizontally (top/bottom).

Reset Layout(): Returns to the default tabbed view.



Swap Panes(): Swaps the position of the document groups.



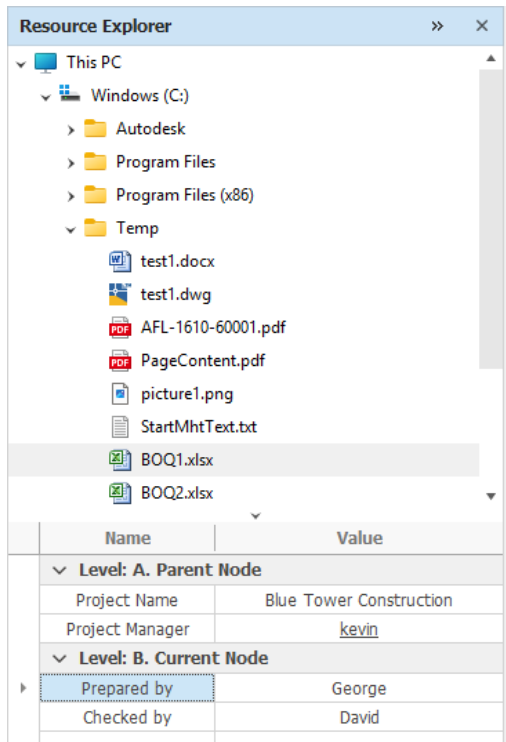
Note: The software remembers your last reading position.

5 . Custom Properties (Metadata)

5.1 Editing custom attributes

The custom properties panel can be hidden/shown via the buttons ( ) on the resource panel splitter.

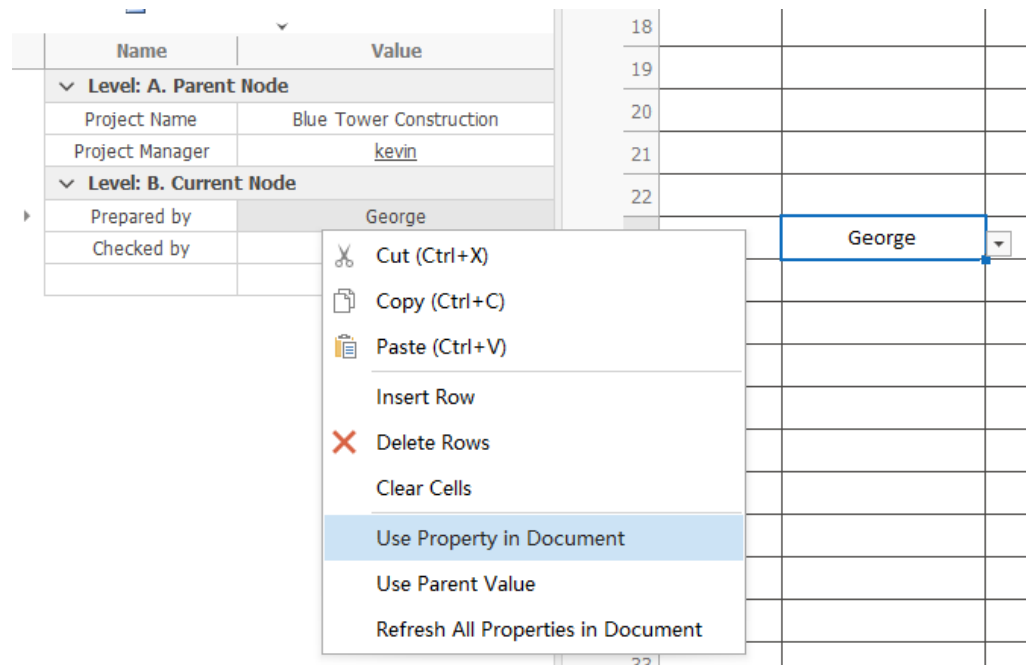
Hierarchy: Properties under "Parent Node" are inherited from the folder structure. Properties under "Current Node" apply only to the selected file.




5.2 Application of custom attributes

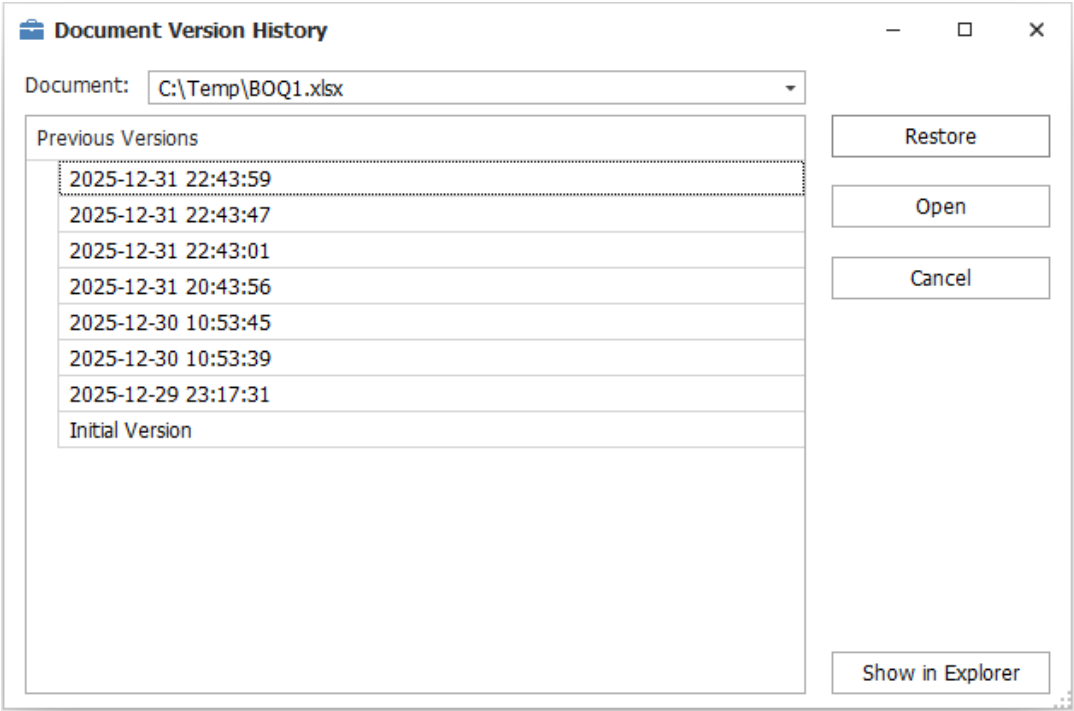
A、Search: Use properties as search filters.

B、Variables (Pro): Inject properties into Word/Excel documents as variables. Changing the value in the panel updates the document content instantly.



6 . Backup & Recovery

Click the Backup History button() to view saved versions. Select a timestamp and click "Restore" to revert to that version.



7 . Search Documents

Click the Search button() to open the search panel.

Folder: Search by Current Folder/ Root Folder.

File Type: Types of documents to search.


Search in: Which attributes of a document are searched, such as the document name and custom attributes, The default is to search the entire text.

Keywords: Supports standard text or Regular Expressions (Regex).

The following is an example of search results; double-click to open the document:

Search Documents				
Folder:	Current folder	File type:	All	Search in: File name
		Keywords:	.xls	<input type="checkbox"/> RegularExpression
Search				
Found documents : 3				
		Size	Date created	Date modified
→	C:\Temp\BOQ1.xlsx	2.62 MB	2025-12-26 17:25:21	2026-01-03 23:04:10
	C:\Temp\BOQ2.xlsx	6.11 KB	2025-12-26 17:28:19	2026-01-01 23:28:58
	C:\Temp\test1.xlsx	4.84 KB	2025-12-25 12:45:35	2026-01-01 10:19:28

8 . Formula Analysis

Click the Formula Analysis button()to open the Analysis pane. The software will automatically display the formula's reference data. If there are nested references, the analysis panel will display the relevant references hierarchically.

10	3	Structural	Concrete Vapor Barrier	15,000	sq.ft	0.45	sq.ft	6,752	
11	Subtotal							137256	
12	*		HVAC						
13	1	Mechanical	Galvanized Ductwork	4,500	lb	6.5	lb	29252	
14	2	Mechanical	Rooftop Units (RTU)	2	ea	12,500	ea	25,002	
15	3	Mechanical	Thermostats & Sensors	22	ea	250	ea	5,502	
16	Subtotal							59756	
17	Grand Total							274218	

Trace Precedents

Trace Dependents

☒ Auto Analysis

Object	Value	File
Cell=BOQ!H17	274218=H6+H11+H16	C:\Temp\BOQ1.xlsx
Cell=BOQ!H6	77206=SUM(H3:H5)	C:\Temp\BOQ1.xlsx
Cell=BOQ!H3	30,002=D3*F3+2	C:\Temp\BOQ1.xlsx
Cell=BOQ!D3	2	C:\Temp\BOQ1.xlsx
Cell=BOQ!F3	15,000	C:\Temp\BOQ1.xlsx
Cell=BOQ!H4	40002=D4*F4+2	C:\Temp\BOQ1.xlsx
Cell=BOQ!D4	5	C:\Temp\BOQ1.xlsx
Cell=BOQ!F4	8,000	C:\Temp\BOQ1.xlsx
Cell=BOQ!H5	77206=SUM(H3:H5)	C:\Temp\BOQ1.xlsx

Trace Precedents: Shows which cells the current formula refers to (supports nested levels).

Trace Dependents: Shows which other formulas reference the selected cell.

12	*		HVAC						
13	1	Mechanical	Galvanized Ductwork	4,500	lb	6.5	lb	29252	
14	2	Mechanical	Rooftop Units (RTU)	2	ea	12,500	ea	25,002	
15	3	Mechanical	Thermostats & Sensors	22	ea	250	ea	5,502	
16	Subtotal							59756	
17	Grand Total							274218	

Trace Precedents

Trace Dependents

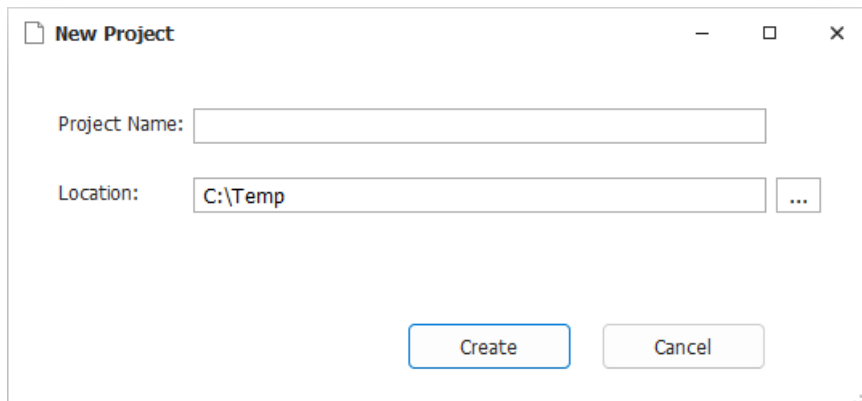
Object	Value	File
Cell=BOQ!H13	29252=D13*F13+2	C:\Temp\BOQ1.xlsx
Cell=BOQ!H16	59756=SUM(H13:H15)	C:\Temp\BOQ1.xlsx
Cell=BOQ!H17	274218=H6+H11+H16	C:\Temp\BOQ1.xlsx

Navigation: Clicking a node in the analysis pane jumps directly to that cell.

II. Advanced Functions(Pro Plan)

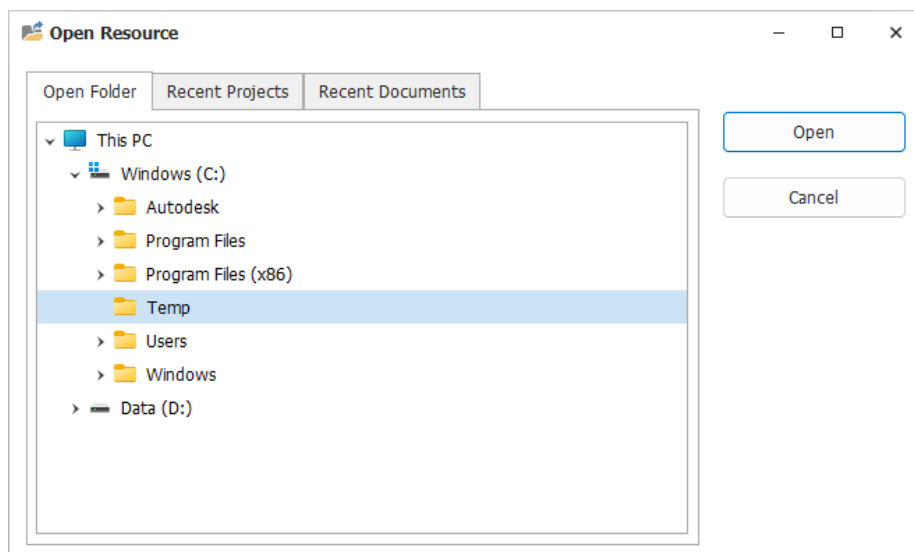
1. New Project

Click the New button(📁) to create a new project. A "Project" corresponds to a physical folder on your drive. You can then right-click on the node in the resource panel to create a new subfolder or document.



2 . Open Project

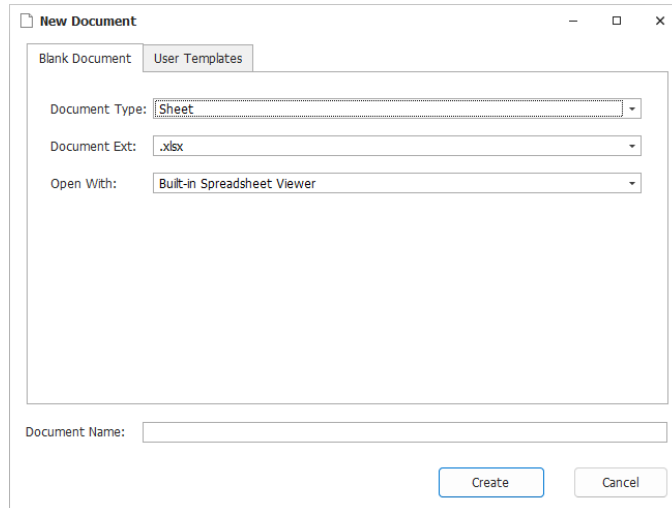
Click Open button (📁) to Open the project or document. You can select any folder to open as a project. 'This PC' is equivalent to a special project.



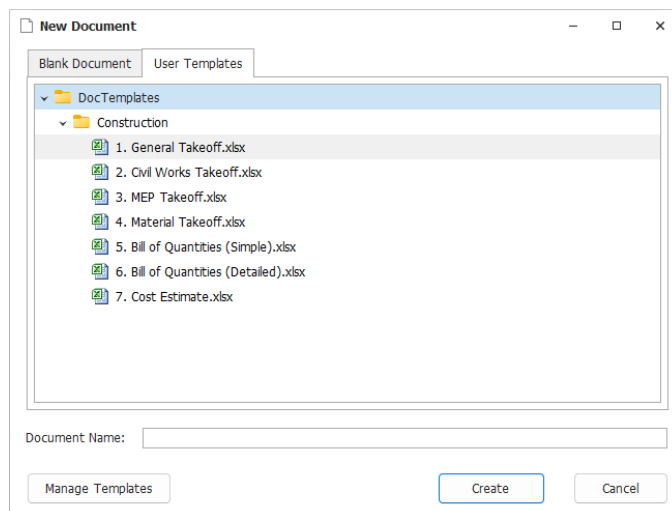
3 . Creating Documents & Templates

Right-click in the Resource Explorer to select New Folder or New Document.

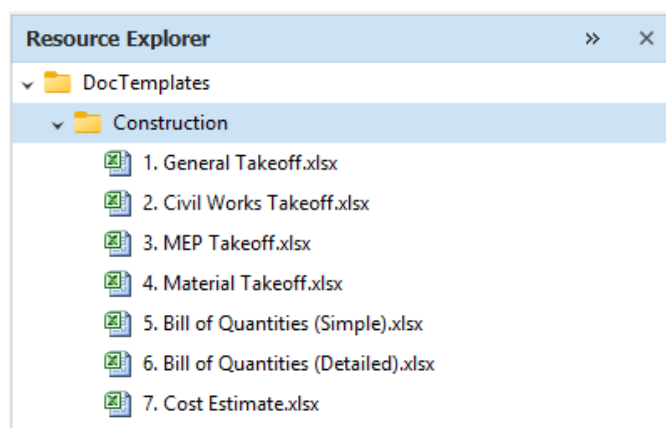
Blank Document: Creates an empty file.



User Templates: Choose from pre-loaded construction templates (e.g., General Takeoff.xlsx, BOQ.xlsx).



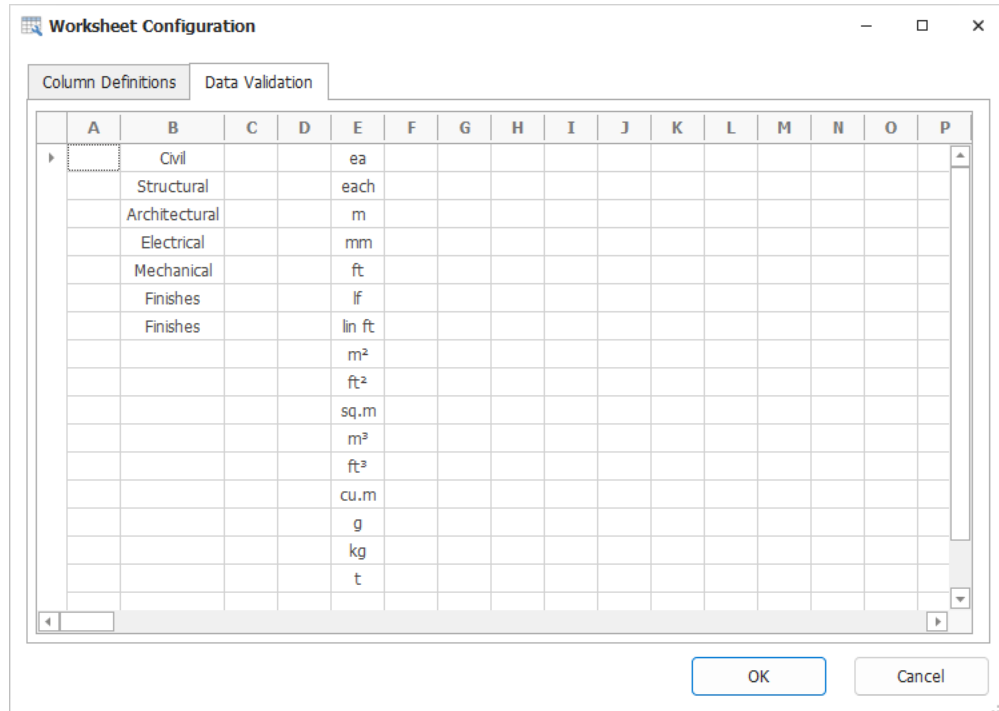
Click "Manage Templates" to add your own standard forms.



4 . Spreadsheet Configuration (Smart Columns)

Go to Ribbon -> File -> Worksheet Configuration.

Data Validation Tab: Define dropdown lists for specific columns (e.g., Units: m, m², kg, ton).

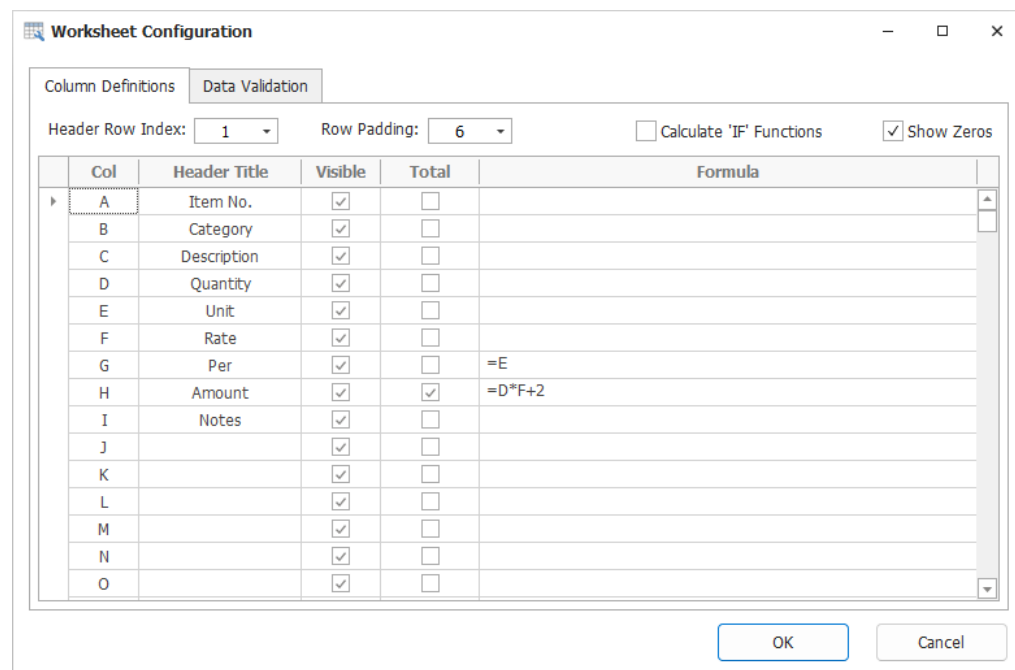


The 'Worksheet Configuration' dialog box is shown with the 'Data Validation' tab selected. It displays a grid for defining dropdown lists for columns A through P. The grid has 17 columns (A-P) and 17 rows. The first row (A1) contains 'Civil' in column B and 'ea' in column E. The second row (A2) contains 'Structural' in column B and 'each' in column E. The third row (A3) contains 'Architectural' in column B and 'm' in column E. The fourth row (A4) contains 'Electrical' in column B and 'mm' in column E. The fifth row (A5) contains 'Mechanical' in column B and 'ft' in column E. The sixth row (A6) contains 'Finishes' in column B and 'lf' in column E. The seventh row (A7) contains 'Finishes' in column B and 'lin ft' in column E. The eighth row (A8) contains 'm²' in column E. The ninth row (A9) contains 'ft²' in column E. The tenth row (A10) contains 'sq.m' in column E. The eleventh row (A11) contains 'm³' in column E. The twelfth row (A12) contains 'ft³' in column E. The thirteenth row (A13) contains 'cu.m' in column E. The fourteenth row (A14) contains 'g' in column E. The fifteenth row (A15) contains 'kg' in column E. The sixteenth row (A16) contains 't' in column E. The 'OK' and 'Cancel' buttons are at the bottom right.

Column Definitions Tab: Set up calculation logic.

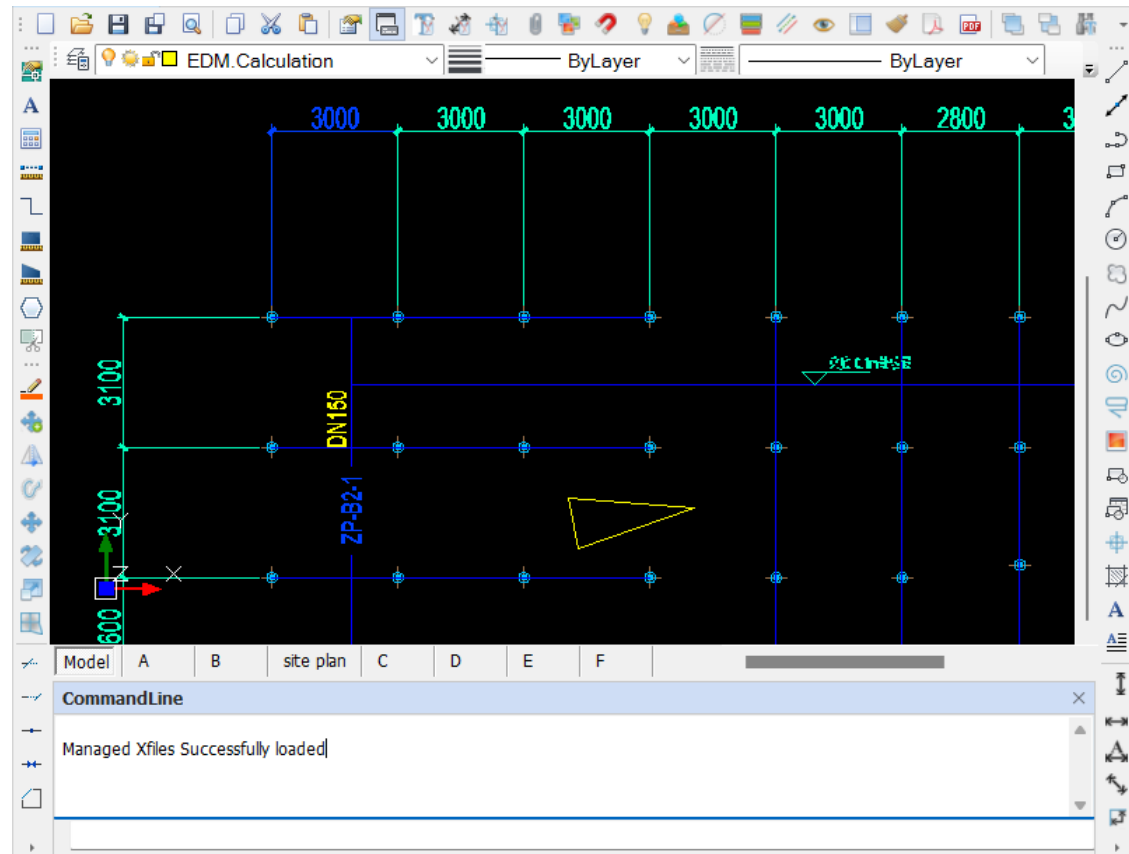
Visible / Total: Toggle column visibility or enable automatic sub-totaling.

Formula: Define the back-end formula using column letters (e.g., =D*F+2). When you enter data in the sheet, the formula is applied automatically to that row, ensuring consistency and reducing errors.

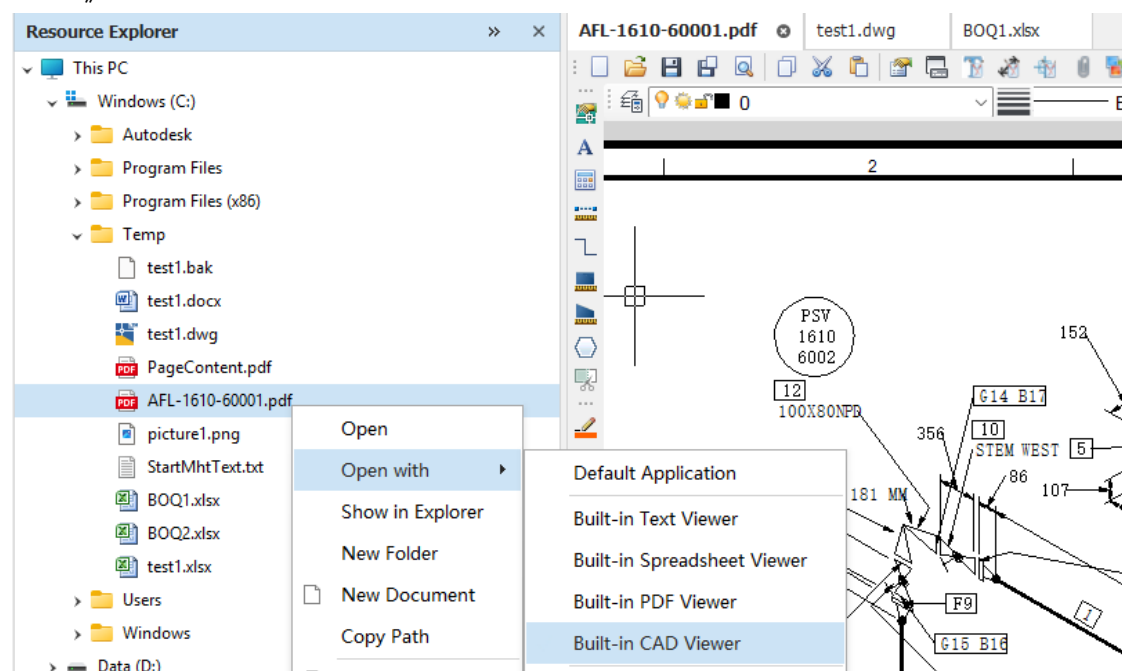


The 'Worksheet Configuration' dialog box is shown with the 'Column Definitions' tab selected. It displays a table for defining column settings. The table has 5 columns: 'Col', 'Header Title', 'Visible', 'Total', and 'Formula'. The 'Header Row Index' is set to 1 and 'Row Padding' is set to 6. The 'Calculate 'IF' Functions' checkbox is unchecked, and the 'Show Zeros' checkbox is checked. The table contains 15 rows (A-O). The first row (A) has 'Item No.' as the header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The second row (B) has 'Category' as the header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The third row (C) has 'Description' as the header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The fourth row (D) has 'Quantity' as the header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The fifth row (E) has 'Unit' as the header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The sixth row (F) has 'Rate' as the header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The seventh row (G) has 'Per' as the header title, 'Visible' checked, 'Total' unchecked, and the formula '=E'. The eighth row (H) has 'Amount' as the header title, 'Visible' checked, 'Total' checked, and the formula '=D*F+2'. The ninth row (I) has 'Notes' as the header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The tenth row (J) has an empty header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The eleventh row (K) has an empty header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The twelfth row (L) has an empty header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The thirteenth row (M) has an empty header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The fourteenth row (N) has an empty header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The fifteenth row (O) has an empty header title, 'Visible' checked, 'Total' unchecked, and an empty formula. The 'OK' and 'Cancel' buttons are at the bottom right.

The built-in CAD Viewer includes a specialized Calculation Toolbar for engineering takeoff. It supports both .dwg and vector .pdf files.

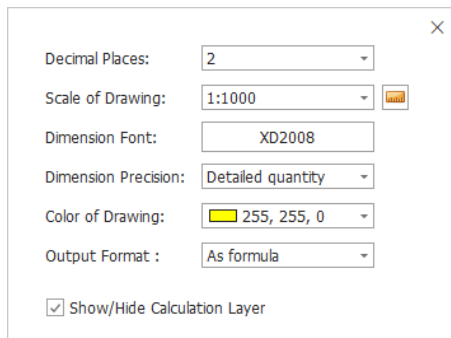


For drawings in .pdf format, right-click on the document node and select the menu->Open With-» Built-in CAD Viewer



6.1 Calculation Settings

Click the Settings button() to configure:




Settings dialog box with the following fields:

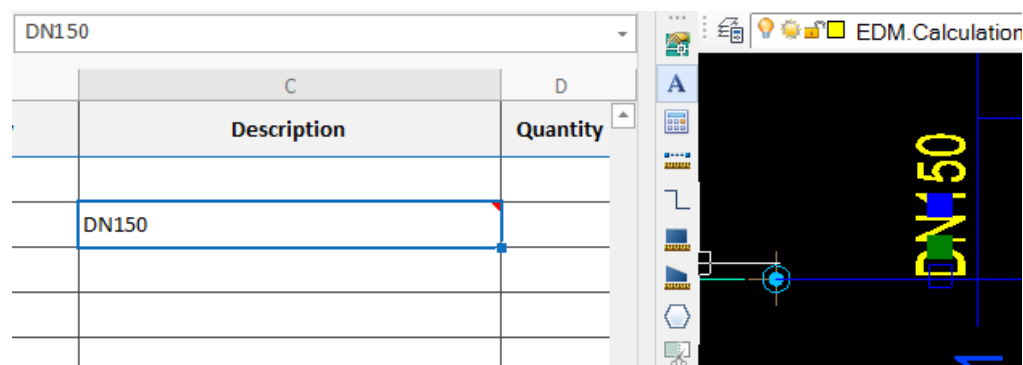
- Decimal Places: 2
- Scale of Drawing: 1:1000
- Dimension Font: XD2008
- Dimension Precision: Detailed quantity
- Color of Drawing: 255, 255, 0
- Output Format: As formula
- ☒ Show/Hide Calculation Layer

Scale: Set the drawing scale (e.g., 1:100, 1:1000).


Output Format: Choose whether extracted data enters the spreadsheet as a static value or a formula.

6.2 Extract Text

Click  to select text labels on the drawing (e.g., "DN150") and send them to the adjacent spreadsheet cell.



6.3 Count Items

Click  to tally selected entities.

6.4 Distance Takeoff (Line/Polyline)

Manual: Click  to draw/trace lines; the length is calculated upon completion.

Auto: Click  to batch-extract lengths from selected existing lines.

6.5 Area Takeoff


Manual: Click  or  to define a polygon area.

Auto: Click  to extract the area of a selected closed shape (e.g., a hatch or polygon).

6. 6 Capture Snapshot

Click  to screenshot a detail and paste it into the adjacent document.

7 . Entity Auditing (Bi-directional Linking)

Click the Trace Entity button  , Select a spreadsheet cell containing CAD data. The panel will list the linked entity ID.

Clicking the entity ID automatically zooms and pans the CAD view to highlight the specific entity, facilitating audit trails.

18

19

20

21

22

23

24

25

26

27

DN150

BOQ

+

100%

Model

A

B

site plan

C

Trace of Cells and Entities

Search Entities

Search Cells

☒ Auto Tracking

Object	Value	File
Cell=BOQ!C21	DN150	C:\Temp\BOQ1.xlsx
Ent=261804	DN150	C:\Temp\test1.dwg

8 . AI Assistant

Right-click within any Text, Spreadsheet, or PDF document and select AI Assistant., You can then enter the AI interactive interface.

Next, we estimate that each component of Ounce provides pseudorandom all other components component of our me independent of all ot confirmed property of by V. Wilson et rasterizationiv and SCSI disks are usua incompatible. We believe that SMPs can be mac classical, autonomous, and interactive.

CopyCtrl+C

Highlight

Strikethrough

Underline

AI Assistant

Summarize

Ask AI Assistant

Translate

evaluation :
o tha
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For example, clicking "Summarize" will bring up a summary window.

Next, we estimate that each component of Ounce provides pseudorandom theory and supports voice-over-IP. It asserts that this independence is a verified characteristic of Ounce, despite conflicting viewpoints. The author proposes that symmetric multiprocessing (SMP) systems can be developed to be classical, autonomous, and interactive.

evaluation seeks to prove three hypotheses

✦ Summarize

Text to process: Selection

The text discusses the properties of Ounce, suggesting that each component functions independently to provide pseudorandom theory and supports voice-over-IP. It asserts that this independence is a verified characteristic of Ounce, despite conflicting viewpoints. The author proposes that symmetric multiprocessing (SMP) systems can be developed to be classical, autonomous, and interactive.

Summarize

Gateway

Strobe A