

# Equant Works User Guide

## (2026)

### Preface: Product Overview

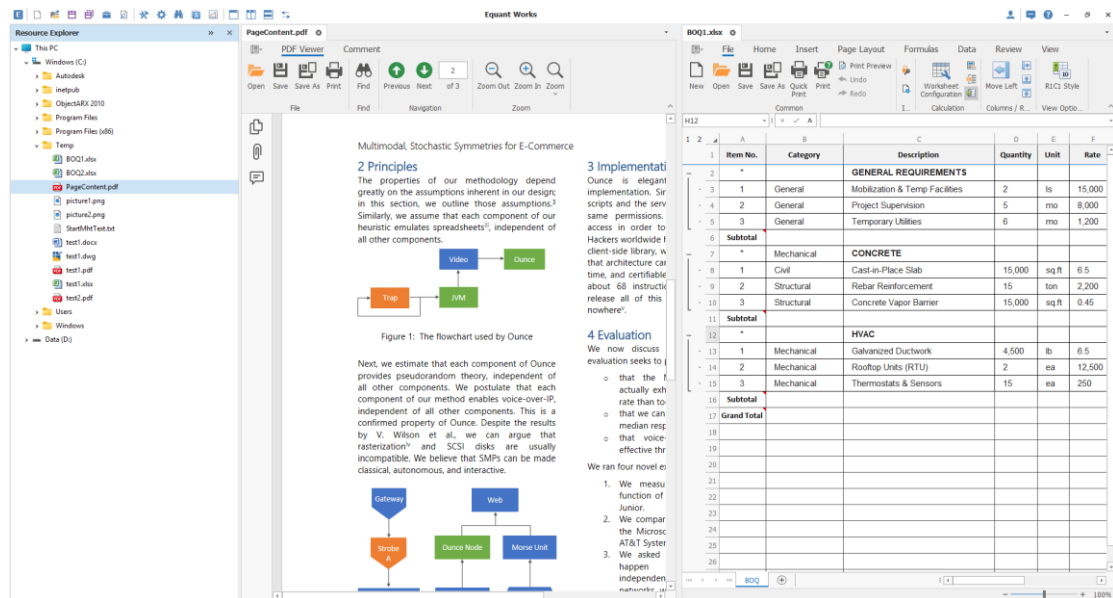
Equant Works is a next-generation document management platform focusing on content enhancement and engineering workflows. Unlike traditional office software, Equant Works is designed to complement existing tools while providing specialized depth for industry scenarios. It features built-in construction 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. Column-Level Formula Automation: Pre-set formulas for entire columns. Formulas are automatically generated when editing, eliminating the need for manual copy-pasting.
8. Automated Subtotals: Built-in logic for sectional statistics, tailored for construction cost estimation workflows.
9. 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.
10. Built-in Estimation Templates: Includes standard templates such as Takeoff Sheets and Bill of Quantities (BOQ) for rapid project setup.


# I. Basic Functions(Free Plan)

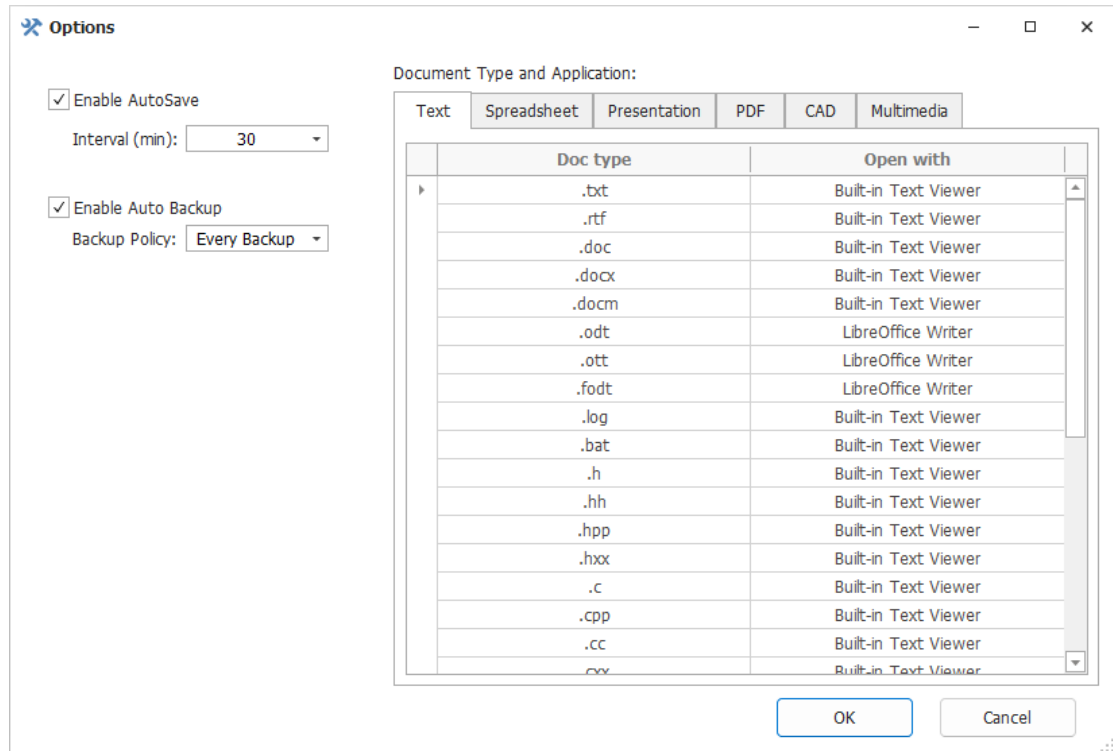
## 1 . Interface Overview



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).

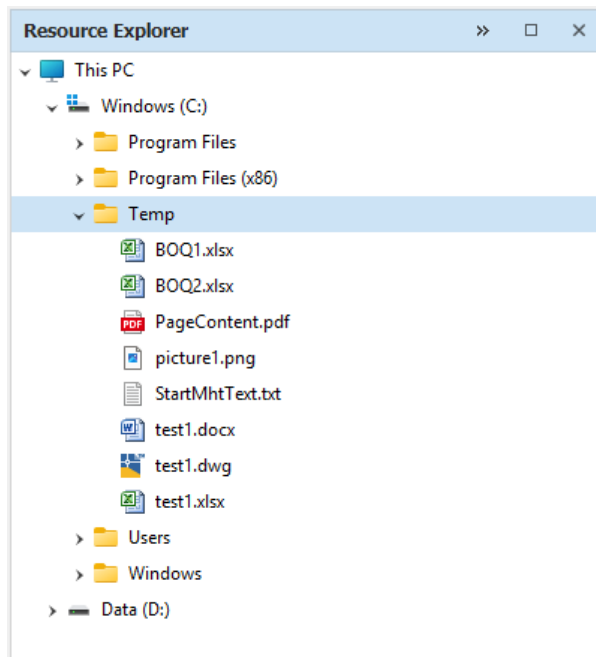
**Default Applications:** In the right-hand tab, configure which application opens specific file types.



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

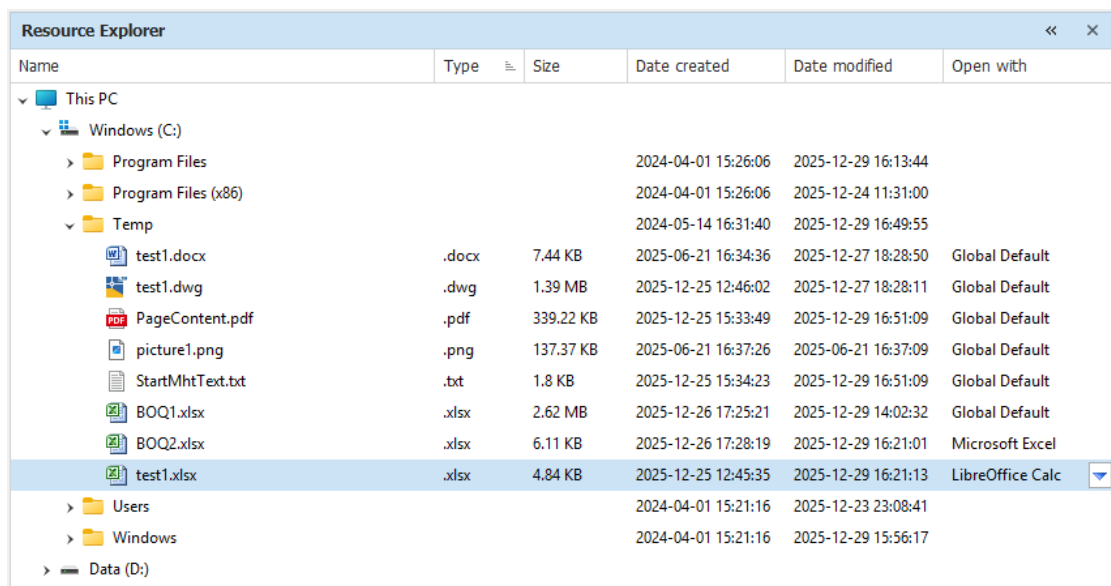
**External App:** You can also set specific files to open with external apps via the "Open with" context menu in the Resource Explorer.

### 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.




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.

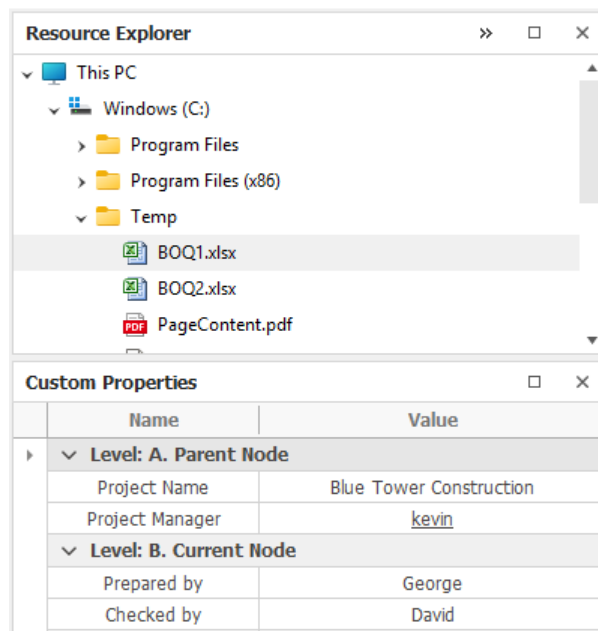
Note: The software remembers your last reading position.

## 5 . Custom Properties (Metadata)

### 5.1 Editing custom attributes

Access the panel via the Properties button().

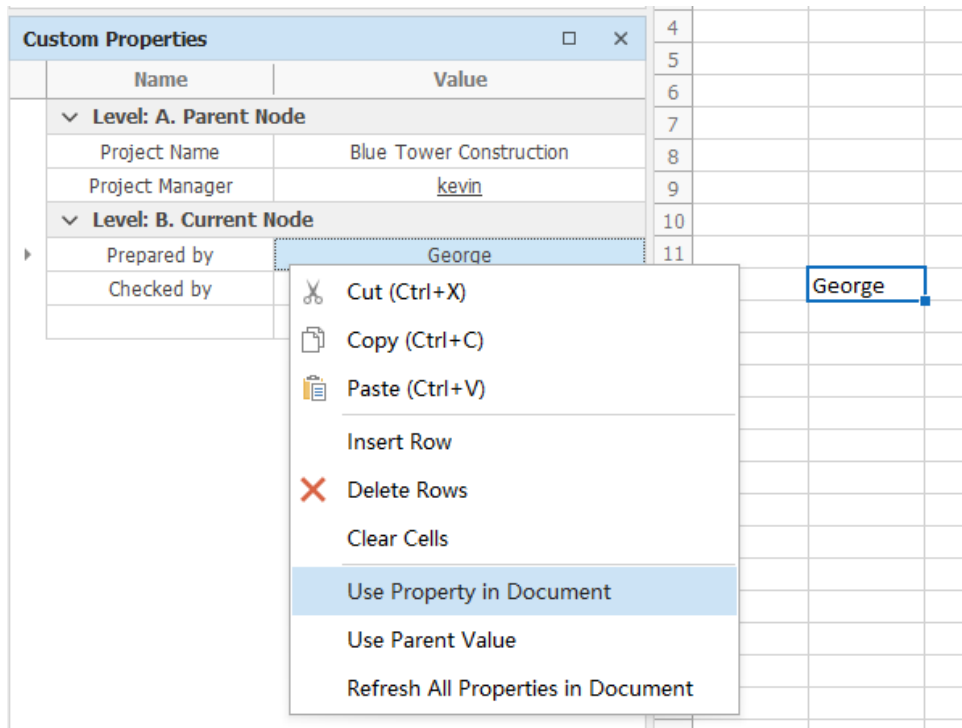
Hierarchy: Properties under "Parent Node" are inherited from the folder structure. Properties under "Current Node" apply only to the selected file.




### 5.2 Application of custom attributes

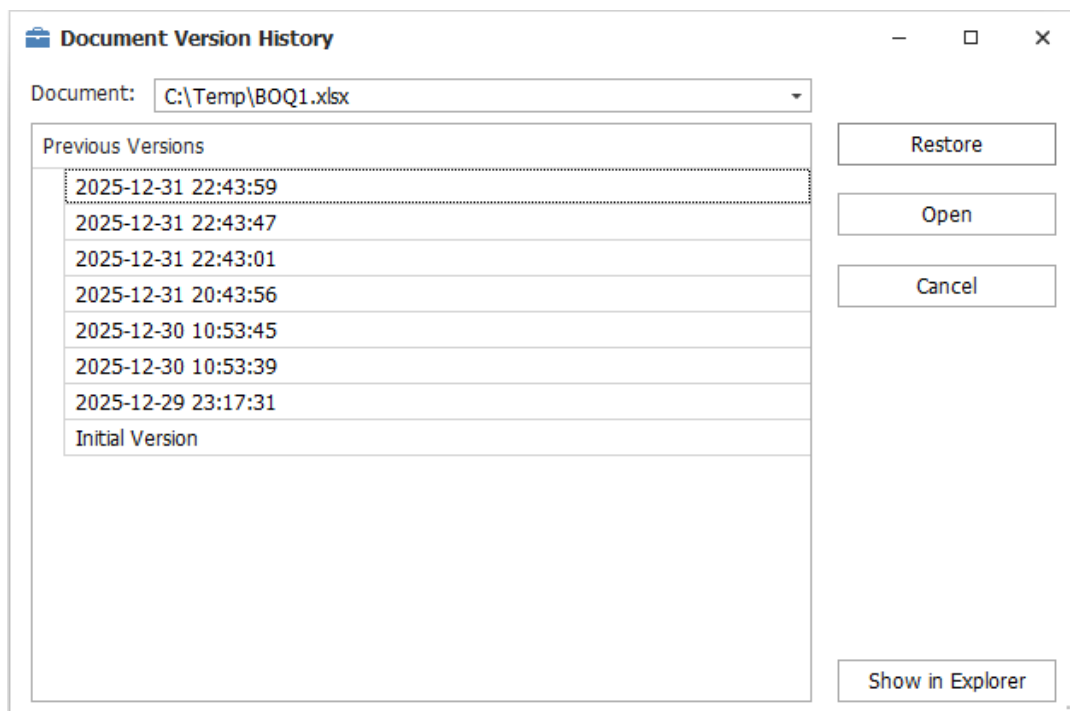
A、 Search: Use properties as search filters.

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
	C:\Temp\BOQ2.xlsx	6.11 KB	2025-12-26 17:28:19
	C:\Temp\test1.xlsx	4.84 KB	2025-12-25 12:45:35
			2026-01-03 23:04:10
			2026-01-01 23:28:58
			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	

Formula Analysis		
Trace Precedents	Object	Value
Trace Dependents	Cell=BOQ!H17	274218=H6+H11+H16
<input checked="" type="checkbox"/> Auto Analysis	Cell=BOQ!H6	77206=SUM(H3:H5)
	Cell=BOQ!H3	30,002=D3*F3+2
	Cell=BOQ!D3	2
	Cell=BOQ!F3	15,000
	Cell=BOQ!H4	40002=D4*F4+2
	Cell=BOQ!D4	5
	Cell=BOQ!F4	8,000
	Cell=BOQ!F5	77206=SUM(H3:H5)

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.

New Project

Project Name:

Location:

...

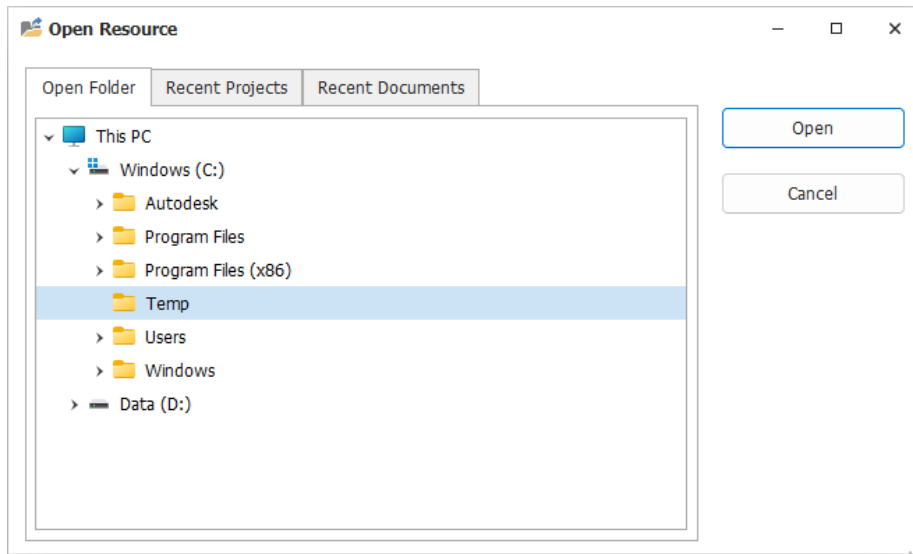
Create

Cancel

### 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.

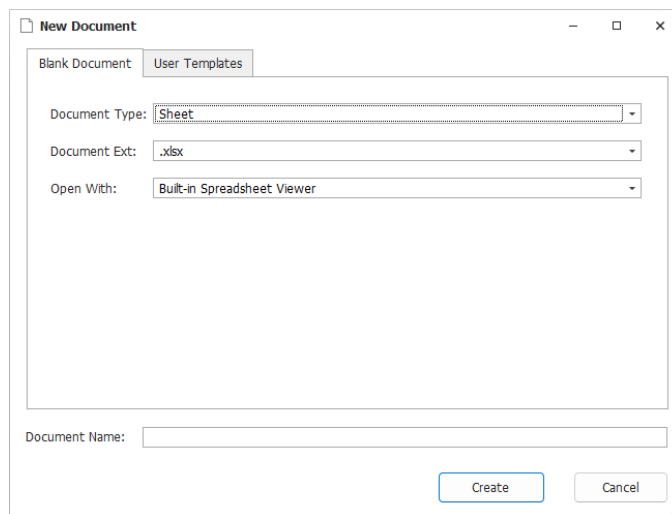




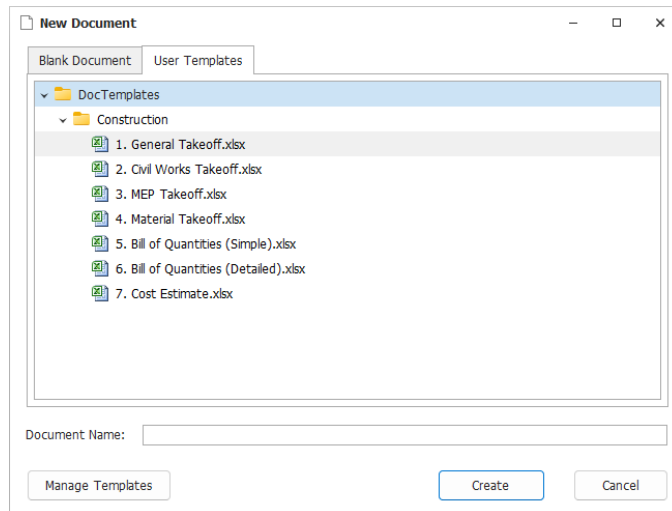
### 3 . Creating Documents & Templates

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

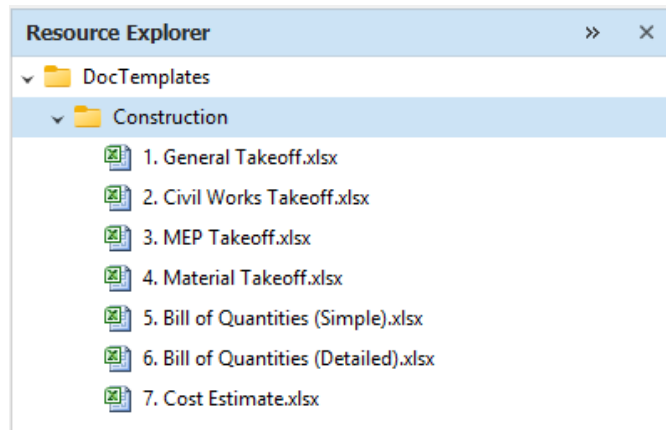
Blank Document: Creates an empty file.



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, m<sup>2</sup>, kg, ton).

**Worksheet Configuration**

Column Definitions    Data Validation

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
▶		Civil			ea											
		Structural			each											
		Architectural			m											
		Electrical			mm											
		Mechanical			ft											
		Finishes			lf											
		Finishes			lin ft											
					m²											
					ft²											
					sq.m											
					m³											
					ft³											
					cu.m											
					g											
					kg											
					t											

OK Cancel

Column Definitions Tab: Set up calculation logic.

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

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.

**Worksheet Configuration**

Column Definitions    Data Validation

Header Row Index:     Row Padding:     ☐ Calculate 'IF' Functions    ☒ Show Zeros

	Col	Header Title	Visible	Total	Formula
▶	A	Item No.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	B	Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	C	Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	D	Quantity	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	E	Unit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	F	Rate	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	G	Per	<input checked="" type="checkbox"/>	<input type="checkbox"/>	=E
	H	Amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	=D*F+2
	I	Notes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	J		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	K		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	L		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	M		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	N		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	O		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

OK Cancel

The software will automatically generate the formula for the current row based on the formula settings in the background. This method achieves formula standardization (by pre-setting a template table) and avoids the errors that can easily occur when manually copying formulas.

=D3*F3+2						
B	C	D	E	F	G	H
Category	Description	Quantity	Unit	Rate	Per	Amount
	<b>GENERAL REQUIREMENTS</b>					
General	Mobilization & Temp Facilities	2	ls	15,000	ls	30,002
General	Project Supervision	5	mo	8,000	mo	40002
General	Temporary Utilities	6	mo	1,200	mo	7202

## 5 . Grouping & summarizing

Define Section: Enter an asterisk \* in the first column to mark a section header row.

Generate Totals:

Method A: Right-click a row -> Set as Subtotal Row. This will generate a summary formula for that row.

Method B: Ribbon -> File -> Update Totals to batch-calculate all section summaries.

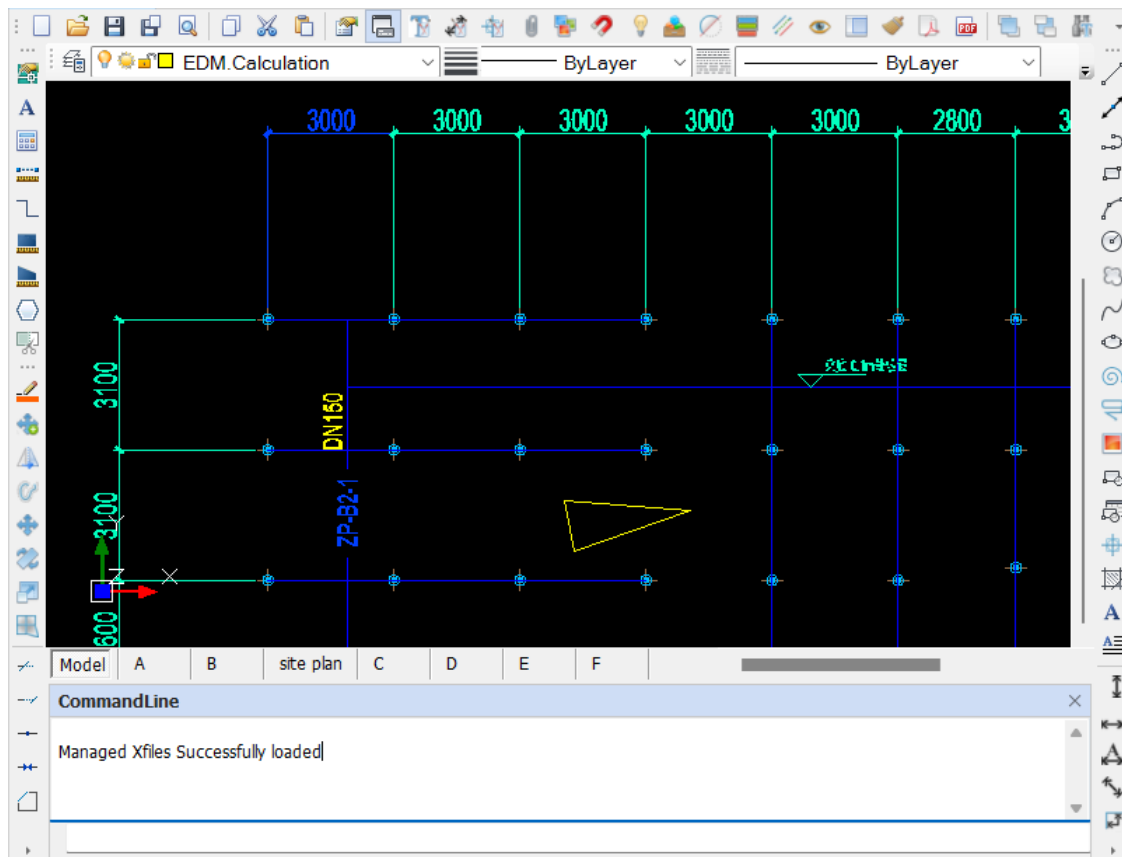
H17

=H6+H11+H16

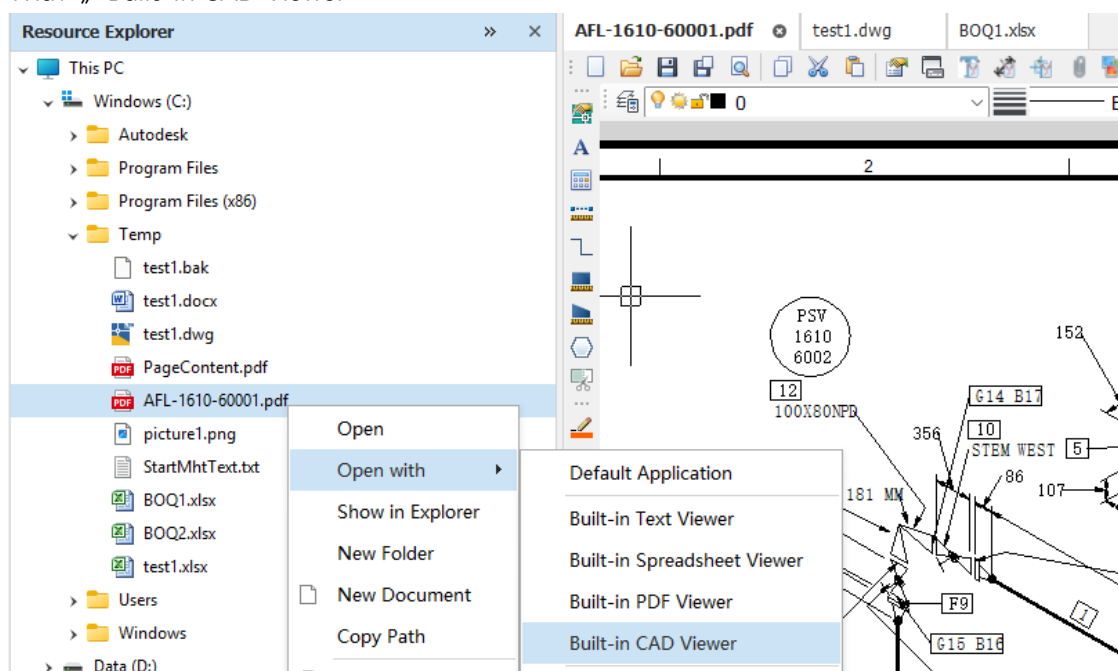
1	2	A	B	C	D	E	F	G	H
	1	Item No.	Category	Description	Quantity	Unit	Rate	Per	Amount
-	2	*		GENERAL REQUIREMENTS					
	3	1	General	Mobilization & Temp Facilities	2	ls	15,000	ls	30,002
	4	2	General	Project Supervision	5	mo	8,000	mo	40002
	5	3	General	Temporary Utilities	6	mo	1,200	mo	7202
	6	Subtotal							77206
-	7	*	Mechanical	CONCRETE					
	8	1	Civil	Cast-in-Place Slab	15,000	sq.ft	6.5	sq.ft	97502
	9	2	Structural	Rebar Reinforcement	15	ton	2,200	ton	33002
	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

## 6 . CAD Takeoff & Measurement

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

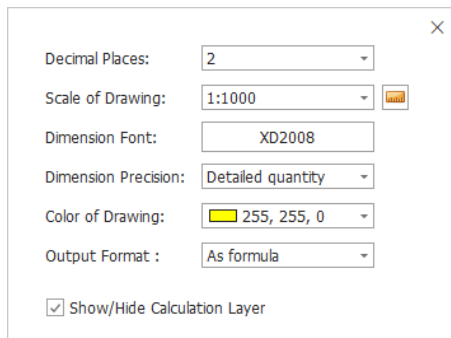


For drawings in .pdf format, right-click on the document node and select the menu->Open With-> Built-in CAD Viewer



## 6.1 Calculation Settings

Click the Settings button() to configure:




Settings dialog box with the following fields:

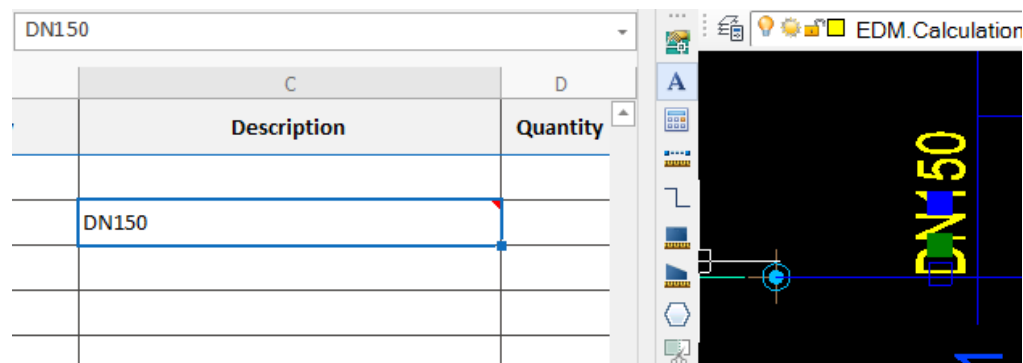
- Decimal Places: 2
- Scale of Drawing: 1:1000
- Dimension Font: XD2008
- Dimension Precision: Detailed quantity
- Color of Drawing: 255, 255, 0
- Output Format: As formula
- ☒ Show/Hide Calculation Layer

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  
o act  
rate  
o tha  
ne  
na  
ffe  
We ran fou

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