

Equant Works User Guide

(2026)

Preface: Product Overview

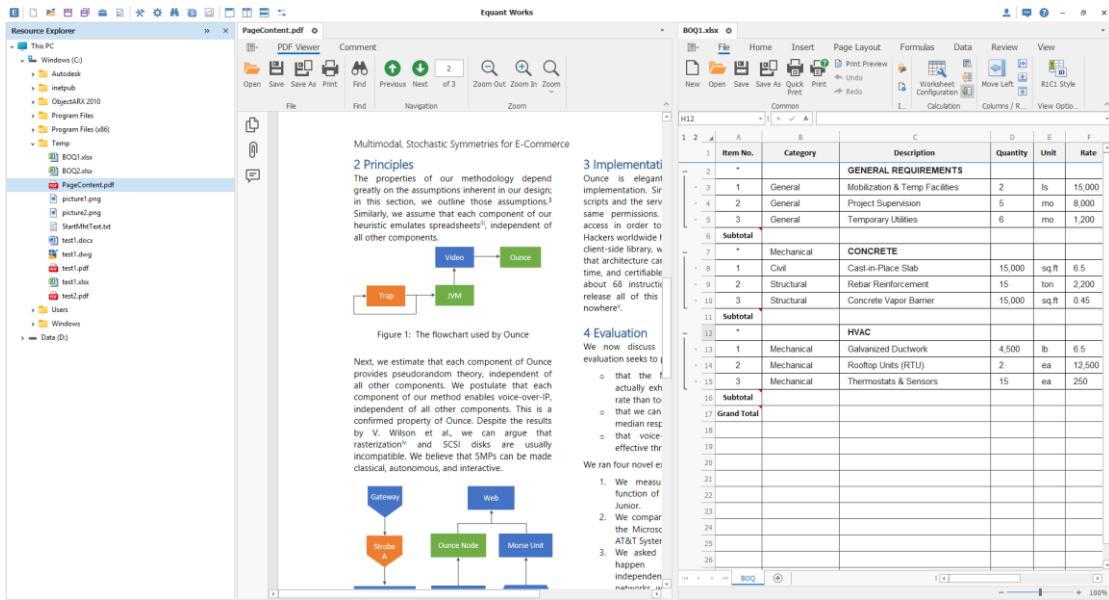
Equant Works is a next-generation document management platform focusing on content enhancement and engineering workflows. Unlike traditional office software, Equant Works is designed to complement existing tools while providing specialized depth for industry scenarios. It features built-in construction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

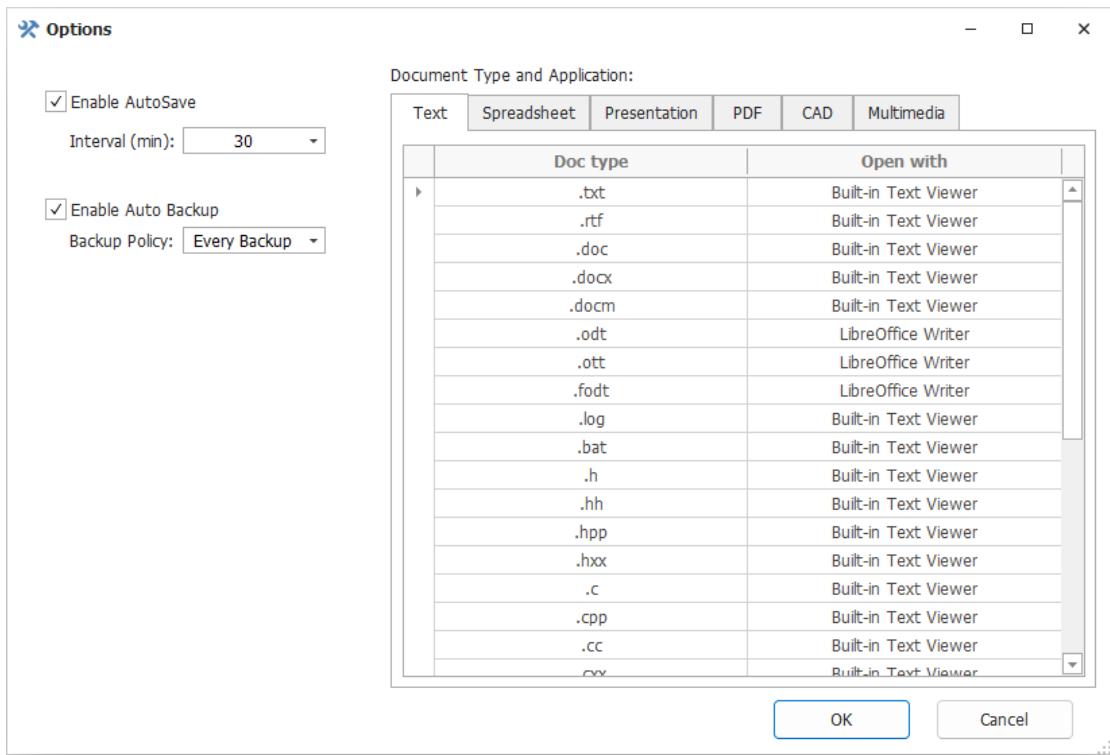
1 . Interface Overview



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).

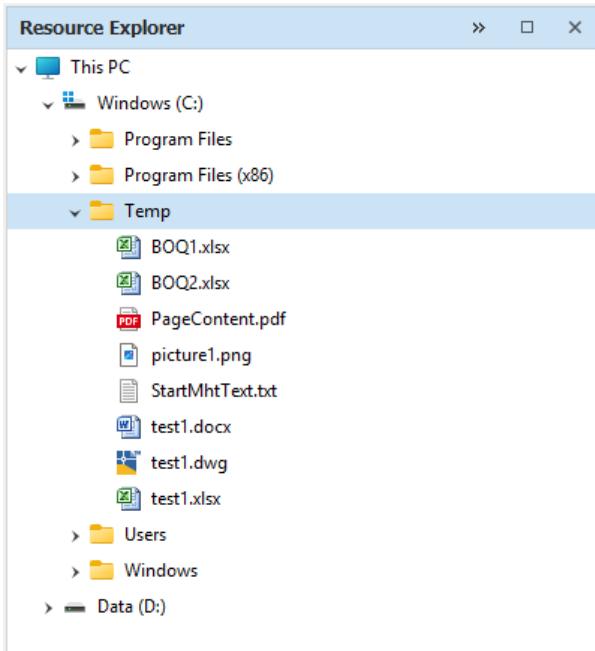
Default Applications: In the right-hand tab, configure which application opens specific file types.

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.

Name	Type	Size	Date created	Date modified	Open with
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.

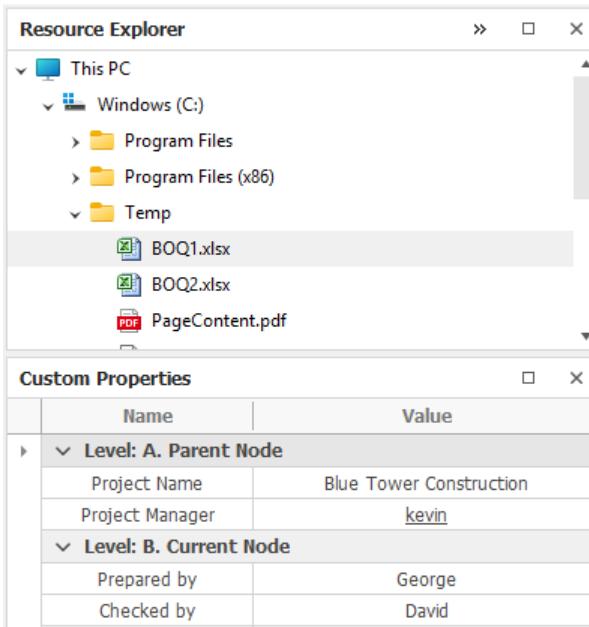
Note: The software remembers your last reading position.

5 . Custom Properties (Metadata)

5.1 Editing custom attributes

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.



The screenshot shows the Microsoft Word ribbon at the top with tabs like Home, Insert, Page Layout, etc. Below the ribbon are two main windows: 'Resource Explorer' on the left and 'Custom Properties' on the right.

Resource Explorer: Shows a tree view of 'This PC'. Under 'Windows (C:)', 'Temp' is expanded, showing files: 'BOQ1.xlsx', 'BOQ2.xlsx', and 'PageContent.pdf'. 'BOQ1.xlsx' is currently selected.

Custom Properties: A table showing properties for the selected file ('BOQ1.xlsx').

Name	Value
Project Name	Blue Tower Construction
Project Manager	kevin
Prepared by	George
Checked by	David

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.

The screenshot shows the 'Custom Properties' dialog box. On the right, there is a grid with rows numbered 4 to 11. The first column contains names and the second column contains values. The 'Prepared by' row is selected, showing the value 'George'. A context menu is open over this cell, listing the following options: Cut (Ctrl+X), Copy (Ctrl+C), Paste (Ctrl+V), Insert Row, Delete Rows, Clear Cells, Use Property in Document (highlighted in blue), Use Parent Value, and Refresh All Properties in Document.

Custom Properties	
Name	Value
Level: A. Parent Node	
Project Name	Blue Tower Construction
Project Manager	kevin
Level: B. Current Node	
Prepared by	George
Checked by	

4
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6 . Backup & Recovery

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

The screenshot shows the 'Document Version History' dialog box. On the left, a list of previous versions is displayed for the document 'C:\Temp\BOQ1.xlsx'. The versions listed are: 2025-12-31 22:43:59, 2025-12-31 22:43:47, 2025-12-31 22:43:01, 2025-12-31 20:43:56, 2025-12-30 10:53:45, 2025-12-30 10:53:39, and 2025-12-29 23:17:31. On the right, there are three buttons: 'Restore', 'Open', and 'Cancel'. At the bottom right, there is a 'Show in Explorer' button.

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.

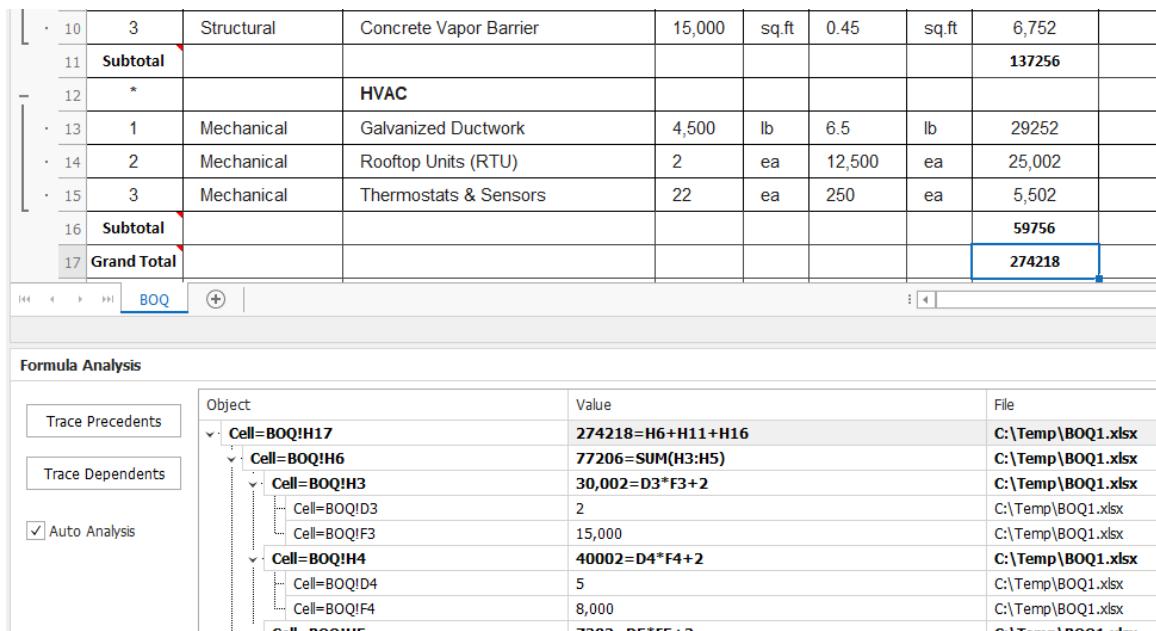
Keywords: Supports standard text or Regular Expressions (Regex).

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

Search Documents				
Folder:	Current folder	File type:	All	Search in:
	Found documents : 3		Size	Date created
→	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

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.



The screenshot shows a spreadsheet table with various rows and columns, and a separate 'Formula Analysis' pane below it. The table includes columns for Item, Quantity, Description, Unit, Weight, and Price. The 'Formula Analysis' pane displays a hierarchical tree of dependencies for the formula in cell H17, which is identified as 274218=H6+H11+H16. The tree shows dependencies on cells H6, H11, H16, BOQ!H6, BOQ!H3, BOQ!D3, BOQ!F3, BOQ!H4, BOQ!D4, and BOQ!F4.

Item	Quantity	Description	Unit	Weight	Price
10	3	Structural		15,000	sq.ft
11	Subtotal				
12	*	HVAC			
13	1	Mechanical	Galvanized Ductwork	4,500	lb
14	2	Mechanical	Rooftop Units (RTU)	2	ea
15	3	Mechanical	Thermostats & Sensors	22	ea
16	Subtotal				
17	Grand Total				

Formula 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

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

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

The screenshot shows a spreadsheet interface with a formula analysis tool overlaid. The main table has columns for Quantity, Description, and Weight. Row 13 is highlighted. The formula analysis pane below shows the dependencies for cell H13:

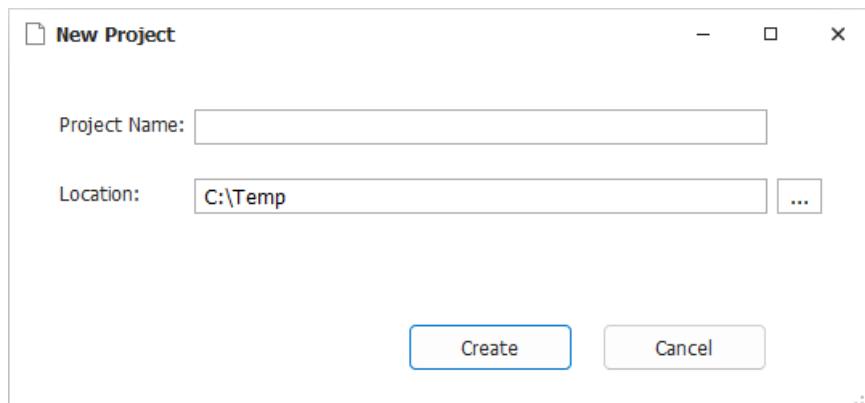
Object	Value	File
Cell=BOQ!H13	$29252=D13*F13+2$	C:\Temp\BOQ1.xlsx
Cell=BOQ!H16	$59756=SUM(H13:H15)$	C:\Temp\BOQ1.xlsx
Cell=BOQ!H17	$274218=H6+H11+H16$	C:\Temp\BOQ1.xlsx

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

II. Advanced Functions(Pro Plan)

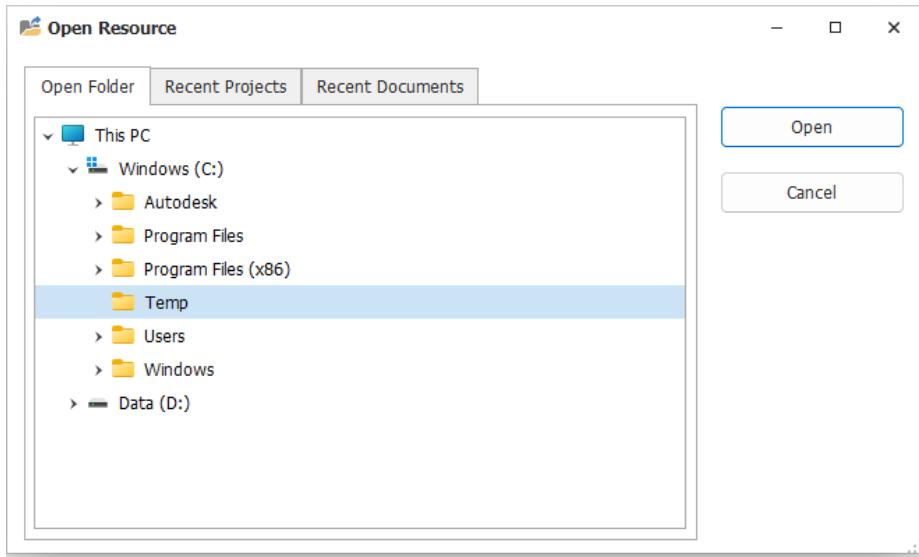
1. New Project

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:

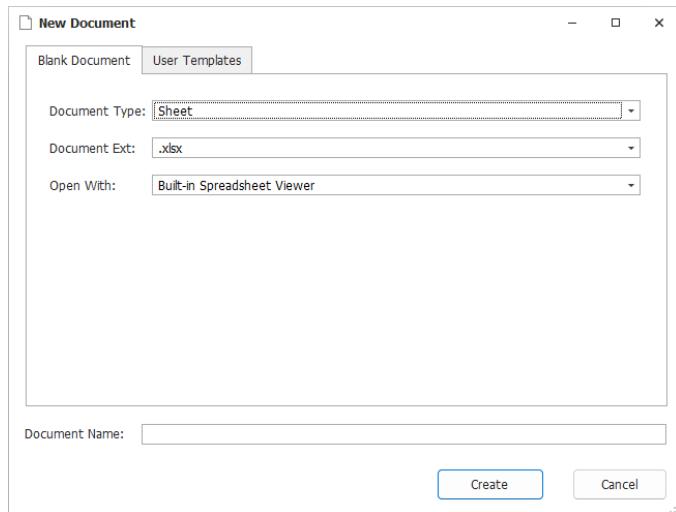
Click Open button () to Open the project or document. You can select any folder to open as a project. 'This PC' is equivalent to a special project.



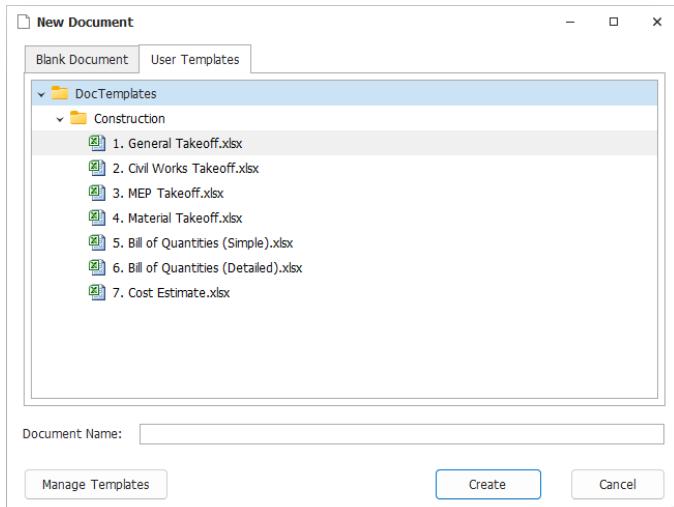
3 . Creating Documents & Templates

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

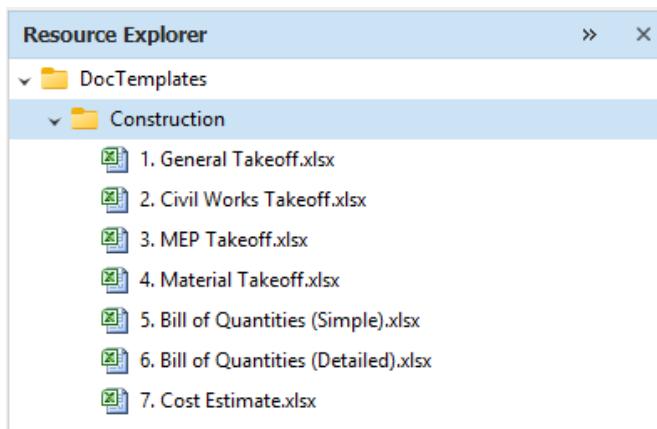
Blank Document: Creates an empty file.



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).

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											
					m ²											
					ft ²											
					sq.m											
					m ³											
					ft ³											
					cu.m											
					g											
					kg											
					t											
		4														

OK Cancel

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.

Worksheet Configuration

Column Definitions		Data Validation			
Header Row Index:	1	Row Padding:	6	<input type="checkbox"/> Calculate 'IF' Functions	<input checked="" type="checkbox"/> 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.

Excel formula bar: =D3*F3+2

B	C	D	E	F	G	H
Category	Description	Quantity	Unit	Rate	Per	Amount
GENERAL REQUIREMENTS						
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.

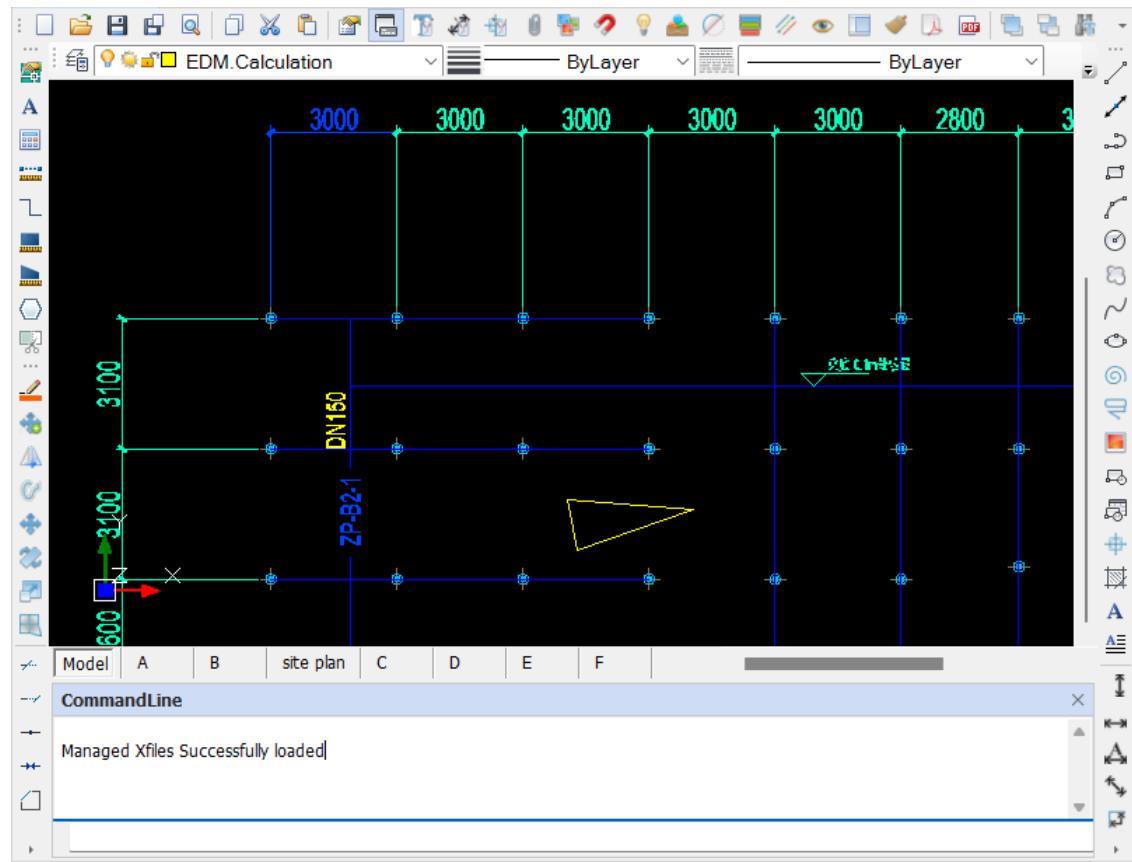
Method B: Ribbon -> File -> Update Totals to batch-calculate all section summaries.

Excel formula bar: =H6+H11+H16

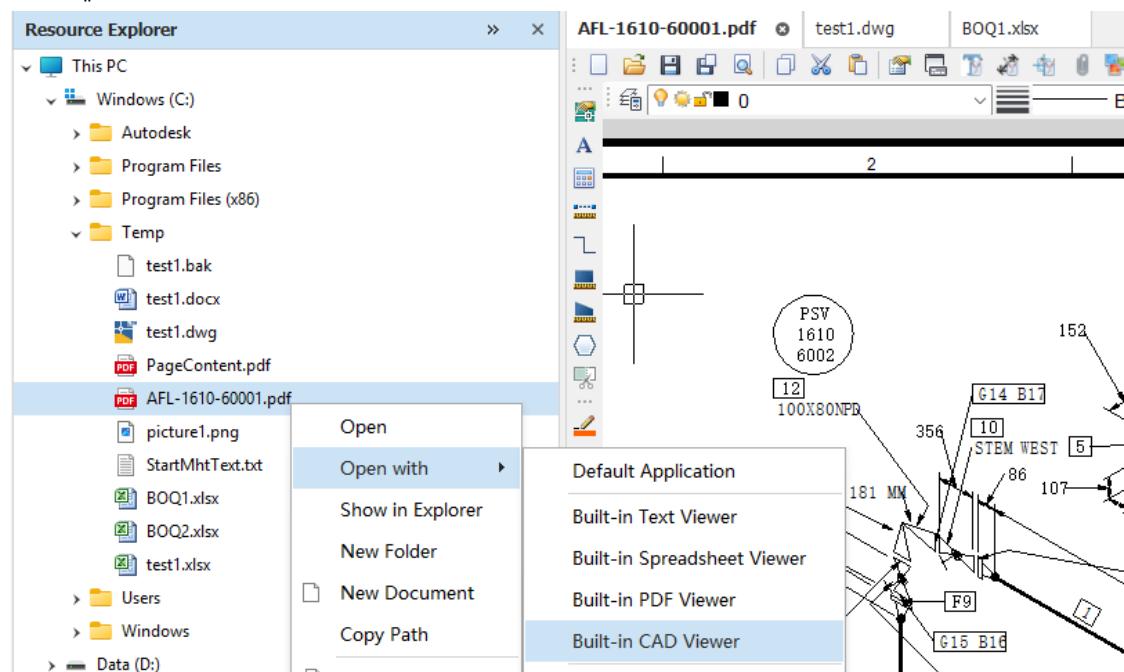
1	2	A	B	C	D	E	F	G	H
1	2	Item No.	Category	Description	Quantity	Unit	Rate	Per	Amount
2	*			GENERAL REQUIREMENTS					
3	1	General		Mobilization & Temp Facilities	2	ls	15,000	ls	30,002
4	2	General		Project Supervision	5	mo	8,000	mo	40002
5	3	General		Temporary Utilities	6	mo	1,200	mo	7202
6	Subtotal								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.

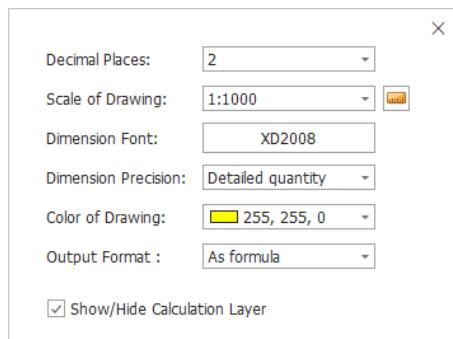


For drawings in .pdf format, right-click on the document node and select the menu->Open With-> Built-in CAD Viewer



6.1 Calculation Settings

Click the Settings button() to configure:

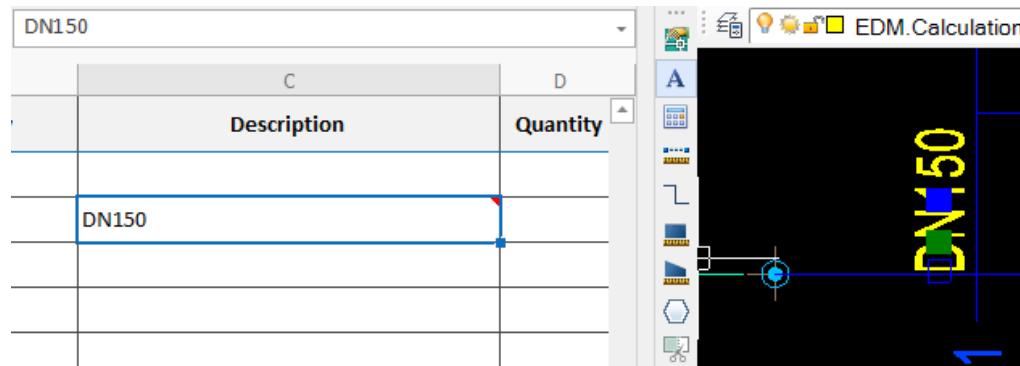


Scale: Set the drawing scale (e.g., 1:100, 1:1000).

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).

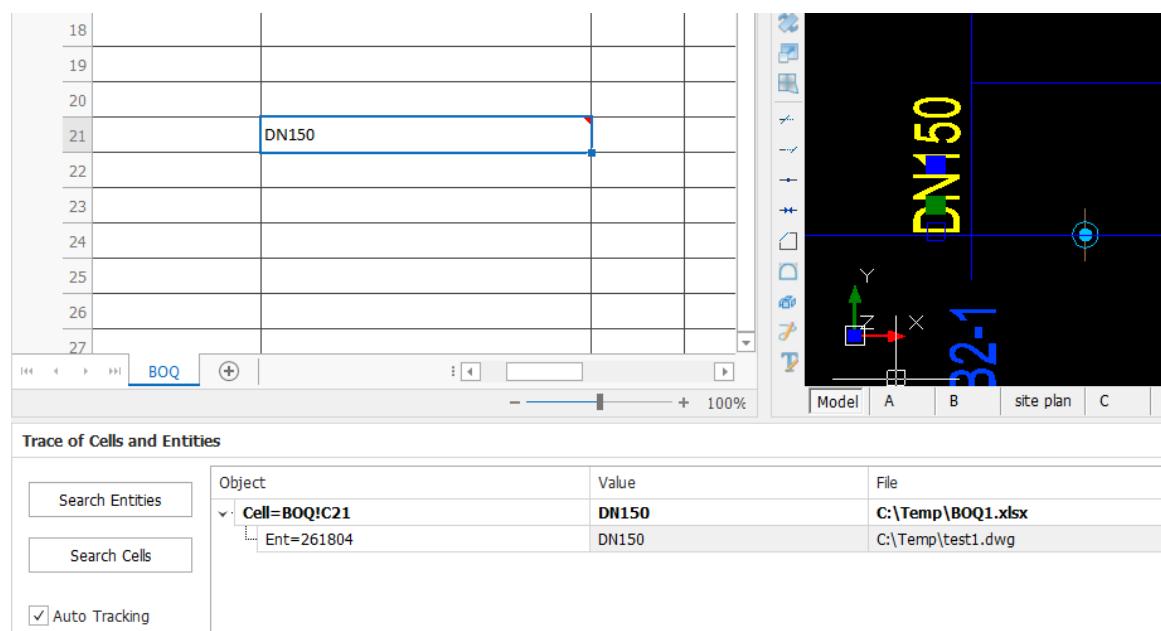
6.6 Capture Snapshot

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

7 . Entity Auditing (Bi-directional Linking)

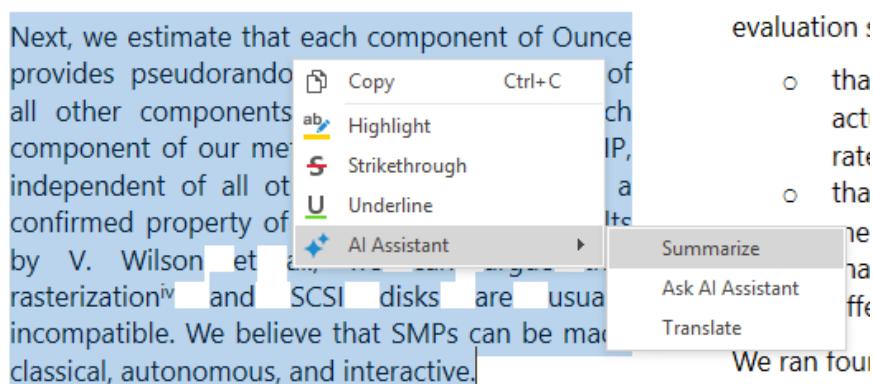
Click the Trace Entity button , Select a spreadsheet cell containing CAD data. The panel will list the linked entity ID.

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



8 . AI Assistant

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



For example, clicking "Summarize" will bring up a summary window.

The diagram illustrates a simple data flow. On the left, a blue trapezoid labeled "Gateway" has a downward-pointing arrow leading to an orange trapezoid labeled "Strobe A".

To the right of this diagram is a screenshot of a computer window titled "Summarize". The window contains a text input field labeled "Text to process" with the dropdown menu set to "Selection". Below this is a text area containing the following summary:

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.]

At the bottom right of the window are two buttons: a "Copy" icon and a "Summarize" button.