



Data List Management

The Data Lists Module provides companies with a structured way to manage the collation, distribution, and tracking of data lists representing packages for internal groups, vendors, contractors, and customers. The Data Lists Module makes our engineering document management system an easy-to-use, vendor-oriented work package management software.

Use the Workflow+ module to create configurable schedule-driven workflows to automate review and approval processes. These workflows employ transmitted and submitted documents/drawings and change requests and automatically update the status in the applicable data list.

Manage the compilation of needed packages or sets and monitor the status of file approvals, reviews, and third-party actions such as revisions, comments/questions, approvals, or simple task completions.

Data List managers can establish user privileges, assign response tasks to specific users, add due dates, and highlight critical items that tend to be worked together.



Update existing data lists, like checklists, in real-time and from anywhere using mobile devices



Create QR codes to link directly to data list(s) and/or email a URL link to a data list(s)



Manage the status of files needed in a package or router, ensuring only approved files are being released



Automatically create transmittals and virtual sets directly from a data list

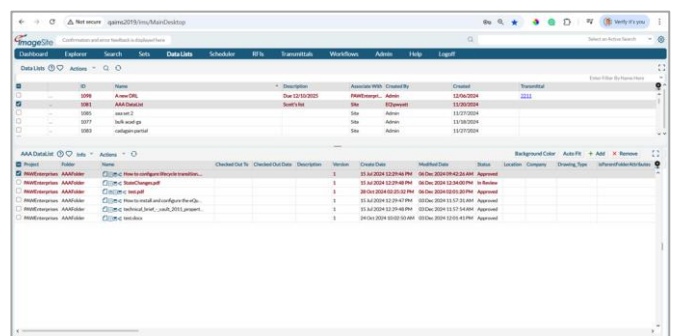
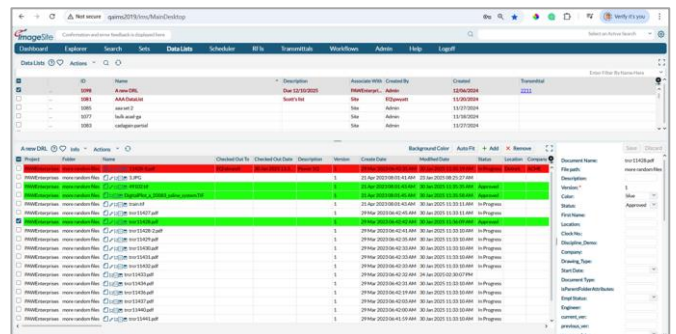
Module Key Features and Functions

- Create data lists from manual selections, data list templates, existing sets, or automatically using workflows
- View multiple data lists for selection
- 11 standard attributes specifically attached to data lists (e.g., Stamp required, Issue Status, Planned Return Date, Actual Return Date)
- Update file attributes directly from the data list or the collapsible information pane
- Create data list specific attributes for searching, sorting, and controlling display elements
- Data List and document attributes can be text, number, date, blob (for large amounts of text), multiple values, or Boolean (e.g., checkbox)
- Autofit all custom field columns with a single click
- Set background colors to indicate file status or special attention required
- Automatically populate a Transmittal from a data list
- Email a URL link to a data list(s)
- Create Favorites for data lists or data list documents
- Run Data List reports to track one or multiple Data Lists to identify status, near due and overdue documents/drawings, outstanding files for return, and more
- Move an entire data list to create a Set or add to an existing Set
- Add/edit notes and comments correlated with a data list
- Search for data lists using multiple criteria, including custom attributes

- Associate files directly with transmittals
- Assign permissions to control access to data lists

Module Key Benefits

- Ensure all work packages have the latest version of files
- Create QR codes for easy access to needed files
- Report on drawings/documents that are near-due or overdue from third parties or internally
- Maintain lists of files that need to be created, reviewed, changed, and/or approved before being released
- Report of status of projects for customers or from a vendor
- Easily change file status and attributes directly from the list
- Use color coding to identify priority items.



Types of Data for Data List Management Software

Vendor Requirements Lists

Projects and contract manufacturing typically require the distribution of files needed by the vendor/contractor. The requirements are often specified up front, and packaging, managing, and approving the files is essential. Vendor/contractor requirements lists are easily constructed in the Data Lists module and can be used over and over again if set up as templates.

Master Documents Lists

Projects and manufactured items typically involve multiple files. Developing a master document list of all required documents lets document controllers, project managers, production managers, technicians, and others quickly access all files needed to complete the effort. Master document lists can be used to create production routers, project specifications, and process checklists.

Handover Packages

Packages of documents/drawings needed to start or continue projects such as new construction, renovation, contract manufacturing, and third-party management are easily identified and managed with Data Lists. If the appropriate status is obtained, the entire set of files can be handed off as a package, either manually, through email, or through a formal transmittal.

Maintenance Checklists

Organizations use maintenance items for equipment, facilities, piping, vehicles, and more to ensure operational integrity. Checklists often include references to drawings, O&M manuals, standard operating procedures (SOP), specifications, and more. Reviewing checklists, completing tasks, and reporting against the effort are essential for operations, production, quality checking, and compliance.

Transmittals

Transmittals are a compendium of files delivered to an internal or external party. The files in transmittals form a data list that can be maintained in the Data List function. Files marked completed, released, or ready for review in a data list can automatically be added to a transmittal form.

Bills of Materials (BOMs)

Data Lists can allow for a list of materials associated with a product, a project, or labor specifications. As long as the item can be related to a file, it can be included in the data list. Placeholder files can be used if digital files are not available. Custom fields for items like quantity, vendor, cost, lead time, interchangeability, and more can be included in the data list.

Industry Applications

Data Lists are used for common engineering processes used to create and maintain related files, including drawings, specifications, checklists, operating procedures, safety data sheets, instructions, and more. Managing these lists allows for the organization to review and report on engineering process status and identifying opportunities for improvement.



Engineering

Architectural, Engineering, and Construction companies create turnover and handoff packages, construction work packages, specifications, etc. Data lists are established with needed files and associated data. Document controllers, project managers, and engineers use the data lists to track the status of the required files, from approved to interdisciplinary review to Issued for Review, to submit, to in-progress, and more. Dates for when files were distributed and when they are expected back are easily tracked and reported. Data associated with each file can be sorted and reported on, such as the user or third party that has ownership, the priority of the files, the associated transmittals, versions, etc.



Construction

Construction packages are received from design and engineering vendors. The packages represent a data list of files and associated data. The date received, the version numbers of documents, and the data associated with the files are all critical for the construction project. When change requests are required, construction organizations can use RFIs/Submittals or markup files received in the work package. When changes are needed, using workflows helps ensure they are addressed in a timely manner, while the corresponding data list can be updated for status and reporting purposes.



Manufacturing

Production routers, maintenance tasks, and Bills of Materials (BOMs) are often bundled as packages for the production floor. These packages represent a data list of files and associated data. Ensuring all package elements are up-to-date (using the correct version of drawings, specifications, procedures, etc.) is essential to getting the right product manufactured for each customer. These files can be assigned to physical routers or parts/equipment using QR codes. In addition, where third-party components are integrated within the assemblies, ensuring the correct parts are received on time and meet specifications is essential for generating the final assembly.



Facilities Management

Whether for maintenance or renovation projects, facilities management departments always work off checklists, SOPs, and construction packages. Checklists with associated needed files can be set up as data lists, allowing users to find the files and data required for each task. Procedures can be maintained as part of a checklist, ensuring everything from installation, operation, maintenance, and rehab can be put together in an associated package. Construction packages containing as-builts and new construction drawings, specifications, and related files can be included as a data list and delivered to the right individuals.



About eQuorum

eQuorum is the developer of EngineBox, one of the first SaaS Cloud engineering document management systems (EDMS) in the U.S. Their product portfolio also includes ImageSite, an on-premise engineering document management system and workflow solution—also offered as a Private Cloud EDMS solution. ImageSite and EngineBox are built in HTML5 and do not require users to download software to their PCs, or download apps to their mobile devices, including laptops, tablets, and smartphones. eQuorum’s engineering document management products serve as a collaboration solution for affiliates, customers, and vendors in a wide variety of industries. eQuorum also provides NIST assessment consulting, training, and software implementation services.

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