



Data List Management

Manage the collation, distribution, tracking and reporting of data lists for projects

- ✓ 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
- ✓ 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)

Vendor Requirements

Reduce the time spent creating identical requirements lists for various vendors and projects. Utilize the data list module to develop a requirements list template to share with the contractor, expediting the packaging and approval process.

Maintenance Checklists

Utilize the data list module to effectively manage maintenance checklists for various projects, and access related documents such as drawings, operation and maintenance (O&M) manuals, standard operating procedures (SOPs), and specifications in real-time access from any location. Ensure compliance with regulatory and safety standards for equipment, facilities, piping, vehicles, and more.

Master Documents List

Prevent project delays and ensure all stakeholders have real-time access to file updates and changes to complete their assigned tasks accurately and on schedule. Create a master document list that includes production routers, project specifications, BOM's and process checklists to facilitate smooth operations.

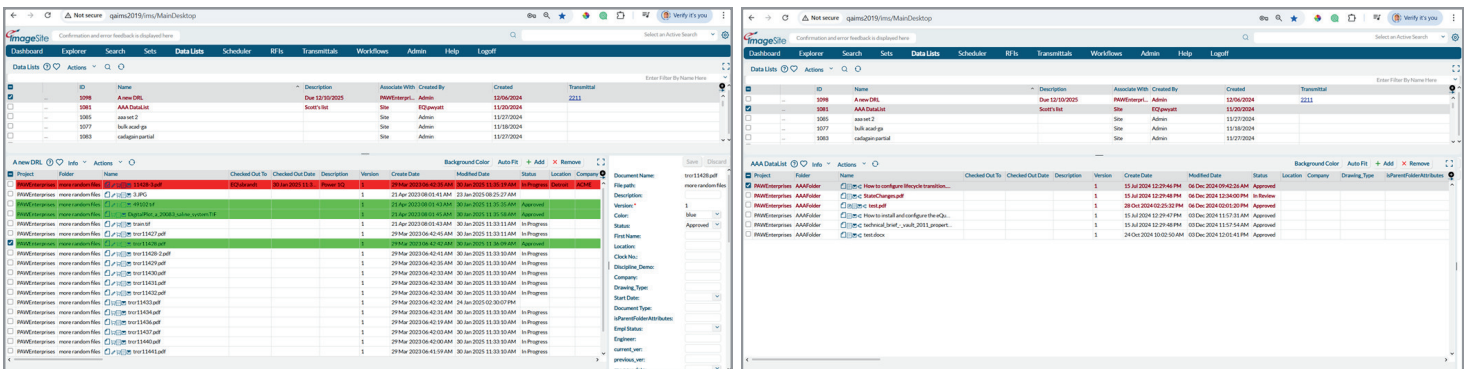
Handover Packages

Accelerate the completion of multiple projects by quickly identifying approved handover packages with the associated documents and drawings ready to be sent for review via email or formal transmittal.

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Create configurable, schedule-driven workflows to automate reviews and approvals. Utilize these workflows to 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 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.

Create and maintain related files, including drawings, specifications, checklists, operating procedures, safety data sheets, instructions, and more. Manage, review and report on engineering process status and identify opportunities for improvement.



- Create data lists from manual selections, data list templates, existing sets, or automatically using workflows
- 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
- Automatically populate a transmittal from a data list by associating files directly with transmittals
- Create data list specific attributes for searching, sorting, and controlling display elements
- Update file attributes directly from the data list or the collapsible information pane
- Assign permissions to control access to data lists
- Highlight data list rows to enhance identification and items needing attention

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