



**Training**

# **ARCHIBUS BY EPTURA | MAINTENANCE**

**Course plan**

# Our program

Based on our experience with **Eptura applications service delivery**, ABTIO has developed the following training program featuring a **practical approach, content tailored to each team's profile**, and **flexible delivery options**.

Our programs combine **functional understanding, operational use of the tool**, and **best practices** so that each training session has a **real impact** on **daily management**.



# About Archibus Maintenance

Archibus Maintenance is the solution designed to **manage** both **Corrective Maintenance** and **Preventive Maintenance** within a **single operational framework**. It enables users to record **Work Requests**, **approve them**, **plan resources**, **issue Work Orders**, **update completed tasks** and **analyze performance** and **costs**.

In addition, it includes the **Maintenance Console** as the central point of operation and the **Archibus OnSite mobile app** for **technicians** and **field personnel**.

From a business perspective, this solution helps organizations to:

- **Organize** the handling of **incidents** and **maintenance requests**
- **Structure Preventive Maintenance programs** with defined frequencies and routines
- **Assign craftspersons, tools** and **parts** with greater control
- **Record hours, materials** and actual **costs** to improve traceability and operational analysis.



# Training Objectives

To provide participants with the knowledge required to understand the **functional logic** of **Archibus Maintenance** and use its main tools to manage **Corrective Maintenance** and **Preventive Maintenance**, from the initial request or scheduled activity to execution, completion, and analysis. By the end of the training, participants will be able to:

- **Understand** the **module's operational workflow** and its relationship with **Service Level Agreements (SLAs)**, **Work Orders**, **resources** and **statuses**
- Interpret how **SLAs** can **automate approvals, assignments** or **work issuance** according to the defined configuration
- Use the **Maintenance Console** to manage **Work Requests** and **Work Orders**
- **Schedule Preventive Maintenance** and execute **Corrective Maintenance** within a **single operational framework**
- **Record hours, tools, parts** and **costs** correctly to improve **control** and **reporting**
- **Understand** the **use** of the **mobile app** and **Maintenance Checklists** for **field execution**
- **Apply best practices** to **improve data quality** and **operational consistency**



# Who is it intended for?

This training can be **tailored** to **different profiles** depending on the scope defined for each organization. It is especially designed for **users involved** in **day-to-day operations, supervision, functional administration, or maintenance process support.**

It is mainly intended for:

- End users who report incidents or track requests
- Maintenance supervisors
- Facility managers
- Maintenance managers
- Technicians or craftspersons
- Service Desk personnel
- Functional administrators



# Agenda

## Module 1. Introduction to Archibus Maintenance

- Overview of the module.
- Differences between Corrective Maintenance and Preventive Maintenance.
- General structure of the process.
- Key concepts: Work Requests, Work Orders, Service Level Agreements (SLAs), roles, and statuses.

## Module 2. Corrective Maintenance Management

- Logging incidents and requests.
- Routing based on SLA.
- Approval and assignment.
- Relationship between a Work Request and a Work Order.
- Issuing, tracking, and closing work.

## Module 3. Preventive Maintenance Management

- Defining procedures, steps and resources.
- Assigning procedures to equipment and locations.
- Scheduling recurring tasks.
- Generating Preventive Maintenance Work Orders.
- Reviewing schedules and planning.



## Module 4. Using the Maintenance Console

- General navigation.
- Searching and filtering Work Requests.
- Managing by status and role.
- Reviewing request details.
- Reporting, export, and operational follow-up.

## Module 5. Resource Planning and Execution

- Estimating trades and parts.
- Assigning and scheduling craftspersons.
- Using the Labor Scheduler.
- Tools and availability.
- Reassignment criteria and workload balancing.

## Module 6. Field Operations and Checklists

- Working from the Archibus OnSite mobile app.
- Updating work from the field.
- Using Maintenance Checklists.
- Recording evidence and tracking tasks.
- Managing observations and rework.



## Module 7. Recording Hours, Materials, and Costs

- Entering actual hours.
- Recording parts, tools, and other costs.
- Difference between estimated and actual values.
- Traceability of completed work.
- Foundation for cost and performance analysis.

## Module 8. Functional Administration and Configuration

- Module behavior parameters.
- Workflow rules.
- Security groups.
- SLA configuration concepts.
- Functional scope by user type.

## Module 9. Best Practices and Frequently Asked Questions

- Criteria for structuring a maintenance workflow.
- Recommendations for adoption by role.
- Data quality and operational consistency.
- Common errors when recording work.
- Frequently asked questions from users and supervisors.



# Formats

## Language

Spanish / English

## Format

Remote / In person (Max. 6 people)

## Level

Beginner / Intermediate/ Advanced

## Duration

6 to 12 hours depending on scope

## Outline

Intensive / short sessions

## Content

Standard / Customized by rol or process

We can **tailor** this training to each organization's specific needs, taking into account its **level of maturity, current processes, active modules** and **specific use cases**. The content can focus on **day-to-day operations, occupancy management, space analysis** or **scenarios involving growth and reorganization**.



# Requirements

- **Access** to the **Archibus environment**
- An **enabled user profile** according to the process
- **Basic knowledge** of the **organization's maintenance workflow**
- **Functional knowledge** of the **role** from which the participant will attend the training
- **General Archibus navigation knowledge is recommended**, although not mandatory



# Why choose ABTIO?

At ABTIO, we have **over 25 years of experience** and a **team of functional, technical, and technology professionals** specializing in **Archibus by Eptura** solutions.

Our training program is designed to help your organization achieve:

- **Better understanding** of the **maintenance process within Archibus**
- **Greater consistency** in the **management of requests, Work Orders and resources**
- **Better traceability** of **hours, materials and costs**
- **More effective adoption** by **users, supervisors and technicians**
- **Practical training adaptable** by **role, user level and operational maturity**



# ■ Book your training

## Ready to train your team?

Contact us to book Archibus by Eptura |  
Maintenance training tailored to your  
organization's needs.



Argentina: +54 11 5258 8100

Spain: +34 910 488 747

Germany: +49 151 670 674 13



[info@abtio.com](mailto:info@abtio.com)



[abtio.com](http://abtio.com)

