



Training

ARCHIBUS BY EPTURA | PORTFOLIO MANAGEMENT AND LEASE ADMINISTRATION

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 | Portfolio Management and Lease Administration

Archibus Portfolio Management and Lease Administration enables organizations to **manage their real estate inventory and associated contracts, tracking properties, buildings, structures, land, parcels and leases** and linking this information to contractual **data, costs, due dates, documentation and portfolio analysis**. Its key features include:

- Manage **real estate assets** and **lease agreements** from a **single platform**.
- Use **Archibus dashboards** and **views** as a central tool for **recording, viewing, and maintaining properties and leases**.
- **Track due dates, options, clauses, amendments, contacts, and related documentation**.

It can also be used as a **foundation** for more **advanced processes**, such as **portfolio analysis, contract management and financial monitoring**.



Training Objectives

To provide participants with a **practical understanding of how to use Archibus to manage real estate assets and lease contracts**, so that they can **upload, view, maintain and analyze key portfolio information** based on **operational and business criteria**.

Upon completion of the training, participants will be able to:

- Understand the **functional logic** of the **Portfolio Management and Lease Administration modules**.
- Identify the **data structure** required for **consistent operations**.
- **Enter and maintain real estate and leases data**.
- **Manage clauses, options, amendments, expiration dates, and contractual documentation**.
- **Record and analyze costs** associated with **properties and contracts**.
- Consult **dashboards, KPIs and reports** for **monitoring and decision-making**.
- Apply **best practices** for **data entry, updating and control**.



Who is it intended for?

This training is designed for **professionals who need to understand and use the module in their day-to-day work**, with a focus on **portfolio management, contract management** and **analytics**. It is primarily intended for:

- Corporate Real Estate Teams.
- Managers responsible for lease and contract administration.
- Real estate portfolio or asset management teams.
- Finance or controlling departments involved in lease management.
- Key users or functional administrators of Archibus.
- Operational stakeholders who need to access information on the real estate portfolio, lease expirations, costs or reports.



Agenda

Module 1. Introduction to Portfolio Management and Lease Administration

- Overview of the Real Property Domain in Archibus
- Difference between properties and leases
- Typical use cases: owned, leased, and subleased properties
- Relationship between operations, contract management and financial analysis
- General navigation through views, consoles, forms, and dashboards

Module 2. Background Data and Information Preparation

- Geographical locations and portfolio structure
- Property types and basic supporting information
- Lease templates
- Cost categories and responsibilities
- Parameters for alerts and expirations
- Data quality criteria



Module 3. Creating and Managing Real Property Assets

- Creating and editing portfolio items
- Using the Portfolio Edit Wizard
- Differences between properties, buildings, structures, land, and parcels
- Relevant information for property tracking
- Amenities and associated attributes
- Considerations for taxes and parcels

Module 4. Creating and Managing Lease Contracts

- Creating new leases
- Using the Lease Console and edit views
- General contract information
- Associated contacts
- Suites and assignments
- Supporting documents
- Data import and export

Module 5. Clauses, Options, Amendments and Communications

- Entering clauses and responsibilities
- Recording contractual options
- Tracking expirations and option exercise
- Recording amendments
- Communications log
- Relationship between documentation and contractual traceability



Module 6. Lease Financial Management and Associated Costs

- Recurring, scheduled, and actual costs
- Base rent and other charges
- Cost profiles
- Introduction to CAM and indexation, depending on scope
- Data entry criteria for reliable reporting
- Relationship between costs and cash flow

Module 7. Alerts, Expirations and Operational Control

- Lease expiration alerts
- Option expiration alerts
- Operational filters for prioritization
- Review of expired leases or leases nearing expiration
- Best practices for periodic monitoring

Module 8. Dashboards, KPIs and Reports for Portfolio Analysis

- Lease Portfolio Dashboard
- Portfolio Summary Dashboard
- Cash flow KPIs
- Cost and cash flow reports
- Filtering criteria by period, geographic hierarchy and property type
- Using dashboards for executive monitoring



Module 9. Guided Practice and Applied Cases

- Creating a building or land item within the portfolio
- Complete lease entry
- Recording clauses, options and amendments
- Associating documents and contacts
- Configuring or reviewing alerts
- Entering recurring costs
- Reviewing dashboards and interpreting cash flow reports



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

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 a **test** or **demo** Archibus environment
- **Basic knowledge** of **navigation** in a web environment
- **General knowledge** of the **organization's real estate** or **contractual operations**
- **Prior definition of roles** and **scope of use**, if the training is intended for real operational use



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:

- Greater **order** and **traceability** in **real property administration**
- Better **monitoring** of **contracts, expirations** and **critical events**
- More **consistent information** for **operational control** and **financial analysis**
- **Better use** of **portfolio dashboards, KPIs** and **reports**
- **Greater adoption** of Archibus among **key users**



Book your training

Ready to train your team?

Contact us to book Archibus by Eptura | Portfolio Management and Lease Administration training tailored to your organization's needs.



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