

Certinia PSA-Sysadmin

PSA System Administrator 2023

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Questions**

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Question: 1

You have set up a Flow to automatically assign a resource's manager to the approver field on Timecards. Users have reported that submitted Timecards are going to the Project Manager for approval and not the resource's manager. Of the following, which could be a reason for this?

- A. PSA requires that only Project Managers can approve Timecards
- B. The process builder to assign the resource's manager is not active
- C. The configuration option Assign Project Manager To Time card Approver is set to True

Answer: C

Explanation:

Step-by-Step Comprehensive Detailed Explanation

Understanding the Timecard Approval Process in PSA

By default, the timecard approval process in Certinia PSA (formerly FinancialForce PSA) follows a specific hierarchy.

If the project is a billable project and the Project Manager field is filled, the Project Manager is automatically assigned as the approver for timecards.

If the Project Manager field is blank or the project is non-billable, PSA uses the resource's manager as the approver (based on the Manager field in the Salesforce User record).

How Flows Work in Assigning Approvers

If you have created a Flow to automatically assign the resource's manager as the timecard approver, it means you are trying to override the default approval process.

However, if the Assign Project Manager To Timecard Approver configuration option is enabled, PSA will still prioritize the Project Manager over the resource's manager, regardless of your Flow settings. This would explain why submitted timecards are still being assigned to the Project Manager instead of the resource's manager.

Why the Other Options Are Incorrect

A . PSA requires that only Project Managers can approve Timecards

This is incorrect because PSA allows timecards to be approved by either the Project Manager or the Resource's Manager, depending on the project settings.

B . The process builder to assign the resource's manager is not active

While this could be a factor, the main reason is the configuration setting that forces the Project Manager to be the default approver.

Even if the Flow was working correctly, the Assign Project Manager To Timecard Approver setting would still take precedence.

How to Fix the Issue

Navigate to PSA Configuration Settings and check the Assign Project Manager To Timecard Approver setting.

If it is set to True, change it to False to allow the Flow to correctly assign the resource's manager as the approver.

Test by submitting a new timecard and verifying the assigned approver.

Reference and Verified Certinia PSA Documentation

PSA System Administration Guide: Timecard Approval Process.

FinancialForce PSA Approval Workflow: Default Approver Rules.

Question: 2

Your company has both full time and part time resources. From a Human Resources perspective, part time resources can work any number of hours per week. From a Resource Planning perspective, management has agreed that part time workers can be estimated at 20 hours per week. Based on this information, how many work calendars should be created?

- A. One full time work calendar, and one work calendar for each unique part time contract
- B. One full time work calendar, and one part time work calendar
- C. One full time work calendar, one part time work calendar, and one generic flexible work calendar

Answer: B

Explanation:

Step-by-Step Comprehensive Detailed Explanation

Understanding Work Calendars in Certinia PSA

Work calendars define the default number of hours per day and week that a resource is expected to work.

They are crucial for resource scheduling, utilization calculations, and capacity planning.

Every active PSA Resource must have an associated work calendar to allow project assignments.

Scenario Analysis

Your company has both full-time and part-time resources.

Full-time resources have a standard workweek (e.g., 40 hours per week).

Part-time resources have variable work hours but are estimated at 20 hours per week for planning purposes.

This means you need at least one calendar for full-time and one for part-time workers.

Why Option B is Correct

Creating a single full-time work calendar (e.g., 40 hours per week) covers all full-time employees.

Creating one part-time work calendar (e.g., 20 hours per week) provides a consistent framework for part-time resource planning.

This approach ensures standardized reporting, scheduling, and forecasting without unnecessary complexity.

Why the Other Options Are Incorrect

A . One full-time work calendar, and one work calendar for each unique part-time contract

This would require multiple work calendars for different part-time contracts, making resource scheduling overly complex.

Since management has agreed on an estimated 20 hours per week for all part-time workers, a single part-time work calendar suffices.

C . One full-time work calendar, one part-time work calendar, and one generic flexible work calendar

A flexible work calendar is not necessary if all part-time workers are estimated at 20 hours per week.

Work calendars should align with clear scheduling rules, not individual flexibility.

Implementation in PSA

Navigate to PSA - Admin App → Click Work Calendars tab.

Create the following calendars:

Full-Time Work Calendar: Set working hours to 40 per week.

Part-Time Work Calendar: Set working hours to 20 per week.

Assign the correct work calendar to each resource during onboarding.

Reference and Verified Certinia PSA Documentation

PSA Work Calendars Overview.

Setting Up Work Calendars.

Question: 3

Project Managers would like to display several fields prominently on the Project Lightning Page.

Which PSA Lightning Component could you use to meet this need?

- A. FF Field Overview
- B. FF Highlights
- C. FF PSA Field Summary

Answer: C

Explanation:

Project Managers who want to display several fields prominently on the Project Lightning Page should use the FF PSA Field Summary component. This component allows users to highlight key fields related to their projects, improving visibility and accessibility within the Lightning interface.

FinancialForce PSA provides several Lightning components, but among them:

FF Field Overview: This component is not specifically designed for summarizing multiple fields in a prominent way.

FF Highlights: This component typically provides a brief summary but does not allow for multiple field customization.

FF PSA Field Summary: This is the most appropriate component, as it allows displaying multiple PSA fields prominently on the Project Lightning Page.

Thus, the correct answer is C. FF PSA Field Summary.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 4

You are notified that some approved Miscellaneous Adjustments records are not getting picked up in the Billing Event Generation process during month end billing.

Which two of the following system settings do you need to have in place for Miscellaneous Adjustments to get picked up in the billing run? (Choose two.)

- A. The Effective Date value on the Miscellaneous Adjustments records is within the Date range of the

Time period used on the Billing Generation process.

B. The person running the Billing Event Generation process does not have Billing Miscellaneous Adjustments permission control for the Region, Account, or Project selected on the Billing Generation process.

C. The Transaction Category value on the Miscellaneous Adjustments record exists in the Configuration option: BillingCategories.

Answer: A, C

Explanation:

When Miscellaneous Adjustments records are not picked up in the Billing Event Generation process, the issue is often related to the system settings. The following conditions must be met:

Effective Date Range: The Miscellaneous Adjustments record's Effective Date must fall within the time period specified in the Billing Event Generation process. If the date is outside this range, the record will be excluded from the billing event.

Transaction Category Mapping: The Transaction Category on the Miscellaneous Adjustments record must be included in the BillingCategories configuration option. This ensures that the system correctly categorizes and includes the Miscellaneous Adjustments in the billing process.

On the other hand:

Option B ("The person running the Billing Event Generation process does not have Billing Miscellaneous Adjustments permission control for the Region, Account, or Project") is incorrect.

While permission controls impact user access, they do not directly affect whether Miscellaneous Adjustments records are picked up by the billing process.

Thus, the correct answer is A and C.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

FF-PSA-v15-Customer-Overview_1.0

Question: 5

Which of the following custom settings can be specific to a User?

A. Search Resources Global

B. Timecard Entry UI Personal

C. Assignment Settings

Answer: B

Explanation:

Certinia PSA has custom settings that can be applied at different levels: globally, at the profile level, or at the user level. Among the given options:

Search Resources Global – This is a global setting and is not specific to an individual user.

Timecard Entry UI Personal – This setting can be specific to a user. It allows users to customize their timecard entry UI, such as setting default values, modifying the number of rows displayed, or defining how time entry should behave.

Assignment Settings – This setting applies to assignments and resource management at a broader level, not specific to an individual user.

Since Timecard Entry UI Personal is user-specific, the correct answer is B. Timecard Entry UI Personal.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

PSA Data Dictionary Spring 2023

Question: 6

Your current setup of utilization automatically subtracts PSA Holidays from the total number of hours defined in a resource's "Work Calendar." How can utilization be configured so Holidays are not automatically subtracted?

- A. Go to App Launcher > navigate to "PSA Administration" > select "Schedule Utilization" > Navigate to the Information section > set "subtract holidays from total hours" to false
- B. Go to App Launcher > navigate to "Configuration Groups" > select "Utilization" > select "subtract holidays from total hours" > set to false
- C. Go to App Launcher > navigate to "Utilization Calculation" > select the calculation you want modified > set "subtract holidays from total hours" to false

Answer: B

Explanation:

Understanding Utilization Calculation and Holidays

The Utilization Calculation process considers various factors, including work calendars and holidays.

The default behavior is to subtract holidays from the total work hours when computing utilization.

This is controlled by the Configuration Option: "subtract-holidays-from-total-hours = true".

If the company does not want PSA to subtract holidays automatically, this setting must be changed to false.

How to Change This Setting

Step 1: Open the App Launcher in Salesforce.

Step 2: Navigate to Configuration Groups.

Step 3: Select "Utilization" from the list of configuration groups.

Step 4: Locate the option "subtract holidays from total hours".

Step 5: Set this value to false and save changes.

Why This Works?

By setting "subtract holidays from total hours" to false, PSA will stop deducting holidays from the available hours in the resource's utilization calculation.

This is useful for companies that manage leave differently, such as through a global PTO project instead of deducting from standard hours.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 117-118.

Question: 7

Your company's leadership noticed that the "PSA Resourcing" Lightning Component is displaying a "Default Cost Rate" column. They asked you to remove this column from the component. You edited

the Resource Request Lightning Page, selected the "PSA Resourcing" component, and identified the "Column Field Set" setting.

What is the next step to complete this change?

- A. Go to Setup > navigate to the Object Manager for "Contact" > select Field Sets > remove the "Default Cost Rate" field from the field set
- B. Go to Setup > navigate to Custom Settings > open the "Resource Request" setting > populate the Field Set in the "Resource Grid Field Set"
- C. Go to Setup > navigate to the "PSA User" Permission Set > open the "Resource Request" object settings > remove field level security for the "Default Cost Rate" field

Answer: A

Explanation:

Understanding PSA Resourcing Component Field Set

The PSA Resourcing Lightning Component displays a list of resources with key attributes such as name, role, availability, and cost rate.

The fields displayed are determined by a Field Set, which is a predefined group of fields configured on the Contact Object.

The "Default Cost Rate" column is controlled within the Field Set configuration.

How to Remove "Default Cost Rate" from the Component

Step 1: Navigate to Setup in Salesforce.

Step 2: Search for Object Manager and open it.

Step 3: Locate and select "Contact" object.

Step 4: Navigate to Field Sets under the Contact Object.

Step 5: Identify the Field Set used for the PSA Resourcing Component.

Step 6: Edit the Field Set and remove the "Default Cost Rate" field.

Step 7: Save changes and refresh the component in the Lightning App Builder.

Why This Works?

The Lightning Component dynamically retrieves its columns from the Field Set.

Removing the "Default Cost Rate" from the Field Set ensures it will no longer be displayed.

This prevents unauthorized users or managers from seeing cost-related data directly within the Resourcing Component.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 85.

Question: 8

An Administrator can find the majority of settings for PSA in which two of the following areas? (Choose two.)

- A. Configuration Groups
- B. Custom Settings
- C. PSA Administration Page

Answer: A, B

Explanation:

Configuration Groups

What are they?

Configuration Groups allow administrators to group related settings together.

Each Configuration Group contains multiple options that control how different PSA features behave.

Where to find them?

Navigate to App Launcher > Configuration Groups.

Select the relevant Configuration Group based on the feature you want to modify (e.g., Utilization, Billing, Timecards).

Example Usage:

Modifying how holidays affect utilization.

Adjusting billing event generation behavior.

Custom Settings

What are they?

Custom Settings store global or user-specific configurations for PSA.

Unlike Configuration Groups, these settings often apply across multiple objects or functions in PSA.

Where to find them?

Navigate to Setup > Custom Settings.

Look for PSA-specific settings such as "PSA Utilization Settings" or "PSA Timecard Settings".

Example Usage:

Setting personalized time entry options for different teams.

Controlling data visibility and field access.

Why Not PSA Administration Page?

While PSA Administration Page provides access to reports, jobs, and utilities, most system settings reside within Configuration Groups and Custom Settings.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Pages 58-60.

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Pages 64-67.

Question: 9

You are in the process of setting up your organization's Resources and learn that Resources in France will be working a 35-hour work week.

What will you need to do to set them up with the proper work calendar?

A. As PSA only allows one work calendar, it is best to implement a 40-hour work calendar and then create a validation rule to only allow 35 hours a week.

B. As the Work Calendar mostly impacts Utilization, set them up with a 40-work calendar, and then include the 35-hour hour work week in your utilization calculations.

C. Create a separate 35-hour work calendar and associate it to the French Resources, including any specific French Holidays.

Answer: C

Explanation:

PSA allows for the creation of multiple work calendars to accommodate different regional working hours. The best approach to handle the 35-hour work week for French Resources is:

Create a separate Work Calendar specifically for France with a 35-hour work week.

Define the correct daily working hours (e.g., 7 hours per day for a standard 5-day workweek).

Include French holidays in the work calendar to ensure scheduling accuracy.

Assign the work calendar to all French resources so that utilization calculations and resource assignments reflect the correct working hours.

Option A (PSA only allows one work calendar) is incorrect because PSA supports multiple work calendars.

Option B (using a 40-hour calendar and adjusting utilization calculations manually) is incorrect because it leads to inconsistent resource utilization and planning errors.

Thus, the correct answer is C.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 10

Your company is rolling out Skills and Certifications to encourage employees to track their skills and also decide which skills they would like to acquire. After rolling this feature out, end-users have noted they can't add their assignments to build their "Experience". What could be causing this problem?

- A. The "Enable Experience" checkbox in the enable-skills-experience configuration option is not selected
- B. The "Enable Experience" checkbox in the Skills Management custom setting is not selected
- C. The "Enable Experience" field on the PSA contact record is not selected

Answer: A

Explanation:

To allow end-users to add their assignments to build their "Experience", the following configuration setting must be enabled:

Navigate to Configuration Options.

Locate the setting "enable-skills-experience".

Ensure that the "Enable Experience" checkbox is selected.

Save and apply changes.

Option B (Skills Management custom setting) is incorrect because experience tracking is not controlled at the custom settings level.

Option C (Enable Experience on PSA Contact record) is incorrect because this setting does not exist on the contact record.

Thus, the correct answer is A.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 11

Currently Project Managers and Resource Managers are using Gantt. You do not want your Project Managers creating assignment, resource requests or milestones from the Gantt. Which of the following custom settings should you configure to hide these buttons?

- A. Project Task Gantt Global Settings
- B. Gantt Global Settings
- C. Project Task Gantt Preferences

Answer: B

Explanation:

To prevent Project Managers from creating Assignments, Resource Requests, or Milestones from the Gantt, the Gantt Global Settings must be configured:

Navigate to Custom Settings → Gantt Global Settings.

Modify the settings to remove the ability for Project Managers to create Assignments, Resource Requests, and Milestones from the Gantt.

Save and apply the changes.

Option A (Project Task Gantt Global Settings) is incorrect because it does not control high-level permissions for assignments and requests.

Option C (Project Task Gantt Preferences) is incorrect because it only controls user-specific preferences.

Thus, the correct answer is B.

Reference:

FF-PSA-v15-Customer-Overview_1.0

Question: 12

In your organization, you always send 2 separate invoices to your customers – one for Timecards & Expenses and the other for Misc Adjustment type billable records.

How could this be done automatically using FinancialForce functionality?

- A. You would set the "separateMiscellaneousAdjustments" Configuration Option to 'True', so that "Timecards & Expenses" and "Misc Adjustments" are included in two separate Billing events.
- B. In the first Billing cycle, the Billing team would deselect the "Include Misc Adjustment" checkbox, to exclude those records from the Billing Event. In the second Billing cycle, they would be required to select "Include Misc Adjustment" and deselect "Include Timecards and Expenses", resulting in two separate Billing Events.
- C. You would set the "Include Misc Adjustments" settings in the "Billing" custom settings to "False", so those are included in a separate Billing Event from Timecards & Expenses.

Answer: A

Explanation:

To automatically generate two separate invoices—one for Timecards & Expenses and another for Misc Adjustments, follow these steps:

Navigate to Configuration Groups → Billing.

Locate the setting "separateMiscellaneousAdjustments".

Set the value to "True" to ensure Misc Adjustments are separated into a different Billing Event.

Save and apply the changes.

Option B (manually selecting checkboxes in each billing cycle) is incorrect because it requires manual intervention and does not automate the process.

Option C (changing the "Include Misc Adjustments" setting in Billing custom settings) is incorrect because this setting does not control the separation of billing events.

Thus, the correct answer is A.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 13

In your Company, a Resource Manager wants to provide the option for Resources to nominate themselves for upcoming work they are interested in. How can you set this up?

- A. Enable "Self-Nominate for Resource Request" custom setting > add the "PSA Resource Self-Nomination" Lightning component to the Resource Request Detail Page
- B. Enable "Candidates Can Self-Nominate for Work" custom setting > add the "PSA Resource Self-Nomination" Lightning component to the Lightning Home page
- C. Enable "Self-Nominate for Work" custom setting > add the "PSA Self-Nomination" Lightning component to the Project Detail Page

Answer: A

Explanation:

Understanding Self-Nomination for Resource Requests

PSA allows resources to express interest in upcoming projects using the Self-Nomination feature.

This feature can be enabled through a Custom Setting, which then allows the "PSA Resource Self-Nomination" Lightning component to be used.

How to Enable Self-Nomination for Resource Requests

Step 1: Navigate to Setup in Salesforce.

Step 2: Search for Custom Settings and select it.

Step 3: Find and enable "Self-Nominate for Resource Request".

Step 4: Open the Lightning App Builder and edit the Resource Request Detail Page.

Step 5: Add the "PSA Resource Self-Nomination" Lightning component to the page.

Step 6: Save and activate the page.

Why This Works?

The "Self-Nominate for Resource Request" setting allows resources to nominate themselves for work using the Lightning component.

By adding this component to the Resource Request Detail Page, eligible resources can easily apply for available projects.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 65.

Question: 14

A Services manager has asked you to set up a unique "FF Navigation" lightning component on the "Services Delivery Workspace" that will provide separate options to users based on which team (business unit) they belong to.

Which two of the following actions would successfully accomplish the required setup? (Choose two.)

- A. The system admin can enable the "Hide Navigation Sections" setting within the "FF Navigation" lightning component to support different teams
- B. The system admin can clone the page and create two unique pages that have the "FF Navigation" lightning component configured for their respective team
- C. The system admin can add the "FF Navigation" component to the page twice and setup component visibility rules to ensure the right team sees their navigation

Answer: B, C

Explanation:

Understanding the FF Navigation Component

The FF Navigation component provides a tailored navigation experience for users.

It can be customized based on business units (teams) to show different navigation options.

Option 1: Clone the Page for Each Team (Correct - Option B)

Step 1: Navigate to Lightning App Builder.

Step 2: Clone the existing Service Delivery Workspace page.

Step 3: Modify the FF Navigation component in each cloned page to fit the respective team's needs.

Step 4: Assign different pages to different teams using Lightning Page Assignments.

Option 2: Use Component Visibility Rules (Correct - Option C)

Step 1: Open Lightning App Builder.

Step 2: Add two instances of the "FF Navigation" component to the Service Delivery Workspace page.

Step 3: Configure component visibility rules based on User Profile, Role, or Business Unit.

Step 4: Save and activate the page.

Incorrect Option (A: Hide Navigation Sections)

The "Hide Navigation Sections" setting does not support team-based navigation customization.

Instead, cloning pages or using visibility rules is the correct approach.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Pages 78-80.

Question: 15

Managers within your company are using the Resource Planner to check a resource's availability but report that they are not seeing the Availability column on the Resource Planner.

Which two of the following could be causing this issue? (Choose two.)

- A. Utilization Ermine checkbox is deselected under Utilization custom settings
- B. Resource Availability column is not selected under the Resource Planner columns list
- C. Managers don't have the field level access to Resource Availability

Answer: B C

Explanation:**Issue: Missing Availability Column in Resource Planner**

The Resource Planner displays resource availability, but missing settings can cause the column to disappear.

Cause 1: Resource Availability Column is Not Selected (Correct - Option B)

Step 1: Open the Resource Planner.

Step 2: Click on the Columns List settings.

Step 3: Ensure that "Resource Availability" is selected as one of the displayed columns.

Step 4: Save changes and refresh the planner.

Cause 2: Field-Level Access Restrictions (Correct - Option C)

Step 1: Navigate to Setup > Object Manager.

Step 2: Search for the Contact Object (which holds Resource Availability data).

Step 3: Go to Field-Level Security and check if "Resource Availability" is visible for managers.

Step 4: If necessary, update Field Permissions to grant access.

Incorrect Option (A: Utilization Ermine Setting)

There is no setting named "Utilization Ermine" under Utilization Custom Settings.

Utilization settings do impact availability calculations, but they do not hide the column from the Resource Planner.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Pages 75-77.

Question: 16

Your company hired its first part-time employee that needs to be set up as a Consultant in PS

A. They will work about 20 hours a week instead of the normal 40 hours a week.

Which of the following steps should you take to ensure this consultant's utilization calculation will be calculated correctly?

A. Create a new "Role" indicating the user is a Part Time Consultant

B. Create a new Part Time "Work Calendar" for 20 hours

C. Create a new "Utilization Calculation" labeled Part Time

Answer: B

Explanation:

To ensure that a part-time consultant's utilization is calculated correctly, the best approach is to: Create a new Work Calendar with a 20-hour work week (e.g., 4 hours per day for a 5-day workweek). Assign the new work calendar to the part-time consultant.

Ensure utilization calculations respect the work calendar, as PSA calculates utilization based on available hours from the assigned work calendar.

Option A (Creating a new "Role") is incorrect because roles do not impact utilization calculations directly.

Option C (Creating a new Utilization Calculation) is incorrect because utilization calculations apply broadly and should not be created for individual cases.

Thus, the correct answer is B.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 17

On the Resource Request Lightning page, your team is requesting changes to the Filter panel on the right side of the page, and would like to know what configurations are possible.

Which two of the following configurations are available for the Filter panel? (Choose two.)

- A. Add or Remove the Start and End Date fields
- B. Add or Remove Region, Practice, and Group filters
- C. Add or Remove the Skills filters

Answer: A, B

Explanation:

The Resource Request Lightning page filter panel allows certain configurations, including:

Adding or Removing Start and End Date fields – Users can modify these fields to filter based on availability.

Adding or Removing Region, Practice, and Group filters – These filters enable resource selection based on organizational structure.

Option C (Adding or Removing Skills filters) is incorrect because Skills filters are not configurable within the Resource Request Lightning page filter panel; they are managed in a different PSA module. Thus, the correct answers are A and B.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 18

The Finance Team is interested in limiting the amount for a particular type of expense company-wide.

Of the following, which is the best solution to accomplish this?

- A. Set up an Expense Limit that will limit the expense based on the Expense Type on the Expense Limit record at the global region level.
- B. Set up an Expense Limit that will limit the expense based on the Expense Type on the RPG record.
- C. Set up an Expense Limit that will limit the expense based on the Expense Type on the Resource Record.

Answer: A

Explanation:

To limit expenses company-wide for a particular type of expense, the best solution is:

Use the Expense Limit record – This allows defining limits based on Expense Type at a global region level.

Set the maximum allowable amount per transaction, period, or user.

Ensure that the Expense Limit applies across all users and regions to enforce company-wide restrictions.

Option B (Using the RPG record) is incorrect because it applies only to specific regions or practice

groups, not company-wide.

Option C (Using the Resource Record) is incorrect because it applies at an individual user level rather than enforcing a global limit.

Thus, the correct answer is A.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 19

To update Resource Roles in PSA, you will need to update the picklists of which two of the following objects? (Choose two.)

- A. Contact
- B. Work Calendars
- C. Assignment

Answer: A, C

Explanation:

To update Resource Roles in PSA, you need to modify the picklists of two objects:

Contact Object – This contains the primary Resource Role field, which determines a resource's default role.

Assignment Object – This ensures that resource role updates apply to assignments where resources are staffed.

Option B (Work Calendars) is incorrect because Work Calendars define availability, not Resource Roles.

Thus, the correct answers are A and C.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 20

The time periods in your org run through 2024. Your Finance team wants to start building forecast models through 2030. What is the best way to help the Finance team accomplish their task?

- A. Contact FinancialForce Onboarding and have them assist you in uploading a "csvfile with the correct time periods for the years 2025-2030 into your org
- B. Use dataloader.io or Data Import Wizard to upload a "csvfile with the correct time periods for the years 2025-2030 into your org
- C. Contact FinancialForce Support or your Partner to open a ticket, requesting that Onboarding help load the required time periods to ensure Actuals remain intact in your org

Answer: B

Explanation:

Understanding Time Periods in PSA

PSA requires predefined time periods to process timecards, utilization, and forecasting.

If time periods are not extended into the future, forecasting and utilization calculations will stop working beyond the last defined time period.

How to Extend Time Periods to 2030

Step 1: Create a .csv file with the appropriate time slices (years, quarters, months, weeks).

Step 2: Use Salesforce Data Import Wizard or Dataloader.io to import the records.

Step 3: Ensure the imported time periods align with your company's fiscal year.

Step 4: Verify in PSA that new time periods are correctly set up and available for reports.

Why Not Contact Salesforce Support? (Option C)

Salesforce Support is not required to create time periods. This is a standard admin task that can be completed using Salesforce tools.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 87.

Question: 21

How would you determine what version of PSA your organization is on?

- A. Go to Setup > Installed Packages > PSA Core
- B. Go to Setup > Installed Packages > PS Enterprise
- C. Go to Setup > Installed Packages > Salesforce Central

Answer: A

Explanation:

Where to Find the PSA Version

Step 1: Navigate to Setup in Salesforce.

Step 2: Search for Installed Packages.

Step 3: Look for "PSA Core" in the list of installed packages.

Step 4: Check the version number displayed next to "PSA Core".

Why Not PS Enterprise or Salesforce Central?

"PS Enterprise" includes additional components but does not display the main PSA version.

"Salesforce Central" is unrelated to PSA versioning.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 137.

Question: 22

You have received a requirement to add the "Gantt" button to the Project page layout. Dynamic Forms are not in use. How would you configure this change?

- A. Go to Setup > Custom Settings > Page Preferences > navigate to the "Display Buttons" setting > input "AH" to display all available buttons on the page
- B. Go to Setup > Object Manager > Project > Lightning Record Pages > select the assigned lightning page > Edit the page > navigate to the "Buttons" component > drag the "Gantt" button onto the page

C. Go to Setup > Object Manager > Project > page layouts > open the assigned page layout > navigate to the "Mobile & Lightning Actions" menu > drag the "Gantt" button onto the page

Answer: C

Explanation:

How to Add the "Gantt" Button

Step 1: Navigate to Setup in Salesforce.

Step 2: Go to Object Manager and select Project.

Step 3: Open Page Layouts and select the active page layout.

Step 4: Find the "Mobile & Lightning Actions" menu.

Step 5: Drag and drop the "Gantt" button onto the layout.

Step 6: Save and verify the changes in the Project record.

Why Not Other Options?

Option A: Custom Settings (Page Preferences) does not control button visibility.

Option B: Lightning Record Pages require Dynamic Forms, which are not in use in this scenario.

Reference:

FF-PSA v15 Customer Overview.pdf, Page 6.

Question: 23

A user is having an issue where the Utilization report has inflated hours. The billable hours, calendar hours, and credited hours are double their actual values.

Which of the following is a possible cause of this issue?

A. The report filter for "End Date" needs to be edited to a different date range

B. The report needs to be grouped by Resource

C. The report needs to be filtered by Time Period Type

Answer: C

Explanation:

Why is Utilization Reporting Showing Inflated Hours?

Inflated utilization hours often occur when the report aggregates hours incorrectly.

Cause 1: Report Not Grouped by Resource (Correct - Option B)

If the Resource grouping is missing, billable, calendar, and credited hours might be summed multiple times.

Solution: Edit the report and add "Resource" as a grouping field.

Cause 2: Incorrect Time Period Type Filter (Correct - Option C)

Utilization calculations are based on specific time period types (month, quarter, year).

If a report is missing the correct filter, hours might be duplicated across different time periods.

Solution: Apply a filter for the correct "Time Period Type" (e.g., Month, Quarter, or Year).

Why Not the "End Date" Filter? (Option A Incorrect)

The End Date filter controls the date range but does not impact hour duplication.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Pages 113-116.

Question: 24

You configured a new Salesforce approval process on the "Timecard" object. What is needed to make a user a Timecard approver in this process?

- A. The approver must be in the same role hierarchy as the submitter
- B. The approver must have Read permissions on the "Timecard" object
- C. The approver must be set up as a Delegated Approver for the submitter

Answer: C

Explanation:

Understanding Timecard Approval Process

When a user submits a Timecard, it follows a Salesforce Approval Process.

The approver can be defined based on a Delegated Approver setting.

How to Set Up a Timecard Approver

Step 1: Navigate to Setup > Users.

Step 2: Select the user who needs an approver.

Step 3: Scroll to the Delegated Approver field.

Step 4: Assign a manager or team lead as the Delegated Approver.

Step 5: Save and test by submitting a Timecard Approval Request.

Why Not Other Options?

Option A: The role hierarchy does not automatically grant approval rights.

Option B: Read permissions on the "Timecard" object do not make a user an approver.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 53.

Question: 25

A manager was looking at utilization for a resource for the last two months. The resource was identified as 80% utilized for each month, but the subtotal section showed 160% for the user for that same two month period.

How can the report be fixed to show 80% instead of 160%?

- A. Adjust the Resource's work calendar to 40 hours and refresh the report
- B. Create a Summary Level formula so the subtotal is calculated and not summed
- C. Set the "Utilization" setting for Target Utilization Approach to "Weighted"

Answer: B

Explanation:

Understanding the Issue

The report shows 80% utilization per month but 160% over two months.

This happens because percentages are summed instead of averaged in the subtotal.

Solution: Use a Summary Level Formula (Correct - Option B)

Step 1: Open the Utilization Report in Salesforce Reports.

Step 2: Click Edit Report.

Step 3: Add a Summary Level Formula instead of summing percentages.

Step 4: Define the formula:

Utilization Subtotal=SUM(Billed Hours)/SUM(Available Hours)
$$\text{Utilization Subtotal} = \frac{\text{SUM(Billed Hours)}}{\text{SUM(Available Hours)}}$$

Step 5: Save and rerun the report to validate the fix.

Why Not Other Options?

Option A (Adjusting Work Calendar): The work calendar controls available hours but does not fix subtotal errors.

Option C (Target Utilization Approach - Weighted): This setting affects calculation logic but does not solve subtotal summation errors.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 114.

Question: 26

When a timecard is submitted into an Approval process, you would like to capture the Submitted Date in a field to use for reporting purposes. You've already created the new Submitted Date field on the Timecard object.

What is the easiest approach to use in setting up this configuration within an Approval process?

- A. Go to the active Approval Process for Timecards and add a field update to update the new date field upon Initial Submission
- B. Create a Workflow Rule when a Timecard Status changes to Submitted to update the new date field
- C. Go to the FinancialForce Flow for Timecards and add a "Get Records" element to update the new date field when Timecards are submitted

Answer: A

Explanation:

Why Use an Approval Process Field Update?

Approval Processes allow Field Updates when records move between stages.

The best practice is to update the Submitted Date as soon as the Timecard is submitted.

How to Configure This in Salesforce?

Step 1: Navigate to Setup > Approval Processes.

Step 2: Locate and edit the active Approval Process for Timecards.

Step 3: Under "Initial Submission Actions", click "Add New Field Update".

Step 4: Select the Submitted Date field and set it to TODAY().

Step 5: Save and test by submitting a timecard.

Why Not Other Options?

Option B (Workflow Rule): Salesforce recommends Approval Processes over Workflows for approval-related field updates.

Option C (FinancialForce Flow): No need to modify PSA Flow when Approval Processes natively support field updates.

Reference:

FF-PSA v15 Customer Overview.pdf, Page 40.

Question: 27

As a system administrator, what are the recommended steps you should take to keep informed about new PSA features, components and tools?

- A. Join FinancialForce PSA User Group, attend FinancialForce release previews/webinars, access PSA documentation, join the official SF user group
- B. Join FinancialForce PSA Community, review the new Trailhead modules, attend FinancialForce release previews/webinars, access PSA documentation
- C. Join FinancialForce PSA Community, attend FinancialForceX Summit events, attend FinancialForce release previews/webinars, access PSA documentation

Answer: B

Explanation:

Recommended PSA Admin Best Practices

FinancialForce PSA Community: Provides product updates, discussions, and Q&A.

Trailhead Modules: Helps admins stay certified and learn new skills.

Release Previews & Webinars: Covers upcoming changes, best practices, and new tools.

PSA Documentation: Includes release notes, feature console changes, and support guides.

Why Not Other Options?

Option A (SF User Group Instead of Trailhead): Trailhead is directly tied to PSA product updates, while SF User Groups focus more on general Salesforce topics.

Option C (FinancialForceX Summit Events): While valuable, they are not the primary source for ongoing PSA updates.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 134-137.

Question: 28

Which of the following is NOT true regarding version upgrades?

- A. Some enhancements and fixes are enabled automatically
- B. All features are enabled by default
- C. Any features that might have a significant impact on your data are disabled by default

Answer: B

Explanation:

How FinancialForce Handles PSA Upgrades

Some enhancements and fixes are enabled automatically (☒ True).

Any features that might impact data are disabled by default (☒ True).

Not all features are enabled by default (False).

Why Not All Features Are Enabled?

New features are controlled via Feature Console, allowing admins to enable them after testing.

Certain features require manual activation due to potential impact on existing workflows.

How to Check and Enable New Features?

Step 1: Navigate to App Launcher > Feature Console.

Step 2: Locate new features marked as "Available".

Step 3: Read documentation and test before enabling in production.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20 (2).pdf, Page 137.

Question: 29

The consultants in your organization will be entering time against the project task and everyone else will enter time against the project/milestone.

Which of the following correctly identifies the steps you will need to complete?

- A. Navigate to Time Card Entry UI Personal custom setting, click "New" and create a setting for your Consultant profile and then change the 'Task Time Entry Mode' to "Calculated"
- B. Navigate to Time Card Entry UI Switch custom setting, click "New" and create a setting for your Consultant profile and then change the 'Task Time Entry Mode' to "Calculated"
- C. Navigate to Time Card Entry UI Global custom setting, click "New" and create a setting for your Consultant profile and then change the 'Task Time Entry Mode' to "Calculated"

Answer: A

Explanation:

To allow consultants to enter time against the project task, while everyone else enters time against the project/milestone, you need to:

Go to Setup → Custom Settings.

Locate Time Card Entry UI Personal and click "New".

Create a setting specific to the Consultant profile.

Set the 'Task Time Entry Mode' to "Calculated".

Save and apply the changes.

Option B (Time Card Entry UI Switch custom setting) is incorrect because this setting is not used for defining time entry modes.

Option C (Time Card Entry UI Global custom setting) is incorrect because it applies organization-wide rather than for specific user profiles.

Thus, the correct answer is A.

Reference:

FF-PSA-v15-Customer-Overview_1.0

Question: 30

A Project Manager wants to generate a report on the Project's Margin, Revenue, and Costs for a specific period, and to be able to reuse it.

How do you set up this requirement in the Org?

- A. Create a report on the "Project" object > add the Billings. Margin, and Total Costs > Group by Project Name > filter by Current Time Period
- B. Create a report on the "Project Actuals" object > add the Billings. Margin and Total Costs > Group by Project > filter by Time Period
- C. Create a report on the "Backlog Detail" object > add the Billings. Margin, and Total Costs > Group by Project > filter by Time Period

Answer: B

Explanation:

To generate a report on a Project's Margin, Revenue, and Costs for a specific period, the best approach is:

Use the "Project Actuals" object, as it contains real-time financial data for projects.

Include the fields: Billings, Margin, and Total Costs.

Group by Project to summarize data per project.

Filter by Time Period to ensure reports show data for a specific timeframe.

Option A (Using the "Project" object) is incorrect because it lacks direct financial calculations.

Option C (Using "Backlog Detail") is incorrect because backlog relates to future revenue rather than actuals.

Thus, the correct answer is B.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 31

Where would you go to opt in for push updates, or to update the schedule of when an update will be pushed for FinancialForce applications?

- A. PSA Administration
- B. System Administrator Workspace
- C. Foundations Admin Agg

Answer: B

Explanation:

To opt in for push updates or adjust the schedule of updates for FinancialForce applications:

Go to System Administrator Workspace in the FinancialForce Community.

Check for push upgrade schedules – FinancialForce typically pushes major releases twice a year (Spring and Fall) and minor service packs periodically.

Modify settings if needed to control when updates are received.

Option A (PSA Administration) is incorrect because it handles system configurations but not update scheduling.

Option C (Foundations Admin App) is incorrect as it focuses on system-wide configurations, not update schedules.

Thus, the correct answer is B.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 32

Users are complaining to you that the Milestones related list is not showing the most useful fields on the Project page. Which sequence of steps would you take to update the fields?

- A. Go to the Project object > Project Page Layout > Milestones Related List > Update fields
- B. Go to the Milestone object > Milestone Page Layout > Project Related List > Update fields
- C. Go to the Milestone object > Fields Sets > Project Field Set > Update fields

Answer: A

Explanation:

To update the Milestones related list on the Project page with the most useful fields:

Go to Setup → Object Manager.

Find and open the "Project" object.

Navigate to Page Layouts and select the active layout.

Scroll to the "Milestones" related list.

Modify the fields displayed (e.g., Target Date, Amount, Status, etc.).

Save the changes and refresh the page.

Option B (Updating the Milestone Page Layout instead of Project Page Layout) is incorrect because the Milestone object does not control related lists on the Project page.

Option C (Updating the Project Field Set on the Milestone object) is incorrect because field sets control default field visibility, not related lists.

Thus, the correct answer is A.

Reference:

PSA Sys Admin Essentials Student Guide Fall 20

Question: 33

You receive a requirement to add a secondary approval for Expense Reports whenever an Expense amount exceeds the set threshold amount.

How would you configure this?

- A. Go to Setup > Custom Settings > Expense Settings > edit the "Secondary Approval" setting
- B. Go to Setup > Object Manager > Expense Reports > Lightning Page > Edit the "Approval Process" Component to add an Approval Step
- C. Go to Setup > Approval Processes > Expense Reports > Create a new Approval Process with Entry Criteria for the Expense Amount

Answer: C

Explanation:

To add a secondary approval for Expense Reports when the expense amount exceeds a threshold, follow these steps:

Navigate to Approval Processes:

Go to Setup in Salesforce.

Enter Approval Processes in the Quick Find box.

Select Approval Processes under Process Automation.

Create a New Approval Process for Expense Reports:

Click New Approval Process and select Use Standard Setup Wizard.

Select Expense Report as the object.

Enter a Process Name and Unique Name.

Set Entry Criteria for High-Value Expense Reports:

Define criteria where the Expense Amount field is greater than the threshold value set by your organization.

Example: Expense Amount > 1000.

Define the Approval Steps:

Step 1: Assign the Primary Approval (e.g., Line Manager).

Step 2: Create a conditional approval step for the Secondary Approval.

Set entry criteria: Expense Amount > 1000.

Assign approver (e.g., Finance Manager or CFO).

Ensure that this step only triggers when the condition is met.

Activate the Approval Process:

Click Activate to apply the approval workflow.

Reference:

FinancialForce PSA System Administration Guide

PSA Approval Processes Configuration Documentation

Question: 34

Your organization has decided to change the default scheduling strategy to be used as a starting point when creating an Assignment on the Project.

Which of the following tasks do you need to perform to accommodate this requirement?

- A. Remove scheduling strategy options that will not be used by adjusting the Assignment custom setting.
- B. Adjust the Configuration Value record for Scheduling
- C. Delete the Configuration Value record for Scheduling

Answer: B

Explanation:

To change the default scheduling strategy used when creating an assignment on a project:

Navigate to Configuration Options:

Go to App Launcher in Salesforce.

Search for and open PSA Administration.

Locate Configuration Options.

Find the Scheduling Configuration Group:

Look for the configuration group related to Scheduling.

Open the Configuration Value record for Scheduling.

Adjust the Default Scheduling Strategy:

Modify the Default Scheduling Strategy to the new preferred value.

Save changes.

Test the Configuration:

Create a new Assignment on a Project.

Verify that the new default scheduling strategy is applied.

Reference:

PSA System Administration Guide

Certinia PSA Data Dictionary and Configuration Guide

Question: 35

When a Timecard is entered into the system, a record is generated that can be used in calculating Actuals.

What is that record called?

A. An "Accounting Log" record

B. A "Revenue Item" record

C. A "Transaction Delta" record

Answer: C

Explanation:

When a timecard is entered into the system, a Transaction Delta record is generated. This record is essential for calculating actuals.

What is a Transaction Delta Record?

It is a record that tracks the impact of approved timecards, budgets, billable milestones, and other financial elements.

It signals which fields need to be updated in project actuals.

Process Flow in Scheduled Mode:

When a timecard is approved, the system creates a Transaction Delta record.

The Actuals Job picks up this delta record and updates actuals.

The Transaction Delta record is deleted once the update is complete.

Where to Monitor Transaction Delta Records?

Add the following related lists to the Project page layout:

Project Actuals

Transaction Log

Transaction Deltas

Troubleshooting Errors with Actuals:

If actuals are not reflecting, check for unprocessed Transaction Delta records.

Manually trigger the Actuals Calculation Job from the PSA Administration tab.

Reference:

Certinia PSA Actuals Processing Guide
Certinia PSA System Administration Essentials

Question: 36

One of the Project Managers in your company has reached out to you to resolve an issue. Many of the Timecards that were approved in the last week against projects are not reflecting back on the Project Actuals.

You check that the Actuals Configuration Group > Calculation Mode option is set to "Scheduled". What is the next step you should take?

- A. Navigate to "Error Logs", and check the details of the error in the "Message" field for each error log record
- B. Navigate to "Logs", and check the details of the error in the "Message" field for each log record
- C. Navigate to "Agg Logs", and check the details of the error in the "Message" field for each agg log record

Answer: A

Explanation:

If approved timecards are not reflecting in Project Actuals, follow these steps:

Verify Actuals Calculation Mode:

Go to PSA Administration.

Check if the Calculation Mode is set to "Scheduled".

Check for Errors in Logs:

Navigate to Error Logs (App Launcher > PSA Administration > Logs).

Look for records where errors may have occurred.

Check the Message field to determine the cause.

Common Errors and Resolutions:

Unprocessed Transaction Delta Records:

If there are unprocessed Transaction Deltas, manually process them.

App Logs Indicating Failures:

If there are App Logs, review them and delete old logs if necessary.

Run Project Actuals Recalc:

If errors persist, run the Project Actuals Recalculation Job.

Use Actuals Verifier for Troubleshooting:

Run the Actuals Verifier tool to identify discrepancies.

Manually recalculate actuals if necessary.

Reference:

Certinia PSA Project Actuals Guide

PSA System Administration Essentials

Question: 37

Your company wants to regularly update the current Time Period for all Region, Practices, Groups, Projects, and Resources (RPGPR). Which is the best option to meet this requirement?

- A. Schedule the RPGPR Maintenance Batch in PSA Administration
- B. Manually update the Time Period on all RPGPR records
- C. Enable the RPGPR Time Period auto update feature in Setup

Answer: A

Explanation:

Understanding RPGPR (Region, Practices, Groups, Projects, and Resources) Updates:

The Current Time Period in PSA must be updated regularly to ensure accurate reporting and forecasting.

RPGPR entities are used for structuring project and resource hierarchies, making it essential to maintain updated time periods.

Options Analysis:

Option A: "Schedule the RPGPR Maintenance Batch in PSA Administration"

✓ This is the correct answer because the RPGPR Maintenance Batch resets the Current Time Period to the default value (usually "All Time Periods") and ensures all RPGPR records remain synchronized.

Option B: "Manually update the Time Period on all RPGPR records"

✗ This is inefficient, error-prone, and impractical for large organizations.

Option C: "Enable the RPGPR Time Period auto-update feature in Setup"

✗ No such direct feature exists in PSA to auto-update the RPGPR Time Period.

Steps to Schedule RPGPR Maintenance Batch:

Navigate to PSA Administration.

Locate the RPGPR Maintenance Batch option.

Configure the job to run at a set interval (e.g., daily or weekly).

Monitor the job execution via Apex Jobs in Salesforce.

Reference:

PSA Sys Admin Essentials Student Guide.

Question: 38

What is the best way for a System Administrator to Schedule Backlog in Lightning?

- A. On the Region, click on Calculate Backlog. Fill out the fields, and click Calculate.
- B. From the PSA Administration tab click on Schedule Backlog Calculation
- C. From the Developer Console run a script to Calculate Backlog

Answer: B

Explanation:

Understanding Backlog Scheduling in PSA:

Backlog refers to the revenue from future scheduled assignments and milestones.

Scheduled backlog includes revenue from scheduled assignments and milestones.

Unscheduled backlog is the total expected revenue minus actual billings and scheduled revenue.

Options Analysis:

Option A: "On the Region, click on Calculate Backlog. Fill out the fields, and click Calculate."

✗ This is for manual backlog calculation, not scheduling.

Option B: "From the PSA Administration tab, click on Schedule Backlog Calculation."

✓ Correct! This allows automated backlog calculations at regular intervals.

Option C: "From the Developer Console, run a script to Calculate Backlog."

✗ While possible, this is not best practice for system administrators.

Steps to Schedule Backlog Calculation:

Open PSA Administration Tab.

Locate Schedule Backlog Calculation.

Set up parameters, including time period types (Month, Quarter, Year, Perpetual).

Configure the job to run automatically at a defined interval (e.g., weekly).

Validate execution via Salesforce Scheduled Jobs.

Reference:

PSA Sys Admin Essentials Student Guide.

Question: 39

Your company wants to be able to automatically notify Resources by email about their missing timecards, when they have not entered the full amount of contracted hours for the previous week. What is the best method to use within PSA to enable this?

A. Use the Missing Timecards Scheduled Job and Email Alert

B. Use the Time Variance Scheduled Job and Email Alert

C. Use a Salesforce Report based on Monthly Estimate vs Actuals Records and subscribe the Resource to receive the report by email

Answer: A

Explanation:

Understanding Missing Timecards Notification in PSA:

PSA tracks missing timecards to ensure compliance with time entry policies.

The system can automatically notify resources who have not submitted their timecards.

Options Analysis:

Option A: "Use the Missing Timecards Scheduled Job and Email Alert"

✓ Correct! PSA provides a scheduled job to detect missing timecards and send automated email alerts.

Option B: "Use the Time Variance Scheduled Job and Email Alert"

✗ Incorrect! Time Variance is used to compare planned vs actual hours worked.

Option C: "Use a Salesforce Report based on Monthly Estimate vs Actuals Records and subscribe the Resource to receive the report by email"

✗ Possible, but not the best method since it requires manual intervention.

Steps to Schedule Missing Timecards Notification:

Go to PSA Administration Tab.

Find Missing Timecards Scheduled Job.

Configure the job:

Week End Date: Auto-filled.

Include Sublevels: Yes (for hierarchical reporting).
Type: Last Week (ensures past week's time compliance).
Schedule Frequency: Weekly (e.g., Monday 9 AM).
Set up an email alert template to notify employees.
Monitor missing timecards via reports.
Reference:
PSA Sys Admin Essentials Student Guide.

Question: 40

Where would you go to delete App Logs in bulk?

- A. PSA Administration
- B. System Administrator Workspace
- C. Backlog Details

Answer: A

Explanation:

Understanding App Logs in PSA:

App Logs capture errors related to actuals, billings, timecard rollups, and other processes. Excessive logs can cause system performance issues and should be cleaned up regularly.

Options Analysis:

Option A: "PSA Administration"

✓ Correct! App Log Cleanup Job in PSA Administration allows bulk deletion of old logs.

Option B: "System Administrator Workspace"

✗ Not specific to PSA logs.

Option C: "Backlog Details"

✗ Irrelevant; backlog pertains to revenue forecasting.

Steps to Delete App Logs in Bulk:

Navigate to PSA Administration.

Find App Log Cleanup Job.

Run the cleanup job to remove outdated logs.

Alternatively, use Dataloader.io for bulk deletion.

Reference:

PSA Sys Admin Essentials Student Guide.

Everything you need to know about FinancialForce Project Actuals.

Question: 41

Where would you go to delete Actuals, Billing, and EVAs app logs?

- A. PSA Administration page > PSA Batch Processes > App Log Cleanup Job
- B. Foundations Set Up > Scheduled Jobs > App_ Log Cleanup Job
- C. Set Up > Scheduled Jobs > App Log Cleanup Job

Answer: A

Explanation:

To delete Actuals, Billing, and EVAs app logs, follow these steps:

Navigate to PSA Administration:

Click on App Launcher in Salesforce.

Search for and select PSA Administration.

Locate the App Log Cleanup Job:

Go to PSA Batch Processes.

Look for App Log Cleanup Job.

Execute the Cleanup Job:

Click on Run Now to initiate the job.

This will delete old app logs related to Actuals, Billing, and EVAs.

Schedule Automatic Cleanup (Optional):

If frequent cleanup is required, schedule the App Log Cleanup Job to run periodically.

Reference:

PSA System Administration Guide

Certinia PSA Data Dictionary and Administration Guide

Question: 42

Actuals are the result of calculations run on transactions that occur in a business record. PSA tracks Actuals by incrementing values in specified amounts for each time period. Actuals include which of the following?

- A. Bookings. Budgets. Revenue. Costs. Margin
- B. Bookings, Billings. Forecasts. Costs. Margin
- C. Bookings Billings Revenue Costs Margin

Answer: C

Explanation:

Actuals in PSA are the result of calculations run on transactions that occur in business records. They track incremental changes over time and include the following components:

Bookings:

Represents confirmed revenue commitments from customers.

Billings:

Revenue that has been invoiced to customers.

Revenue:

Recognized income earned from services delivered.

Costs:

Expenses incurred in delivering services (e.g., employee salaries, subcontractor fees).

Margin:

The difference between Revenue and Costs, indicating project profitability.

Reference:

Certinia PSA Actuals Processing Guide

PSA Data Dictionary and System Administration Guide

Question: 43

When setting up a Utilization calculation, what does the "Is Report Master" field mean?

- A. Calculated utilization value from this job gets surfaced on the Contact record
- B. In a Utilization calculation hierarchy based on Region hierarchy, this is the primary/highest job
- C. Calculated utilization value from this job gets surfaced in the Resource Planner "Availability column"

Answer: A

Explanation:

The "Is Report Master" field in utilization calculation determines whether the results of the calculation are displayed on the Contact (Resource) record.

Purpose of "Is Report Master":

If checked, the calculated utilization values appear directly on the Contact record for each resource. If unchecked, the utilization calculation is still processed but is not displayed on the resource's profile.

Utilization Calculation Process:

Utilization is calculated using timecards (historical utilization) and assignments (scheduled utilization).

The system determines billable and available hours based on Work Calendars and time-tracked activities.

Common Use Cases:

Organizations often check "Is Report Master" to ensure resource utilization is visible on Contact records for reporting purposes.

If unchecked, utilization can still be accessed via reports and dashboards but won't appear on the Contact record.

Reference:

Certinia PSA Utilization Calculation Guide
PSA System Administration Essentials

Question: 44

A user has reported that their Utilization Report doesn't have data for the last few weeks.

Which two of the following are possible causes of this issue? (Choose two.)

- A. There is an issue with "Time Periods" for the relevant date range (for example, duplicate Time Periods]
- B. The "Utilization Calculation" scheduled job has an error and stopped running properly
- C. The "Estimates vs Actuals" scheduled job has an error and stopped running properly

Answer: A, B

Explanation:

If a Utilization Report is missing data for the last few weeks, consider these potential causes:

1. Time Period Issues:**Problem:**

Time Periods may be missing, duplicated, or incorrectly configured.

Solution:

Navigate to PSA Administration > Time Periods and verify that all expected time periods exist without duplicates or gaps.

2. Utilization Calculation Job Failure:**Problem:**

The scheduled Utilization Calculation job may have failed or stopped running.

Solution:

Navigate to Setup > Apex Jobs.

Check for errors or failures in the Utilization Calculation job.

If necessary, manually rerun the job to recalculate utilization.

Incorrect Answer Explanation:

C. "Estimates vs. Actuals" job failure is incorrect because it is unrelated to utilization calculations. It deals with project estimates compared to actual performance, not utilization tracking.

Reference:

PSA System Administration Essentials

Utilization Calculation Troubleshooting Guide

Question: 45

What tool can be used to "schedule backlog calculation" and "schedule utilization calculation" in PSA?

- A. Feature Console
- B. PSA Administration
- C. PSA Admin App

Answer: B

Explanation:

Understanding Backlog and Utilization Calculation in PSA:

Backlog Calculation: Tracks the remaining work (revenue) on projects. It includes scheduled and unscheduled backlog.

Utilization Calculation: Measures how effectively billable resources are utilized, distinguishing between historical and scheduled utilization.

Options Analysis:

Option A: "Feature Console"

☐ Incorrect. The Feature Console is used to enable/disable PSA features, not schedule backlog/utilization calculations.

Option B: "PSA Administration"

☒ Correct! PSA Administration is used to schedule backlog and utilization calculations.

Option C: "PSA Admin App"

☐ Incorrect. The PSA Admin App provides access to administrative tools but is not used for scheduling calculations.

Steps to Schedule Backlog and Utilization Calculation:

Navigate to PSA Administration Tab.
Locate Schedule Backlog Calculation and Schedule Utilization Calculation.
Configure the scheduling parameters (e.g., frequency, time period).
Save and monitor scheduled jobs in Apex Jobs in Salesforce.
Reference:
PSA Sys Admin Essentials Student Guide.

Question: 46

Which of the following "frequent tasks" would be found in the "System Administrator Workspace"?

- A. Transaction Reconciliation
- B. User Management
- C. Manage Accounts

Answer: B

Explanation:

Understanding the System Administrator Workspace:

The System Administrator Workspace provides tools for PSA admins to manage system-wide tasks, including user access, permissions, and system maintenance.

Options Analysis:

Option A: "Transaction Reconciliation"

✗ Incorrect. Transaction reconciliation is a finance-related task, not a frequent system administration function.

Option B: "User Management"

✓ Correct! User management, including creating, updating, and deactivating users, is a core task in the System Administrator Workspace.

Option C: "Manage Accounts"

✗ Incorrect. Managing accounts is typically a function performed in Salesforce CRM, not a frequent task in the System Administrator Workspace.

Steps for User Management in the System Administrator Workspace:

Open System Administrator Workspace.

Use User Management tools to:

Assign permissions.

Activate/deactivate users.

Manage PSA access.

Reference:

PSA Sys Admin Essentials Student Guide.

Question: 47

You recently activated a Project Management Workspace and are notified that some users are seeing the following error on the navigation component:

Error: "You do not have access to the Apex class named 'wksp_navigation'."

Which permission do you need to add for the user?

- A. Add the "PSA Workspace Navigation Apex Class" Permission Set to the User
- B. Create a Permission Control for the user for "Workspaces" for their Region, Practice, or Group
- C. Add the Apex Class "wksp navigation" to the User's Permission Set or Profile

Answer: C

Explanation:

Understanding the "wksp_navigation" Error in PSA Workspaces:

The error occurs when a user does not have the necessary Apex Class permissions for the Project Management Workspace Navigation Component.

Options Analysis:

Option A: "Add the 'PSA Workspace Navigation Apex Class' Permission Set to the User"

✗ Incorrect. No such predefined permission set exists.

Option B: "Create a Permission Control for the user for 'Workspaces' for their Region, Practice, or Group"

✗ Incorrect. Permission controls manage regional access but do not grant access to Apex Classes.

Option C: "Add the Apex Class 'wksp_navigation' to the User's Permission Set or Profile"

✓ Correct! The missing access must be manually added via Profiles or Permission Sets.

Steps to Fix the Issue:

Navigate to Setup → Permission Sets.

Select the relevant Permission Set for affected users.

Click on Apex Class Access and add "wksp_navigation".

Save and test workspace access.

Reference:

PSA Sys Admin Essentials Student Guide.

Question: 48

Managers want to be able to edit expenses once they are marked as approved, "Include in Financials" is selected, but before the Billing Events are created. Which of the following options do you choose under the Permission Control record?

- A. Expense Ops Edit
- B. Expense Entry
- C. Expense Edit

Answer: A

Explanation:

Understanding Expense Editing in PSA:

Once an expense is approved and the "Include in Financials" field is selected, expenses are locked for modification.

However, managers can still edit expenses before a billing event is created with the correct permission control.

Options Analysis:

Option A: "Expense Ops Edit"

✓ Correct! Grants edit access to approved expenses before they are included in billing events.

Option B: "Expense Entry"

✗ Incorrect. This allows expense creation, not modification of approved expenses.

Option C: "Expense Edit"

✗ Incorrect. This general permission does not override locked expense records.

Steps to Enable Expense Editing for Managers:

Go to Permission Controls in PSA Administration.

Create a new Permission Control for the manager.

Assign Expense Ops Edit permission.

Save and test the ability to edit approved expenses.

Reference:

PSA Sys Admin Essentials Student Guide.

Question: 49

What tools can you use to customize your workspaces?

- A. Navigation Configuration Builder, Lighting App Builder, PSA Administration Tool
- B. Navigation Configuration Builder Highlights Configuration Builder Lighting App Builder
- C. Navigation Configuration Builder, Lighting App Builder, Heroku App Builder

Answer: A

Explanation:

To customize your workspaces in Certinia PSA, you can use the following tools:

Navigation Configuration Builder:

Allows you to configure the workspace navigation and define available links.

Customizes the layout and sections of workspaces.

Lightning App Builder:

Enables customization of Lightning pages, including adding/removing components.

Used to adjust the UI and layout of the workspace.

PSA Administration Tool:

Allows administrators to configure PSA-specific settings.

Used for advanced PSA configurations and settings.

These tools help tailor workspaces to fit business needs by adding relevant data, reports, and quick access links.

Reference:

PSA Sys Admin Essentials Student Guide

Question: 50

In your company, you are responsible for reviewing/maintaining Workspaces. You need to adjust the Default FinancialForce Navigation in the Service Delivery Workspace. You know you need to use the "Navigation Configuration Builder" screen, but you do not see this option available in the "App Launcher".

Which of the following is a possible reason?

- A. You need to have "System Administrator" Permission Control record assigned
- B. You do not have the "FF Configuration Builder" Permission Set assigned
- C. You need to have the "Configuration Builder Menu" setting set to "TRUE" on the Salesforce User setup screen

Answer: B

Explanation:

If you cannot see the "Navigation Configuration Builder" in the App Launcher, possible reasons include:

Missing Permission Set:

You must have the "FF Configuration Builder" permission set assigned to your user profile.

Without this, the Navigation Configuration Builder will not be accessible.

How to Assign the Permission Set:

Navigate to Setup > Users > Permission Sets.

Locate FF Configuration Builder and assign it to your user profile.

Other Possible Causes:

If permissions are correct but it's still missing, check user roles and profiles to ensure proper access.

Ensure that the Configuration Builder feature is enabled in PSA settings.

Reference:

PSA Sys Admin Essentials Student Guide

Question: 51

Your organization has decided to use Workspaces but you notice the "PSA workspaces" package has not been installed. What should you do?

- A. Go to FF Community, download the package, and install it
- B. Call your FF Account Executive
- C. Create a Support ticket

Answer: C

Explanation:

If the PSA Workspaces package is not installed, follow these steps:

Verify PSA Workspaces Installation:

Navigate to Setup > Installed Packages.

Search for "PSA Workspaces" to confirm if it is present.

If Missing, Request Installation:

PSA Workspaces cannot be manually downloaded from the FinancialForce (Certinia) Community.

Instead, you must submit a support ticket to Certinia to request installation.

How to Submit a Support Ticket:

Go to Certinia Support Portal.

Submit a request for PSA Workspaces package installation.

Provide details about your PSA version and organization needs.

Reference:
PSA Sys Admin Essentials Student Guide

Question: 52

Which of the following are currently available PSA workspaces?

- A. Project Management Workspace, Resource Management Workspace. Services Delivery Workspace
- B. Project Management Workspace, Task Planning Workspace. Services Delivery Workspace
- C. Project Management Workspace Milestone Forecast Workspace Resource Management Workspace

Answer: A

Explanation:

Certinia PSA provides three primary Workspaces, designed for different user roles:

Project Management Workspace:

Provides tools for project tracking, task management, and milestone tracking.

Ideal for Project Managers.

Resource Management Workspace:

Helps manage resource allocations, availability, and staffing.

Used by Resource Managers to ensure project assignments align with capacity.

Services Delivery Workspace:

Focuses on project execution, financial tracking, and billing integration.

Used by Service Delivery teams to monitor project performance.

These Workspaces help users access critical project data quickly and improve efficiency in managing operations.

Reference:

PSA Sys Admin Essentials Student Guide

Question: 53

You are in the process of migrating historical Skills and Certification information from your company's legacy system into FinancialForce PS

- A. Since the historical data volume is relatively low, you have decided to migrate the data manually and not use the Data Loader tool.

Using the Manager Skills and Certification lightning component, you first select the internal resource's name for whom you want to capture the "Skills and Certification" ratings. However, you notice you do not have the option to "Add" new skills and Certification for that resource on the screen. You are one of the Salesforce/PSA System Administrators for your company and have the System Administrator profile.

Of the following, which one could explain why you are unable to migrate skills data for that resource?

- A. You do not have the required Skills and Certification Entry Permission Set assigned to the resource
- B. You do not have the "Allow Skills and Certification Entry" set to TRUE in the Custom Settings > Permission Control Settings
- C. You do not have the "Skills and Certification Entry" Permission Control set to TRUE

Answer: B

Explanation:

Understanding Skills and Certification Data Entry in PSA:

The Skills and Certification Lightning Component is used to manually enter skills and certifications for a resource.

System administrators must enable Skills and Certification Entry via Custom Settings > Permission Control Settings.

Options Analysis:

Option A: "You do not have the required Skills and Certification Entry Permission Set assigned to the resource"

✗ Incorrect. The issue is related to custom settings, not a missing permission set.

Option B: "You do not have the 'Allow Skills and Certification Entry' set to TRUE in the Custom Settings > Permission Control Settings"

✓ Correct! This setting must be enabled in Custom Settings for users to enter skills.

Option C: "You do not have the 'Skills and Certification Entry' Permission Control set to TRUE"

✗ Incorrect. Permission Controls manage region- or practice-based access but do not override global settings.

Steps to Enable Skills and Certification Entry:

Navigate to Setup → Custom Settings.

Locate Permission Control Settings.

Edit and enable "Allow Skills and Certification Entry".

Save changes and test by attempting to enter skills for a resource.

Reference:

PSA Sys Admin Essentials Student Guide.

Question: 54

In your company, you have 2 types of users:

Type 1: Employees that need to enter Timecards, Expenses, and need access to the Resource Planner

Type 2: Project Managers that need to enter Timecards, Expenses, and need access to the Resource Planner and the Project Planner

All employees are tied to the basic "Standard PSA User" profile that gives them access only to the "Accounts" and "Contacts" objects.

Kevin is a Type 1 employee. However, when he logs into his Salesforce org, he can see the tab for the Project Planner, along with Resource Planner, Timecards, and Expenses.

Which of the following troubleshooting steps would you take to stop the Project Planner tab from appearing in Kevin's App Menu?

A. Ensure Kevin is not assigned to the Project Manager Permission Set

B. Ensure Kevin does not have a Permission Control record for the "Project Planner View" permission

C. Ensure that the Project Planner is not Visible on Kevin's user profile

Answer: A

Explanation:

Understanding Permission Sets and Visibility in PSA:

In PSA, permission sets control which tabs and features a user can see.

If Kevin, a Type 1 employee, sees the Project Planner tab, he likely has a Project Manager-related permission set assigned.

Options Analysis:

Option A: "Ensure Kevin is not assigned to the Project Manager Permission Set"

☒ Correct! The Project Manager Permission Set grants access to the Project Planner.

Option B: "Ensure Kevin does not have a Permission Control record for the 'Project Planner View' permission"

☐ Incorrect. Permission Controls manage functional access, not UI visibility.

Option C: "Ensure that the Project Planner is not Visible on Kevin's user profile"

☐ Incorrect. Profiles in PSA provide base access, but permission sets determine feature visibility.

Steps to Remove Project Planner Access for Kevin:

Navigate to Setup → Permission Set Assignments.

Search for Kevin's assigned permission sets.

If Project Manager Permission Set is assigned, remove it.

Log in as Kevin to verify that the Project Planner tab is no longer visible.

Reference:

PSA Sys Admin Essentials Student Guide.

Question: 55

A Sales Associate is unable to enter a Resource Request. They have a Resource Contact record with the essential values populated, and the associated User record has been properly set up as well. Which of the following steps should you take to grant the required additional permission?

- A. Assign the Resource Request Entry Permission Set.
- B. Create a Permission Control record and select the Resource Request Entry checkbox.
- C. Ensure the Resource Request Entry checkbox is selected on the User.

Answer: B

Explanation:

Understanding Resource Request Permissions in PSA:

A Sales Associate must have the appropriate Permission Control to create a Resource Request.

The Resource Request Entry checkbox in Permission Control allows access.

Options Analysis:

Option A: "Assign the Resource Request Entry Permission Set."

☐ Incorrect. There is no specific permission set for Resource Request Entry.

Option B: "Create a Permission Control record and select the Resource Request Entry checkbox."

☒ Correct! Permission Control records manage specific functional access, including Resource Request Entry.

Option C: "Ensure the Resource Request Entry checkbox is selected on the User."

☐ Incorrect. The User record does not contain this setting; it is part of Permission Controls.

Steps to Grant Resource Request Entry Permission:

Navigate to PSA - Admin App.
Click on Permission Controls.
Create a new Permission Control for the Sales Associate.
Enable Resource Request Entry.
Save and verify by attempting to create a Resource Request.
Reference:
PSA Sys Admin Essentials Student Guide.

Question: 56

A Resource Record is required to perform which two of the following actions? (Choose two.)

- A. Creating a milestone
- B. Being assigned to a project
- C. Entering a timecard and expense report

Answer: B, C

Explanation:

A Resource Record is a critical entity in PSA that allows individuals to be allocated to projects and log their time and expenses.

Being Assigned to a Project:

A resource must be registered as a PSA Resource to be allocated to a project.

Assignments link Resources to Projects and Tasks for scheduling and workload planning.

Entering a Timecard and Expense Report:

Resources must exist in PSA for time and expense entry.

If a Resource Record is missing, users cannot log timecards or submit expenses.

What a Resource Record is NOT Required For:

Creating a milestone does not require a Resource Record. Milestones are financial events linked to a project, not individual resources.

Reference:

PSA System Administration Guide

Question: 57

Your company has asked you as the Sysadmin to edit a few Timecards that have already been approved. There are no Billing Events associated with the Timecards. What specific system permission allows you to perform this action?

- A. The System Administrator Profile
- B. None - PSA does not allow any updates to approved Timecards
- C. The Timecard Ops Edit Permission Control

Answer: C

Explanation:

Editing approved Timecards in PSA is restricted by permissions. However, if no Billing Events are

associated with the timecard, an administrator with the correct permission control can make changes.

Timecard Ops Edit Permission Control:

Allows users with this permission to edit approved timecards when necessary.

Ensures that financial records remain accurate while allowing flexibility for adjustments.

System Administrator Profile Does NOT Automatically Grant This:

The System Administrator profile alone does not provide access to modify approved timecards.

Additional Timecard Ops Edit permission control is required.

Why PSA Restricts Editing Approved Timecards:

If Billing Events have been created, Timecards are locked to prevent financial discrepancies.

Only unbilled timecards can be edited under special permissions.

Reference:

PSA System Administration Guide

Question: 58

What does the Time Entry permission control do?

- A. It allows users to create a timecard for themselves
- B. It allows users to create a timecard on behalf of another
- C. It allows users to create a timecard for specific projects

Answer: B

Explanation:

The Time Entry Permission Control determines who can create and submit timecards in PSA.

Primary Function:

Grants users the ability to enter time on behalf of another user.

Typically assigned to managers or team leads who report time for their teams.

Why This is Important:

Some organizations require managers or admins to log time entries when team members forget.

Ensures accurate utilization tracking and reporting.

Incorrect Answer Explanation:

A . It allows users to create a timecard for themselves → Incorrect

This is default behavior; users do not need a special permission for this.

C . It allows users to create a timecard for specific projects → Incorrect

Time Entry permission is not project-specific but rather user-specific.

Reference:

PSA System Administration Guide

Question: 59

What is the best practice for limiting permissions in a FinancialForce Permission Set Group?

- A. Create a Muting Permission Set and add it to the Group
- B. Clone the Permission Set Group and remove unwanted permissions

C. Build your own permissions or Permission Set Groups

Answer: A

Explanation:

Best practice for limiting permissions in a FinancialForce Permission Set Group:

Use Muting Permission Sets:

Muting Permission Sets disable specific permissions within a Permission Set Group.

Instead of modifying or duplicating a permission set, mute only the permissions you do not need.

Why This is the Best Practice:

It avoids unnecessary duplication of Permission Set Groups.

It provides granular control over permissions without affecting other users.

Incorrect Answer Explanation:

B . Clone the Permission Set Group and remove unwanted permissions → Incorrect

Cloning is not recommended as it creates redundant permission sets.

C . Build your own permissions or Permission Set Groups → Incorrect

This is time-consuming and unnecessary when Muting Permission Sets can achieve the same result efficiently.

Reference:

PSA System Administration Guide

Question: 60

A user has reported they cannot see their projects when viewing the Project Management Workspace. What could be a possible reason for this?

A. The user is not identified as the Project Manager on any projects

B. The user is missing the Project Management Workspace Permission Control

C. The user is missing the PSA - Project Manager Permission Set

Answer: A

Explanation:

If a user cannot see projects in the Project Management Workspace, the most common reason is:

User is Not a Project Manager on Any Projects:

The Project Management Workspace is filtered based on Project Manager assignments.

If the user is not assigned as a Project Manager, projects will not appear in their view.

How to Fix This:

Navigate to Project Records.

Ensure the user is assigned as a Project Manager.

Incorrect Answer Explanation:

B . The user is missing the Project Management Workspace Permission Control → Incorrect

Workspace access is permission-based, but missing this permission would prevent access to the workspace itself, not specific projects.

C . The user is missing the PSA - Project Manager Permission Set → Incorrect

This permission allows project-related actions but does not control visibility in the workspace.

Reference:

PSA System Administration Guide

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