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## **PSA-Sysadmin**

### **PSA System Administrator 2023**



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# Latest Version: 6.1

## 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.

## 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

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