Certinia PSA-Sysadmin Practice Questions

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Question 1

Question Type: MultipleChoice

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?

Options:

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.

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Question 2

Question Type: MultipleChoice

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?

Options:

A- You would set the 'separateMiscellaneousAdiustments' 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.

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Question 3

Question Type: MultipleChoice

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

What is that record called?

Options:

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.

Certinia PSA Actuals Processing Guide

Certinia PSA System Administration Essentials

Question 4

Question Type: MultipleChoice

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

Options:

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.

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Question 5

Question Type: MultipleChoice

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%?

Options:

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:
UtilizationSubtotal=SUM(BilledHours)SUM(AvailableHours)\text{Utilization Subtotal} = \frac{\text{SUM(Billed Hours)}}{\text{SUM(Available Hours)}}UtilizationSubtotal=SUM(AvailableHours)SUM(BilledHours)

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.

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Question 6

Question Type: MultipleChoice

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?

Options:

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 'Ag 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.

Certinia PSA Project Actuals Guide

PSA System Administration Essentials

Question 7

Question Type: MultipleChoice

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?

Options:

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.

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Question 8

Question Type: MultipleChoice

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

Options:

A- You do not have the required Skills and Certification Entry Permission Set assigned to the resource
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?
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.

PSA Sys Admin Essentials Student Guide.

Question 9

Question Type: MultipleChoice

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 option best custom settings should you configure to hide these buttons?

Options:

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.

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Question 10

Question Type: MultipleChoice

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

Options:

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.

PSA System Administration Guide

Question 11

Question Type: MultipleChoice

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

Options:

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

PSA System Administration Guide

Certinia PSA Data Dictionary and Administration Guide

Question 12

Question Type: MultipleChoice

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?

Options:

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.