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PSA System Administrator 2023

Certinia PSA-Sysadmin

Version Demo

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Topic Break Down

Topic	No. of Questions
Topic 1, PSA System Administration	27
Topic 2, Resource Management	21
Topic 3, Project Management	4
Topic 4, Time and Expense Management	16
Topic 5, Financial Management	7
Topic 6, Reporting	5
Total	80

QUESTION NO: 1

The Finance team wants to enforce a maximum amount for hotel expenses across all regions, practices, groups, projects, and resources.

Which two configuration choices are required to meet this requirement? (Choose two.)

- A. Create an Expense Limit record for the Hotel expense type.
- B. Set the Expense Limit record at the global region level.
- C. Add the maximum hotel amount to each Resource record.
- D. Create a separate Expense Limit record for every Project.

ANSWER: A B

Explanation:

An Expense Limit record must be configured for the Hotel expense type so PSA knows which category is subject to the policy. The limit must also be configured at the global region level so that it applies company-wide rather than only to a specific part of the resource hierarchy.

Applying a limit to an individual Resource or a single Practice would restrict its scope and would not meet the stated company-wide requirement.

QUESTION NO: 2

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:

Adjust the Configuration Value record for Scheduling. In Certinia PSA, configuration values control organization-wide behavior for PSA features, including the default scheduling behavior applied when an assignment is created. Updating the applicable Scheduling configuration value lets an administrator define the scheduling strategy that should be preselected as the starting point for new project assignments. This provides a consistent default for users while still allowing assignment scheduling to be managed according to the organization's operating model and project needs. Configuration values are intended to centralize these administrative defaults, so the change takes effect without requiring an administrator to alter individual project or assignment records. Before changing the value in production, confirm that the selected strategy is active and suitable for the organization's resource-scheduling process, then validate the result by creating a test assignment on a project. Certinia's administration guidance describes configuration values as the mechanism used to configure PSA application behavior. See the [Certinia PSA configuration values documentation](#) and the [Certinia PSA setup documentation](#).

QUESTION NO: 3

Your organization requires a weekly reminder for resources who did not enter their required hours in the previous week. The reminder must be sent automatically without requiring an administrator to review a report each week.

Which two actions should you configure? (Choose two.)

- A. Schedule the Missing Timecards Scheduled Job.
- B. Configure an Email Alert for the Missing Timecards process.
- C. Schedule the Utilization Calculation job for the same weekly period.
- D. Subscribe all resources to a Project Actuals report.

ANSWER: A B

Explanation:

The **Missing Timecards Scheduled Job** is designed to identify resources whose entered time does not meet the required hours for the configured period. Configuring an **Email Alert** provides the automated notification to the resources identified by that process.

A utilization calculation can calculate utilization data, but it is not the PSA mechanism for identifying and emailing resources about missing Timecards. A manually subscribed report would require a different process and would not provide the PSA-specific missing-timecard evaluation.

QUESTION NO: 4

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: B

Explanation:

The user is missing the Project Management Workspace Permission Control is a possible reason because Certinia PSA uses Permission Control assignments to govern access to specific functional areas and workspaces. The Project Management Workspace relies on this workspace-specific control to determine whether a user can access and work with the project-management experience and its associated project information. If the control has not been assigned through the user's permission configuration, the workspace may not return the projects that the user expects to manage or view, even where the user otherwise has access to PSA and relevant project records. An administrator should therefore review the user's assigned permission sets and Permission Control configuration, then ensure that the Project Management Workspace Permission Control is included in the permissions granted to that user. This should be assessed alongside the organization's Salesforce sharing model, since workspace authorization and record-level access work together to provide the intended user experience. Certinia's PSA documentation is available through the [Certinia PSA Help](#), and Salesforce provides background on assigning and managing user permissions in its [Permission Sets overview](#).

QUESTION NO: 5

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: B

Explanation:

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" is correct because the required behavior differs by user population and must therefore be configured at the profile level. A Time Card Entry UI Switch custom-setting record can be created specifically for the Consultant profile, allowing the time-entry experience used by consultants to differ from the default experience used by other users. Setting Task Time Entry Mode to Calculated enables the task-oriented time-entry behavior for that profile: Certinia can determine the applicable task context from the consultant's assigned work and present time entry against the project task. Users not covered by that profile-specific setting continue to use the organization's applicable default configuration, which supports entry at the project or milestone level as required in the scenario. This approach provides targeted control without requiring a separate configuration for every individual consultant, and it remains maintainable when users are assigned to the Consultant profile. For background on managing hierarchy custom settings in Salesforce, see [Salesforce Help: Custom Settings](#). Certinia product documentation and release resources are available through the [Certinia Help Center](#).

QUESTION NO: 6

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:

"All features are enabled by default" is the statement that is not true. Certinia manages upgrade behavior carefully so that customers receive applicable enhancements and fixes while retaining control over functionality that could materially alter established processes, configuration, or data. Release-related changes are therefore not treated as a blanket activation of every newly delivered capability. Administrators should review the release notes for their installed PSA version, identify features requiring explicit enablement or configuration, assess any prerequisite setup, and test relevant changes in a sandbox before enabling them in production. This approach supports predictable adoption of new functionality and helps organizations coordinate operational changes, user communication, data review, and training. It is particularly important for a PSA administrator to treat each release as a controlled change-management activity rather than assuming that all available functionality becomes active immediately. Certinia's documentation portal provides version-specific product documentation and release information at [Certinia Help](#). Certinia's product resources also provide release and product-update context at [Certinia Resources](#).

QUESTION NO: 7

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:

Contact and **Assignment** are the required objects because PSA uses resource-role picklist values at both the resource and staffing levels. The resource role held on a Contact establishes the role information associated with the resource record, allowing PSA administrators to maintain the organization's approved role vocabulary for people who can be scheduled. The resource role held on an Assignment captures the role used when that resource is staffed on a particular project or assignment. Maintaining the picklist values on both objects keeps role selection consistent between the person's resource details and the role recorded for their project staffing.

This is especially important when an organization introduces, renames, or retires roles. The corresponding Contact and Assignment picklists must contain the values needed by administrators, resource managers, and project managers so that role-based planning, assignment staffing, and reporting can use the intended terminology. Picklist configuration is managed in Salesforce object fields, where administrators can control the values available to users and their availability by record type where applicable. See Certinia's [product documentation portal](#) and Salesforce's [guidance for customizing picklists](#).

QUESTION NO: 8

A utilization report returns exactly double the expected billable hours, calendar hours, and credited hours for several resources. The source timecards and assignments have been checked and contain the correct values.

Which two areas should the administrator investigate? (Choose two.)

- A. Add a filter for the intended Time Period Type.
- B. Review the relevant Time Period records for duplicates or overlapping periods.
- C. Group the report by Resource Name.
- D. Change the resource role on each affected Contact.

ANSWER: A B

Explanation:

Utilization results can be duplicated when the report includes more than one Time Period Type covering the same dates. Filtering the report to the intended Time Period Type ensures that it uses the correct reporting calendar.

The administrator should also review the Time Period setup for overlapping or duplicate periods in the relevant date range. Duplicate Time Period records can cause the same utilization activity to be represented more than once.

Grouping a report differently changes its presentation but does not correct duplicate underlying utilization results.