Certinia PSA Administrator Practice Exam (Sample)

Study Guide

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Questions

1. **What is required to calculate utilization for a parent utilization calculation record?**
   - A. One or more child utilization detail records
   - B. Only historical utilization data
   - C. Multiple parent records
   - D. Additional resources and tools

2. **What action must be taken to create an Expense Limit in the Expense Limit/Rate Tab?**
   - A. Deselect the Rate checkbox
   - B. Select the Rate checkbox
   - C. Modify the Rate Unit field
   - D. Set cascading options

3. **In which section do you adjust behavior in expenses?**
   - A. Expense Settings
   - B. Configuration Group
   - C. Expense Reports
   - D. Management Settings

4. **What actions can be performed within the feature console?**
   - A. Change user passwords
   - B. Add fields, update layouts, etc.
   - C. Delete old data
   - D. Generate reports

5. **Are PSA Permission Sets/Groups assigned based on user roles?**
   - A. Yes, they are role-based
   - B. No, they are assigned randomly
   - C. Only for certain users
   - D. They are based on user performance

6. What is a primary benefit of using a Child utilization summary record in PSA?

A. It allows for individual billing rates

B. It helps in creating consolidated reports from multiple sources

C. It aids in understanding utilization data by breaking it down

D. It simplifies scheduling processes

7. How are columns modified for a list view in Certinia PSA?

A. Through Field-Level Security

B. Using Field sets

C. Via the UI Configuration

D. By Custom Scripting

8. What is the purpose of Field Sets in Project Task and Project Task Assignment?

A. To customize report layouts

B. To manage user access

C. To control editable columns

D. To create new workflow rules

9. What platform is referenced for accessing the articles related to timecard entry?

A. Microsoft Teams

B. Certinia Community

C. Salesforce Hub

D. Employee Dashboard

10. What is the recommended way to resolve a missing package issue in the FF application?

A. Contact your manager

B. Open a Support Case

C. Restart your application

D. Check your internet connection

Answers

1. **A**
2. **A**
3. **B**
4. **B**
5. **A**
6. **C**
7. **B**
8. **C**
9. **B**
10. **B**

Explanations

1. What is required to calculate utilization for a parent utilization calculation record?

A. One or more child utilization detail records

B. Only historical utilization data

C. Multiple parent records

D. Additional resources and tools

To calculate utilization for a parent utilization calculation record, the requirement is to have one or more child utilization detail records. This is because the parent record aggregates the data from its child records to determine overall utilization metrics. Each child detail record contains specific data points, such as hours worked vs. billable hours, which contribute to the parent record's overall calculations. This structure allows for a detailed understanding of how individual components (the child records) contribute to the larger picture (the parent record). It ensures that the calculation reflects all relevant activity and can produce accurate and meaningful results, essential for effective resource planning and management in professional services automation. The other choices do not provide the necessary framework for the utilization calculation: relying solely on historical data would lack the current context; having multiple parent records would not contribute to a single utilization metric; and additional resources or tools are not specified as a requirement for this calculation process. Thus, having child detail records is essential for the accurate calculation of the parent utilization.

2. What action must be taken to create an Expense Limit in the Expense Limit/Rate Tab?

A. Deselect the Rate checkbox

B. Select the Rate checkbox

C. Modify the Rate Unit field

D. Set cascading options

To create an Expense Limit in the Expense Limit/Rate Tab, it is necessary to deselect the Rate checkbox. This action indicates that the system should treat the entry as an expense limit rather than a rate limit. By doing so, the configuration clearly defines that the focus is on setting a cap on the amount that can be expensed, which is essential for effective budget management. Selecting the Rate checkbox would imply that you are instead configuring a rate, which is relevant for different purposes, such as hourly billing or per-unit pricing, rather than establishing a ceiling on expenses. Modifying the Rate Unit field and setting cascading options are both related to how rates are processed and applied but do not directly pertain to the creation of an expense limit itself. Thus, the correct choice highlights the important distinction between these functionalities within the system.

3. In which section do you adjust behavior in expenses?

A. Expense Settings

B. Configuration Group

C. Expense Reports

D. Management Settings

The section where you can adjust behavior in expenses is found within the Configuration Group. This area allows administrators to define how expenses are managed and categorized within the system. It encompasses various settings that can impact how expense data is handled, including policies regarding approvals, limits, and categorizations. By configuring the settings in this group, you ensure that the expenses align with the organization's requirements and compliance needs. For instance, you can dictate whether certain types of expenses require additional approvals, or establish default categories for specific types of expenditures. The other sections listed do not provide the same level of control over the overall behavior of expenses. Expense Settings might allow for certain configurations but does not encompass the broader adjustments that can be made in the Configuration Group. Expense Reports deal more with the submission and review of expenses rather than their underlying behavior. Management Settings typically focus on higher-level preferences and guidelines rather than detailed expense management. Therefore, the Configuration Group stands out as the primary area for adjusting how expenses behave within the system.

4. What actions can be performed within the feature console?

A. Change user passwords

B. Add fields, update layouts, etc.

C. Delete old data

D. Generate reports

The feature console in Certinia PSA is designed to facilitate customization and configuration of various aspects of the platform. One of the primary actions that can be performed in this environment is adding fields and updating layouts. This capability is essential for tailoring the user interface and data entry forms to meet an organization's unique needs. Modifying layouts helps in optimizing user interactions, ensuring that the most relevant information is easily accessible, and aligning the software with the business processes. While user password changes, data deletion, and report generation are critical functionalities within any system, they are typically managed through different administrative settings or modules rather than through the feature console itself, which focuses on customization. Thus, the ability to add fields and update layouts stands out as the core functionality of the feature console.

5. Are PSA Permission Sets/Groups assigned based on user roles?

A. Yes, they are role-based

B. No, they are assigned randomly

C. Only for certain users

D. They are based on user performance

PSA Permission Sets and Groups are indeed designed to be role-based, meaning they are assigned according to the specific roles that users hold within an organization. This structure ensures that individuals have access to the functionalities and data relevant to their job responsibilities. Role-based permissions facilitate security and efficiency by allowing users to perform their duties without unnecessary access to information outside their domain. This approach reflects best practices in access management, as it streamlines the assignment process and aligns it with the organizational hierarchy and workflows. By basing permissions on user roles, organizations can maintain a clear and organized method for managing user access, reducing the likelihood of errors and ensuring compliance with internal policies.

6. What is a primary benefit of using a Child utilization summary record in PSA?

A. It allows for individual billing rates

B. It helps in creating consolidated reports from multiple sources

C. It aids in understanding utilization data by breaking it down

D. It simplifies scheduling processes

Using a Child utilization summary record in PSA significantly aids in understanding utilization data by breaking it down into more manageable and specific categories. This level of granularity allows organizations to analyze individual contributions or performance metrics more effectively, which is crucial for monitoring productivity and optimizing resource allocation. By dissecting the utilization data, management can identify trends, detect areas for improvement, and make data-driven decisions. While other options might suggest benefits such as billing rates, report consolidation, or scheduling, they do not encapsulate the primary purpose of a Child utilization summary record, which is fundamentally focused on enhancing comprehension of resource utilization metrics through detailed breakdowns.

7. How are columns modified for a list view in Certinia PSA?

A. Through Field-Level Security

B. Using Field sets

C. Via the UI Configuration

D. By Custom Scripting

In Certinia PSA, columns in a list view are modified using field sets. Field sets are collections of fields that determine which fields are displayed in a specific user interface context, such as list views. By configuring these field sets, administrators can customize the visibility and arrangement of fields that users see in the list view, allowing for a more tailored and relevant display of information. Field sets allow for flexibility in the way data is presented and can be easily adjusted without the need for custom coding or extensive UI configuration changes. This feature enhances usability and ensures that users have access to the most pertinent fields for their work, making data retrieval and interaction with the system more efficient. Other methods, such as field-level security or UI configuration, may have roles in data visibility or overall layout but do not specifically modify list view columns in the manner that field sets do. Custom scripting involves programming that can alter behaviors but is not necessary for simple adjustments like changing list view columns. Thus, the use of field sets stands out as the appropriate and direct method for this task.

8. What is the purpose of Field Sets in Project Task and Project Task Assignment?

A. To customize report layouts

B. To manage user access

C. To control editable columns

D. To create new workflow rules

Field Sets serve a specific purpose in customizing the behavior and appearance of data entry forms within Certinia PSA, particularly for Project Task and Project Task Assignment. These allow administrators to define which fields are editable by users in the context of a project task. This means that by utilizing Field Sets, an administrator can control the visibility and editability of various data points, making it easier to streamline workflows and ensure that only relevant information is presented to users. By managing editable columns in Project Task and Project Task Assignment instances, administrators can enhance user experience and maintain data integrity. This function is crucial in situations where certain fields should not be modified by users or where specific data points need to be prioritized for input during task management. Therefore, the ability to define Field Sets supports better governance of data quality and user interactions in the system.

9. What platform is referenced for accessing the articles related to timecard entry?

A. Microsoft Teams

B. Certinia Community

C. Salesforce Hub

D. Employee Dashboard

The Certinia Community serves as a centralized platform designed to provide users with access to a variety of resources, including articles, documentation, and user forums related to different functionalities within the Certinia system, such as timecard entry. This community platform facilitates collaboration among users, allows sharing of knowledge, and provides direct access to user-generated content as well as official resources. In the context of timecard entry, users can find relevant articles that offer guidance, tips, and troubleshooting assistance, making it the ideal place for accessing supportive content specific to that area. While other platforms such as Microsoft Teams, Salesforce Hub, and Employee Dashboard can provide helpful information, they are not primarily focused on the systematic aggregation of community knowledge and resources related to Certinia's functionalities like timecard entry. Microsoft Teams is mainly a communication tool, Salesforce Hub is focused on customer relationship management, and the Employee Dashboard typically offers employee-specific information and tasks rather than access to broader documentation or community interactions.

10. What is the recommended way to resolve a missing package issue in the FF application?

A. Contact your manager

B. Open a Support Case

C. Restart your application

D. Check your internet connection

Opening a Support Case is the recommended approach to resolve a missing package issue in the FF application because this action directly engages the technical support team, who are equipped to diagnose and address specific issues related to software packages. The support team has the necessary tools and expertise to investigate the underlying causes of the problem, whether it relates to installation errors, version discrepancies, or other technical malfunctions. By submitting a Support Case, users can provide detailed information regarding the issue they are experiencing, allowing the support staff to respond effectively. They can receive guidance tailored to their specific situation and ensure that the problem is resolved efficiently, potentially with updates or patches applied if necessary. In contrast, other choices may not effectively address the issue at hand. For example, contacting a manager may lead to delays in action, as it typically does not involve technical support. Restarting the application or checking the internet connection might be useful troubleshooting steps in some situations, but they are less likely to resolve a missing package issue, which generally requires direct technical intervention.