

Training Course: Introduction to Financial Force PSA Administration

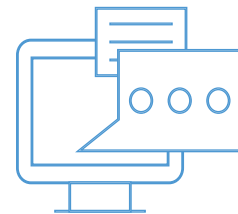
Professional Services Automation (PSA) is a powerful application developed by FinancialForce and based on the Salesforce platform. This introduction to PSA administration enables you to utilize the tools and guides provided to you in the day-to-day maintenance of PSA within your organization. The focus of this introduction is on the administration of the basic PSA configuration items that may require future maintenance.

This interactive instructor lead course emphasizes how to utilize select PSA functionality focusing on key PSA Administrator tasks. The course is tailored to use actual examples and situations from the participants' own business and customized PSA instance.

Learn how to
utilize select PSA
functionality
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tasks

Learning Objectives:

- Describe the structure of PSA and all its major functions.
- Maintain PSA (PS Enterprise) Licenses
- Creating and Maintaining PSA Resources
- Maintaining Resource Skills and Certifications
- Changing PSA Configuration Groups, Options, and Values
- Managing PSA Custom Settings
- Managing Missing Timecard, Backlog, and Utilization reports and records
- Global Project Setup and Maintenance
- Maintain RPGs, Time Periods, Work Calendars, Holidays
- Maintain Workflows, Email Notifications, Approval Processes, and Actuals



Pre-requisites

Participants should be familiar with the Salesforce platform and its basic features as well as Project Management tasks and functions. Participants should have also completed Salesforce Administrator training or equivalent experience.

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Audience & Duration

This course is primarily intended for PSA Administrators. The web based Instructor Led Training 4 hours

Course Introduction

- Course Introduction & Overview
- Course goals & agenda

Overview of PSA Objects

- PSA Structure and its major functions
- PSA Objects and their associated functions

Maintaining PSA (PS Enterprise) License

- Activating a PSA license
- Deactivating PSA Licenses
- Managing additional licensed features
- Managing site licenses

Changing PSA Configuration Groups Options, and Values

- Managing configuration groups, options, and values
- Managing PSA custom settings

Maintain RPGs, Time Periods, Work Calendars, and Holidays

- Creating and managing RPG hierarchy
- Maintaining & updating holiday schedules
- Maintaining & updating time periods

Managing PSA Resources

- Resource field descriptions
- Permission controls
- Managing Resource Roles
- Adding & deactivating PSA Resources
- Maintaining Skills and Certifications



Global Project Setup and Maintenance

- Creating Global Projects
- Managing Global Project attributes

Managing Missing Timecard, Backlog, and Utilization reports and records

- Calculate, Schedule, and generate Missing Timecard records
- Generate Backlog records
- Refine the utilization processing strategy

Maintain Workflows, Email Notifications, Approval Processes, and Actuals

- Configuring and managing workflows and approval processes
- Managing automated and manual actuals processing

Force.com Platform Maintenance

- Maintaining page layouts
- Creating new fields
- Managing list views