

PSA Fundamentals

Overview

PSA Fundamentals is an introductory-level course designed to help new users understand the basic building blocks of the PSA application. The course aims to educate individuals on essential PSA concepts applicable to various professional services business operations.

The course uses a combination of lecture, demonstration, and hands-on exercises tailored to equip participants with the necessary knowledge and skills to proficiently navigate and leverage PSA tools.

Learning Objectives

In this course, students will:

- Discuss intended design functionality and related leading practices
- Identify key PSA functionality
- Create opportunities, resource requests, projects, milestones, and project tasks
- Use the Work Planner and Gantt
- Review options to create and staff projects, Resource Request Staffer, Intelligent

Staffing

- Understand how to use skills and certifications, Work Opportunity Hub
- Manage timecards, expense reports, and miscellaneous adjustments
- Generate Billing Events
- Access PSA reports

Audience

Project Managers (those who oversee project delivery)

Resource or Operations Managers (those who oversee staffing, timecards & expenses)

Project Implementation Team (those who are implementing or planning to implement PSA)

Prerequisites

Solid understanding and knowledge of the Salesforce Platform.