

Topic	SUBTOPIC	TASK	ID	YOUR COMMENTS (CLICK IN CELL TO WRITE YOUR OWN NOTES)
1. PSA Custom Settings, Configuration Groups, Metadata	Lightning Components & Visualforce Pages	Manage Lightning Pages (add Certinia Lightning components)	1.1.1	
1. PSA Custom Settings, Configuration Groups, Metadata	Lightning Components & Visualforce Pages	Use Field Sets to customize Lightning pages and components	1.1.2	
1. PSA Custom Settings, Configuration Groups, Metadata	PSA Configuration Groups	Manage Configuration Groups / Options / Values, Object Settings	1.2.1	
1. PSA Custom Settings, Configuration Groups, Metadata	PSA Custom Settings	Review & discuss the evolving PSA Custom Settings	1.3.1	
1. PSA Custom Settings, Configuration Groups, Metadata	Setup & Maintain PSA Metadata	Discuss Regions, Practices and Groups Discuss then create and/or import: Time Periods, Work Calendars	1.4.1	
2. Configuration Management	General Configuration & Ux Customizations	Customize Page Layouts (Ex: Opportunities; Accounts, Projects)	2.1.1	
2. Configuration Management	General Configuration & Ux Customizations	Configure Gantt	2.1.2	
2. Configuration Management	General Configuration & Ux Customizations	Setup Task Time Entry Mode	2.1.3	
2. Configuration Management	New Release Management	Facilitate testing of existing processes and validation of new features with users	2.2.1	
2. Configuration Management	New Release Management	Discuss selected features for implementation usingFeature Console	2.2.2	
2. Configuration Management	Reporting	Discuss the native PSA Reports and Dashboards	2.3.1	
3. Automated Jobs & Scheduled Maintenance	Schedule Jobs	Schedule jobs using PSA Administration - review jobs from Scheduled Jobs Schedule Actuals (if applicable), Utilization, Backlog, and Missing Timecards jobs	3.1.1	
3. Automated Jobs & Scheduled Maintenance	Actuals	Discuss and configure 'Actuals Configuration Group' configuration options	3.2.1	
3. Automated Jobs & Scheduled Maintenance	App Log Maintenance	Review and discuss App Logs	3.3.1	
4. User Management	Security	Manage user access by assigning & managaging: - Permission Sets & Permission Set Groups - Profiles - Package Licenses - Creating Users - Offboarding Users - User Management app	4.1.1	
4. User Management	Permission Controls	Manage user access by assigning Permission Controls	4.2.1	
4. User Management	Workspaces	Create and assign a new workspaces to PSA users	4.3.1	
4. User Management	Workspaces	Use Certinia Lightning web contonents and actions to reflect personas within your organization	4.3.2	
5. Maintenance	Upgrading PSA	Understand the PSA release schedule Review PSA new release documentation Introduce Certinia Community - Feature Previews (register via Events tab in Certinia Community)	5.1.1	
5. Maintenance	Push upgrage process	Understand the Push Upgrade Process	5.2.1	
5. Maintenance	Troubleshooting	Understand how to troubleshoot Actuals, Utilization, & Backlog	5.3.1	