

Harvest Cheat Sheet - DRAFT

Harvest is predominantly a Project Management tool, hence it is important to understand the structure used to know where to time your work.

Harvest is broken up into Clients, Projects and Tasks which are detailed below.

Client categories

- Customers - 1 client for each customer of Janison
- zInternal Projects – to house all internal projects / R&D
- zInternal Services – all other hours

Projects

Under each Client in Harvest there is typically one or more Projects.

For external projects the purpose of each can differ depending on the staff member responsible for creating the project. Over time we will look to make these projects more consistent to avoid confusion whilst still supporting required reporting.

There are 8 projects under zInternal Projects client. Each of which is listed and explained below. These projects are not billable for reporting purposes and should not influence whether you time against them or not.

There may be new projects added to this list in the future but for the moment we will be focussing on consolidating existing Internal Projects into these classifications and ensuring that any new time logged is against one of the below Internal Projects.

Projects found under the client zInternal Projects:

Project name	Project description
CLS	Work carried out on CLS (e.g. BA, Software Development, Software Configuration, Process Improvement) that can be utilised by more than one current customers (improves existing functionality) or future customers (introduces new functionality that can be resold).
LMS	As above but for the LMS
Janison Academy	Same as above, however it is likely that all work on building Janison Academy will be recorded here as all clients will get the same product. This includes the Janison Academy Website. Client-specific configuration of Janison Academy (similar to that of configuring the CLS) should be timed against software configuration Task of the corresponding client project.
Exam Centre	Same as above
Help Site	Any work on content / review / improvement of Help Site.
Web Site	Any work on content / review / improvement of the Janison Web Site
Cluster Admin	Any work specifically relating to maintaining and administering clusters
IT Admin	General IT Projects that can't be classified under Cluster Admin or one of the specific Janison products.

Projects found under the client zInternal Services:

There are 7 projects set up under the client zInternal Services that cater for recording time against your department/team for typically administrative tasks or non-project work. These projects are also non-billable and their purpose is to track time spent on non-project work such as meetings, paid leave or general requests that cannot be assigned to a specific client or internal project.

If you transition to another Department, e.g. from Build to Deploy you will need to ensure time spent in the new position is recorded against your new department.

Project name
Build
Deploy
Test
Manage
Serve
Win
Enable

Non-billable vs Billable – it's not what you think

Contrary to popular belief non-billable tasks vs billable tasks should have no impact on how you assign your hours. Non-billable and billable tasks are not used to calculate how much a client needs to be invoiced and are used in Harvest more for gauging an understanding of how much time is being spent on work associated with improving our products for everyone vs specific product enhancements or development that cannot be reused.

Tasks

Tasks should be considered Janison's Chart of Accounts when it comes to timekeeping. Every entry in Harvest will be assigned to one of the 19 tasks ratified by the leadership team. A description with examples for each task can be found on the following pages.

It is important to remember that not all projects will have all 19 tasks associated with them – the person responsible for setting up the project you're recording time against will choose the tasks applicable to the project and he/she can add any of the remaining tasks if and as required.

These tasks may be added to or consolidated in the future but like with a chart of accounts, these changes are generally not made mid-reporting season or without thorough review.

Task name	Task description	Usage
Account Management	Any work completed as part of maintaining an existing client relationship either contractual or not. Typically only used by AMs and PMs.	Monthly account management meeting with client. AM seeing an escalated issue through to resolution.
Business Analysis	Work completed in specifying requirements for development work or as part of researching future enhancements.	PO preparing or reviewing a build specification. AM/BA/PO attending a client workshop to gather requirements for a project (and subsequent documentation).
Business Development	Work carried out in order to win new business for Janison.	Product demo to prospective client. Assisting with preparing a demo tenant/site for a product demo. Contributing to the preparation of tender documents.
Client Training	Scheduled training of a client in the use of a Janison product or 3 rd party system used by Janison (e.g. Zendesk).	Preparing for and conducting a webinar for a client in the use of a particular feature of the CLS.
Content Services	Preparation or sourcing of content requested by a client.	Creating a training course on behalf of a client. Curating content on behalf of a client.
Corporate Admin	Meetings or activities (non-IT) not specifically associated with a project (external or internal).	Monday stand-up meeting. Birthday/announcement morning tea. Timesheet preparation (for Janison employees).
Customer Support	Any support provided to an external customer that can't be classified under an alternative service such as Content Services or Client Training.	Support desk call from client or received electronically.
IT Admin	Any IT Administration task that cannot be classified as another task	IT Support fixing a computer. Administration of Internal Network and Directories PC Sourcing and Set-ups Administration of Access Controls and User Permissions in various software tools.
Paid Leave	Any approved leave other than leave without pay	Sick leave ½ day time in lieu for working on Coffs Cup ½ day holiday

Task name	Task description	Usage
Process Improvement	Any work that improves Janison's processes.	Automation of a task. Refinement of an existing policy/procedure or introduction of a new policy/procedure
Professional Development	Training attended by staff or completed online	Attending a conference or seminar Learning about new software library or technology being used by Janison
Project Management	Any work on a project that relates to managing resources, timelines or clients	Weekly PM meeting Resource planning for a project
Quality Assurance	Any work reviewing development or documentation not classed as 'testing'	Code review QA of a client configuration against specifications
Recruitment	Any work related to recruiting new staff to Janison	Interviewing potential candidates Reviewing candidate resumes and/or shortlisting
Research	Activities that involve investigating potential new solutions or products before technical feasibility is established.	3 rd party integration into an existing product Researching best practice for new policy or procedure development
Software Configuration	Janison product or internally used software configuration.	Updating settings in Azure following introduction of new features or deprecation of old features Changing settings/options for TeamCity.
Software Development	Software development for on products for which technical feasibility has been established.	Building a CLS feature (new or extending existing) Building customised features for clients Extending Zendesk through use of an API
Team Management	Similar to project management but on a more granular level.	Daily scrum meeting Sprint planning meeting Weekly team meeting
Testing	Activities specifically relating to testing a product or service.	Conducting testing against a supplied test plan. Testing a new build prior to release