Harvest Time Tracking Training

Overview

Harvest is the new time tracking tool that Agilify will now use to track hours across projects. In addition, the tool can also be used to track expenses.

FEATURES:

- Enter Time
  - Daily View
  - Weekly View
  - Send time for approval
- Enter Expenses
  - Send expenses for approval
- Platforms
  - Browser Plugins (Google, Microsoft Edge, Firefox)
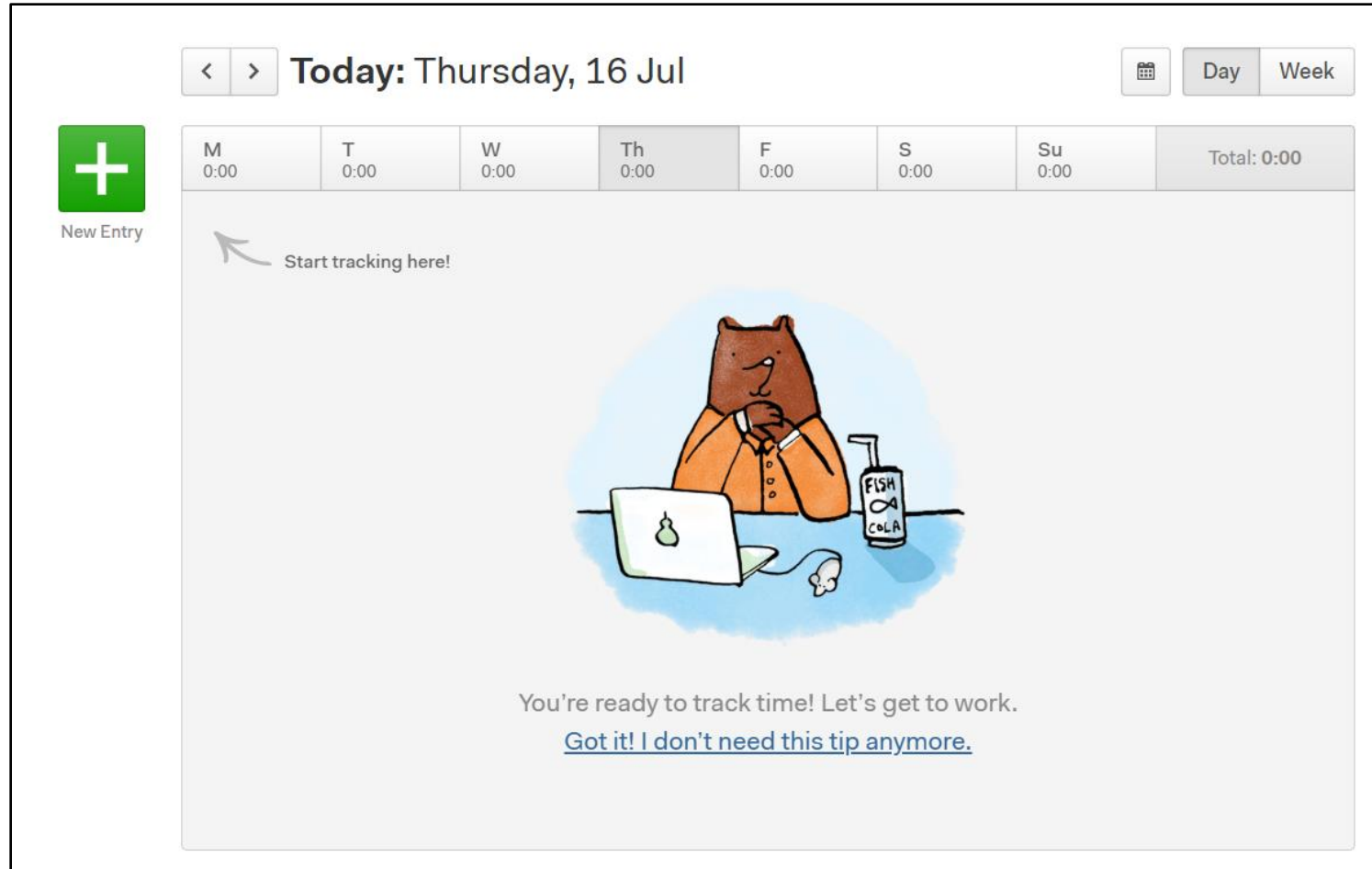 - Desktop App
  - Mobile Apps

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Setup

- Harvest is compatible with the following browsers: Google Chrome, Firefox, Microsoft Edge, and Internet Explorer.

- Harvest has plugins for the following browsers: Google Chrome, Firefox, and Microsoft Edge

- There is also a Desktop App and a Mobile app that can be downloaded to make time entry convenient and more accessible while on the move,
  - The Desktop App can be downloaded from the Microsoft store. The mobile applications can be found in the Apple application store and in the Android application store

- Go to the URL below in order to get to the browser for Harvest.
  - https://www.getharvest.com/

How to Enter Time in the Browser

The following screen is what you should see when first logging in.
When Day is selected, you will be able to enter time for the day that is currently selected.

Click the " ✚ New Entry" button on the upper-left hand corner to get to the screen to enter time.

How to Enter Time in the Browser

- Select a Project/Task
  - Note: You will only see projects that you are assigned to
- Add notes (this can be entered by using the daily view)
- Enter hours in the next field
- Notes(optional): If you are on a non-LDH project you must enter notes
- Start Timer: This option allows you track your time as you go along during the day for a project or task.

How to Enter Time in the Browser

Weekly View:

- When the weekly view is selected, you will be able to enter time for the day that is currently selected
- When entering time in the weekly view, you must submit the hours under each day.
- There is not an option to submit Notes in this view.

- If you need to insert a new project/task, click the "**+** New Row" button.

How to Enter Time in the Browser

- To submit time for approval, click the "Submit Week for Approval" button in the lower right-hand corner.
- If you need to make changes after submitting the week, just make the corrections and then resubmit the week.

Getting to the Expenses Screen

To start creating expenses click on the "Expenses " tab

Click on the " **+** New Expense" button to get to the screen to enter expenses.

Entering Expenses

- A Project/Category must be selected to create an expense
- Notes can be added to the expense.
- There is an option to attach the receipt to the expense
- Check or Un-check the "Expense is billable box" depending on the type of expense that's being entered.
  Example of Billable Expenses: Air Fare, Hotels, etc.
  Example of Unbillable Expenses: Parking downtown for Cambria office, Office Supplies, etc.
  Note: If you are unsure, ask if the expense is billable or not.
- Save the Expense when all the required information and additional information is added to it by clicking the "Save Expense" button.

Date	Project / Category	Amount
07/23/2020	Choose a project... ⌄	$
	Choose a category... ⌄	
	Notes (optional)	
	📎 Attach Receipt	
	☑ This expense is billable	
	Save Expense Cancel	

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Entering Expenses

To submit the expense for approval, click the "Submit for Approval" button on the upper-left hand portion of the screen (the expense must be saved before it can be submitted for approval).
If you need to make changes, after saving the expense, just go into the expense and update it and resave it.
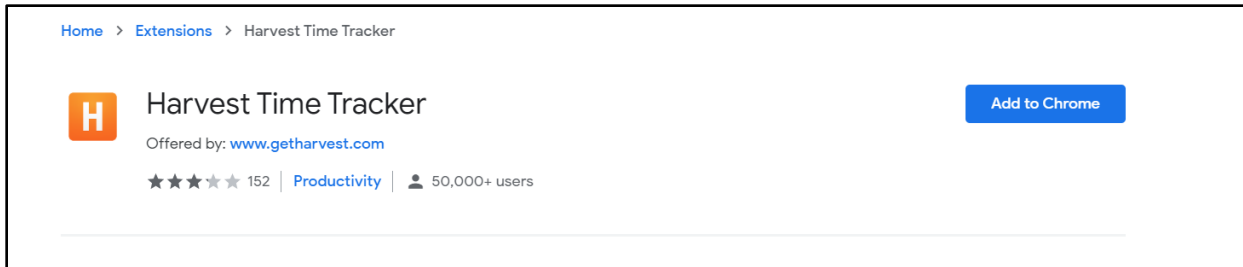
Plugins

Chrome:
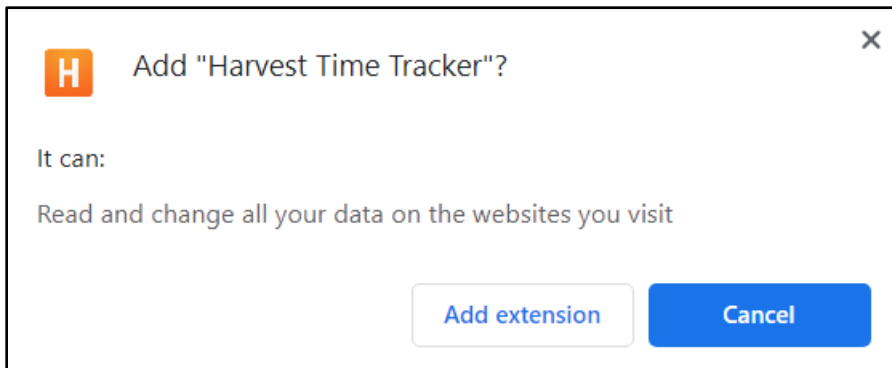
https://www.getharvest.com/apps-and-integrations/chrome

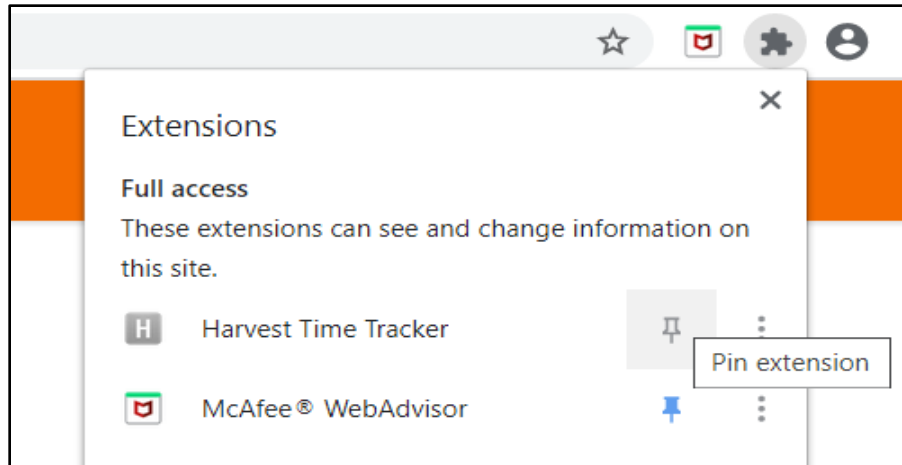- Press the "Add to Chrome button" to add the Google Chrome Extension.

- Click on the Add extension button to confirm adding the extension .

Plugins

- Click on the "pin button" to pin the extension.

Firefox:

https://www.getharvest.com/apps-and-integrations/firefox

Microsoft Edge:

https://www.getharvest.com/apps-and-integrations/edge

Recap

For time-tracking, remember these points:
- This is the URL to get to the browser for Harvest:
  https://www.getharvest.com/
- Time needs to be submitted weekly by 12:00 PM on Friday.
- Team members assigned to LDH projects only need to submit hours into Harvest.
- All other team members must enter both notes and hours.
- Time submitted for approval will go to Nhi and Jeremy.
- The start date will be August 3rd

For entering expenses, remember these points:
- Check or Un-check the "Expense is billable box" depending on the type of expense that's being entered.
- If you are unsure about an expense, ask if its billable or not.
- Expenses submitted for approval will go to Nhi and Jeremy.

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