

**GLOBAL
INITIATIVE**

How-to-Guide
Project Management Training
13 June 2023

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Harvest Download

- Log into your harvest account
- Go to “Reports” and click on “Detailed time”
- Select the relevant timeframe and enter the project code that you manage under “Projects”
- Click on “Run report”

The screenshot shows the Harvest application interface. At the top, there is a green navigation bar with tabs for 'Time', 'Projects', and 'Reports'. The 'Reports' tab is active. Below the navigation bar, the 'Detailed time' report form is displayed. The form includes the following fields and options:

- Timeframe:** A dropdown menu set to 'All time'.
- Include archived items in filters:** An unchecked checkbox.
- Clients:** A text input field containing 'All clients'.
- Projects:** A text input field containing '[GIZ - 23.OCWART] Organised Crime West Africa Response to trafficking 2023' with a close button (X).
- Tasks:** A text input field containing 'All tasks'.
- Team:** A text input field containing 'Everyone'.

A green 'Run report' button is located at the bottom of the form. A 'Search roles' link is also visible next to the Team field.

- The report that is generated should look like the following

Detailed time report: All time

Change filters

Total hours

1,161.29

627.00 Uninvoiced billable hours

Clients

1 Project

Tasks

Team

All clients

Orgnised Crime West Africa Response to trafficking 2023

All tasks

Everyone

Show: All hours ▾ Group by: Date ▾ Active projects only

Export ▾

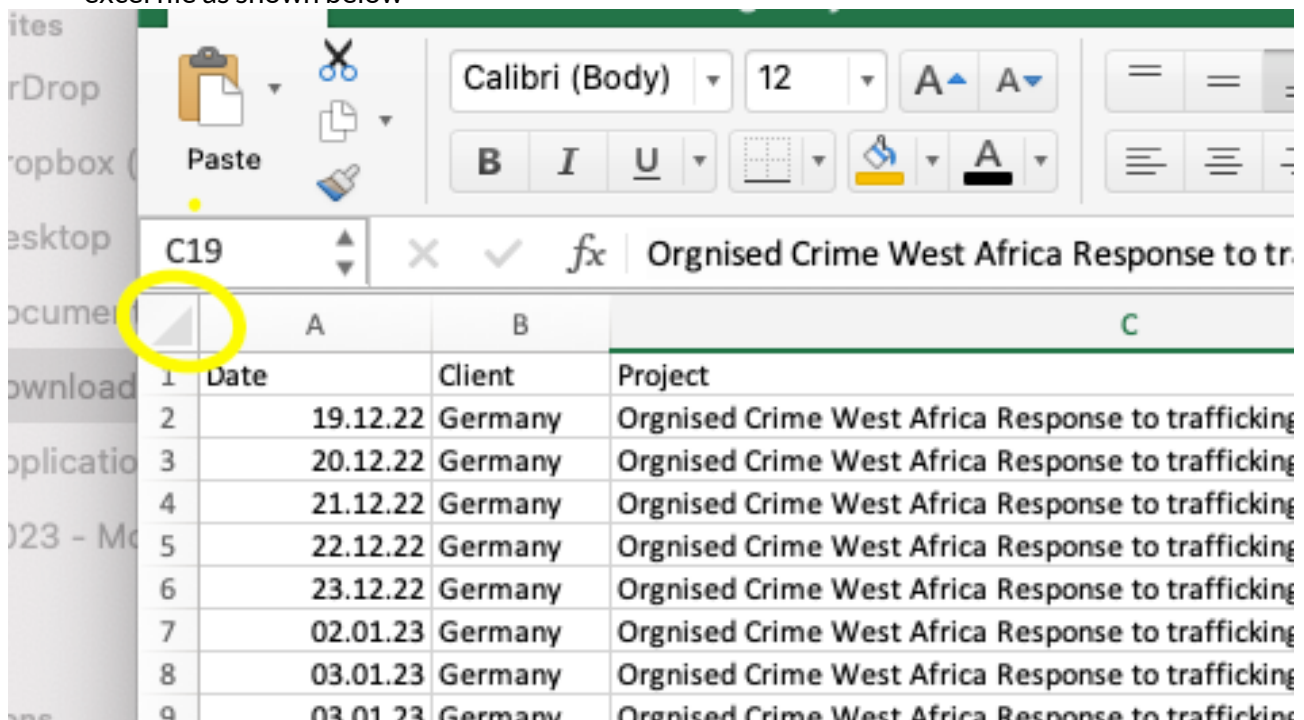
Client	Project	Task	Roles	Person	Hours
19.12.2022					6.00
Germany	[GIZ - 23.OCWART] Orgnised Crime West Africa Response to trafficking 2023	Editorial	Communications Officer	Abigail Davies	6.00

- Then click on the button “Export” and select excel in the drop-down list
- The excel file that is generated should look like the following

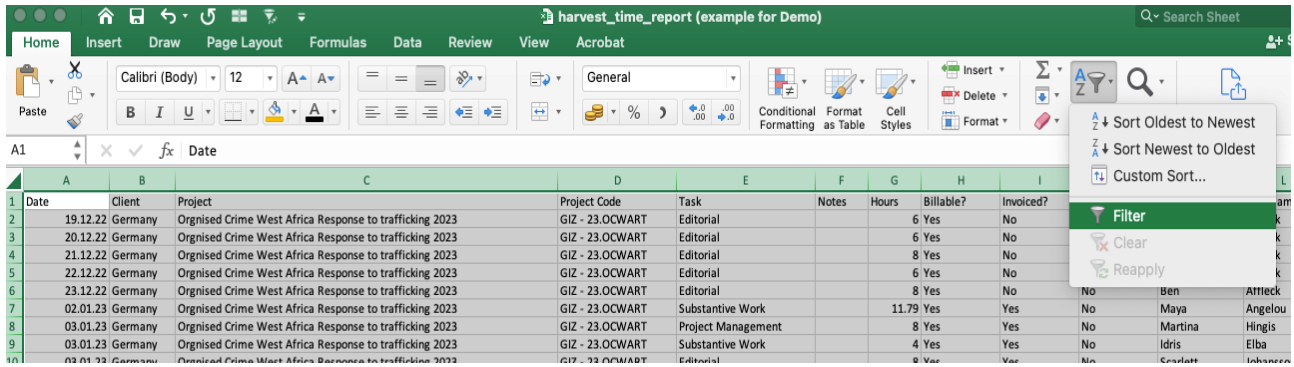


How to Filter and Unfilter in Excel

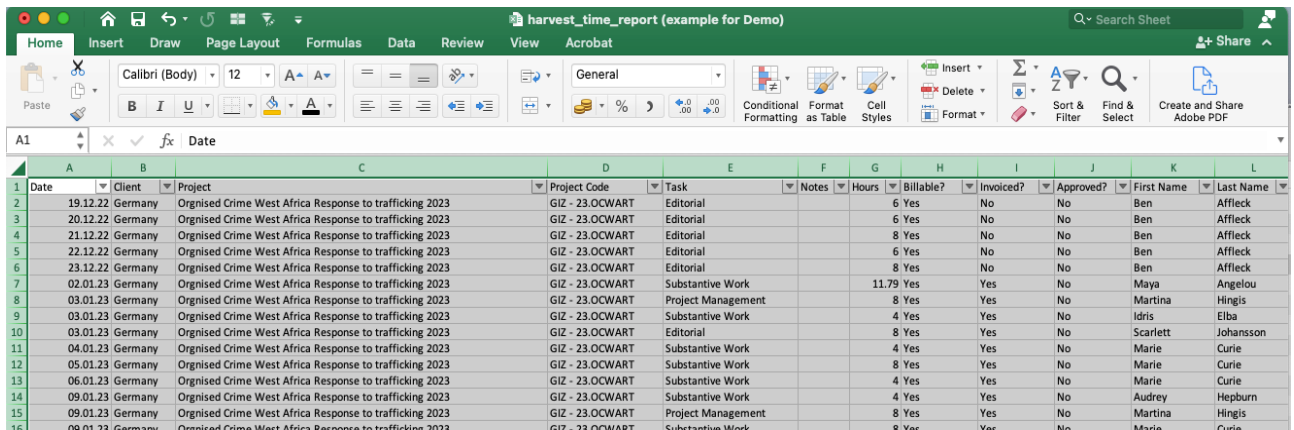
- In your harvest download select the full page by clicking the button on the top left-hand side of the excel file as shown below



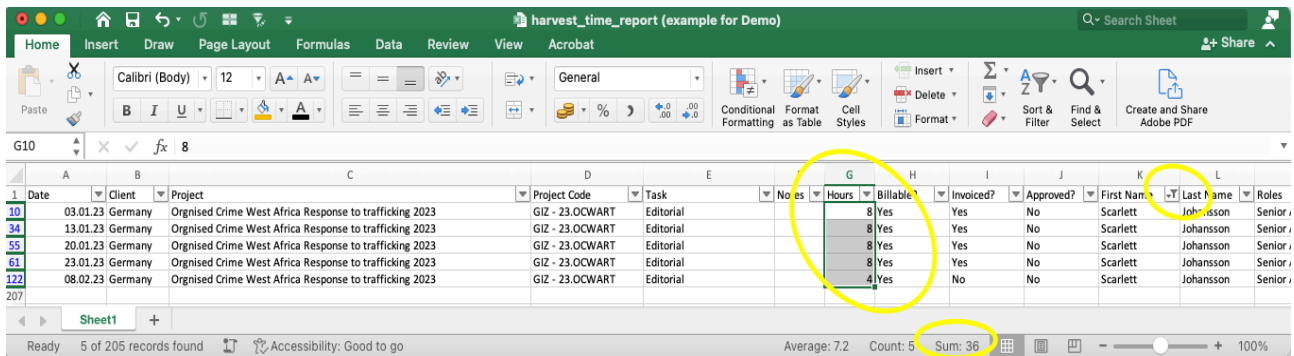
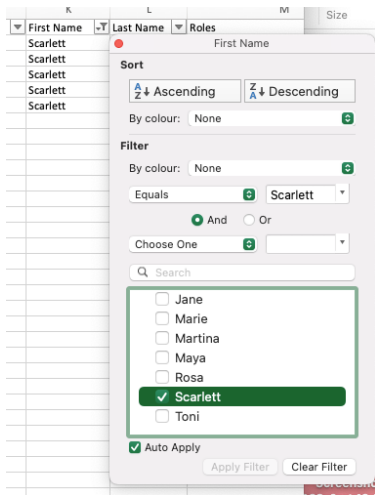
- Then go to the “Sort and Filter” button and select “Filter” in the drop-down list as shown below



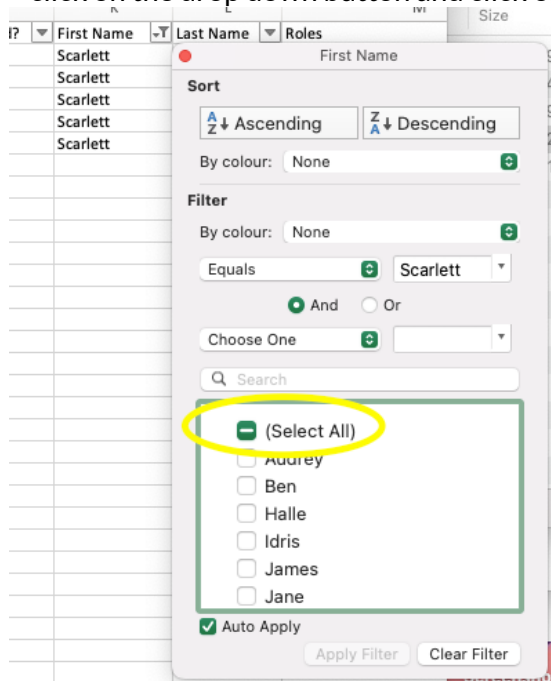
- Your file should look like the following



- You can now for example select a specific first name by clicking on the filter that is located on the first line of the file under the first name column. Under that selection you for example for instance see the sum of the number hours booked by that person



- To unselect the person you chose you go the column that contains the first name of the person and click on the drop down button and click on “Select All”



- To remove the filter altogether go back to the “Sort and Filter” button and select “Filter” again

“IF” Formula in Excel

- If you need to quickly check if a person’s hours have already been transferred to our accounting system and can’t be changed anymore you can use the following formula in column T. You can either type in or copy and paste this exact formula in the raw data you downloaded from Harvest

=IF(I2="No","Harvest hours not transferred","Harvest hours transferred")

Invoiced?	Approved?	First Name	Last Name	Roles	Employee?	Billable Rate	Billable Amount	Currency	External Reference URL	Harvest Hours Transfer Status
No	No	Ben	Affleck	Communications Officer	Yes	31.87	191.22	Swiss Franc - CHF		Harvest hours not transferred
No	No	Ben	Affleck	Communications Officer	Yes	31.87	191.22	Swiss Franc - CHF		Harvest hours not transferred
No	No	Ben	Affleck	Communications Officer	Yes	31.87	254.96	Swiss Franc - CHF		Harvest hours not transferred
No	No	Ben	Affleck	Communications Officer	Yes	31.87	191.22	Swiss Franc - CHF		Harvest hours not transferred
No	No	Ben	Affleck	Communications Officer	Yes	31.87	254.96	Swiss Franc - CHF		Harvest hours not transferred

- Then drag the formula to the cells below using the little plus sign that appears on the bottom right side of the cell

Days	Harvest Hours Transfer Status	U	V
0.5	Harvest hours not transferred		
0.75			
1			
0.75			
1			
1.47375			
1			
0.5			
1			
0.5			
1			
0.5			
1			

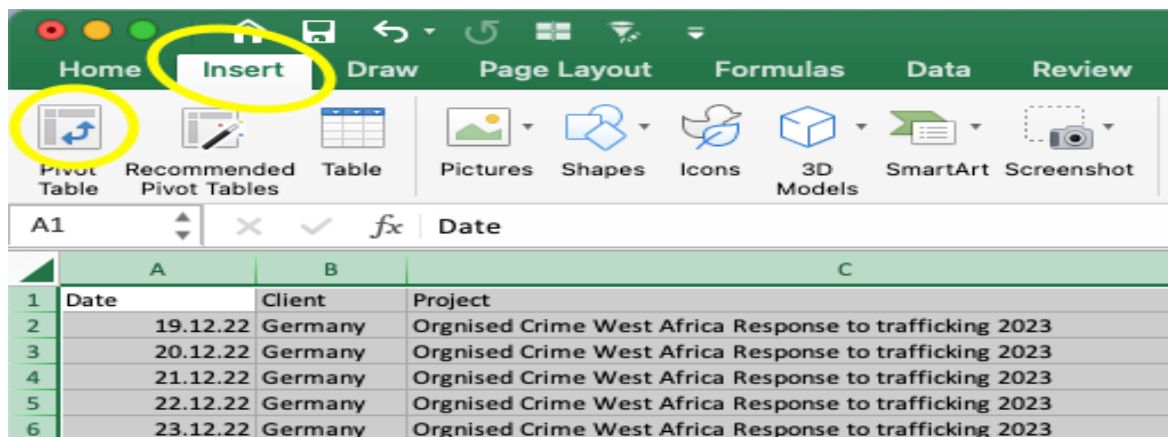
“Days” Formula in Excel

- To convert the number of hours recorded in harvest into days either type or copy and paste the following formula in your harvest download file in column S

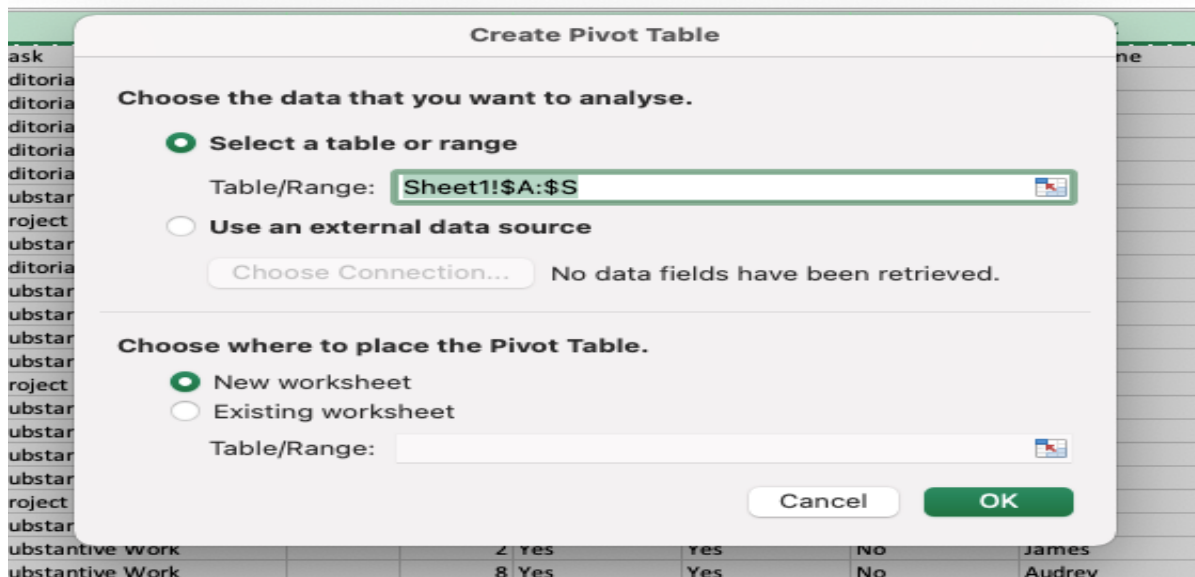
=G2/8

How to Generate a Pivot Table

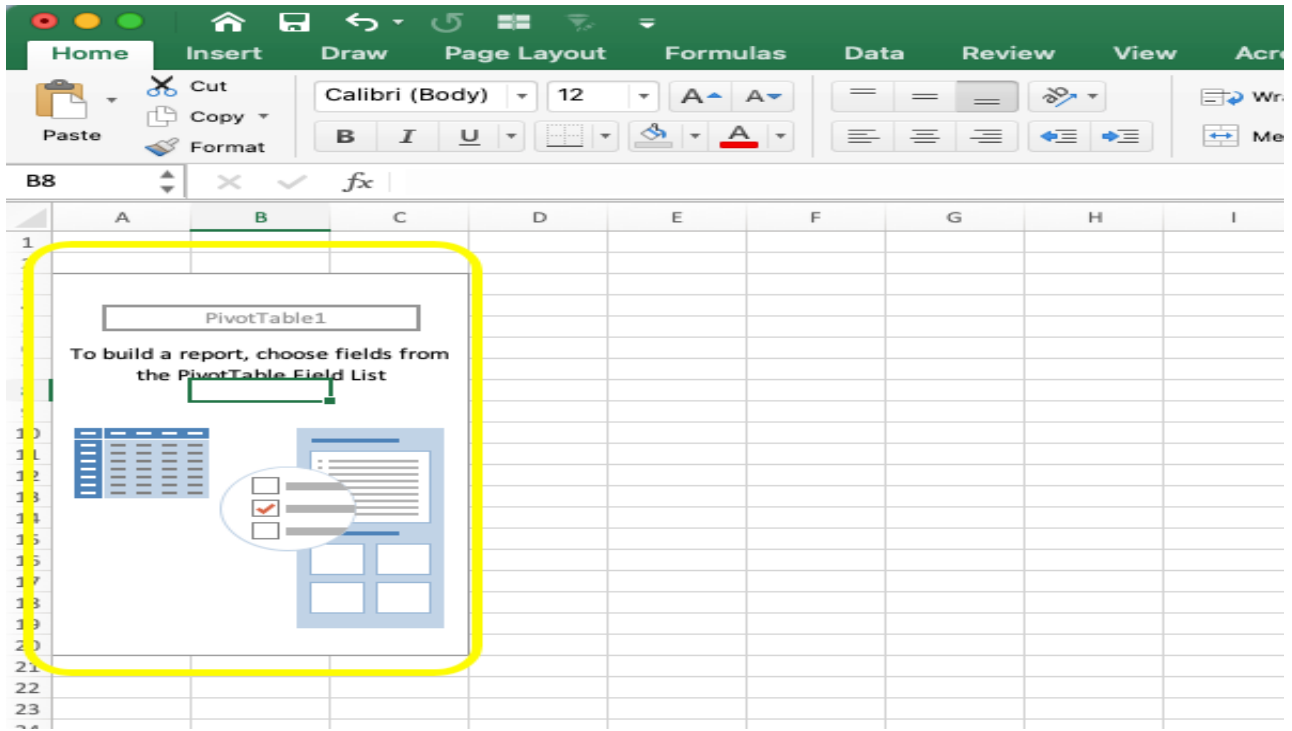
- Make sure there are no columns that don't have title if not you will not be able to generate a report
- Select the full page as demonstrated previously
- Go to "Insert" and choose "PivotTable"



- Normally the "Select a table or range" section will be selected and automatically be filled in because you selected the full page. If it is filled in click on "Ok"



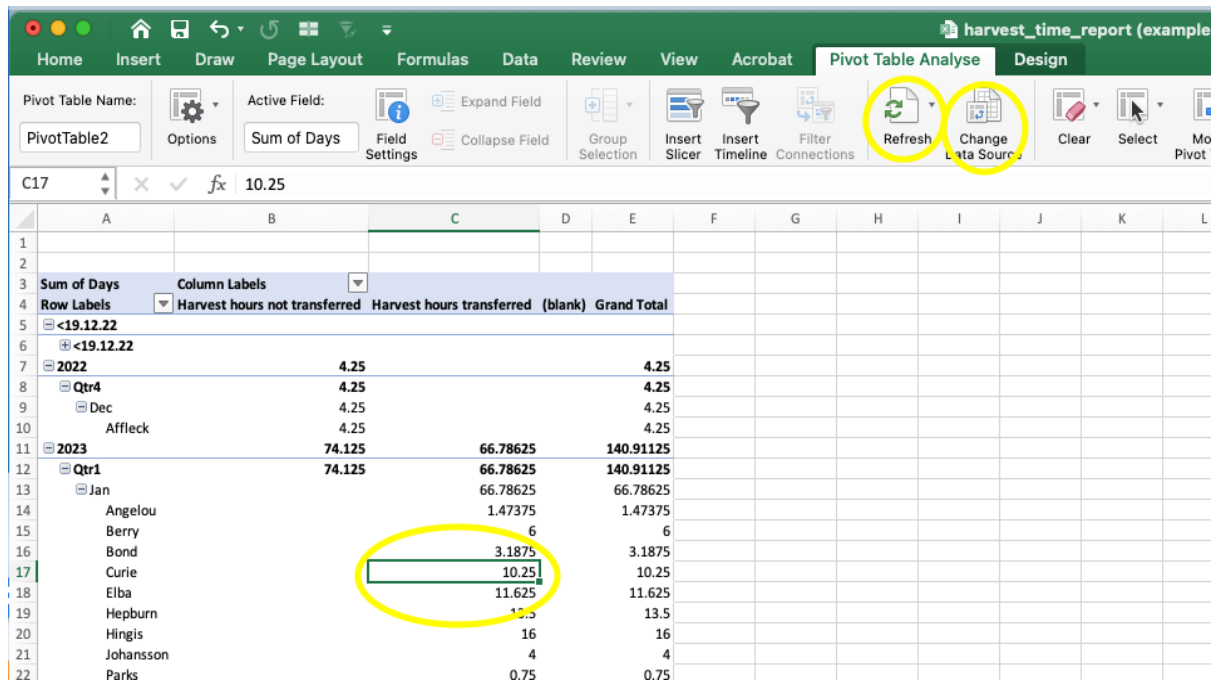
- You will automatically be directed to another worksheet that looked like the following. Click in the section indicated in the following image and generate the data in your table



- The final pivot can for example look like the following depending on the data you want to analyze

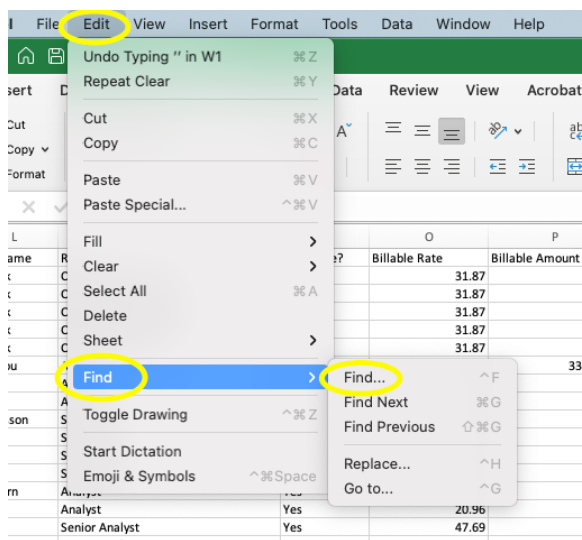
Sum of Hours	Column Labels		
Row Labels	Harvest hours not transferred	Harvest hours transferred (blank)	Grand Total
<19.12.22			
2022	34		34
Dec	34		34
Affleck	34		34
2023	593	534.29	1127.29
Jan		534.29	534.29
Angelou		11.79	11.79
Berry		48	48
Bond		25.5	25.5
Curie		82	82
Elba		93	93
Hepburn		108	108
Hingis		128	128
Johansson		32	32
Parks		6	6
Feb	532		532
Affleck	30		30
Angelou	64		64
Austen	13.5		13.5
Berry	32		32
Bond	31.5		31.5
Curie	76		76
Elba	92		92
Hepburn	108		108
Hingis	12		12
Johansson	4		4
Morrison	40		40
Parks	29		29
Mar	61		61
Curie	32		32
Hepburn	28		28
Parks	1		1
Grand Total	627	534.29	1161.29

- If you have done a new harvest download and need to update the pivot table so that it can reflect up to date data, please click on the pivot section and then go to “Pivot Table Analyze” and click on the “Refresh” button. Similarly if you have added some new columns please make sure to use the “Change Data Source” button to add the data found in the new columns in the pivot table.

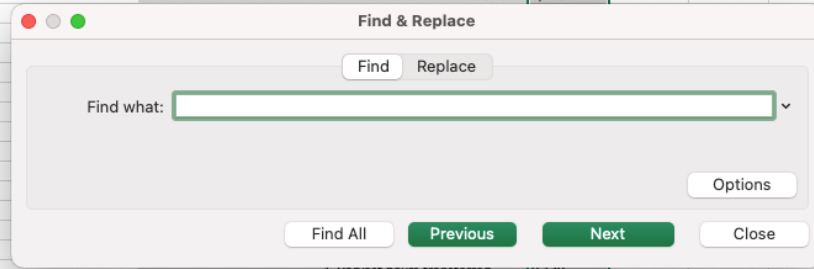


Find and Replace

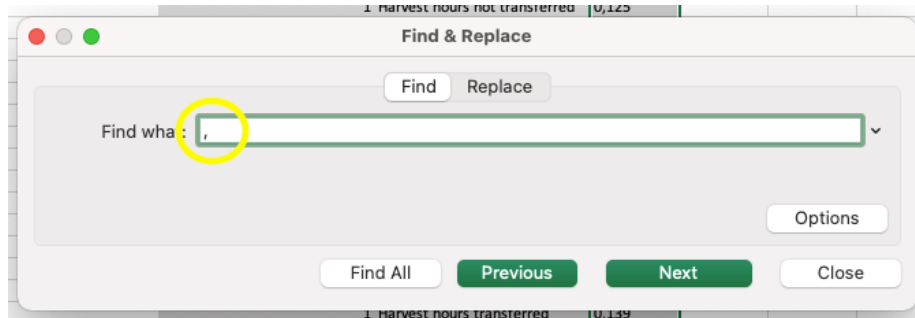
- If you need to remove a gap or comas in your excel file you can use the find and replace function. First select the column or page where you want to find and replace and then either click on Control+F (at the same time) on your Mac or go to the “Edit” and select find.



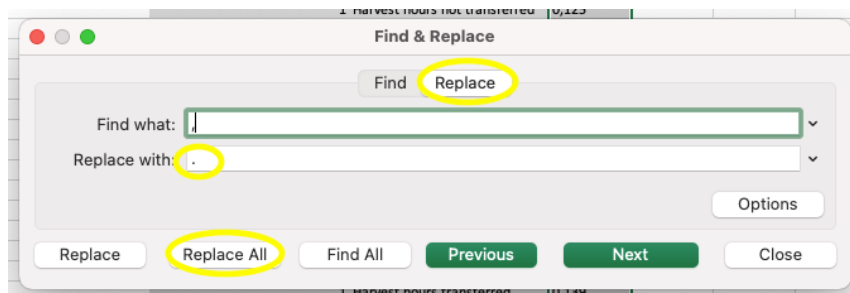
R	S	T	U	V	W	X	Y
nal Reference URL	Days	Harvest Hours Transfer Status					
		0.75 Harvest hours not transferred	0,123				
		0.75 Harvest hours not transferred	0,124				
		1 Harvest hours not transferred	0,125				
		1 Harvest hours transferred	0,139				
		1 Harvest hours transferred	0,140				
		1 Harvest hours transferred	0,141				
		1 Harvest hours transferred	0,142				
		0.25 Harvest hours transferred	0,143				
		1 Harvest hours transferred	0,144				
		1 Harvest hours transferred	0,145				
		1 Harvest hours transferred	0,146				
		1 Harvest hours transferred	0,147				
		0.375 Harvest hours transferred	0,148				
		1 Harvest hours transferred	0,149				
		1 Harvest hours transferred	0,150				



- Then you instruct excel what to find (it is a coma in the example below)

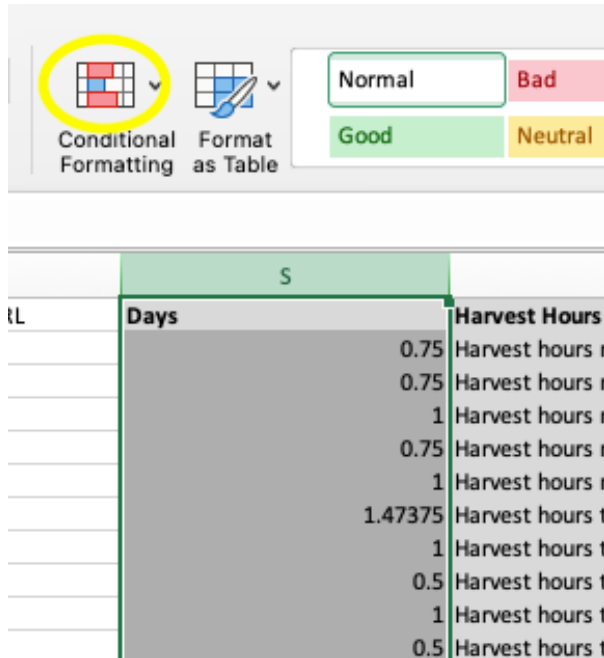


- Finally click on the replace button and indicate what you want to replace the coma with (a point in the example below) and click on replace all

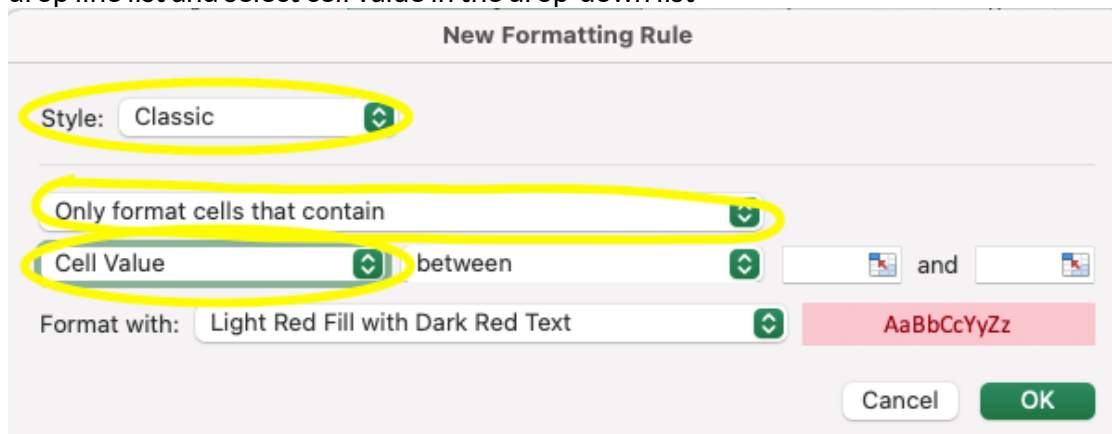


Conditional Formatting

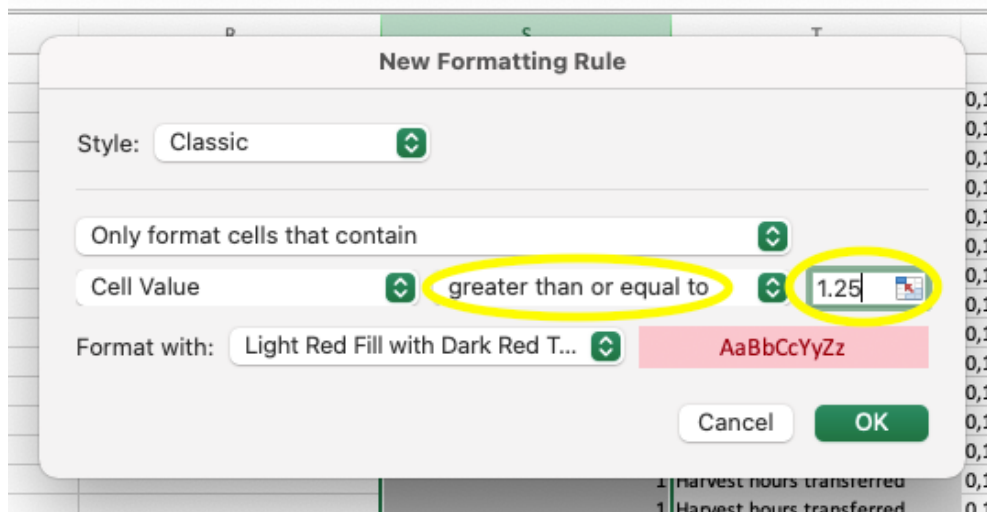
- Select the column where you where you want to apply conditional formatting on and click on Conditional Formatting in the formula bar



- Then select "New Rule". Change the Style to "Classic", select "Only format cells that contain" in the drop line list and select cell value in the drop-down list



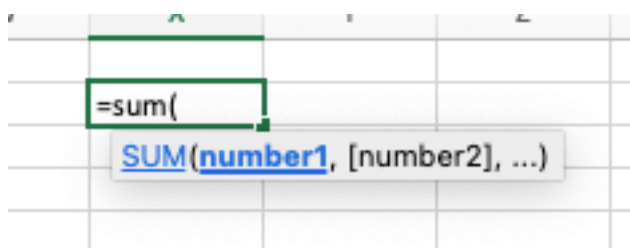
- Then finally select the formula that will allow you to format specific values. In this case we want to only highlight cells that are equal to or greater then 1.25



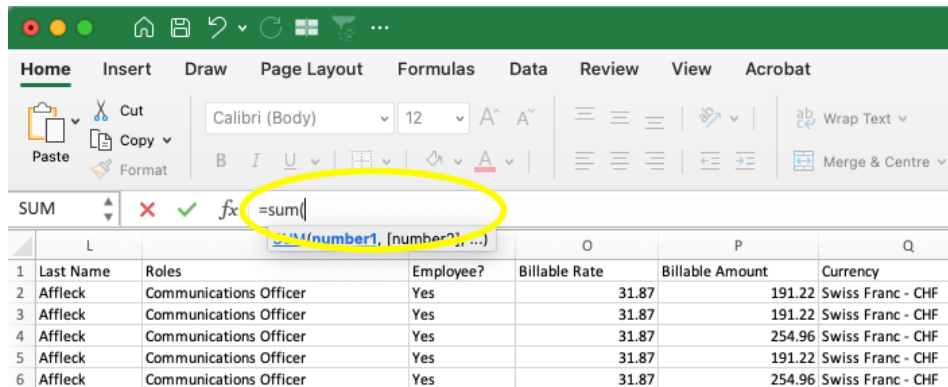
Days	S
	0.75
	0.75
	1
	0.75
	1
	1.47375
	1
	0.5
	1
	0.5
	1
	0.5
	0.5
	1

How to Generate a Formula

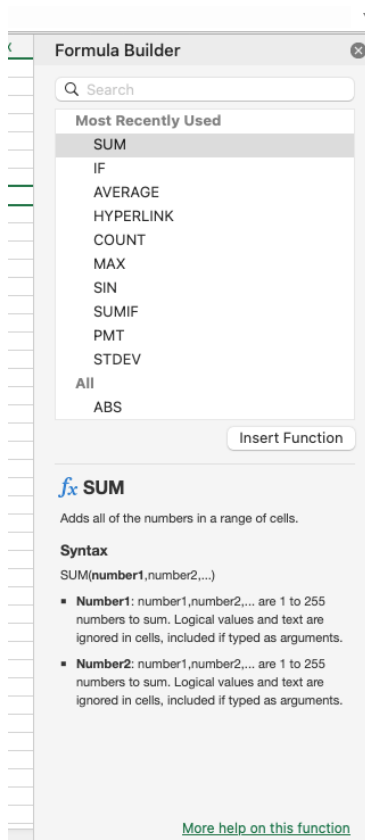
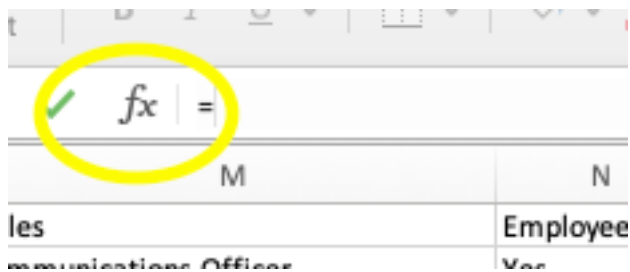
- There are three ways of generating formulas in excel;
 - 1) Manually enter it using an equal sign



2) Type it in the formula bar also using the equal sign

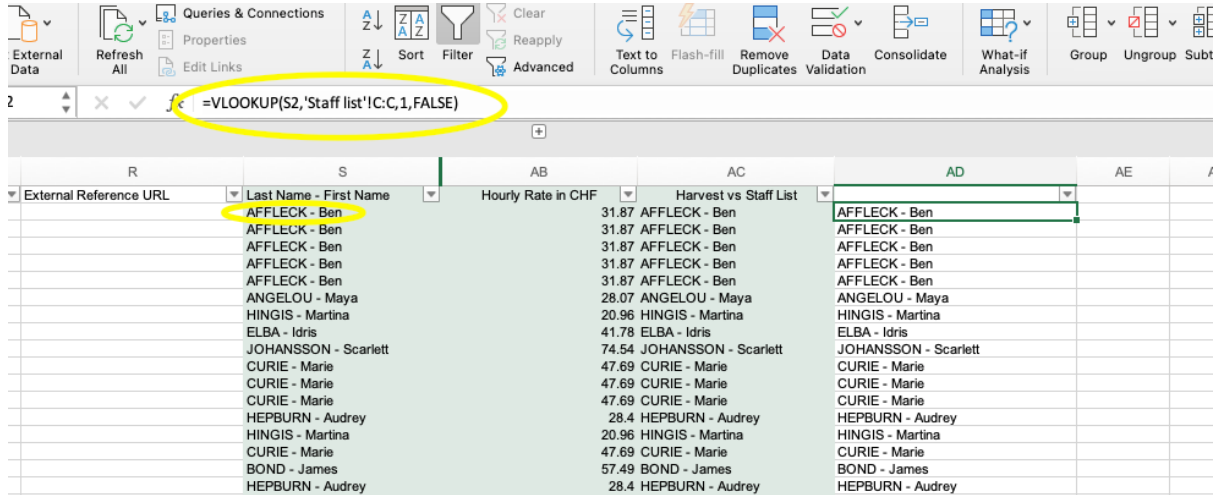


3) Click on function symbol (fx) that is found next to the formula bar. It will open a formula bar table on the right side of the excel sheet



Vlookup

- Make sure the data you are searching for based on a criterion is found on the first column. In the example below I am searching for AFFLECK – Ben so in the staff list tab the first column on which I am searching has to be column C.



A	B	C	D	E	F	H	I	J	
Upper Last Name	First Name	Concatenate	Staff / Consultant (for those filling time in Harvest)	Procurement	Contract (signed by consultant and GI-TOC)	Daily rate in Grant Currency (select grant currency in cell S2)	Number of days assigned on the project	Number of Days Booked in Harvest	Number of Days Booked in Harvest
Program Mgr	Program Mgr	Finance	Finance	Program Mgr	HR	Finance	Program Mgr	Finance	Finance
AFFLECK	Ben	AFFLECK - Ben				100	20	8	
ANGELOU	Maya	ANGELOU - Maya				250	65	9.47	
HINGIS	Martina	HINGIS - Martina				300	90	17.5	
ELBA	Idris	ELBA - Idris				150	5	23.13	
JOHANSSON	Scarlett	JOHANSSON - Scarlett				500	6	4.5	
CURIE	Marie	CURIE - Marie				400	0	23.75	
HEPBURN	Audrey	HEPBURN - Audrey				200	12	30.5	
BOND	James	BOND - James				250	50	7.13	
BERRY	Halle	BERRY - Halle				300	46	10	
PARKS	Rosa	PARKS - Rosa				320	78	4.5	
MORRISON	Toni	MORRISON - Toni				340	2	5	
AUSTEN	Jane	AUSTEN - Jane				100	3	1.69	
Federer	Roger	Federer - Roger				150	2	0	
		-				#N/A		0	
		-				#N/A		0	

- Then the formula to enter to look up AFFLECK – Ben from the Harvest sheet into the Staff list tab is the following;

=VLOOKUP(S2,'Staff list'!C:C,1,FALSE)

Concatenate

- If you want to combine values found into two cells into one you can use the Concatenate formula. In the example below we are combining the first and last name of staff members.

Surname	Firstname	Title
AFFLECK	Ben	
ANGELOU	Maya	
HINGIS	Martina	
ELBA	Idris	
JOHANSSON	Scarlett	
CURIE	Marie	
HEPBURN	Audrey	
BOND	James	
BERRY	Halle	
PARKS	Rosa	
MORRISON	Toni	
AUSTEN	Jane	
Federer	Roger	

- The formula to enter is =CONCATENATE(B5,"-",C5)

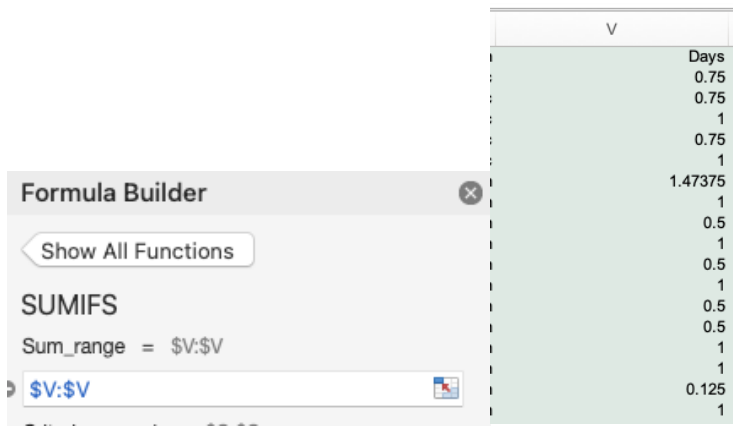
Upper

- If you want to change all letters in a cell from lower case to all upper-case letters use the Upper formula. To use the formula type =UPPER and then select the cell that contains the name that you want to change to upper cases to and then click enter.

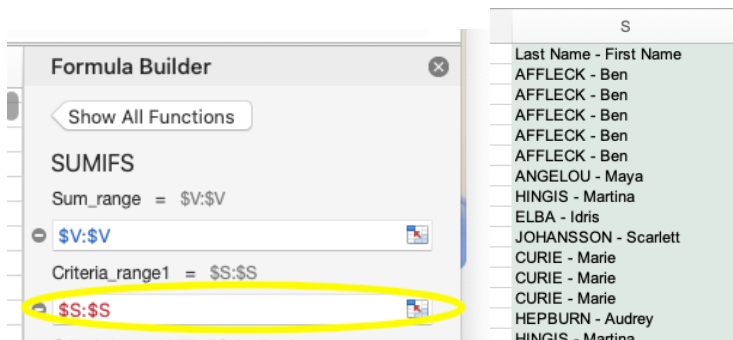
Surname	Firstname	Title	EUR Full Recharge Daily rate	All Upper Case Name
AFFLECK	Ben		100	BEN
ANGELOU	Maya		250	MAYA
HINGIS	Martina		300	MARTINA
ELBA	Idris		150	IDRIS
JOHANSSON	Scarlett		500	SCARLETT
CURIE	Marie		400	MARIE
HEPBURN	Audrey		200	AUDREY
BOND	James		250	JAMES
BERRY	Halle		300	HALLE

SUMIFS

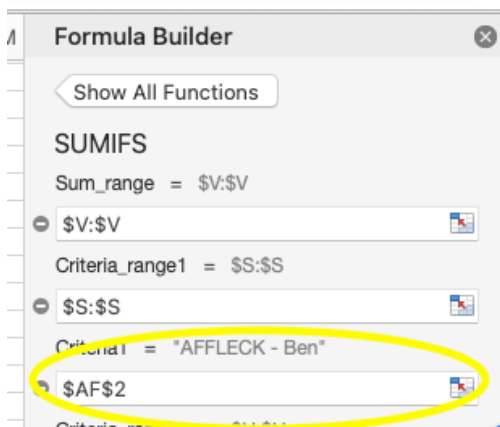
- If you need to sum-up data with more than one criterion then you can use the Sumifs formula. For example, if you need to sum time booked in harvest by employee and month you can use the following way;
- First you type =sumifs and as the first criteria you need to select the column that you want to sum up



- Then you select the column that contains the data of your first criteria. In this example it is the column that contains the last and first name of the employee



- The third step is to select the cell in which your criteria is located in. In this example we want to sum up the hours of Ben Affleck.



AF
AFFLECK - Ben

- If you have additional criterions to add you repeat steps 3 and 4 as many times as you need

Calculating Hours to be Charged Per Employee in Harvest (One Single Person Per Budget Line)

We have created a new tab called “Hours Per Employee + Per Month” in the budget tracking file to help calculate the number hours that need to be allocated in harvest per month and per employee.

- All budget needs to be entered in the grant currency (in the example below it is EUR). Cell H2 is automatically updated based on the grant currency indicated in the staff list tab.
- Enter the duration of the budget (based on what has been indicated in the donor contract).
- First please enter the budget description and total budget in the grant currency.

Budget Description	Total Budget by Budget Line in Grant Currency	Duration of Project in Months	Budget Amount Per Month (Average)	Sum of Check Calculation	Delta/Check	Grant Currency	Duration of Project in Months
Expert Staff Time	25'000	10	2'500	25000	0	EUR	10
Editorial, publications, mapping, graphics	10'000	10	1'000	10000	0		
Finance	10'000	10	1'000	0	10'000		
Leadership time	30'000	10	3'000	30000	0		
Project lead time	40'000	10	4'000	40000	0		
Research Assistant	20'000	10	2'000	8000	12'000		
Translation	15'000	10	1'500	15000	0		

- Finally allocate one staff member per one budget line. Meaning you only have one person working on one budget line item. You do the allocation by selecting the staff under the “Staff Member Working on Project (allocated to the correct budget line)” column using the drop-down list. Then select their budget position under “Budget Position” column. The days they can allocate in harvest on a monthly basis is calculated automatically as long as they have been correctly included in the staff list and you have obtained their daily rate from finance.

Budget Description	Total Budget by Budget Line in Grant Currency	Duration of Project in Months	Budget Amount Per Month (Average)	Sum of Check Calculation	Delta/Check	Grant Currency	Duration of Project in Months
Expert Staff Time	25'000	10	2'500	25000	0	EUR	10
Editorial, publications, mapping, graphics	10'000	10	1'000	10000	0		
Finance	10'000	10	1'000	0	10'000		
Leadership time	30'000	10	3'000	30000	0		
Project lead time	40'000	10	4'000	40000	0		
Research Assistant	20'000	10	2'000	8000	12'000		
Translation	15'000	10	1'500	15000	0		

Staff Member Working on Project (allocated to the correct budget line)	Budget Position	Daily Rate in Grant Currency	Budget Amount Per Month Based on FULL Budget Line	Duration of Project in Months	Days That Can Be Allocated Per Month - One Staff per Budget Line - Calculated Amount	Days That Can Be Allocated Per Month - Multiple Staff per Budget Line - Manual Entry	Check Calculation
AFLECK - Ben	Expert Staff Time	100	2500	10	25.00		25000
ANGELOU - Maya	Leadership time	250	3000	10	12.00		30000
HINGIS - Martina	Project lead time	400	4000	10	10.00		40000
BOND - James	Translation	250	1500	10	6.00		15000
		#N/A	#N/A	10	#N/A		#N/A

Calculating Hours to be Charged Per Employee in Harvest (Multiple People on one Budget Line)

- Please follow the steps mentioned in the Calculating Hours to be Charged Per Employee in Harvest (One Single Person Per Budget Line) section.
- Then please fill in manually the “Days That Can Be Allocated Per Month - Multiple Staff per Budget Line - Manual Entry” until the full budget has been allocated among all the relevant staff members.

Budget Description	Total Budget by Budget Line in Grant Currency	Duration of Project in Months	Budget Amount Per Month (Average)	Sum of Check Calculation	Delta/Check	Grant Currency	Duration of Project in Months
Expert Staff Time	25'000	10	2'500	25000	0	EUR	10
Editorial, publications, mapping, graphics	10'000	10	1'000	10000	0		
Finance	10'000	10	1'000	0	10'000		
Leadership time	30'000	10	3'000	30000	0		
Project lead time	40'000	10	4'000	40000	0		
Research Assistant	20'000	10	2'000	8000	12'000		
Translation	15'000	10	1'500	15000	0		

Staff Member Working on Project (allocated to the correct budget line)	Budget Position	Daily Rate in Grant Currency	Budget Amount Per Month Based on FULL Budget Line	Duration of Project in Months	Days That Can Be Allocated Per Month - One Staff per Budget Line - Calculated Amount	Days That Can Be Allocated Per Month - Multiple Staff per Budget Line - Manual Entry	Check Calculation
AFLECK - Ben	Expert Staff Time	100	2500	10	25.00		25000
ANGELOU - Maya	Leadership time	250	3000	10	12.00		30000
HINGIS - Martina	Project lead time	400	4000	10	10.00		40000
BOND - James	Translation	250	1500	10	6.00		15000
		#N/A	#N/A	10	#N/A		#N/A
ELBA - Idris	Editorial, publications, mapping, graphics	150	1000	10		2.00	3000
JOHANSSON - Scarlett	Editorial, publications, mapping, graphics	500	1000	10		1.00	5000
HEPBURN - Audrey	Editorial, publications, mapping, graphics	200	1000	10		1.00	2000
AUSTEN - Jane	Research Assistant	100	2000	10		8.00	8000
CURIE - Marie	Research Assistant	400	2000	10			0