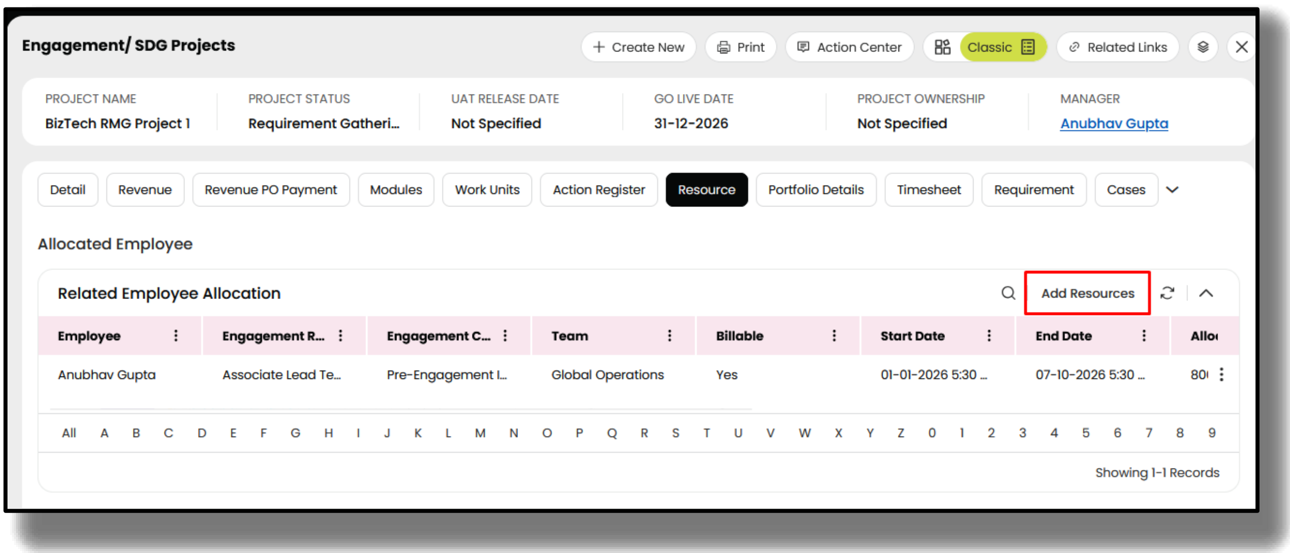
<u>*RESOURCE ALLOCATION*</u>

A. How will PMs/POs navigate to resource allocation.

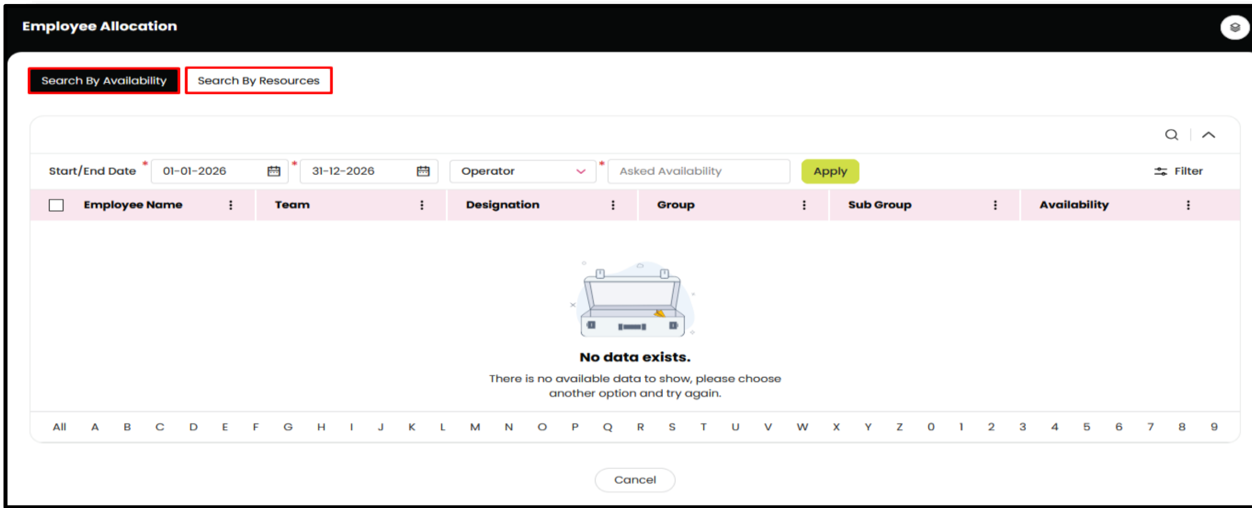
1. Log into MY.BUSINESSNEXT Portal using **Project Manager/US Project Manager/US Portfolio Manager** role.
2. Navigate to **Project** object homepage.
3. Access an existing Project created under '***Engagement/SDG Project***' layout
4. On Project 360, look for '***Resource***' tab and click on it to view '***Related Employee Allocation***' listing.

B. How will PMs/POs will search for resources to Allocate?

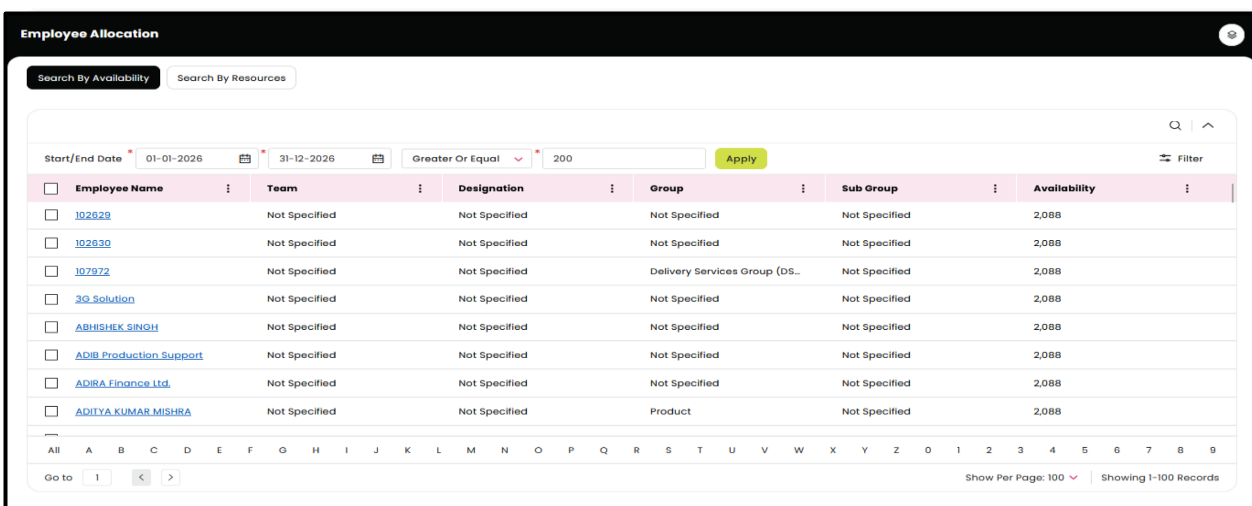
1. Click on the '**Add Resource**' in the '**Related Employee Allocation**' listing available under the '**Resources**' tab of Project 360.



2. On the pop-up screen, PM/PO will be able to see two tabs namely, '**Search by Availability**' & '**Search by Resources**'.

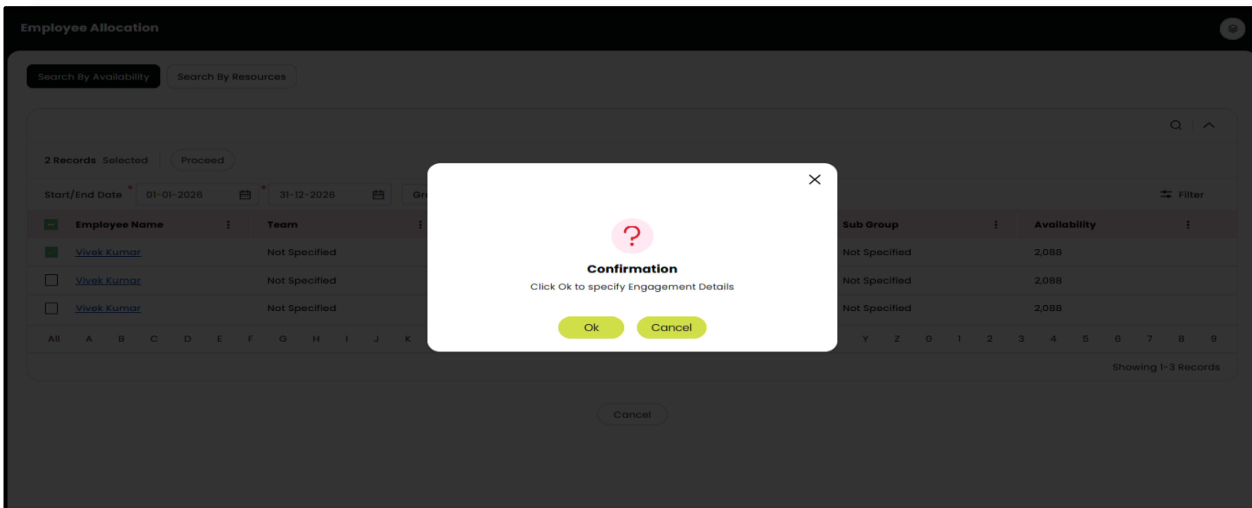


3. Under the '***Search by Availability***' tab, specify the **Start Date** & **End Date** as they are mandatory field. Although, these two fields will carry the relevant project's Start Date and End Date, respectively as their default values. The PM/PO may customize the values within the constraints of these default values.
   - **Note:** In case the PM/PO wants to allocate resources beyond the constraints, they'll need to update the Project Start and End Date to expand the existing selection of dates.
4. PM/PO may also specify the desired availability of the resources that they like to view for allocation by entering the value in '**Asked Availability**' field.
   - **Note:** The use of available operations is mandatory and will help filtering out resources relevant to their request for availability.
5. Click on Search after specifying the **Start Date***, **End Date***, **Operator*** & optionally **Asked Availability.**
6. The resources will appear in the search listing based on the parameters specified on top of the screen.

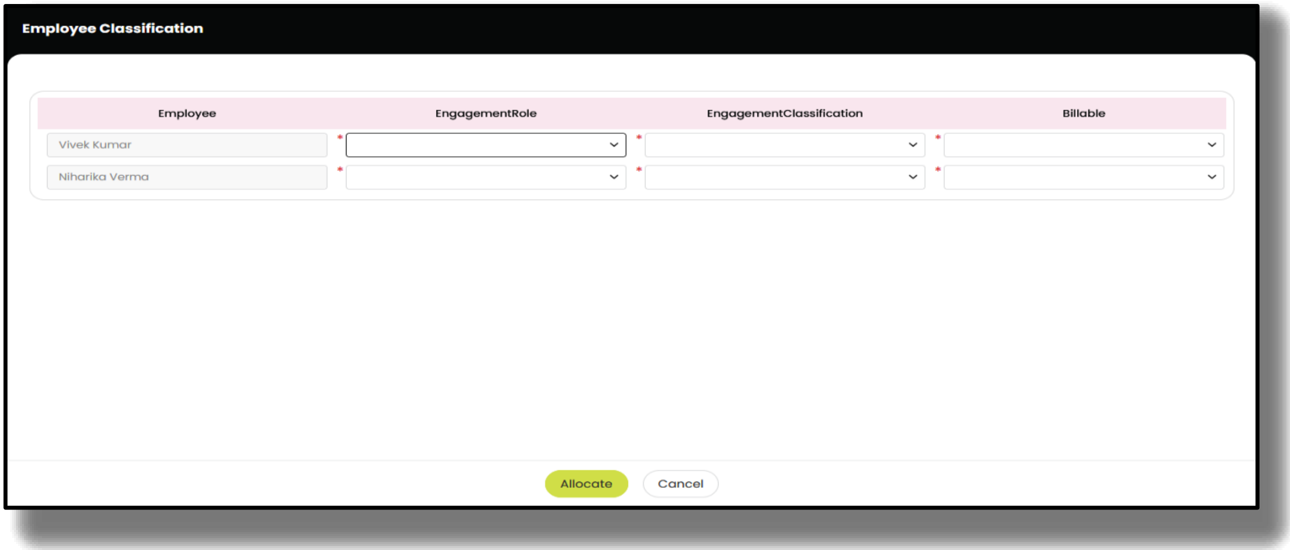


C. How will a PM/PO select relevant resources for Allocation? (cont. B.6)

1. PM/PO will be able to view the following details of the resources in the listing:
    - Employee Name
    - Employee Team (Default)
    - Designation
    - Group
    - Sub Group
    - Availability
2. PM/PO may select their desired resources from the list by checking the box next to the Employee Name.
3. When checked and clicked on 'Proceed', the system will prompt PM/PO user to specify engagement details.



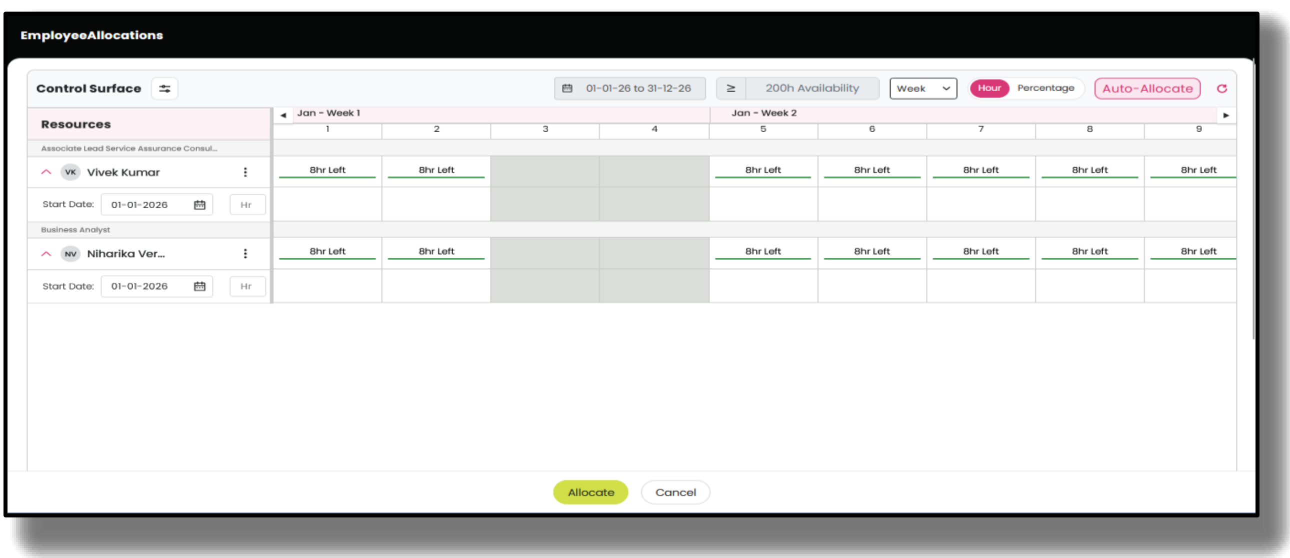
4. Click 'Ok' to proceed with Engagement Detail specification for each selected resource.
    - Engagement Role [Picklist] – *The role which this resource will be billed for/performing in this project.*
    - Engagement Classification [Picklist] – *The suitable classification of this resource based on their role in this project and the current stage of the project.*
    - Billable [Picklist] – *To specify whether the selected resource is to be billed or not in this project.*



5. Specify the value for the above fields for all the selected line items from the listing and click on '***Allocate***' button available on the bottom of the screen.

D. How will PMs/POs set allocation specs for each of their selected resources?

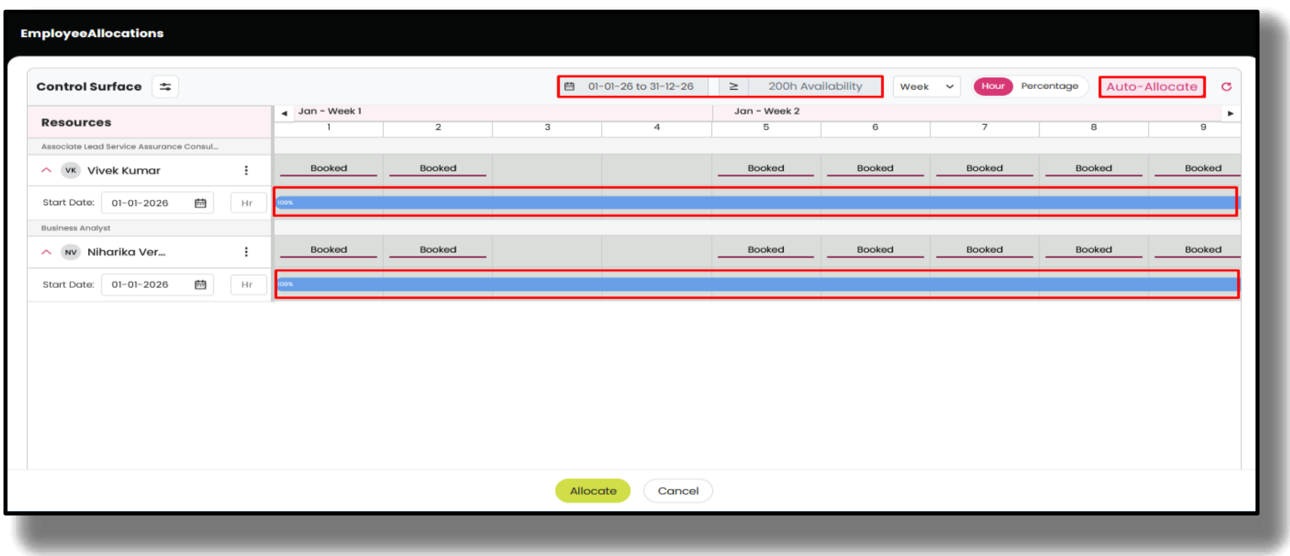
1. After clicking on the '**Allocate**' button, the PM/PO will be taken to the next screen where the crucial work for Employee Allocation begins.
2. A chart-table-like design will appear on the Control surface, where the PM/PO will be able to view their selected resource on the left side of the screen while their allocations will be set up next to their names, on the chart available on right side.
   - **Note:** The chart form used here is **Gantt.**



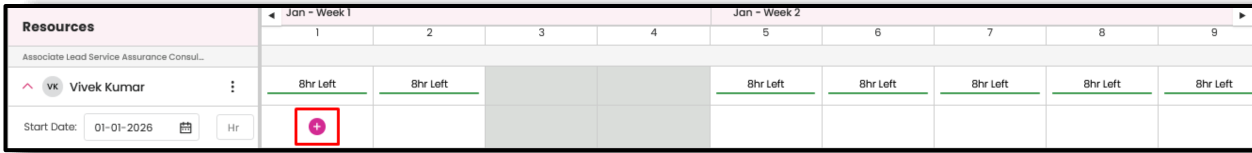
3. On the top ribbon of the screen, PM/PO will be able to view the parameters defined by them in the previous screen, namely:

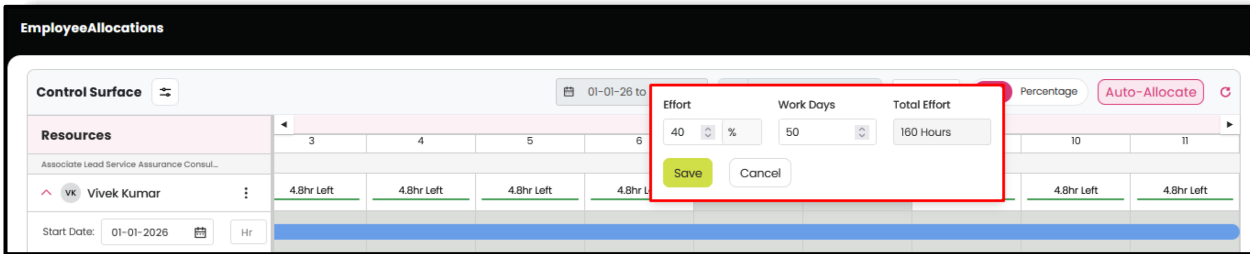
- Allocation Start Date - End Date.
- Asked Availability w/selected operator
- Interval Granularity Selector – *It allows the user to switch the view of the resource allocation data by different time periods (e.g., **Year, Quarter, Month, & Week).***
- Unit of Allocation - *It lets the user choose how they want to view and allocate resources — either in **hours** or in **percentage** terms*
- Auto – Allocate – *Will be explained later in the document.*

4. There are three ways to specify allocation of the selected resources for the project:
   - **Auto – Allocation:** *Smart Allocation (system-driven, optimized based on availability)* PM/PO can just click on 'Auto-Allocate' button available on top right of the screen to specify the allocations for all the resources from Start Date and the Asked Availability on the Gantt chart.

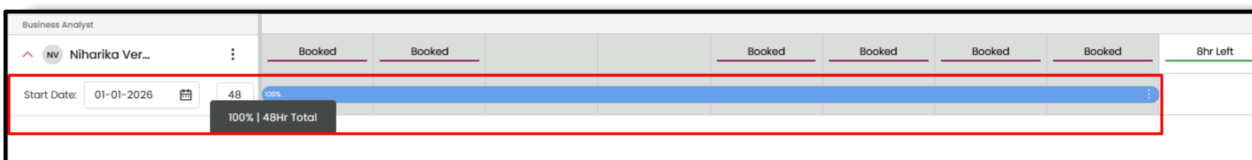


   - **Manual Allocations:**
     - **Gantt Grid Click:** *Manual Drag-and-Drop Allocation (interactive, visual scheduling):* PM/PO can hover and click on the '+' Gantt chart's grid box, next to the resource from the timeline of their choice. This will open a floating anchor block where they'll have to specify '**Effort**' & '**Workdays**' for the resource. The values will calculate the '**Total Effort**' and set up an allocation bar of the resource on the grid.
     - Efforts can be specified in either Hours[8hrs maximum] or Percentage[100 % maximum].

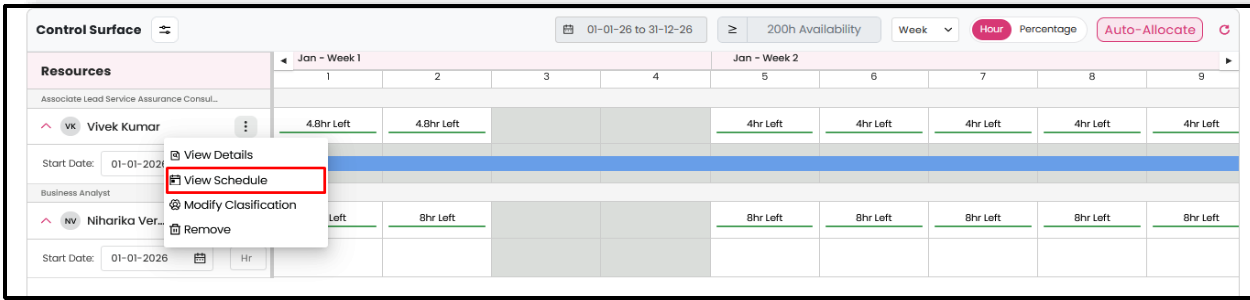


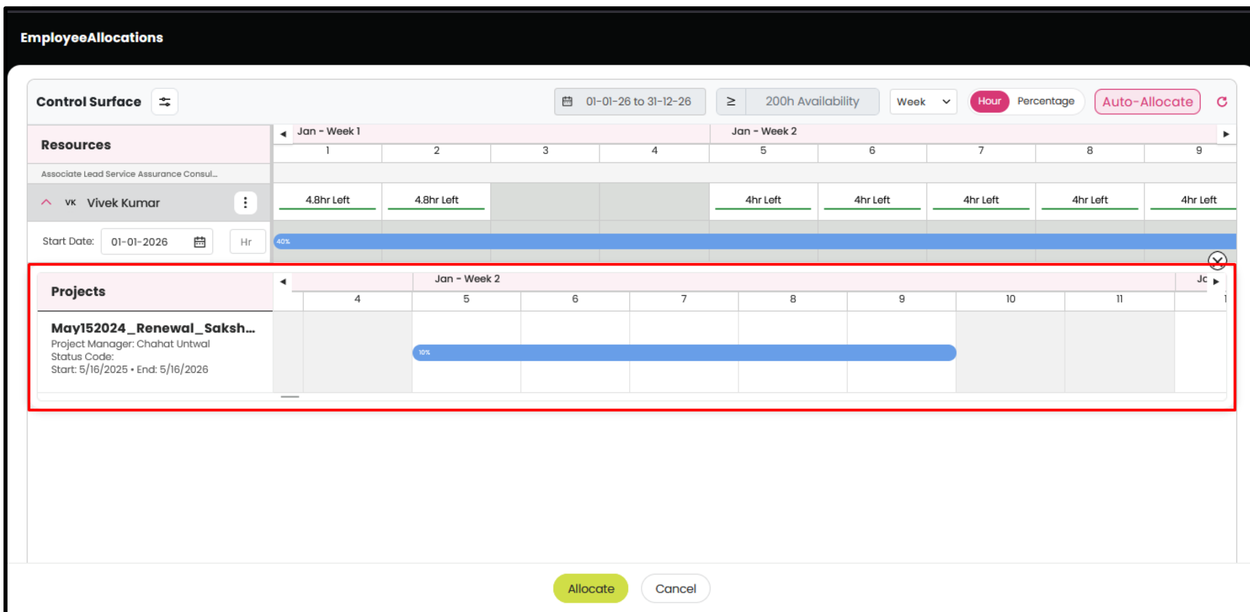


- **Schedule-by-Input:** *Form-based Allocation (precise, input-driven entry)* PM/PO will have to specify the **Start Date & Effort Hours** of the resource under their name available on the left part of the chart. The timeline for the allocation will be calculated based on the input and the allocation represented by the bar will appear on the grid moving to the right from the specified **Start Date.**

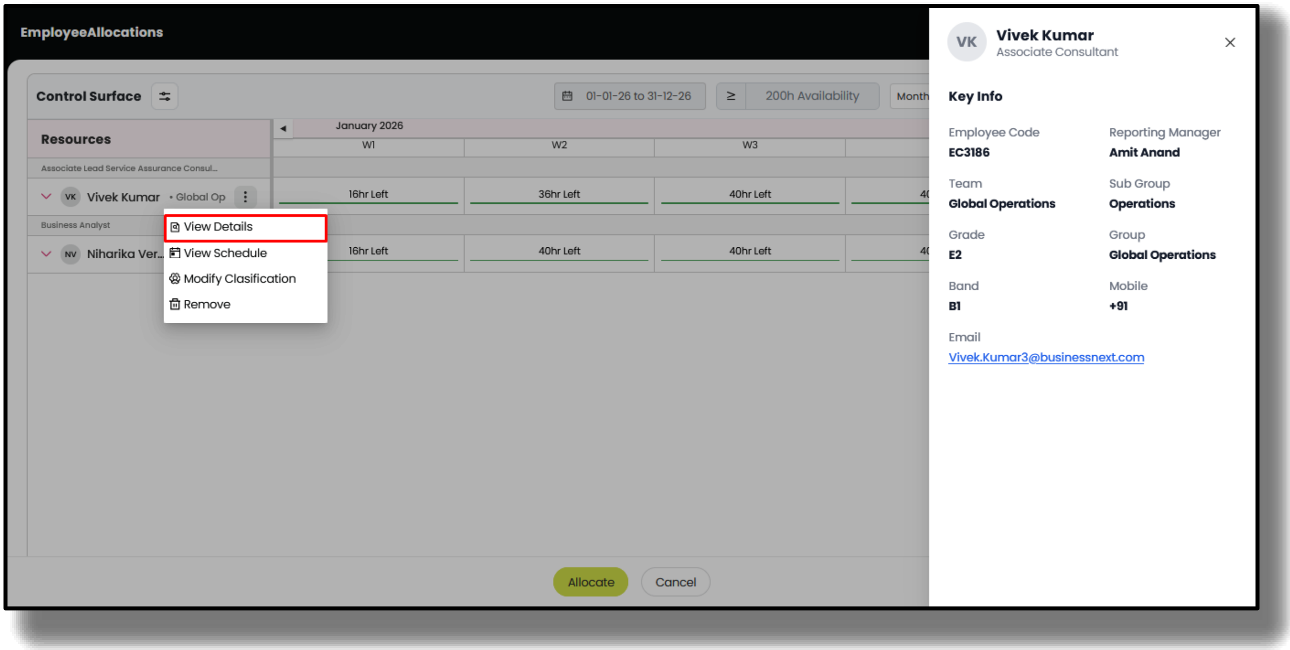


5. Now in case PM/PO wished to view the current allocation of their selected resources to alter or set up the allocation around it, they may do that by hovering their pointer over the three dots visible next to resource's name. A carousel of control opens, select the '**View Schedule**' option from the list. This will expand the schedule of the resource's existing allocation.

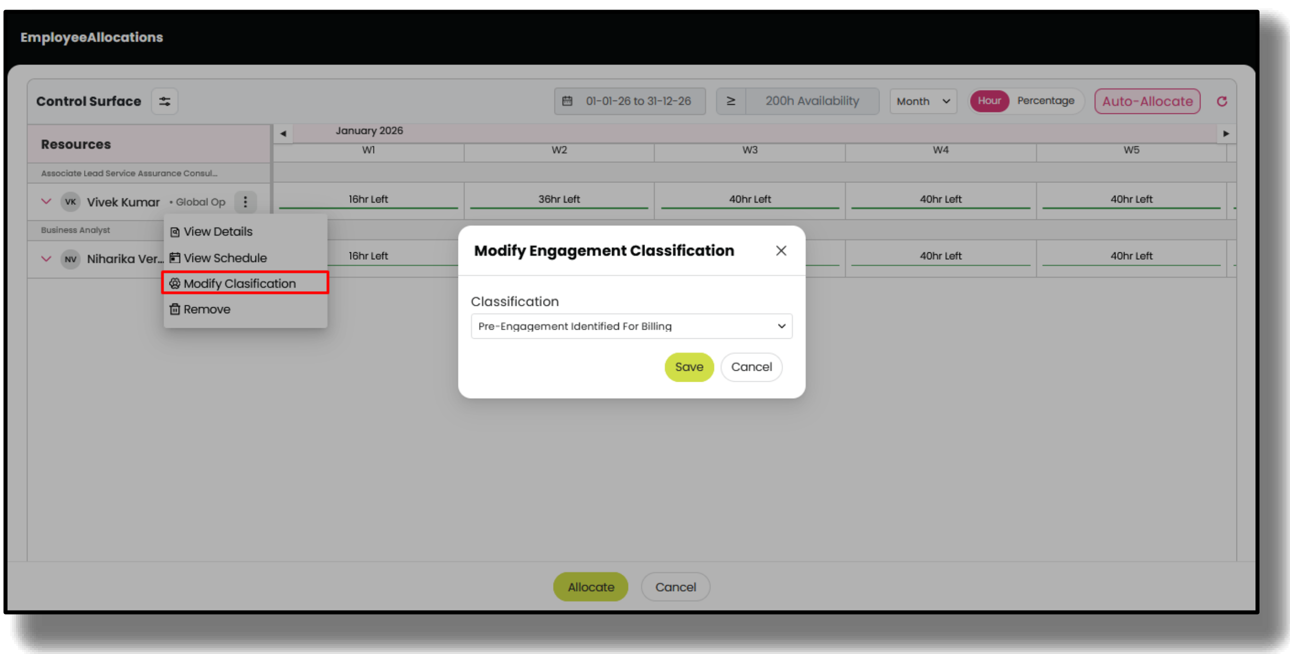




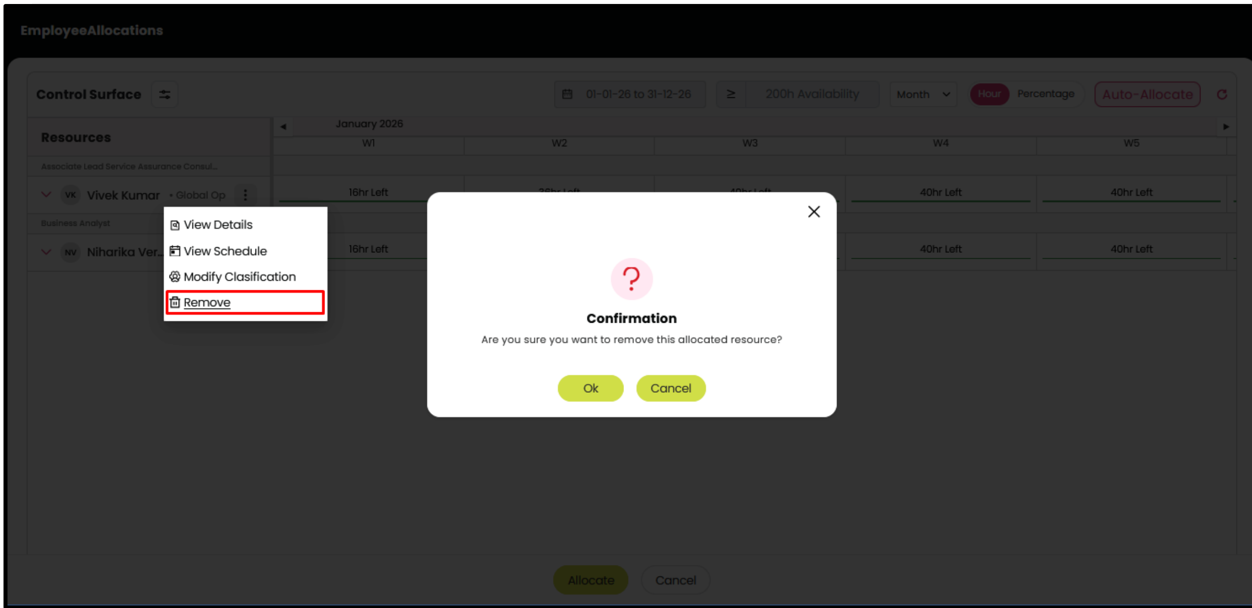
6. Other options facilitate access to following information/actions**:**
   - View Details: *To show the resource's profile; encapsulate their Band, Group, Subgroup, Grade, Team, etc.*



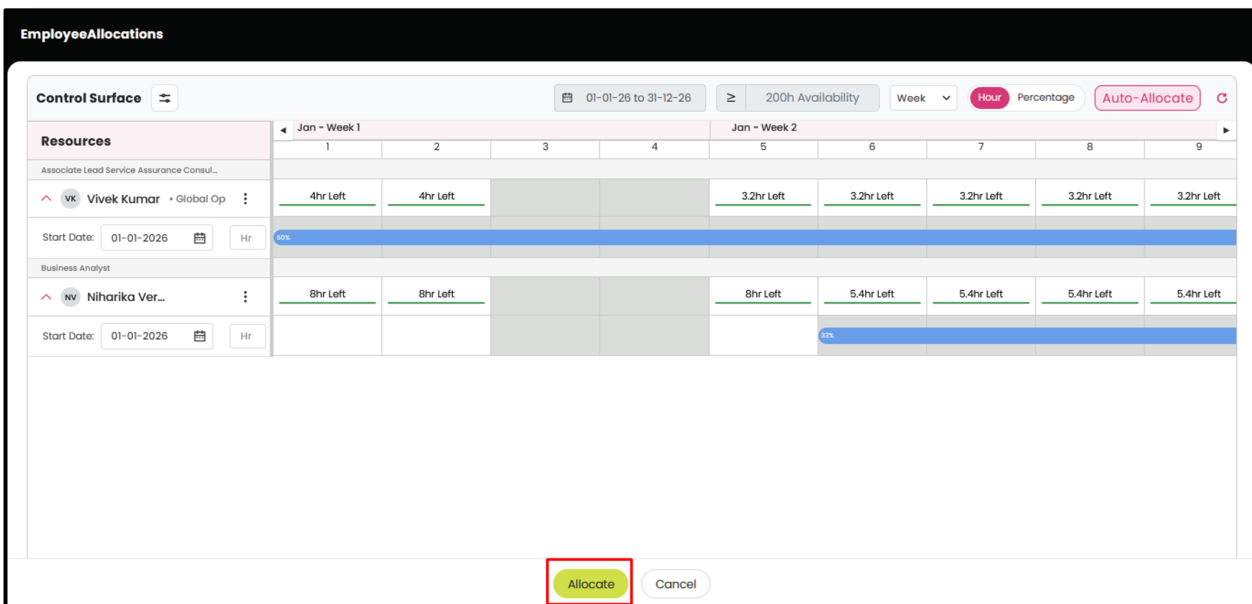
- Modify Classification: *To respecify a new engagement classification to the resource which was specified during selection on previous screen.*



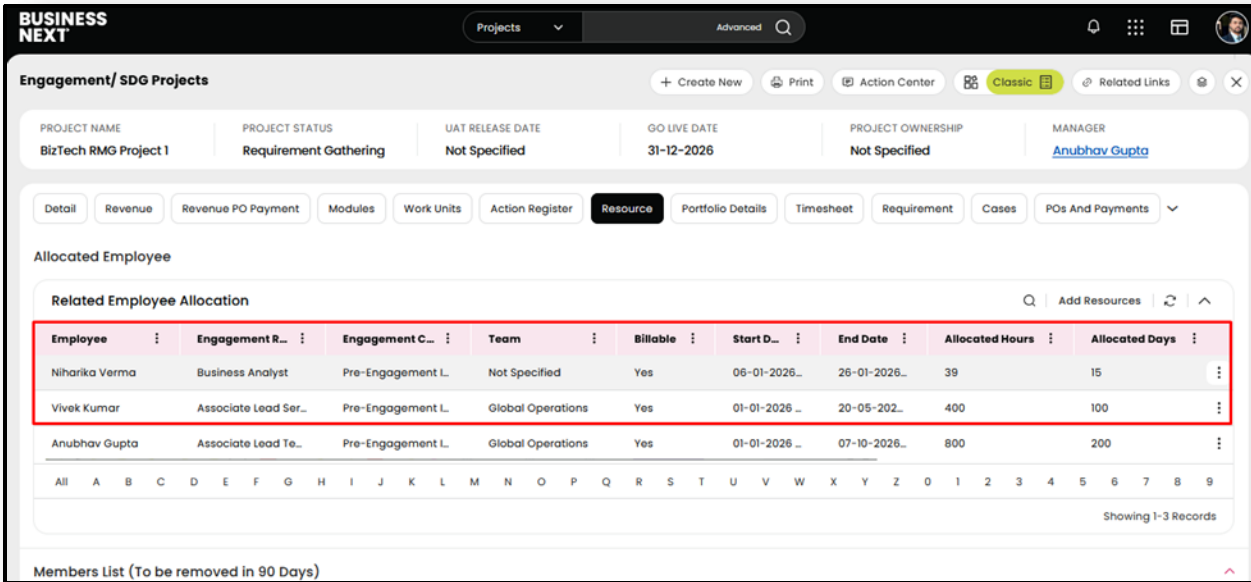
- Remove: *To remove the resource from the allocation grid, essentially removing them from the allocation process for this project.*



7. Click on Allocate to conclude and block allocation of the selected resources for this project.



8. Once clicked, PM/PO will be redirected back to project 360 to view their saved allocations.


BUSINESS NEXT
Projects
Advanced
Engagement/ SDG Projects
Create New
Print
Action Center
Classic
Related Links
PROJECT NAME
BizTech RMG Project 1
PROJECT STATUS
Requirement Gathering
UAT RELEASE DATE
Not Specified
GO LIVE DATE
31-12-2026
PROJECT OWNERSHIP
Not Specified
MANAGER
Anubhav Gupta
Detail
Revenue
Revenue PO Payment
Modules
Work Units
Action Register
Resource
Portfolio Details
Timesheet
Requirement
Cases
POs And Payments
Allocated Employee
Related Employee Allocation
Add Resources
Employee
Engagement R...
Engagement C...
Team
Billable
Start D...
End Date
Allocated Hours
Allocated Days
Niharika Verma
Business Analyst
Pre-Engagement I...
Not Specified
Yes
06-01-2026...
26-01-2026...
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Vivek Kumar
Associate Lead Ser...
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Global Operations
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200
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9
Showing 1-3 Records
Members List (To be removed in 90 Days)