

MODIFY ALLOCATION/ REALLOCATION

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 '**Employee Allocation**' listing.

B. How will PM/PO modify the existing allocation of its project resources?

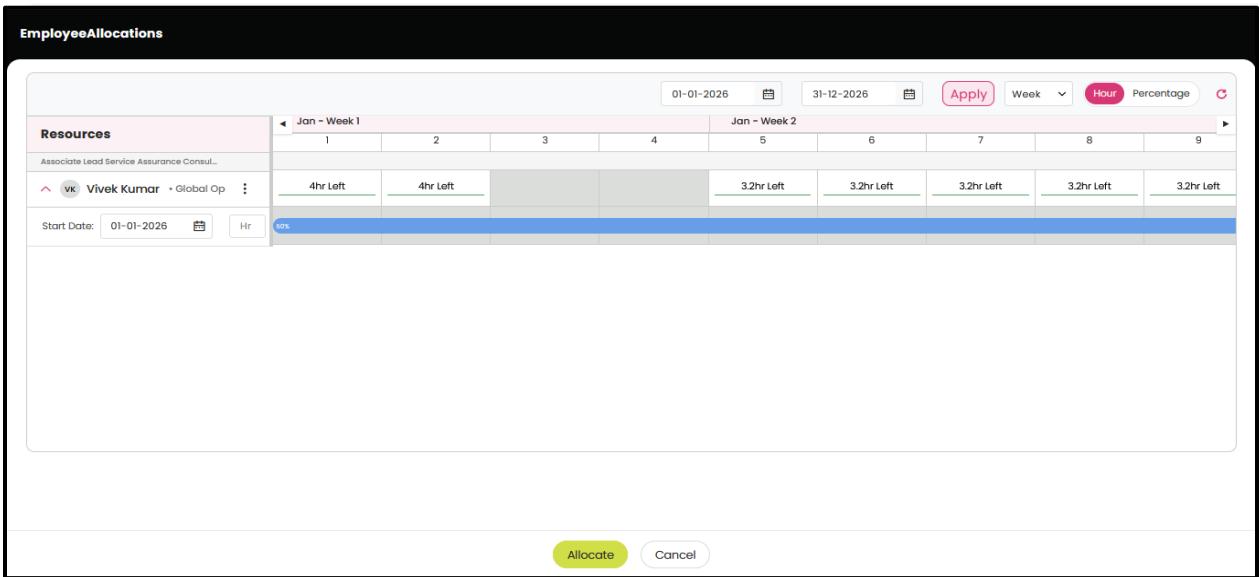
1. By using either Project Manager, US Project Manager and US Portfolio Manager role, PM/PO will navigate to their project's details page aka Project 360.
2. On Project 360, navigate to Resource tab to view allocated resources' listing.

The screenshot shows the MY.BUSINESSNEXT Portal interface. At the top, there is a navigation bar with 'PROJECTS' and 'Advanced' dropdowns, a search bar, and user profile icons. Below the header, the title 'Engagement/ SDG Projects' is displayed, followed by a project summary card for 'BizTech RMG Project 1'. The card includes fields for PROJECT NAME, PROJECT STATUS, UAT RELEASE DATE, GO LIVE DATE, and PROJECT OWNERSHIP, all set to 'Not Specified'. The MANAGER is listed as 'Anubhav Gupta'. Below the card, a horizontal menu bar contains tabs: Detail, Revenue, Revenue PO Payment, Modules, Work Units, Action Register, **Resource** (which is highlighted in black), Portfolio Details, Timesheet, Requirement, Cases, and POs And Payments. A red box highlights the 'Allocated Employee' section. This section has a sub-header 'Related Employee Allocation' and a table with columns: Employee, Engagement R..., Engagement C..., Team, Billable, Start D..., End Date, Allocated Hours, and Allocated Days. The table lists three employees: Niharika Verma, Vivek Kumar, and Anubhav Gupta, each with their respective details. At the bottom of the table, there is a footer note: 'Showing 1-3 Records'.

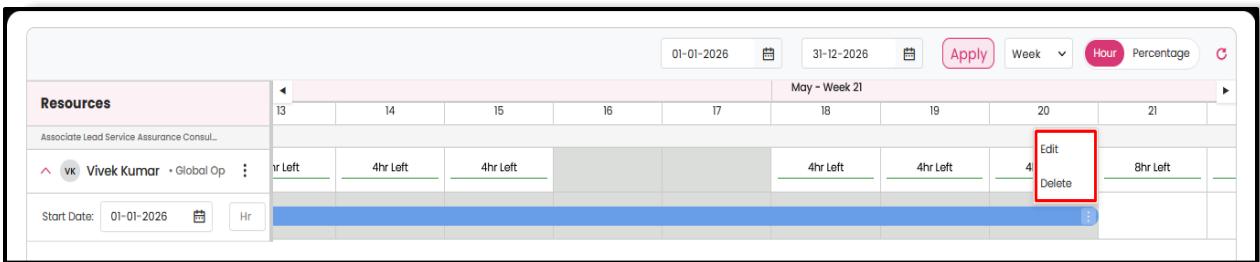
3. Each line item in the listing depicts the resources that are allocated in the relevant project.
4. Click on three dots icon available on the extreme left of each line item to view the dialog box.
5. Upon clicking on 3 dots, the following options will appear on the dialog box:
 - Edit
 - Delete

Allocated Employee																																				
Related Employee Allocation																																				
Employee	Engagement R...	Engagement C...	Team	Billable	Start D...	End Date	Allocated Hours	Allocated Days																												
Niharika Verma	Business Analyst	Pre-Engagement L...	Not Specified	Yes	06-01-2026...	26-01-2026...	39	15																												
Vivek Kumar	Associate Lead Ser...	Pre-Engagement L...	Global Operations	Yes	01-01-2026 ...	20-05-202...	400		Delete																											
Anubhav Gupta	Associate Lead Te...	Pre-Engagement L...	Global Operations	Yes	01-01-2026 ...	07-10-2026...	800		Edit																											
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																																				

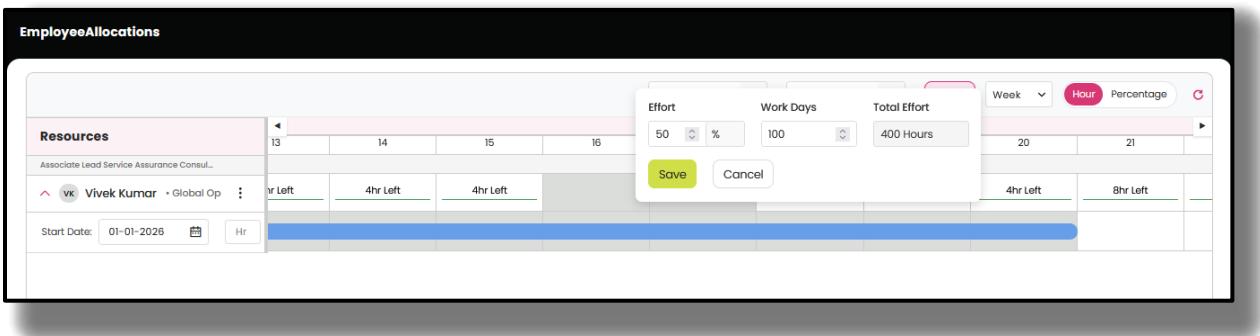
6. Click on ‘**Modify Allocation**’ to edit a resource’s existing allocation.
7. Once clicked, the PM/PO will be taken to the Gantt grid page where they set up allocation metrics for resources while assigning them to the project.



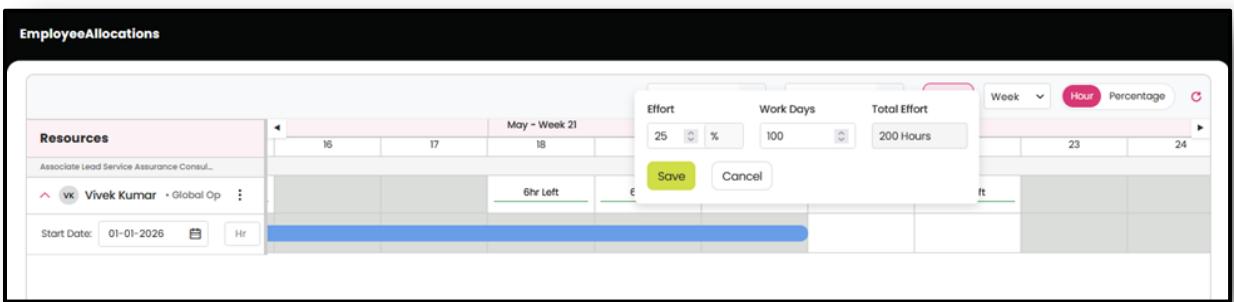
8. To edit the exiting allocation, hover the pointer over the existing allocation bar to highlight the **three dots** option on the bar, click on the three dots to view the dialog box with further available actions:
 - Edit
 - Delete



- To delete the existing allocation and start fresh, select the ‘Delete’ option. But if PM/PO would like to work on the existing bar, they may click on edit option. Once clicked, the floater pane will open to facilitate the editing of ‘Effort’ & ‘Workdays’ to provide updated ‘Total Efforts’ and Gantt bar on the grid.



- Click on save to Save to conclude the modifications on timeline and save again to close the modification screen.



- In case PM/PO wishes to perform a split allocation i.e. two allocations of a resource in same project separated by an interval, they may do so by clicking the ‘+’ available over the empty allocation box and then specifying ‘Effort’ and ‘Work Days’.

EmployeeAllocations

Resources Associate Lead Service Assurance Consul... Vivek Kumar Global Op... Start Date: 01-01-2026 Hr

Effort Work Days Total Effort Week Hours Percentage

20 21 22 26 27 28

8hr Left 8hr Left 8hr Left

Save Cancel

8hr Left 8hr Left 8hr Left

EmployeeAllocations		01-01-2026		31-12-2026		Apply		Week	Hour	Percentage	C
		20	21	22	23	24	25	26	27		
Resources		May - Week 22									
Associate Lead Service Assurance Consul...	Vivek Kumar - Global Op	6hr Left	8hr Left	8hr Left			4.8hr Left	4.8hr Left	4.8hr Left		
		Existing Allocation						New Allocation			
Start Date:	01-01-2026	Hr									

12. Click on ‘Allocate’ button to save the modified allocation.

EmployeeAllocations

01-01-2026 31-12-2026 Apply Week Hour Percentage

Resources	20	21	22	23	24	May - Week 22	25	26	27
Associate Lead Service Assurance Consult...	8hr	6hr Left	Bhr Left	Bhr Left			4.8hr Left	4.8hr Left	4.8hr Left
Vivek Kumar + Global Op	Start Date: 01-01-2026	Hr	Allocated				4hr		

Allocate Cancel

13. Once saved, PM/PO will be redirected to Project 360 where they can see the details of their resource's modified allocation.

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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
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Detail Revenue Revenue PO Payment Modules Work Units Action Register **Resource** Portfolio Details Timesheet Requirement Cases POs And Payments

Allocated Employee

Related Employee Allocation

Employee	Engagement R...	Engagement C...	Team	Billable	Start D...	End Date	Allocated Hours	Allocated Days
Niharika Verma	Business Analyst	Pre-Engagement L...	Not Specified	Yes	06-01-2026 ..	26-01-2026 ..	39	15
Vivek Kumar	Associate Lead Ser...	Pre-Engagement L...	Global Operati...	Yes	01-01-2026 ..	29-05-2026 ..	216	105
Anubhav Gupta	Associate Lead Te...	Pre-Engagement L...	Global Operati...	Yes	01-01-2026 ..	07-10-2026 ..	800	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