Enterprise - How to Create Assignment Restrictions

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Assignment Restrictions from TempWorks Software on Vimeo.

What is an Assignment Restriction?

In certain circumstances, you may want to prevent an employee from being assigned to a customer; this may be at the request of the employee, customer, or both parties. Assignment restrictions, also known as DNA (Do Not Assign), can be set from the employee, the customer and the assignment records.

Note This is NOT the same as deactivating an employee record. See Enterprise -How to Deactivate and Reactivate Employee Records for more information.

Note Based on your Enterprise configurations, this type of assignment restriction may display as a "soft stop" (*i* icon) instead of a "hard stop" (stop sign icon).

This Article Contains:

- 1. Create Assignment Restrictions from Employee Record
- 2. Create Assignment Restrictions from Customer Record
- 3. Create Assignment Restriction from Assignment Record
- 4. Edit or Remove a Restriction

Create Assignment Restrictions from Employee Record

- 1. Navigate to Employee Record
- 2. Expand 'Details' and select 'assignment restrictions'

3. Select the '+' icon in the upper right

Lorelai " 123 Maple Lane Saint Paul, MN S	Leah" Woodbury D: 4295080432 55123 SSN: xxx-xx-3753 Branch: New Brighton ▼	Call Andrea Back Don't forget about lunch tasks appointments	I Call Ben Luke Dane Background check Currently viewing 4 of 491182 tasks. View more Social email + ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲ ▲
 visifile details aca activity tracker assignment restrictions contact methods candidacy direct hire education interpersonal interview questionnaire past jobs required docs test scores 	initiated by employee		×
transportation unemployment work experience work interests	initiated by customer		> / *

4. From the drop down, select the Customer & Department the employee should not

re	tu	rn	to

+ add assig	nment res	triction	⑦ ×	
Select an employee to add Customer	d to this customer's	assignment restriction list	: •	
Description	ID	Customer Name	Department Name	1
All Departments	4295010910	ABC Broom co	Primary	
CustomerDNAEmployee	4295014668	Cotton Candy	Smore	
EmployeeDNACustomer	4295012808	Cotton Candy	Strawberry	
EmployeeDNAcustomer	4295013726	jj contruction	Primary	
	4295011766	123 Company	Dept A	
	4295011748	123 Company	Primary K	
	4294989562	123 Main St.	Primary	
	4295011170	123 Medical Company	Emergency Department	
	4295011171	123 Medical Company	Materials Management	
	778658	123 Nursing	Primary	
	4295011852	123 Tools	Dept A	
	4295011860	123 Tools	Dept B	
	4295011862	123 Tools	Dept C	
	4295011838	123 Tools	Primary	
	4295012511	123abc	Primary	-

5. Enter details in the 'Description' field

+ add assignment restriction				
Select an employee to add to this customer's assignment restriction list				
Customer	123 Tools	-		
Description	Allergic to Equipment			
All Departments				
CustomerDNAEmployee				
EmployeeDNACustomer	×			
	💾 Save 🚽	New		

- 6. Select from the following options:
 - Select All departments if employee should not return to customer in any form
 - Check the box next to Customer DNA Employee if the request is Customer initiated
 - Check the box next to Employee DNA Customer if the request is Employee initiated
- 7. Select 'Save'

If an employee has an assignment restriction, there will be a new avatar icon that will appear:

Andrew Woodbury12 Maple LaneID: 4295080431Saint Paul, MN 55123SSN: xxx-xx-5872Branch: New Brighton			
) 🥏 🗒			
visifile details 	DNA Records Do-Not-Assign (DNA) statuses exist for this employee and the customers listed below.		
 integrations evaluations messages 	AJ's Cookie Factory Primary Buy N Large Primary		

Hover over the gold DNA icon to see any current restrictions.

Create Assignment Restriction from the Customer Record

- 1. Navigate to Customer Record
- 2. Expand 'Details' and select 'assignment restrictions'
- 3. Select the '+' icon in the upper right



- 4. From the drop down, select the employee that should not return
- 5. Enter details in the 'Description' field

+ add a	ssignment restriction	⑦ ×		
Select an employee to add to this customer's assignment restriction list				
Employee	Woodbury, Andrew	-		
Description	fought with manager			
All Departments				
	💾 Save	New		

- 6. Select All departments if employee should not return to customer in any form
- 7. Select 'Save'

Create Assignment Restriction from Assignment

When an assignment restriction is created from the customer record, the same effects take place as when adding the assignment restriction from the employee record. Meaning, the DNA will be set on the employee record and the messages will automatically be logged on both the employee and the customer record.

- 1. Navigate to Assignment Details screen
- 2. Check the box next to Customer DNA or Employee DNA or both

Adams, S Buy N Large, Assignment II Order ID: 429	Samuel General Laborer D: 4301407202 95091752	Employee ID Branch: St.F + 👆 🗣 🛧	: 4295082616 Paul · ⊡\Q ↑ ↓	Call Andro Don't forg tasks	ea Ba get al ap
 details 	assignmer	nt informatior	ו		
accruals	Employee	Adams, Samuel			Q,
adjustments	Aldent	4295082616			Q,
commission allocations integrations 	Customer	Buy N Large			Q,
	Department	Primary			Q,
messages	Order ID	4295091752			Q,
tasks search	Assignment ID	4301407202	Alt Assignment ID		
	Burden	Heavy Burden	, L		-
	Temp Phone	()			
	Status	Open			-
	Replaces				-
		Customer DNA	Employee DNA		
	job information				
	Job Title	General Labore	r		-

3. Select 'Save'

Note All aspects of the assignment restriction will be set by creating the restriction from the assignment, except: When setting the assignment restriction from the assignment, the restriction will only be applied to the department of the customer to which the employee was assigned. If the assignment restriction should be set for subdepartments or all departments, it is recommended that the restriction be set at the employee or customer record.

Edit or Remove Restriction

- 1. Navigate to the assignment restriction on the Customer or Employee record
- 2. Select the restriction you wish to edit or remove



- 3. Select the pencil icon to edit
- 4. Select the X icon to remove
- 5. Select 'Save' when complete

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