

Core - Do Not Assign (DNA)

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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.

Quick Steps

Create Assignment Restrictions from Employee Record

1. Navigate to the Employee record.
2. Expand 'details' and select 'assignment restrictions.'
3. Select the '+' icon in the upper right.
4. From the drop down, select the Customer & Department the employee should not return to.
5. Enter details in the 'Description' field.
6. Select All departments if employee should not return to customer in any form.
7. Check the box next to Customer DNA Employee if the request is Customer initiated.
8. Check the box next to Employee DNA Customer if the request is Employee initiated.
9. Select 'Save.'

Create Assignment Restriction from Assignment

1. Navigate to the Assignment record.
2. Expand 'details' and select 'assignment restrictions.'
3. Check the box next to Customer DNA or Employee DNA or both.
4. Select 'Save.'

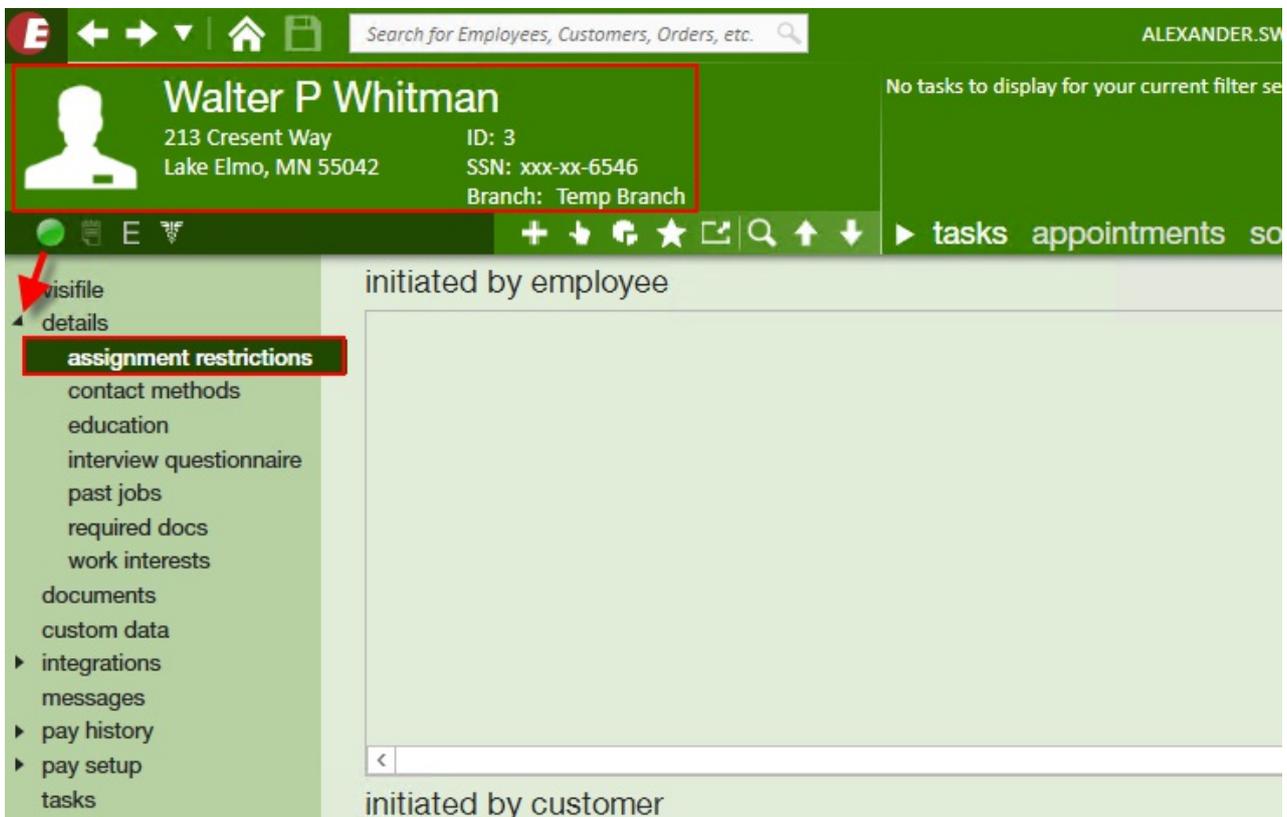
Edit or Remove Restriction

1. Navigate to the assignment restriction on the 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.

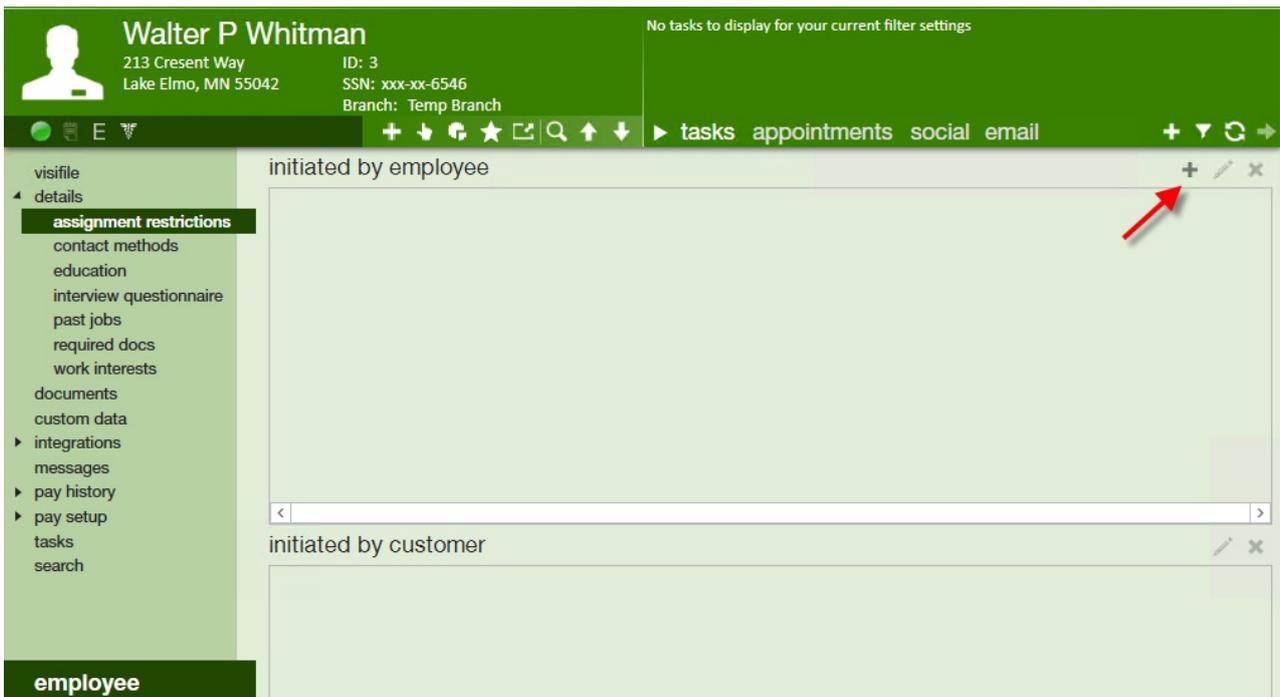
Complete and Detailed Steps

Create an Assignment Restriction from the Employee Record

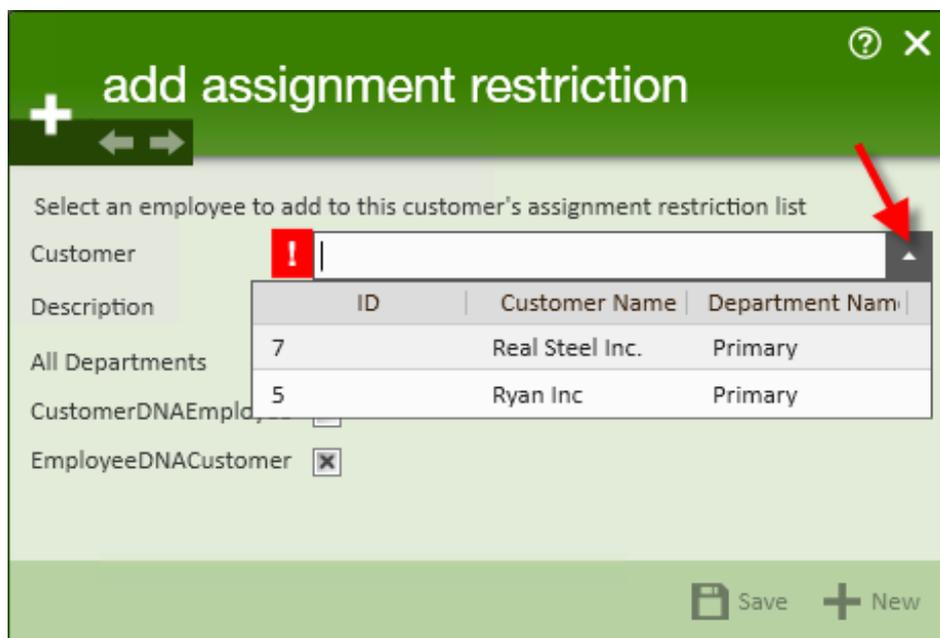
Step 1: Navigate to the employee for whom the restriction should be set. Expand the details section and select the assignment restrictions page:



Step 2: Select the + icon to create the new assignment restriction:



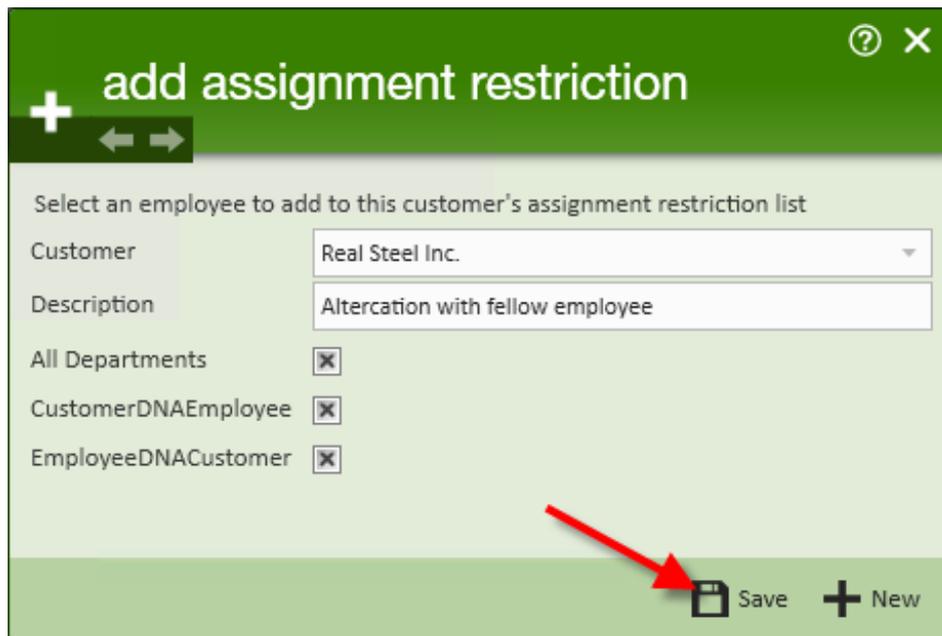
Step 3: Select the appropriate customer and within the description field, enter any relevant notes as to why the employee should not return to this customer/department:



Note If the selected customer has multiple departments, be sure to select the correct department as well. If the employee should not return to any of the customer's departments, select the primary or root record, and select the "All Departments" checkbox.

Step 4: Select *CustomerDNAEmployee* and/or *EmployeeDNACustomer* based on where the

request has come from:



add assignment restriction

Select an employee to add to this customer's assignment restriction list

Customer: Real Steel Inc.

Description: Altercation with fellow employee

All Departments

CustomerDNAEmployee

EmployeeDNACustomer

Save + New

Step 5: Click 'Save.' Once the Assignment Restriction has been added, a few things will happen automatically:

- In the employee>details>assignment restriction page, the assignment restriction will be listed:

The screenshot displays the employee record for Walter P Whitman. The header includes navigation icons, a search bar, and the employee's name and contact information. The left sidebar lists various record sections, with 'assignment restrictions' highlighted. The main content area is divided into 'initiated by employee' and 'initiated by customer' sections. Both sections contain a card for 'Real Steel Inc. (Primary)' with a checked 'All Departments' option and the text 'Altercation with fellow emplo...'. A red box highlights the card in the 'initiated by employee' section, and a red line connects it to the card in the 'initiated by customer' section. A red arrow in the second screenshot points to the 'assignment restrictions' icon in the sidebar.

Walter P Whitman
 213 Cresent Way
 Lake Elmo, MN 55042
 ID: 3
 SSN: xxx-xx-6546
 Branch: Temp Branch

assignment restrictions

initiated by employee

Real Steel Inc. (Primary)
 All Departments
 Altercation with fellow emplo...

initiated by customer

Real Steel Inc. (Primary)
 All Departments
 Altercation with fellow emplo...

employee

- An assignment restriction avatar icon will appear on the employee record:

This screenshot is similar to the first one but highlights the 'assignment restrictions' icon in the left sidebar with a red arrow. The main content area shows the 'initiated by employee' section with the 'Real Steel Inc. (Primary)' card.

Walter P Whitman
 213 Cresent Way
 Lake Elmo, MN 55042
 ID: 3
 SSN: xxx-xx-6546
 Branch: Temp Branch

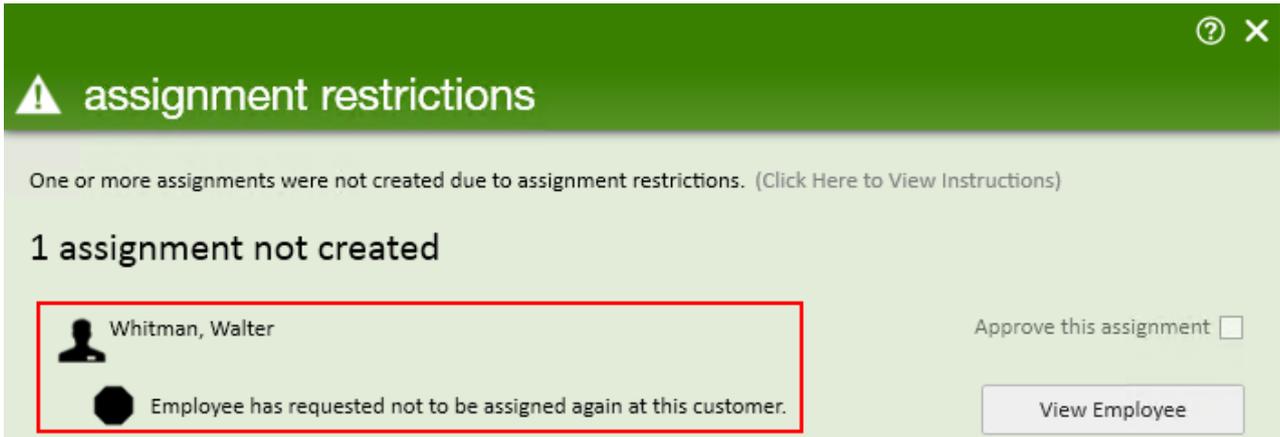
assignment restrictions

initiated by employee

Real Steel Inc. (Primary)
 All Departments
 Altercation with fellow emplo...

- A message will be logged on both the employee and the customer/department for whom the assignment restriction has been set.

In the future, if there is an attempt to assign this employee to that customer/department, Enterprise will react with an assignment restriction, which may be a hard stop, preventing the assignment:



The screenshot shows a notification window with a green header titled "assignment restrictions" containing a warning triangle icon. Below the header, a message states: "One or more assignments were not created due to assignment restrictions. (Click Here to View Instructions)". The main content area is titled "1 assignment not created" and lists an entry for "Whitman, Walter" with a person icon. A red box highlights the entry, which includes a black circle icon and the text "Employee has requested not to be assigned again at this customer." To the right of the entry is a checkbox labeled "Approve this assignment" and a "View Employee" button.

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).

Creating an Assignment Restriction from the Assignment Record:

An assignment restriction can be set when ending an assignment.

Step 1: From the details page of the assignment, end the assignment as usual. Users will notice that there are two check boxes related to DNA- one to set a *Customer DNA* the other to set an *Employee DNA*:

Testing, Ryan
Ryan Inc, Default
Assignment ID: 2
Order ID: 1
Employee ID: 2
Branch: Temp Branch

No tasks to display for your current filter settings

tasks appointments social email

details
accruals
adjustments
calls
custom data
integrations
messages
tasks
search

assignment information

Employee: Testing, Ryan
Aldent: 2
Customer: Ryan Inc
Department: Primary
Order ID: 1
Assignment ID: 2

Status: Complete
 Customer DNA Employee DNA

job information

Job Title: Production
Start Date: 6/12/2018
Actual Date Ended: 8/8/2018
Shift:
Start Time:
End Time:
 Sun Mon Tue Wed Thu Fri Sat

financial details

Multiplier: None
Bill Rate: \$0.00
Salary Bill: \$0.00
Unit Bill: \$0.00
Overtime Bill: \$0.00
Doubletime Bill: \$0.00
Company: CompanyFullName
EINC: 1
Worker Comp Code: MN 3179

employee
customer
order
assignment

other information

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 sub-departments or all departments, it is recommended that the restriction be set at the employee or customer record.

Removing an Assignment Restriction

A customer or employee may change their mind about the assignment restriction or perhaps a restriction expires.

Step 1: Navigate to the assignment restriction page of the employee record.

Step 2: Click to highlight the assignment restriction which is to be edited or removed. Click on the pencil icon to edit or the x button to remove the restriction:

initiated by employee

Real Steel Inc. (Primary)
 All Departments
Altercation with fellow emplo

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