Booking Rules
SLCM_AD_315

IRIS
Integrated Resource
Information System

UK UNIVERSITY OF KENTUCKY

Course Content

IRIS
Integrated Resource
Information System

This course is designed to teach users how to view, add, and remove restrictions on courses and course sections via the *myUK* portal. Rule restrictions include classification, college, and major/minor restrictions. Making sure that courses are restricted properly during registration through these booking rules will allow only approved students to book automatically with little to no overrides necessary.

- Unit 1 – Booking Rules Overview
- Unit 2 – Adding Rules
- Unit 3 – Deleting Rules
- Summary

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Learning Objectives

By the end of this course, you will be able to:

- Understand Booking Rules
- Display Booking Rules
- Add Booking Rules to a Section
- Add Booking Rules to a Course
- Remove Booking Rules from a Section
- Remove Booking Rules from a Course

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Prerequisites and Roles

- Prerequisites
  - UK_100 IRIS Awareness & Navigation
  - SLCM_200 Student Lifecycle Management Overview
  - SLCM_AD_300 Event Planning

- Roles
  - Authorized users responsible for creating or modifying events and event packages

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Booking Rules Access

- Booking Rules may be accessed via **Student Administration** tab on the *myUK* portal.

- In order to access booking rules, you need:
  - To successfully complete **SLCM_AD_315 Booking Rules**,
  - To be designated as a person with the responsibility to view, create, and change booking rules,
  - To sign the **Statement of Responsibility** (**SOR**).
    - Instructions are available on the *myHelp* website.
    - If you have signed the **SOR** in **UK_100**, you do not need to sign it a second time.

- If you do not have access, please work with your college contact to get this access assigned.
  - The college contact list is located at http://www.uky.edu/IRIS/CM/cm-group.html.

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Booking Rules Navigation

- Depending on the user's role, access to the Booking Rules on the *myUK* portal can be reached through one of the following paths.

  - For **Registrar** role, the menu path is **Student Administration** → **Administrative Services** → **Registrar** → **Booking Rules**
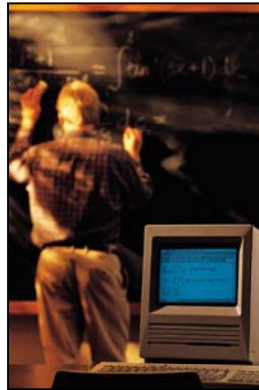

  - For **Administrator** role, the menu path is **Student Administration** → **Administrative Services** → **Administrators** → **Booking Rules**

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Unit 1

Overview

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Unit 1 – Overview

- Rule Types
- Displaying Rules
    - Linked to a Specific Section
    - Linked to a Course

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Booking Rules Overview

- The restrictions on courses and sections that control registration access are known as **Booking Rules**.

- Authorized personnel maintain Booking Rules via the *myUK* portal.

- Restrictions may be maintained at the course level or the section level.

  - **Course Level Restriction** – If a restriction is maintained at the course level, **all** sections of the course will inherit the restriction.

  - **Section Level Restriction** – If a restriction is maintained at the section level, the restriction will apply only to the selected section of the course.

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Rule Types Overview

- There are three types of Booking Rules that can be maintained via the *myUK* portal.

- **Classification Restrictions**
  - They can be used to restrict registration by including or excluding students, according to their progression classification.
  - They can be maintained for a single progression classification or multiple classifications.

- **Major/Minor Restrictions**
  - They can be used to restrict registration by including or excluding students, based upon their majors or minors.

- **College Restrictions**
  - They can be used to restrict registration by including or excluding students, based upon their college.

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Rule Types Overview

- Course level and section level restrictions **of the same rule type** cannot be mixed.

- Instead, such restriction situations must be maintained at the section level.

- The three Rule Types (Classification, Major/Minor, and College Restrictions) are **term-specific**.

- They do not automatically become available to future terms.

- All rules are linked to the system **Object ID** of the course or section.

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Rule Types Overview

- If a new section is created for the current term in Event Planning, a new system **Object ID** is assigned (a new "Section 011", for example, is created).
  - Any rules attached to the current sections (001 through 010) will not be inherited by the new section, so rules must be added and maintained on the new section.
  - Any rules attached to the course will be inherited by the new section, so the rules can be added and maintained at the course level.

- If a new section is created for an upcoming term in Event Planning, a new system **Object ID** is assigned (a new "Section 001" is created).
  - Since rules are term-specific, any rules attached to the previous term's Section 001 will not carry forward to the new one.
  - Rules must be added and maintained on the new sections or at the course level.

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Displaying Specific Section Linked Rules

- If restrictions exist on a section of a course, the restrictions can be displayed by completing the following steps:
  - Select the correct **Academic Year** and **Term**

  - Enter the **Course Subject** and **Number**

Displaying Specific Section Linked Rules

- Click on **Search**

- When the course is found, click on **View Sections** to see a list of the available sections

- Click on the desired section to view a list of rules assigned to that section

Displaying Specific Section Linked Rules

- If there are rules maintained on the section, they will be displayed below the **Course** and **Section**

- **Note**: The example above displays the rules linked to SOC 101 Section 003 (in the test system).

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Displaying Specific Section Linked Rules

- This section has seven rules.
  - It is subject to **Controlled Enrollment**.
  - It is limited to **Sociology** and **Early Childhood Education** majors.
  - It is limited to students in **Arts & Sciences** and **Education**.
  - It is limited to **Freshmen** and **Sophomores**.

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Displaying Specific Section Linked Rules

- Note that the rule restricting the course to SOCI majors is maintained at the course level, rather than the section level.
  - This is indicated by **All Section(s)** in the **Sections** column of the restriction.
  - The **Remove** icon in the **Remove** column is missing.
  - Rules maintained at the course level cannot be removed at the section level.

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Displaying Rules Linked to a Course

- Rules maintained at the course level are inherited by all sections of the course.

- To display rules maintained at the course level by using the following steps:
  - Select the correct **Academic Year** and **Term**

  - Enter the **Course Subject** and **Number**

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Displaying Rules Linked to a Course

- Click on the **Search** button

- Click on the course link

- Any existing restrictions will display below the course

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Displaying Rules

- If no rules are maintained on a course or a section of a course, a system message will display.

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Unit 1
Assessment

Unit 1 Summary

- Booking Rules are restrictions on courses and sections that control registration access.
- Booking Rules are accessed via the Student Administration tab on the myUK portal.
- Restrictions may be maintained at the course or section level.
- There are three rule types: Classification, Major/Minor, and College.
- Course level and section level restrictions of the same rule type cannot be mixed.
- Classification, Major/Minor, and College restrictions are term-specific.
    - They do not automatically become available to future terms.

Unit 1 Summary

- Same rule type restrictions can be mixed at the section level only, not the course level.
- All rules are linked to the system Object ID of the course or section.
- Rules must be added and maintained on the new sections, if the rules are linked to the sections and not linked to the course.
- Rules linked to the course will be inherited by all sections of that course.
- Rules maintained at the course level cannot be removed at the section level.
- If no rules are maintained, you will see a system message stating that no booking rules are found.

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Unit 2

Adding Rules

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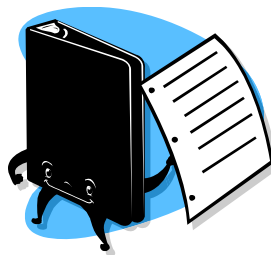
Unit 2 – Adding Rules

- Linked to a Specific Section of a Course
  - Adding College Restrictions
  - Adding Classification Restrictions
  - Adding Major/Minor Restrictions
- Linked to a Course

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Adding Rules Linked to a Specific Section

- Use the following steps to add rules linked to a specific section.
  - Select the correct **Academic Year** and **Term**

  Find a course:
  Academic Term: Acad Year 2008-2009, Fall Semester Aug-2008
  Course Subject & Number: i.e. ENG 101
  Search

  - Enter the **Course Subject** and **Number**

  Find a course:
  Academic Term: Acad Year 2008-2009, Fall Semester Aug-2008
  Course Subject & Number: SOC 101   e. ENG 101
  Search

  - Click on the **Search** button

  Find a course:
  Academic Term: Acad Year 2008-2009, Fall Semester Aug-2008
  Course Subject & Number: SOC 101   i.e. ENG 101
  Search

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Adding Rules Linked to a Specific Section

- When the course is found, click on **View Sections**

- Click on the desired section to view a list of rules assigned to that section

- **Note**: Use the steps on the following slides to add College, Classification, and/or Major/Minor restrictions.

Adding College Restrictions

- Use the following steps to add college restrictions to a specific sections.
    - Scroll down to the **College Rules** area
    - Click on the desired college rule

    - Click on **Add**

Adding College Restrictions

- To add multiple colleges at one time, hold down the **Ctrl** key and click each college

- Click on **Add**

Adding College Restrictions

- Once rules have been added successfully, they will appear in the list of active rules for the section at the top of the screen
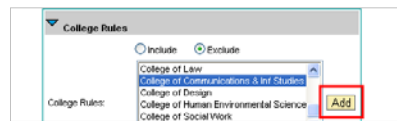
Adding College Restrictions

- Use the following steps to exclude students in a particular college.
  - Select the college
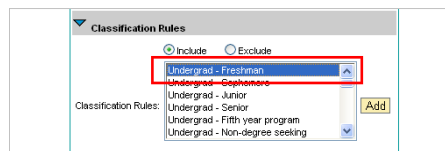

  - Change the radio button from **Include** to **Exclude**
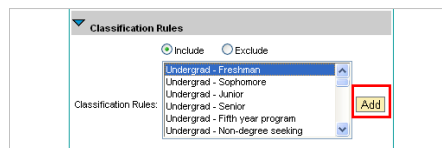

  - Click on **Add**

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Adding Classification Restrictions

- Scroll down to the **Classification Rules** area
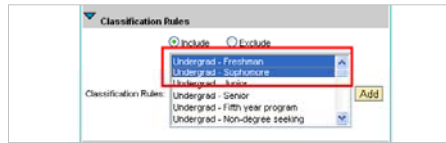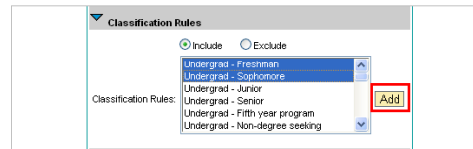- Click on the desired Classification(s)

- Click on **Add**

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Adding Classification Restrictions

- To add multiple classifications at one time, hold down the Ctrl key and click on each classification
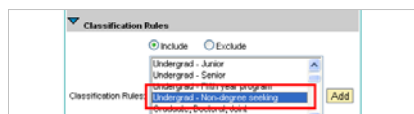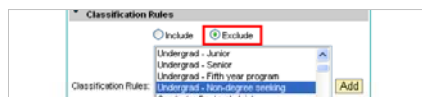

- Click on Add

Adding Classification Restrictions
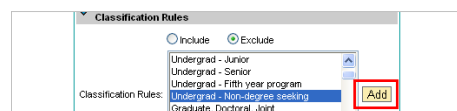
- Use the following steps to exclude students in a particular classification.
  - Select the classification

  - Change the radio button from Include to Exclude

  - Click on Add

Adding Major/Minor Restrictions

- Scroll down to the **Major Rules** area
- Key the four-character major or minor code for the restriction

- Click on **Search**

Adding Major/Minor Restrictions

- If a match is found, the major code will appear in a list below the **Search** field

- To add it to the course restriction, click on the **Add** icon

- **Note**: There may be multiple matches
- Selection of one results in the application of the rule to all

Adding Major/Minor Restrictions

- Use the following steps to exclude students in a particular major.

  - Select the major

  - Change the radio button from **Include** to **Exclude**

  - Click on the **Add** icon

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Adding Rules Linked to a Course

- Rules maintained at the course level are inherited by all sections of the course.

- Use the following steps to add rules maintained at the course level.

  - Select the correct **Academic Year** and **Term**

  - Enter the **Course Subject** and **Number**

  - Click on **Search**

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Adding Rules Linked to a Course

- Click on the course link

- Add Rules by scrolling down in each area

- Follow the same procedure as outlined for adding restrictions linked to course sections

- Click on **Add**

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Unit 2
Assessment

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Unit 2 Summary

- When adding college restrictions, you can add multiple colleges at the same time.

- Once rules have been added successfully, they will appear in the list of active rules for the section at the top of the screen.

- To add a major/minor restriction, search for it by keying in the four-character major/minor code.

- To exclude students in a particular college, select the college, change the radio button from Include to Exclude, and click on Add.

- When adding multiple restrictions, such as restricting several colleges, hold down on the Ctrl key and click on the desired restrictions.

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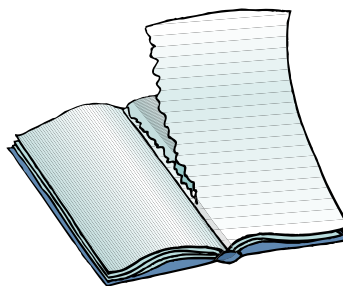
Unit 3

Removing Rules

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Unit 3 – Removing Rules

- Linked to a Specific Section of a Course
- Linked to a Course

Removing Rules Linked to a Specific Section

- If restrictions exist on a section of a course, the restrictions can be displayed and removed from the section, even though the restrictions remain on other sections of the course.
- Remove rules linked to a specific section by completing the following steps.
  - Select the correct **Academic Year** and **Term**

  - Enter the **Course Subject** and **Number**

  - Click on **Search**

Removing Rules Linked to a Specific Section

- When the course is found, click on **View Sections** to see a list of the available sections

- Click on the desired section to view a list of rules assigned to that section

- To remove a rule, click on the **Remove** icon in the **Remove** column

Removing Rules Linked to a Course

- Rules maintained at the course level are inherited by all sections of the course.

- Thus, if a rule linked to a course is removed, it is removed from all sections of the course.

- Use the following steps to display and remove rules maintained at the course level.

  - Select the correct **Academic Year** and **Term**

  - the **Course Subject** and **Number**

Removing Rules Linked to a Course

- Click on **Search**

  Course Subject & Number: SOC 101   i.e. ENG 101
  [Search]

- Click on the course link

  Select Course / Section:

Course	Description	Add Rule(s) to Section
SOC 101	INTRO TO SOCIOLOGY	View Sections

- Existing course restrictions will display.

- To remove a rule, click on the **Remove** icon in the **Remove** column.

  Course: SOC 101 – INTRO TO SOCIOLOGY
  Section: All Section(s)
  [Find a Course]

  Booked Rule(s):

  ■ R - Rule Container ■ S - Specialization Rules ■ C - College Rules ■ L - Classification Rules

Type	Section	Rule	Description	Flag	Remove
S	All Section(s)	Soci	Sociology	Include	✖

Unit 3
Assessment

Unit 3 Summary

- To remove a rule, click on the red X in the Remove column.

- If a rule linked to a course is removed, it is removed from all sections of the course.

- If restrictions exist on a section of a course, the restrictions can be displayed and removed from that section, even though the restrictions may remain on other sections of the course.

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Booking Rules Contacts

- Questions regarding Booking Rules should be directed to the **Registrar's office**.

- Contact the Customer Service Center (218-HELP) or local IT expert if you:
  - Need an AD password
  - Go to the *myUK* Portal and it is not responding
  - The IRIS session that you are running is suddenly terminated and you cannot regain access

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Help Websites

- myHelp website:
    - http://myHelp.uky.edu/rwd/HTML/index.html
    - Contains Quick Reference Cards (QRCs), updated course manuals, Simulations, Frequently Asked Questions, and other job aids

- IRIS website
    - http://www.uky.edu/IRIS/
    - Contains Information Directory, Forms, and other references

Help!

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Reminders

- Course level and section level restrictions **of the same rule type** cannot be mixed.

- Colleges must create restrictions for courses and/or sections for each term.

- Access to Booking Rules is limited to a small group of college users.

Don't FORGET!

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Course Summary

You are now able to:

- Understand Booking Rules
- Display Booking Rules
- Add Booking Rules to a Section
- Add Booking Rules to a Course
- Remove Booking Rules from a Section
- Remove Booking Rules from a Course

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Course Evaluation

- You can provide IRIS Training with feedback on this course by completing the **SLCM_AD_315 Booking Rules** course evaluation.

- Use the button below to complete the evaluation.

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