

## THD4 Self-Service Applications

### DIM Action for External Student Lookup Fields

In THD version 4.0.0010, a new feature was added for THD administrators to set the DIM Import Action per application.

The screenshot displays the 'Applications' configuration page for 'Housing Application Fall 2015'. The 'General' tab is active, showing various settings. The 'DIM Action for External Student Lookup Fields' dropdown menu is highlighted with a red circle and contains the value 'Student\_Import'. Other visible fields include 'Application Name', 'Application active from' dates, 'Contract file', 'Thank You file', 'External Filter SQL', 'Application can be cancelled' dates, 'Application can be revisited' dates, 'Underage applicants', 'Downloadable Application', 'On completion, add to', 'Send confirmation email', 'Include PDF file', 'Dining Plan selection', and 'Attach Signed Contract to Student Record'. A 'Save Application' button is located at the bottom right.

Previous to this version, all active applications used the same import action (aka, job) which was set under Setup > General > General Setup > Dim Action for Importing a Student. There does still need to be an import action set here as well, but it will only impact the Student screen menu option File > Import student from external data.

The screenshot shows the 'Configuration of Lists' dialog box, specifically the 'General Setup' sub-dialog. The 'Name of Institution' is 'Adirondack University'. Several checkboxes are checked: 'Show Student Number alongside name in drop-down lists', 'Require billing descriptions', and 'A bed is available for check-in on the same day as check-out'. The 'DIM Action for External Student Lookup Fields' dropdown is set to 'Import\_Test'. The 'DIM Action for Importing a Student' dropdown is also highlighted with a red circle and set to 'Import\_Test'. Other fields include 'DIM Action for Updating all Students' (set to '(none)') and 'Currency Symbol' (set to '\$'). A 'Save Setup' button is at the bottom right.

The ability to set a different import action per application gives THD administrators flexibility on several fronts:

1. Applications can be open for multiple terms at the same time
  - a. The import action specifies which term the student record is being created in
  - b. Thus, you may have multiple import actions available, all set to different terms

2. The student can be imported from different sources for different applications
  - a. Generally, the student is imported from one of two locations: THD's tblStudents (which is the main student table in THD's database) or the data from the Student Information System (SIS).
    - i. THD's tblStudents is used as the source for one or both of the following reasons:
      1. The student may exist in THD but not exist in the SIS data
      2. The External Filter SQL for the application should reference data which exists in tblStudents. In other words, the "rule" for who can apply for a particular application can be based on something in tblStudents, including the popularly used "Additional ID 1" field that is often edited in mass via report to tag eligible students for that application with a particular value that can be filtered (SOCSEC = 'X'). This is explained in more detail in the application video.
    - ii. The SIS data is used as the source for one or both of the following reasons:
      1. The student may exist in the SIS data but not yet in THD
      2. The External Filter SQL for the application should reference data which exists in the SIS data. In other words, the "rule" for who can apply for a particular application can be based on something in the SIS data rather than in tblStudents.

As explained above, the DIM action specifies both the term as well as the data source. You should work with your technical administrators so that you are certain that the import job you are selecting is correct for your application. If you have the software on your campus, ask your technical team; if you are hosted in Adirondack Solutions' data center, please create a support ticket.

Important notes for the import action, shown in below screen shot and detailed here:

- The import action must be pointed to the correct data source and table name
- The import job must be set to "based on and ID parameter passed in", *not* "Standalone"
- The correct term for your application must be specified