

CARNEGIE

POWERED BY UNDERScore

Slate Stage

Origin Sources and You



Presenter

Jill

- + **Slate Implementation Strategist**
- + **Slate user since 2018**
- + **Former Business Systems Analyst/Slate Captain at Columbia College Chicago**
- + **Origin Sources Nerd**



+ today's agenda

1. What are Origin Sources?
2. Initial Set-Up
3. Ongoing Maintenance
4. Using the Data
5. Questions and Answers

1

What Are Origin Sources?

What Are Origin Sources?

- Slate records every change to a student record
- Origin Sources organize these changes
- Customizable to your business and reporting needs
- Automatically calculated overnight
- Help in measuring ROI
- They are very cool!

**Slate gives you more
access to more data
than ever before**

TAKE A STEP BACK AND SURVEY EVERYTHING YOU'VE BUILT

2

Initial Set-Up

Database

Database

Pinned Features

To pin a feature or tool, access the feature or tool and then pin the item in your recent item list under the Database menu.

<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Records</div> <ul style="list-style-type: none"> Fields / Fields (beta) Tabs Prompts Materials Checklists Tests Course Catalog Tags Activity & Interaction Codes Datasets Entities 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Applications</div> <ul style="list-style-type: none"> Application Editor Application Periods Application Rounds Application Logic Teasers (deprecated) Essays (deprecated) 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Decisions</div> <ul style="list-style-type: none"> Release Decisions / Release Decisions (beta) Letter Templates Decision Codes Decision Reasons 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Reader</div> <ul style="list-style-type: none"> Workflows (new) Reader Bins Reader Review Forms Reader Tab Groups Reader Tab Materials Workflows (deprecated) Merge Fields
<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Automations</div> <ul style="list-style-type: none"> Rules Populations Origin Groups Origin Sources Translation Codes SQL Logic Triggers (deprecated) 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Import</div> <ul style="list-style-type: none"> Sources / Upload Dataset Batch Acquire Consolidate Records SFTP Explorer Source Formats Transfer Objects Source Format Library Force Process Pickup Force Process Import Scrub Address Records 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Queries</div> <ul style="list-style-type: none"> Query Exports/Filters Query Bases Export/Filter References Standard Query Library Refresh Configurable Joins Library Configurable Joins Base Explorer 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Messages</div> <ul style="list-style-type: none"> Deliver Configuration DKIM Configuration Email Deliverability Communications History Message Groups Email to Slate Gateway Microsoft Outlook Add-in

Insert Record in Origin Groups

Folder

Name

Origin Groups

Name

[Insert](#)

Initial Source

Origin Groups

Start with just one **Origin Group** and call it **Initial Source**.

Regardless of whether a record enters as a prospect on a name buy, an inquiry signing up for a campus tour, or a stealth applicant, **every record should have an Initial Source**.

First Source / Last Source

- Slate calculates the First Source and Last Source for each Origin Group

Initial Source	First Source				Last Source
Date	8/1/2021	9/1/2021	10/1/2021	11/1/2021	12/1/2021
Activity	ACT Score Data File	Naviance Prospect	Campus Tour Registration	CommonApp	Admissions Counselor Appointment

First Source / Last Source

- Slate calculates the First Source and Last Source for each Origin Group

Initial Source	First Source					Last Source
Date	8/1/2021	9/1/2021	10/1/2021	11/1/2021	12/1/2021	1/1/2022
Activity	ACT Score Data File	Naviance Prospect	Campus Tour Registration	CommonApp	Admissions Counselor Appointment	Transcript Received

Database

Database

Pinned Features

To pin a feature or tool, access the feature or tool and then pin the item in your recent item list under the Database menu.

<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Records</div> <ul style="list-style-type: none"> Fields / Fields (beta) Tabs Prompts Materials Checklists Tests Course Catalog Tags Activity & Interaction Codes Datasets Entities 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Applications</div> <ul style="list-style-type: none"> Application Editor Application Periods Application Rounds Application Logic Teasers (deprecated) Essays (deprecated) 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Decisions</div> <ul style="list-style-type: none"> Release Decisions / Release Decisions (beta) Letter Templates Decision Codes Decision Reasons 	<div style="background-color: #e6f2ff; padding: 5px; margin-bottom: 5px;">Reader</div> <ul style="list-style-type: none"> Workflows (new) Reader Bins Reader Review Forms Reader Tab Groups Reader Tab Materials Workflows (deprecated) Merge Fields
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Create an Origin Source

Insert Record in Origin Sources


Status	<input type="text" value="Active"/>
Folder	<input type="text"/>
Summary	<input type="text"/>
Origin Group	<input type="text"/>
Source Type	<input type="text"/>
Category	<input type="text"/>
Score	<input type="text"/>
Export Value	<input type="text"/>
Export Value 2	<input type="text"/>
Export Value 3	<input type="text"/>
Export Value 4	<input type="text"/>
Export Value 5	<input type="text"/>

Create an Origin Source

Insert Record in Origin Sources

Status: Active ▾

Folder: ▾

Summary: 

Origin Group: ▾

Source Type: ▾

Category:

Score:

Export Value:

Export Value 2:

Export Value 3:

Export Value 4:


Export Value 5:

- Event Template
- Interview Template
- Event Attended Template
- Interview Attended Template
- Form
- Interaction
- Material
- Source Format
- Test
- Application Creation
- Form Folder
- Event Folder
- Interview Folder
- Event Attended Folder
- Interview Attended Folder
- Source Folder

Insert Record in Origin Sources

Status: Active ▾

Folder: ▾

Summary: 

Origin Group: ▾

Source Type: Source Format ▾

Source: All Source Formats ▾

Category:

Score:

Export Value:

Export Value 2:

Export Value 3:


Export Value 4:

Export Value 5:

- CommonAppRecommendations
- CommonAppSuspects
- CommonAppWriting
- CONAP
- Duolingo English Test
- Field Import
- Front Rush
- GMAT Score Data File
- GMAT Search List
- GRE Score Data File
- GRE Search List
- Hobsons
- Housing App Completed
- IELTS Results Service

Create an Origin Source

Edit Record in Origin Sources

Status	<input type="text" value="Active"/>
Folder	<input type="text"/>
Summary	<input type="text" value="Request for Information Form"/> 
Origin Group	<input type="text" value="First Source"/>
Source Type	<input type="text" value="Form"/>
Source	<input type="text" value="Prospective Student - Request for Information"/>
Category	<input type="text" value="Inquiry Forms"/>
Score	<input type="text"/>
Export Value	<input type="text"/>
Export Value 2	<input type="text"/>
Export Value 3	<input type="text"/>
Export Value 4	<input type="text"/>
Export Value 5	<input type="text"/>

Summary ▲	Origin Group	Source Type	Source	Category
Group Visit	Initial Source	Event Folder	Group Visit	On-Campus Events
Transfer Infosessions	Initial Source	Event Folder	Transfer / Virtual	Virtual Events
Transfer Infosessions	Transfer Source	Event Folder	Transfer / Virtual	Virtual Events
Transfer Saturday Tour	Initial Source	Event Folder	Transfer / Saturday Tour	Campus Tour
Transfer Saturday Tour	Transfer Source	Event Folder	Transfer / Saturday Tour	Campus Tour
Transfer Saturday Visit	Initial Source	Event Folder	Transfer / Saturday Visit	Campus Tour
Transfer Saturday Visit	Transfer Source	Event Folder	Transfer / Saturday Visit	Campus Tour
UG Academic Session	Initial Source	Event Folder	Undergraduate / Virtual Acad...	Virtual Events
UG Campus Tour	Initial Source	Event Folder	Undergraduate / Campus Tour	On-Campus Events
UG Campus Tour and Intervi...	Initial Source	Event Folder	Undergraduate / Campus To...	On-Campus Events
UG Infosession	Initial Source	Event Folder	Undergraduate / Virtual Infor...	Virtual Events

Leverage categories to group similar sources.

Think of categories like folders within your Origin Sources, or as export groupings on a report.

Where do your student records come from?

- Inquiry Forms/RFI
- College Fairs
- Open House registration
- ACT import
- Visitor Center walk-ins
- Parchment transcripts
- Duolingo file
- Group Tours

Where do your student records come from?

- Inquiry Forms/RFI
- College Fairs
- Open House registration
- ACT import
- Visitor Center walk-ins
- Parchment transcripts
- Duolingo file
- Group Tours

Define your categories

- Inquiry Form
- Recruiting
- Event Registration - On Campus
- Event Registration - Virtual
- Test Scores
- Materials

Summary ▲	Origin Group	Source Type	Source	Category
Group Visit	Initial Source	Event Folder	Group Visit	On-Campus Events
Transfer Infosessions	Initial Source	Event Folder	Transfer / Virtual	Virtual Events
Transfer Infosessions	Transfer Source	Event Folder	Transfer / Virtual	Virtual Events
Transfer Saturday Tour	Initial Source	Event Folder	Transfer / Saturday Tour	Campus Tour
Transfer Saturday Tour	Transfer Source	Event Folder	Transfer / Saturday Tour	Campus Tour
Transfer Saturday Visit	Initial Source	Event Folder	Transfer / Saturday Visit	Campus Tour
Transfer Saturday Visit	Transfer Source	Event Folder	Transfer / Saturday Visit	Campus Tour
UG Academic Session	Initial Source	Event Folder	Undergraduate / Virtual Acad...	Virtual Events
UG Campus Tour	Initial Source	Event Folder	Undergraduate / Campus Tour	On-Campus Events
UG Campus Tour and Intervi...	Initial Source	Event Folder	Undergraduate / Campus To...	On-Campus Events
UG Infosession	Initial Source	Event Folder	Undergraduate / Virtual Infor...	Virtual Events

Customize your summaries to be useful labels.

Focus on creating summaries that are **intuitive** and **evergreen**. Decide what level of **granularity** you will need for reporting.

Inquiry Form Origin Source

Edit Record in Origin Sources

Status	<input type="text" value="Active"/>
Folder	<input type="text"/>
Summary	<input type="text" value="Request for Information Form"/>
Origin Group	<input type="text" value="First Source"/>
Source Type	<input type="text" value="Form"/>
Source	<input type="text" value="Prospective Student - Request for Information"/>
Category	<input type="text" value="Inquiry Forms"/>
Score	<input type="text"/>
Export Value	<input type="text"/>
Export Value 2	<input type="text"/>
Export Value 3	<input type="text"/>
Export Value 4	<input type="text"/>
Export Value 5	<input type="text"/>

Marketing Name

- Coffee Chats
- Transfer Talks
- International Study Interviews

Marketing Name

- Coffee Chats
- Transfer Talks
- International Study Interviews

Origin Sources

Off-campus Appointment

- Off-campus appointment - FR
- Off-campus appointment - TR
- Off-campus appointment - INTL

Marketing Name

- Coffee Chats
- Transfer Talks
- International Study Interviews

Origin Sources

Off-campus Appointment

- Off-campus appointment - FR
- Off-campus appointment - TR
- Off-campus appointment - INTL

Recruiting

- Off-campus appointment

Origin Sources on the Dashboard

Freshman Applicant (TEST), Underscore (TEST) Applicant

[Dashboard](#) [Timeline](#) [Freshman Fall 20... Decided](#) [Profile](#) [Materials](#) [Pre-App Info](#)

Dashboard

Staff Assigned: [REDACTED]
Banner ID: [REDACTED]

App Student Type: Freshman
App Entry Term: Fall 2022
App Major: Biology
Pre-Professional Program:

Person Events:

Applied/Accepted Student Events:

Sports:

Biographic

Male
Born 01/01/2000, age 22
Citizen of United States
White

Freshman Fall 2022

Decided
Submitted 09/10/2020

Denied - Released 04/06/2022

Pre-Review	Review	HEOP Admission Review	HEOP Review	Decision
Awaiting Materials	First Review	HEOP Review	HEOP Office Review	Accept
	Follow-up		Post-HEOP Admission Review	Accept Non-Nursing
	Second Review			Deny
	Nursing Review			Withdrawal
	Director Review			Released

Connect

Email [REDACTED]
Phone [REDACTED]

Tags

Athlete Historical **Opt Out Communications**
Test Record VIP

Status History

09/10/2020 Applicant


Origins

09/29/2020 Freshman Infosessions - Prospective FR On Campus Event (Initial Source)

Test Scores

SAT (After March 2016)

[REDACTED] Total
Evidence-Based Reading and Writing Section
Math Section



3

Take a Systematic Approach

Data points that connect to Origin Sources:

- Forms
- Event Templates
- Scheduler Templates
- Materials
- Test Scores
- Interactions
- Source Formats

Data points that connect to Origin Sources:

- Forms
- Event Templates AND Event Folders
- Scheduler Templates AND Scheduler Folders
- Materials
- Test Scores
- Interactions
- Source Formats AND Source Folders

Data points that DO NOT connect to Origin Sources:

- Application Scoped Forms
- Application Scoped Events and Interviews
- Specific Application Sources
- Fields
- Populations
- Application Activities
- Inbox Messages
- Audit Events

Data points that DO NOT connect to Origin Sources:

- Sources that do not have a Source Format **and** are not stored in a folder
- Events/Interviews that do not use a template **and** are not stored in a folder

Organize your folders now to save time later

SMALL DECISIONS CAN HAVE A BIG IMPACT

Systematic Approach

- Work through your instance systematically
- Start with modules that create the highest volume of records
- Only include sources that can create new records
- Build system queries to help audit potential sources

Use Queries to Analyze Your Instance

Quick Query

Type	Configurable Joins
Category	Related
Base	Form

Filters Matching Rows: 67

Type	IN Event, Scheduler
Folder	IN Templates

Form Title	Form Type	Form Status	Form Archived
Group Visit	event	CONFIRMED	No
High School Counselor Breakfast	event	CONFIRMED	No
Information Session and Campus Tour	Event	TENTATIVE	No

Use Queries to Analyze Your Instance

	A	B	C	D	E	F
1	Category	Initial Source	Form Title	Form Type	Form Status	Form Archived
2	Event - On Campus	N	Accepted Student Day	Event	CONFIRMED	No
3	Event - On Campus	Y	Daily Campus Tour	Event	CONFIRMED	No
4	Event - On Campus	Y	Daily Campus Tour (old)	Event	TENTATIVE	Yes
5	Event - Virtual	Y	Virtual Campus Tour	Event	CONFIRMED	No
6	Recruiting - In Person	Y	College Fair	Event	TENTATIVE	No
7	Event - On Campus	Y	Group Visit	Event	CONFIRMED	No
8	Event - On Campus	N	Shadow Day	Event	CONFIRMED	No
9	Counselor Event	N	High School Counselor Breakfast	Event	CONFIRMED	No
10	Recruiting - In Person	Y	High School Visit	Event	CONFIRMED	No
11	Recruiting - Virtual	Y	Virtual College Fair	Event	CONFIRMED	No
12	Appointment - Off Campus	Y	Coffee Chat	Interview	CONFIRMED	No
13	Appointment - On Campus	Y	Portfolio Review	Interview	CONFIRMED	No

Use Queries to Analyze Your Instance

Edit Part ✕

Status

Name

Source

Type

Aggregate

Exports

Filters

Join [Origin Source](#)

[Origin Source / Group](#) Origin Group = Initial Source

Use Queries to Analyze Your Instance

Exports

Person Name

Person Created Date

First Interaction  Concatenate Row Separator: \n Row Limit: 1

First Form  Concatenate Row Separator: \n Row Limit: 1

Filters [Check Logic](#) Matching Rows: 71

No Initial Source  Not Exists

Created Date Created Date < today-1

not test  Not Exists

4

Additional Origin Groups

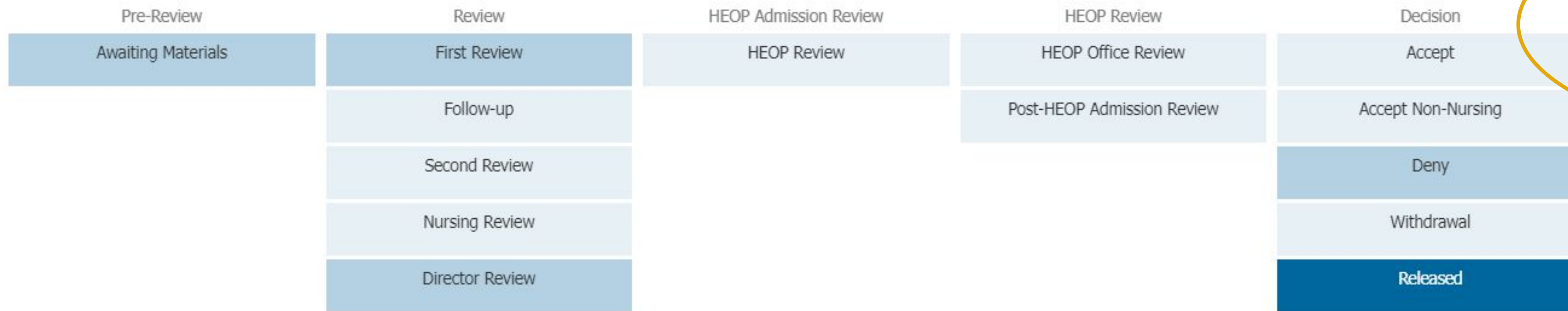
Additional Origin Groups

- Prospect Source
- Inquiry Source
- Application Source
- Campus Visit Source

Freshman Fall 2022

Decided
Submitted 03/15/2022

Denied - Released 04/01/2022



Status History

03/16/2022 Applicant

Origins

03/16/2022 CommonApp - CommonApp (Initial Source)

Freshman Fall 2022

Decided
Submitted 03/15/2022; Started 02/02/2022

Accepted RA/Denied HEOP - Released 03/22/2022



Status History

09/14/2021 Prospect
02/02/2022 Inquiry
03/16/2022 Applicant

Origins

09/13/2021 SAT Name Buy - SAT Name Buy (Initial Source)

02/02/2022 FrontRush - Front Rush (Transfer Source)

Events

Attended: 03/29/2022 Campus Tour

Activity History

Additional Origin Groups

Record	Initial Source	Prospect Source	Inquiry Source	Application Source	Campus Visit Source
Marcus	Naviance Prospects	Naviance Prospects	Campus Tour Registration	Slate Application	Campus Tour Attendance

Additional Origin Groups

Record	Initial Source	Prospect Source	Inquiry Source	Application Source	Campus Visit Source
Marcus	Naviance Prospects	Naviance Prospects	Campus Tour Registration	Slate Application	Campus Tour Attendance
Priya	Inquiry Form		Inquiry Form		

Additional Origin Groups

Record	Initial Source	Prospect Source	Inquiry Source	Application Source	Campus Visit Source
Marcus	Naviance Prospects	Naviance Prospects	Campus Tour Registration	Slate Application	Campus Tour Attendance
Priya	Inquiry Form		Inquiry Form		
Carlos	CommonApp			CommonApp	

Additional Origin Groups

Record	Initial Source	Prospect Source	Inquiry Source	Application Source	Campus Visit Source
Marcus	Naviance Prospects	Naviance Prospects	Campus Tour Registration	Slate Application	Campus Tour Attendance
Priya	Inquiry Form		Inquiry Form		
Carlos	CommonApp			CommonApp	
Avery	ACT Scores	ACT Scores		Fast App	Open House Attendance

5

Set Yourself Up For Success

A few small configurations can streamline results

ELIMINATE THOSE MYSTERY SOURCES BEFORE THEY START

Suggested Configurations

- Internal Record Creation Form
- Account Created/No App Started Interaction
- Application Creation Interactions

Internal Record Creation Form

The screenshot shows the top navigation bar of the Slate application with the 'slate' logo and several icons. Below the navigation bar is a 'Lookup' section with a search input field labeled 'Search...'. To the right of the search field is a button labeled 'New Person', which is circled in red. Below the search field are sections for 'Matching Rows' and 'Filters', with the latter containing buttons for 'Filter', 'NOT', '(', 'OR', and ')'. The 'New Person' button is highlighted with a red circle.

The 'New Person' form is displayed with the following fields and controls:

- Email:** A text input field with a user icon on the right side.
- First Name:** A text input field.
- Last Name:** A text input field.
- Birthdate:** A text input field with a placeholder 'mm/dd/yyyy' to its right.
- Buttons:** 'Create' and 'Cancel' buttons at the bottom.

Internal Record Creation Form

Person Creation Form

Record: Unassigned

Your Name

Interaction Code *

Interaction Subject

Interaction Comments

Customizing the New Record Lookup Link

Follow

[Expand-All](#) [Collapse-All](#)

This article describes how to customize and replace the New Record form for the Person, Organization, Organization Contacts and custom datasets.

▼ [Creating a New Record Form](#)

▼ [Integrating the New Record Form](#)

Account Created / No Application Started

Application Management

Returning users:

[Log in](#) to continue an application.

First-time users:

[Create an account](#) to start a new application.

Account Created / No Application Started

Prospect [redacted]

Dashboard | Timeline | Profile | Materials | Pre-App Info

Dashboard

Staff Assigned: [redacted]
Banner ID: [redacted]

Student Type:
Pre-App Entry Term:

Pre-Professional Program:

Person Events:

Applied/Accepted Student Events:

Sports:

Biographic
Born [redacted] age 16

Activity History

Connect
Email [redacted]

Tags
Athlete Historical Opt Out Communications
Test Record VIP

Status History
04/06/2022 Prospect

2022 Apr

- 04/22 10:37:23 AM Record Access
- 04/22 10:19:01 AM Record Access
- 04/14 9:28:51 AM Record Access
- 04/06 12:34:17 AM Field Set Staff Assigned set to [redacted]
- 04/06 12:34:17 AM Status Change Status Change: Prospect
- 04/06 12:27:10 AM Person Created Person Created

Account Created / No Application Started

Edit Record in Activity & Interaction Codes

Status	Active <input type="button" value="v"/>
Folder	<input type="button" value="v"/>
Type	Interaction <input type="button" value="v"/>
Code	slate_app_account_created <input type="button" value="📄"/>
Parent Code	<input type="button" value="v"/>
Label	Slate App Account Created
Export Value	<input type="text"/>
Score	<input type="text"/>
Custom Permission	<input type="text"/>
Show in Reader	No <input type="button" value="v"/>

Edit Rule

Name	Add Interaction: Slate Application Account Created
Status	Active
Type	Interaction
Base	Person
Folder	Interactions
Created	04/12/2022
Updated	04/12/2022

Filters

Matching Rows 445

Filters

NOT (OR)

Status IN Inquiry, Prospect

PIN Created/Reset Timestamp < today-7

Action

No Action Rule Do nothing and skip processing of other lower-priority rules in this Exclusion


User

Code Slate App Account Created

Subject

Application Creation Origin Sources

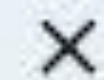
Insert Record in Origin Sources

Status	Active ▾
Folder	▾
Summary	Application Creation 
Origin Group	Initial Source ▾
Source Type	Application Creation
Category	Application
Score	
Export Value	
Export Value 2	
Export Value 3	
Export Value 4	
Export Value 5	

Application Creation Origin Sources

Application Creation	app_creation
Application Creation > Common App	app_creation_ca
Application Creation > NURSCAS App	app_creation_nurscas
Application Creation > OTCAS App	app_creation_otcas

Set Static Mapping



Destination

Interaction



Interaction: Code



Group

1

Value

Application Creation - Common App

Application Creation Origin Sources

Edit Rule

Name	App Creation - Slate App
Status	Active
Type	Interaction
Base	Person
Folder	Interactions
Created	04/11/2022
Updated	04/11/2022

Filters

Matching Rows: 10

Filters: Filter NOT (OR) Join Settings

Submitted Date Today

No CommonApp Today

Action

No Action Rule: Do nothing and skip processing of other lower-priority rules in this Exclusivity Group when filter criteria are met.

User:

Code: Application Creation

Subcode: Slate App

Subject:

Private Comments:

Application Creation Origin Sources

Common Application	Initial Source	Interaction	Common App	Application
Common Application	Initial Source	Source	CommonApp	Application
Historical App	Initial Source	Source	Historical Data - App Record	Application
NursingCAS	Initial Source	Interaction	NURSCAS App	Application
OTCAS	Initial Source	Interaction	OTCAS App	Application
████ Application	Initial Source	Interaction	Slate App	Application

6

Ongoing Maintenance

Origin Source Maintenance

- New Event Templates and Folders
- New Scheduler Templates and Folders
- New Source Formats
- New Forms
- Folder reorganization

- Use an audit query to find records with no origin sources
- Designate an Origin Source Keeper

Exports

Person Name
Person Created Date
First Interaction  Concatenate Row Separator: \n Row Limit: 1
First Form  Concatenate Row Separator: \n Row Limit: 1

Filters [Check Logic](#) Matching Rows: 71

No Initial Source  Not Exists
Created Date Created Date < today-1
not test  Not Exists

Matching Rows 90

Matching Rows 8,470

Matching Rows 17,544

7

Using the Data

Origin Sources can help you make informed decisions on name buys, event planning, recruitment resources

2022 Origin Sources/ROI Edit									
Folder	Underscore / 2020-22 Reports								
Current as of	04/27/2022 at 04:25:29 PM ET Export to PDF								
Status	Completed successfully. Export to Query								
Metric	Total	Inquiries	Applications	Admits	Deposits	Net Deposits	Application Rate	Melt Rate	Yield
	FA22	FA22	FA22	FA22	FA22	FA22	FA22	FA22	FA22
FR FA22									
Total	4,166	2,533	4,105	3,020	302	299	98.5%	1%	9.9%
Freshman Infosessions	346	346	346	325	58	57	100%	1.7%	17.5%
Search Non-Responders	573	376	568	500	48	48	99.1%	%	9.6%
FrontRush	257	255	256	214	44	43	99.6%	2.3%	20.1%
Historical Data Load	370	299	327	266	28	27	88.4%	3.6%	10.2%
CommonApp	1,030	28	1,026	606	24	24	99.6%	%	4%
SAT Name Buy	554	239	552	384	22	22	99.6%	%	5.7%
FR Inquiry Form	101	101	100	83	10	10	99%	%	12%
Niche	144	144	142	97	9	9	98.6%	%	9.3%
UG Open House	63	61	63	52	8	8	100%	%	15.4%
Hobsons	109	109	108	85	6	6	99.1%	%	7.1%
Inquiry Card	74	71	74	45	6	6	100%	%	13.3%
Search Responders	36	36	36	30	5	5	100%	%	16.7%
UG Campus Tour	48	48	48	39	5	5	100%	%	12.8%
Common App Freshman Inquiries	220	220	220	106	4	4	100%	%	3.8%
High School Visit QR	24	24	24	20	4	4	100%	%	20%
NRCCUA Declared Student Connections	14	14	13	11	3	3	92.9%	%	27.3%
SAT Test Score	26	26	26	22	3	3	100%	%	13.6%
ACT Name Buy	38	17	38	30	2	2	100%	%	6.7%
ACT Test Score	8	8	8	7	2	2	100%	%	28.6%
Athletic Prospects	19	14	19	18	2	2	100%	%	11.1%

8

Top Tips

Top Tips from an Origin Source Nerd

- Origin sources are not calculated in test



Top Tips from an Origin Source Nerd

- Origin Sources are calculated every night for any record that was updated **that day**
- If you reconfigure your Origin Source setup, Origin Sources are recalculated overnight for any record that has been updated within the **past year**

Top Tips from an Origin Source Nerd

- Retroactive Refresh alone may not trigger updates for older records

Edit Record in Fields

Status	Active
Folder	
Dataset	
Scope	Person
ID	admin_update
Name	Admin Update
Prompt	Other
Tab	
Category	Other
Group	
Order	
Size	
Value	Store Value (bit/language/state/country/user prompts and text fields only)
Multiple	Single value
Unique for Merging	Do not use value for merging

Records Missing Origin Source

Output: Field

Export

Field Management

Records Affected	706
Field	Admin Update
Action	Replace Values
Value	04/28/2022

Top Tips from an Origin Source Nerd

- Source Format vs Source Folder

Source File	Source Format	Source Folder	Origin Source Type
ACT Import	ACT Score Data File	ACT Import	Source Format
College Fair List		College Fair Attendees	Source Folder

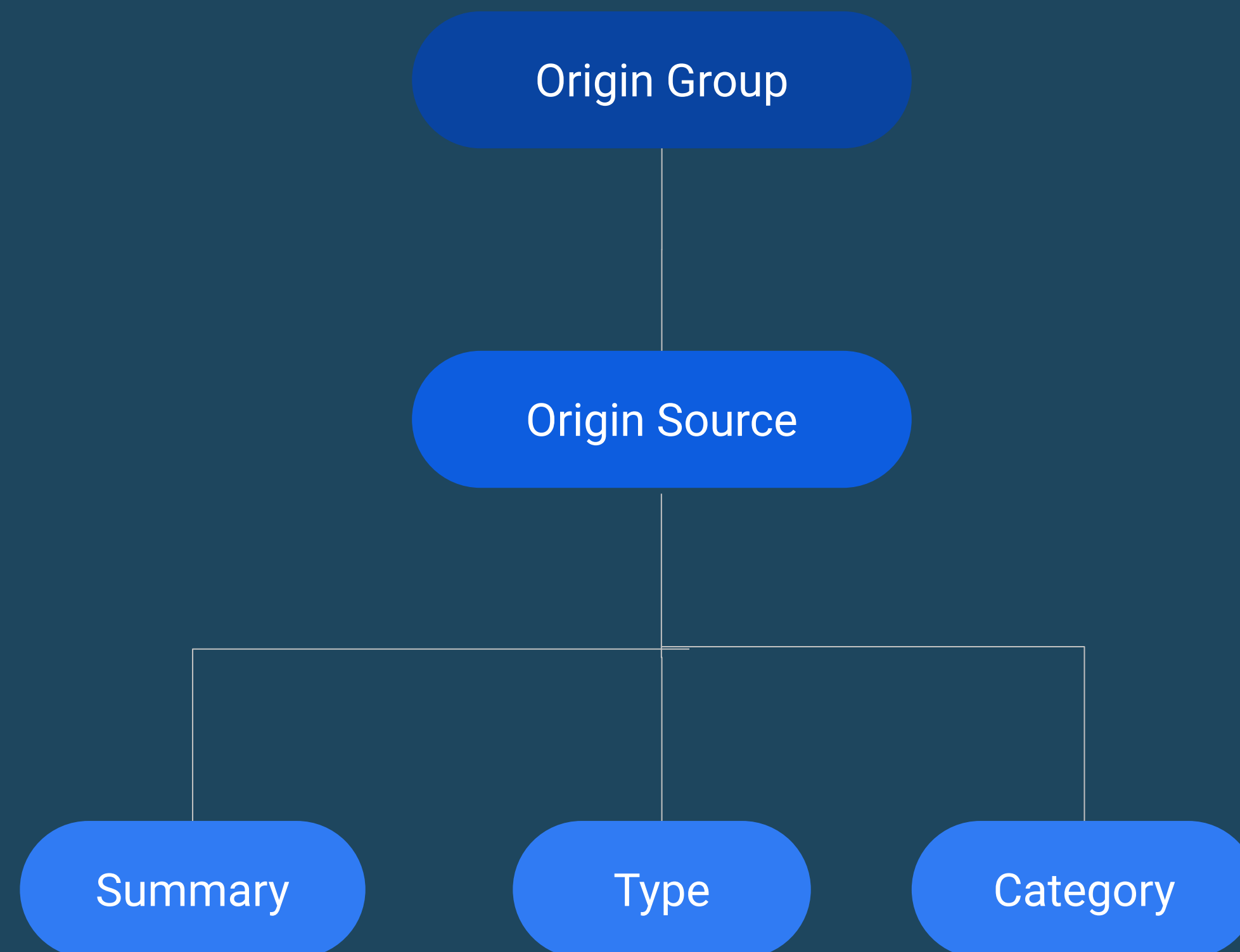
Top Tips from an Origin Source Nerd

- Source Format vs Source Folder

Source File	Source Format	Source Folder	Origin Source Type
ACT Import	ACT Score Data File	ACT Import	Source Format
College Fair List		College Fair Attendees	Source Folder
Name Buy ABC		Prospect Name Buys	Source Folder
Name Buy XYZ	Name Buy XYZ	Prospect Name Buys	Source Format

Conclusion

**Origin Sources will help answer the question:
Where did this student come from?**



And is it worth it to find more students from that same source?

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Questions + Answers

Thank You!



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