UNIVERSITY OF TWENTE.



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Version management

Click here for the latest version of the manual

Changes in the manual compared to the previous version:

- Screenshots updated
- Button "export to CSV" modified to "export for Osiris"
- Advice "neutral modified to "Doubts" (T) and "Not attended" modified to "Not participated" (ND)
- Values to be used in advices are indicated in several places.
- Output format for export document for SAS has been changed to .txt
- "Export for Osiris" with "from" date
- Position of reminder email template has been corrected

Question types

When creating or editing a questionnaire, there are a couple of options for the types of questions that can be used in the questionnaires. Each type of question has the possibility to mark that question as:

- Mandatory
- Trigger question
- Show in excel export

Mandatory

An answer <u>must</u> be provided by the prospective student for this question. If no answer is provided, the questionnaire cannot be submitted by the prospective student. A question will only be made mandatory if a study programme has explicitly requested it. **Be aware**

Be aware, if a questionnaire doesn't have any mandatory questions, it's technically possible to submit a blank questionnaire after confirming with 'YES' to the last control question, 'Are you sure you want to submit the questionnaire?'. Submitted questionnaires can't be made undone or resend.

```
Below you can register for one of the matching events we are organising. Applicants located in the Netherlands are expected to register for one of the or
campus matching events. Applicants located outside the Netherlands are of course welcome to join us on campus as well.
After registration, you will be given more information about the event in due time.
```

Mandatory questions are marked with *.

Trigger question

A trigger question ensures that the matching advisor is presented with an overview of the answers to the trigger questions in "prospect view".

VIEW PROSPEC	т				
NUMBER OF STREET S				INTERNAL CHAT	
have Traigenpartment					
Summary Matching f	forms Files Emails				
DETAILS		TRIGGER QUESTIONS			
Student number 2018 First name 1600	100	MIDDLE		ן	
Infixes Not		1. De ingevulde vragenlijst zorgt dat ik beter voorbereid aan de studie kan beninnen	Helemaal mee eens		
Date of birth Line Email adress	D-0001 Next@PELderCythema.in	den de stades fan segninen.			
NATIONALITY				·	
Country of birth					
Country of residence					
Language NL				Press CTRL + Enter to send	- 41
APPLICATION				MATCHING EVENTS	
Academic year 2024	4			Event	Attended
Application date 24-03	7-2024			No items found.	
Deficient					
Also applicated for:					
- press perchasile sources (p	100D				

Show in excel export

If a question is marked as "Show in export", the answer to this question will be included in a column in an Excel export.

The name of this Excel label is the column name in the Excel export. The functional admin and Matching admin can give the label their own description if desired.

Q1 - 9. WISKUNDE B CIJFER:			-
Question type			
Alphanumeric			\sim
Grade (i)	Trigger question (i)		
Mandatory	Show in excel export (i)		
	Excel label Wiskunde B cijfer]	
1st Sort # Question			
1 😡 Source B I S 🗄 🗄 🗏 🕸			
9. Wiskunde B cijfer:			
A B C D E F	G H I J K	L M	N O P
1 Student nr Program Academic year Program intensity Date Matching event Result Matching event Firs	t name Initials Last name Infixes Birth date	Emailadress Residence countr	y Birth country Language Application date D

	A	В	С	D	E	F	G	н	1.1	J	К	L	M	N	0	P	Q	R	S
1	Student	nr Program	Academic year	Program intensity	Date Matching event	Result Matching event	First name	Initials	Last name	Infixes	Birth date	Emailadress	Residence country	Birth country	Language	Application date	Deficient	Wiskunde B cijfer	
2	- Belleville	B-TN	2024	V			highling:	1.0.	the second	÷.	11-11-2005 00:00	and the second second second	Nederland	Nederland	NL	1-11-2023 00:00			
3	100.000	B-TN	2024	v			int .	100.00	Support of		16-10-2006 00:00	and an interaction of the	Nederland	Nederland	NL	25-12-2023 00:00			
4	10000	B-TN	2024	v			test the	100	10.00	÷.	3-3-2006 00:00	and an international states of the	Nederland	Nederland	NL	29-10-2023 00:00			
5	- 400	B-TN	2024	v	11-8-2024 13:00		Part in	14.4	Production (Control of Control of		8-7-1978 00:00	a finite in the second		NL	NL	18-7-2024 13:38		6	
6	1000	B-TN	2024	v	30-8-2024 17:00		Arriell (mahare)		10.000		19-6-1973 00:00	a finite de la contra d	NL	NL	NL	1-7-2024 00:00			
7																			

Because the explanation text has already been explained before, this chapter will not give any additional information about the explanation texts.

Matching event

Matching events in Matching are primarily intended for the organisation of scheduled group information sessions given online or on campus during the course of a college year. Matching events in Matching can also be used for information sessions that have not yet been scheduled. For both variants, a prospective student must register for it when filling in a questionnaire. The matching event must therefore be included as a question type on a questionnaire before a questionnaire has been published. Configuring a matching event can be done on the 'Matching events' tab at the CONFIG tile.



A list of all matching events registered for the programme will be shown. Most of the time, only one matching event with multiple timeslots during a college year.

- 'New': Creates a new matching event
- 'Edit': Changes the selected matching event
- 'Delete': Deletes the selected matching event. Be careful if it has been used in a questionnaire and prospective students have subscribed to it. What you delete is no longer available.

It is possible to create more than one matching event. For each event, it is possible to create a specific mail template and link to the specific event.

Creating or changing a matching event

Tab details

You can fill in the name of a matching event and optionally a detailed description of the event here. Both are presented in a questionnaire, so if additional information is needed, it can be maintained here. Tip: in the questionnaire itself this can also be done in an information field when defining the specific question of the 'Matching event' question type.

EDIT MATCH	ING EVENT
Details Timeslots Participants	
Name	Namin'ny paosifisitra ing indiana
Description	the result where we are related as a result of the set of the set of the proof and the proof we will depend of
Used in the following form(s):	Questionnaire Technology Science - Version nr.1 Ail questiontypes Technology Science - Version nr.1 DEMO All questiontypes Technology Science - Version nr.1

If a Matching event is used as a question type in one or more questionnaires, it will be shown here.

Tab Timeslots		
EDIT MATCHING	EVENT	
Details Timeslots Participants		
+ New		
Date	Location	Participants
04-03-2025 08:00 - 12:00	Zwaaier 3	9
04-03-2025 13:30 - 16:30	Zwaaier	0

On the Timeslots tab, you can maintain time slots:

- Creating a time slot can be done with the '+New' button
- Modifying a time slot can be done by selecting the record and click on the pencil on the right
- Deleting a time slot can be done by selecting a record and click on the recycle bin on the right

If either creating or modifying is chosen, a new window will pop up where you can maintain a timeslot.

You can edit an existing time slot by pressing the edit-pencil:

Details Timeslots Participants			
+ New			
Date	Location	Participants	
10.000 Att. 100	Ter Transmitt	3/20 [<u>n</u>
0.0.002 0.00-0.00	Inclusive .	2/20	
10.00 80.00	http://www.beckyney.com/chine.	0	
10.000	CONTRACTOR OF A DESCRIPTION	0	
ten aparten	English (Telline)	0	

Maintaining a scheduled timeslot

NEW TIME S	SLOT		
Location	UT Campus event in Gebouw de Waaier		
Online	Yes 💽 No		
Date	dd-mm-yyyy		
Specify time	Yes No		
Start time	HH:mm	٩	
End time	HH:mm	()	
Registration close date	dd-mm-yyyy		
Specify max participants	Yes No		
Max participants			
Save X Ca	incel		

A scheduled time slot has the following characteristics that can be maintained:

- Location: The location where the event takes place.
- Online: an indication whether or not it is an online event. Tip: describe that in the Location as well.
- Date: The date on which the event takes place.
- Specify time: If the start and end times are known, they can be specified here. This is not mandatory.
- Start time: The start time of the event.
- End time: the end time of the event.

- Registration close date: the date on which a prospective student can no longer subscribe for that timeslot. From that day, the time slot will be crossed out in the questionnaire and can no longer be registered for!
- Specify max participants: If the maximum number of participants is known, it can be specified here. This is not mandatory.
- Max participants: The maximum number of participants. If this maximum has been reached, the Time slot in the questionnaire will be crossed out and can no longer be registered for!

Maintaining an unscheduled timeslot

Location	Online Groeps Event, uitnodiging volgt per mail	
Online	Yes No	
Date	dd-mm-yyyy	
Specify time	Ves 🔘 No	
Registration close date	dd-mm-yyyy	
Specify max	Yes 🖸 No	

An unscheduled timeslot can be used to create an Online unscheduled event that can be used in a questionnaire. Such an unscheduled online event can be used, for example, during a college year, to invite groups of prospects to an online group meeting.

An unscheduled timeslot has the following characteristics that can be maintained:

- Location: the place where the event takes place. Put here clearly what kind of event it is.
- Online: an indication whether or not it is an online event. Tip: describe that in the location as well.
- Date: The date on which the event takes place. This is not mandatory.
- Specify time: If the start and end times are known, they can be specified here. This is not mandatory.
- Registration close date: The date on which the event can no longer be registered. From that day, the Time slot will be crossed out in the questionnaire and can no longer be registered for! This is not mandatory.
- Specify max participants: If the maximum number of participants is known, it can be specified here. This is not mandatory.

Tab Participants

On this tab, you can view the registrations of prospects for the matching events, maintain them and email them individually or in groups to inform them in more detail about the matching event they have registered for.

Tab Partici	ab Participants/Prospects								
EDIT	EDIT MATCHING EVENT								
Details Timeslots	Details Timeslots Participants								
Prospects Not s	ent Sent								
Export to Excel									
First name	Last name	Email	Timeslot	Attended					
1000	10000	osiris-test@utwente.nl	10-02-2025 08:00 - 12:00 De Zwaaier	No					
and the second sec	Parameters.	osiris-test@utwente.nl	10-02-2025 08:00 - 12:00 De Zwaaier	Yes					
1994	10000	osiris-test@utwente.nl	10-02-2025 08:00 - 12:00 De Zwaaier	No					
1000	1000	osiris-test@utwente.nl	10-02-2025 13:00 - 17:00 De Zwaaier	No					
			10-02-2025 13:00 - 17:00 De Zwaaier	Yes					

Here you will find an overview of all registrations for all time slots of a matching event. The prospective student can only register for a matching event via a questionnaire if it is included there as a question. You will find the following buttons here:

- Export to Excel: This creates a .csv file containing an overview of all registrations. This can be used, for instance, as an attendance list on the day of the actual event.
- Select all: Selects all lines.

Prospects Not sent Sent

- Deselect all: Deselects all lines.
- Toggle attendance: Changes the indication whether the prospective student whose entry is selected was present at the event.
- Change timeslot: Allows you to change the timeslot of the selected lines if necessary. **Note**: this does not automatically notify the prospect.
- Search button (the magnifying glass), a search menu pops up as shown below. Here you can search by First name, Last name, Email, Timeslot, Attended and combinations of them. Pressing the search button again will perform the search selection. Next to the search button is a reset button that clears the search selection. Below it, "hide search" pops up, which can be used to close the search bar.

First name	Last name	Email	Timeslot	~		Q ()
~						
Export to Excel	all	gle attendance ① Change time	slot		1 to 9 of 9 🛛 🕨	Hide search 🔨

Mailing about matching event: Tab Participants/not sent

EDIT N	латснії	IG EVENT	*	
Details Timeslots	Participants			
Prospects Not se	ent Sent			
First name	Last name	Email	Timeslot	× (Q)(D)
Attended				
	~			
Select all] Deselect all	all		≪ 1 to 20 of 23 → → Hide search ∧
First name	Last name	Email	Timeslot	Attended
(in a)	Traken .	e adres di stantane	04-04-2025 online	No
The Association of the Associati	See.	and an integral difference on	12-06-2025 online	No
The last	Research and the	and an inclusion of some	04-04-2025 online	No
ile en	inter-	Independence Report Former	14-03-2025 on campus UT	No
and an	terhops.	terrar of a participation of a	12-06-2025 online	No
The second	Distance little	termination and provide the	14-03-2025 on campus UT	No
100	The states	No. Photo Street and	04-04-2025 online	No
-	Inclusion Inclusion	period and period and	04-04-2025 online	No
inger (province (springer)	25-04-2025 on campus UT	No
date:	Part of the second s	percent of process	14-03-2025 on campus UT	No
Tar.	140	and the second second	04-04-2025 online	No
tanya.	Pergudan	and a second second second	04-04-2025 online	No
1000	1000	and considered and	25-04-2025 on campus UT	No

This tab shows the prospects who have not yet received an email about the matching event they have registered for. Sending an email about the matching event has to be done manually.

Be aware:

In the default view, no specific time slot is selected. The selection you see, contains prospects in multiple time slots mixed together (default: alphabetical order of first name).

If you'd like to write to a specific group of prospects from a specific time slot, you will have to make that selection first. Do that as follows:

- Click on the 'timeslot' bar and select the specific timeslot you want to email prospects from.
- Then click on the magnifying glass

You can see that the selection of prospects has now changed. Now only prospects who have signed up for this particular time slot are shown.

EDIT MATCHING EVENT

Details Timeslots	Participants			
Prospects Not sen	t Sent			
First name	Last name	Email	Timeslot 14-03-2025 on campus	
Attended	~			
Select all	Deselect all Send e	mail		≪ 1 to 5 of 5 ▷ ➢ ➢ Hide search ∧
First name	Last name	Email	Timeslot	Attended
444	distants.	Any and produces	14-03-2025 on campus UT	No
for the second	Exceptions.	construction of the process.	14-03-2025 on campus UT	No
	And and	perception in the second	14-03-2025 on campus UT	No
Sec.	Sec. 1	and a provide state	14-03-2025 on campus UT	No

Here you can send emails about the matching event. You will find the following buttons here:

- Select all: Which selects all lines presented on screen. Lines hidden on the next page, won't be selected.
- Deselect all: Which deselects all lines
- Send email: All selected lines will receive an email of the Matching event email type with the email template linked to it *
- Search button (the magnifying glass): the standard search functionality

* A specific email text can be created by creating an email template at 'CONFIG/Email templates' with, for example, a link in it to a Teams meeting. This template must then be linked to the Matching event at 'CONFIG/Email settings'. That email is then sent to the selected lines after pressing the 'Send email' button

Mailing about matching event: Tab Participants/sent

EDIT I	матсн	NG EVENT			
Details Timeslo	ots Participants				
Prospects Not s	sent Sent				
Select all	Deselect all	email		1 to 4 of 4 🕨	
First name	Last name	Email	Timeslot	Email sent	Attended
			40.00.0005.00.00.40.00.LD- 7	04.00.0004	AL.
1000	The second	COLUMN STREET, STREET, ST	10-02-2025 08:00 - 12:00 De zwaaier	24-09-2024	NO
1942	Transa .	tern aufperarie to	10-02-2025 08:00 - 12:00 De Zwaaier	12-12-2024	Yes
160 160	Territori Antonio Antonio	internationales en	10-02-2025 08:00 - 12:00 De Zwaaier 10-02-2025 08:00 - 12:00 De Zwaaier 10-02-2025 08:00 - 12:00 De Zwaaier	12-12-2024 12-12-2024	Yes No

This tab shows the prospects who already received an email about the matching event they registered for. The email sent column shows when that email was sent. If

necessary, another email can be sent from here to the registrant about the matching event. For example, to pass on a change. You will find the following buttons here:

- Select all: Which selects all lines.
- Deselect all: To deselect all lines.
- Send email: All lines that are selected will receive an email of the Matching event type with the email template linked to it *.
- Search button (the magnifying glass): The standard search functionality

* A specific email text can be created by creating an email template at the tile 'CONFIG/Email templates' with, for example, a link in it to a Teams meeting. This template must then be linked to the Matching event at 'CONFIG/Email settings'. That email is then sent to the selected prospects after pressing the 'Send email' button.

Matching Forms

The Functional admin has set up the questionnaire in three parts:

- Intro (short welcome message at the opening of the questionnaire)
- Middle (the actual questionnaire)
- **Outro** (short thank you message at the end of the questionnaire)

Preview Matching forms

The Matching admin has the option to view the questionnaire before going live. Under the "Matching Forms" tab, there are the above-mentioned parts. Select the "**middle**" and click on "preview".

The second se		Notes -				
DASHBOARI		1 alt				
Program Pagainings 201+31	81	~				
Matching events Matching forms Em	ail templates Email se	attings Reminder s	attings Intro	text Import / Export		
MATCHING FORMS						
Preview & Edit trigger- and excel of	questions				🗵 📲 1 to 5 of 5	5 × × Q
Name	Status	Form type	Version	Last changed by	Changed date	Primary
Outre in the	Current	Outro	1	Functional Admin	19-07-2024	No
	Current	later		Functional Admin	03-10-2024	
Intre in Par	Current	intro	2	r unouonur Aumin	00 10 2021	NO
Intra B.PBP Middle B-PSY	Current	Middle	4	Functional Admin	03-10-2024	Yes
Intre B-PSY	Current	Middle	4	Functional Admin	03-10-2024 30-10-2024	Yes No

You will now see the questionnaire as the applicant will see it. Here you can see if everything is set up and functioning as desired. Also, check how the questions work. The numbers at the top are the different sections that have been set up. You can use the previous" and "next" buttons to move back- and forward.



Editing trigger and export questions

The Matching admin can make changes to the "trigger" and "export" settings without any issues. The changes made will be immediately active and will not cause a version change. **Note**: These actions can only be done after the questionnaire has gone live.

- 1. Select the correct course.
- 2. Click on Matching Forms.

3. Select type "middle" and click on "edit trigger- and excel questions".

UNIVERSITY OF TWENTE. MATCHING

DASHBOA	RD						
Program Psychology	2024-2025	~] 0				
Matching events Matching form	ns Email templates Email setti	ngs Intro text	Import / Expo	rt			
Preview	d excel questions				🖂 🐳 1 to 3 of 3	Q	
Name	Status	Form type	Version	Last changed by	Changed date	Primary	
Intro B-PSY	Current	Intro	1	Functional Admin	19-07-2024	No	
Outro B-PSY	Current	Outro	1	Functional Admin	19-07-2024	No	
Middle B-PSY	Current	Middle	2	Functional Admin	19-07-2024	Yes	

You will now be taken to a new screen:

5 - WID	DLE B-H	PSY
ect overview as so called shown as column heade	l trigger questions. And w r in the export.	vhich
ls trigger qu	estion Show in excel	Excel label
\checkmark		
\checkmark		
	Y	123434
\checkmark	\checkmark	Likert Dutch
V	\checkmark	MC
	\checkmark	ddd
\checkmark	\checkmark	
V		
\checkmark	\checkmark	Date Picker
\checkmark	\checkmark	
	J - IVID Nect overview as so called shown as column header Is trigger qu V V V V V V V V V V V V V	S - WIDDLLC D- nect overview as so called trigger questions. And we shown as column header in the export. Is trigger question Show in excel I g G G G G G G G G G G G G G G G G G G

× Close

A

By turning checkmarks on and off, you can indicate what the correct setting should be for each question. If you mark a question as "show in Excel" a column "Excel label" will appear. It needs to be defined. (What do you want the column of this question to be called in the Excel export?)

Email templates

The Matching admin can create and edit Forms. Because the templates have already been set up by functional admin, it is especially important to find out how to edit an existing template.

There are two types of text in an email template:

- HTML Preview
- Plain text

Both fields need to be filled.

HTML Preview

First, the HTML Preview is filled in. Placeholders can be set up here.

emplate Name	 St. Balanti (Constante page 1996) p.1. 	
ubject	B-CE Entertrainstructure and SERLAR	
Plain text HTML Preview A	lttachments	
B I S <u>I</u> _x ≟≡ ∶≡ ∉≡	±μ 99 ∞ ∞ ∞ ■ 🖬 🏛 🚊 Ω Styles 🔹 Format 🔹 🔀 ?	
Dear student,		Ô
Thanks for completing the online serves as a self-check, so you wi with the study advisor . If you w	e questionnaire for the Civil Engineering programme at the University of Twente. This questionnaire Il not receive specific feedback on your answers unless you have specified that you want a meeting ish to view the answers you gave, please check (SVS_weblink).	Ŧ

If the Matching admin is also Matching advisor, the Matching admin functionalities are behind the "config" button.

DASHBOARD

The Mendix @ UT team builds apps optimized for Go	oogle Chrome and Microsoft Edge.	Please use one of these browsers for the best	experience	
Program Technische Natuurkunde 2024	- 2025 2024-2025 🗸 🗸			
1 IN PROGRESS	O Advised	1 ALL	5 co	ۇغ NFIG
Matching events Email templates Email settings	s TEMP Create questionnaire	Export		
EMAIL TEMPLATES				
+ New CEdit Delete Duplicate	Refresh tokens		📧 🔍 1 to 3 of	3 » » Q
Template name	Subject		Attachment	Created on
Follow up Technische Natuurkunde	Korte vragenlijst		No	16-07-2024 11:18
Herinnering	Herinnering om vragenlijst in te	vullen	No	16-07-2024 11:26
Uitnodigingsbrief Technische Natuurkunde	Uitnodigingsbrief		No	12-07-2024 14:36

×

• Click on the "New" button to create a new template.

In the screen that follows, you can do the following:

emplate Name	B-CE Bedankt (instroom sept 2024_v2)	
ubject	B-CE Bedankt (instroom sept 2024_v2)	
mail Content 3		
Plain text HTML Preview	Attachments	
B⊻I≡≣		
www.utwente.nl/en/openday	y <u>s/bachelor</u>	
 Student for a Day: Do you 	u want get a taste of student life at the UT and gain first-hand experience from a first or second-year Civil	
Engineering student? This is	s possible at any week day until mid-June. If you cannot come to campus, you can arrange an online meet- information and to sinn up (before 1, lune), please visit our website.	1
	memalen and to sign up (core of care), prodo the car <u>mound</u> .	
 Check the Study Choice 	Calendar for an overview of all activities	
chock the <u>cludy choice</u>		
)	Sultituir for an overview of an advanted.	rds
p	<u>Subtrue</u> for an overview of an additional.	rds
p laceholders	<u>Subtrue</u> for an overview of an additional.	rds
p laceholders	306 wo	rds
aceholders	add dynamic content to the body of your email template. For example, by name. The placeholder will automatically be replaced by the	rds
aceholders aceholders aceholders election Module to your pro	add dynamic content to the body of your email template. For example, by name. The placeholder will automatically be replaced by the of the entity type selected here. You need to add and configure the bject before you can create placeholders.	rds
P Placeholders Placeholders can be used to a rou can address the recipient tiribute values of an object o Reflection Module to your pro	add dynamic content to the body of your email template. For example, solution to the body of your email template. For example, by name. The placeholder will automatically be replaced by the of the entity type selected here. You need to add and configure the oject before you can create placeholders.	rds
p Placeholders laceholders can be used to a ou can address the recipient tribute values of an object o leflection Module to your pro- select	306 wo add dynamic content to the body of your email template. For example, t by name. The placeholder will automatically be replaced by the of the entity type selected here. You need to add and configure the oject before you can create placeholders.	rds
p laceholders laceholders laceholders laceholder ttribute values of an object o eflection Module to your pro elect laceholder ntity Core	306 wo add dynamic content to the body of your email template. For example, tby name. The placeholder will automatically be replaced by the of the entity type selected here. You need to add and configure the oject before you can create placeholders.	rds
P Placeholders Vaceholders can be used to a ou can address the recipient ttribute values of an object o leflection Module to your pro- velect Vaceholder initiy	306 wo add dynamic content to the body of your email template. For example, by name. The placeholder will automatically be replaced by the of the entity type selected here. You need to add and configure the oject before you can create placeholders.	rds
p laceholders laceholders can be used to a use an address the recipient trribute values of an object o effection Module to your pro- ielect laceholder ntity	306 wo add dynamic content to the body of your email template. For example, by name. The placeholder will automatically be replaced by the of the entity type selected here. You need to add and configure the oject before you can create placeholders.	rds
Placeholders Placeholders Placeholders can be used to a rou can address the recipient triribute values of an object o leflection Module to your pro- Select Placeholder Inity Core Core Module to your pro- Select Placeholder Inity Core The core The core	add dynamic content to the body of your email template. For example, to name. The placeholder will automatically be replaced by the of the entity type selected here. You need to add and configure the oject before you can create placeholders. a.EmailTemplateHelper	rds
Placeholders 4 Placeholders can be used to a ou can address the recipient ttribute values of an object o teflection Module to your pro- Select Placeholder Core inity Placeholder Name	Solution for an order of an additional 306 wo add dynamic content to the body of your email template. For example, iby name. The placeholder will automatically be replaced by the of the entity type selected here. You need to add and configure the oject before you can create placeholders. e.EmailTemplateHelper Delete Value	rds

1. Enter the name of the Template here.

This is just the name of the template. The recipient of the email won't see this name.

2. Fill in the subject of the template here.

The subject line will be shown to the recipient.

3. Fill in the HTML Preview first and create the plain text later.

Write the text of the email here. In the bar above it, there are options to adjust the settings of the text and links.

Links

To link a text to a link, do this:

• Select the text to which the link should be linked and press the outlined button:

Insert/Edit Link	×
URL	
https://www.utwente.nl/en/opendays/back	helor
Text to display	
www.utwente.nl/en/opendays/bachelor	
Title	
Open link in	
New window	~

• At "Open link in ..." you can choose how the link should be opened when clicked. The following choices are available:

Insert/Edit Link	×
URL	
https://www.utwente.nl/en/opendays/bachelor	
Text to display	
www.utwente.nl/en/opendays/bachelor	
Title	
Onen link in	
New window	~
Current window	
New window	\checkmark

Placeholders/Fishhook Fields

Note that creating placeholders and properly incorporating them into an email template is a precise job. **Be aware that placeholders are capital sensitive.**

You can create placeholders if you need to. However, the advice is not to do this yourself for the first year (or let Functional Management check it out) .

If the deeplink is not entered correctly, the student will receive the email but will not be able to access the questionnaire.

Error message for the student will then be:

UT. Matching - Dashboard × UT. 400 Ba	ad Request × UT. 400 Bad Request	× +		-	0	×
https://matching.utwente.nl/%7B%Deeplink%%71						
		400 Bad Request				
		nginx				

A placeholder/fishhook field makes it possible to have specific data filled in automatically. For example, it is possible to choose a setting in the placeholder that has the salutation "dear {%FullNameProspect%} à "dear Rob Meinders".

Setting up placeholders is done as follows:

Once you've opened a template to edit, click the arrow next to "select placeholder entity".

DIT EMAIL TEM	PLATE
mplate Name	Developst growing the investigation
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nail Content Plain text HTML Preview	/ Attachments
B ⊻ <i>I</i> Ξ	
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The program is required to any questions about the ad Kind regards. P P P P P P P P P P P P P	provide you with advice based on the completed questionnaire. Please note this is a general advice. If you have ice, you can contact

If there is no placeholder/ fishhook field: then, on the next screen:

 double-click on "emailtemplatehelper". (Please only use the emailtemplatehelper. This is the safest and best way to enter placeholders. Using the email template helper, there is the least chance of errors.)

SELECT AN OBJECTTYPE						
Model Image: Select name Persistence Image: Select name Persistence Image: Select name Operation Persistence Non-persistent Non-persistent Matching DashboardHeper Non-persistent Matching Program Persistable Matching Program Persistable Matching ProspectFinalMessage Persistable	SELECT A					
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• Select "type": attribute

			×
TOKEN DE	TAILS		
Token	{%	%}	
Description			
Туре		~	
Display Pattern			
	The pattern is optional to format your values. If specified it uses the java.text. Decimal/Format for formatting Decimal/Float/Currency attributes and the java.util.Formatter for all other fields. The module does not catch or check the pattern so please make sure that it is correct. Please see the respective JavaDocs for the format of the potential patterns.	Test	
Required?			
₽ Save	× Cancel		

• Then select the type of fishhook field/placeholder you want to use under "attribute".

Token	{% FullNameProspect %}	
Description	FullNameProspect	
Гуре	Attribute ~	
Objecttype	Core.EmailTemplateHelper	
Attribute	FullNameProspect	
Display Pattern		
	The pattern is optional to format your values. If specified it uses the java.text.DecimalFormat for formatting Decimal/Float/Currency attributes and the java.util formatter for all other fields. The module does not eatch or check the pattern so plases make sure that it is correct. Please see the respective JavaDocs for the format of the potential patterns.	
Required?		

Note: don't fill in the Display Pattern or use type "required"! This will cause a malfunction.

- Copy the name (e.g. FullNameProspect as in the example) to the red-bordered areas and then press "Save".
- The placeholder/fishhook field is now ready to be placed in the HTML text of the email template in the desired place.

There are two ways to include a placeholder in an email template: **Option 1**: type the placeholder as text: Dear {%FullNameProspect%} à will be: Dear Erik Eriksen

Option 2: (often used for deeplinks)

'Hide' the deeplink behind text. In the case of a deeplink, this looks better. The student sees this:

Fill in the Online Questionnaire <u>Please click here</u> before the final deadline of 1 June 2025, which takes about 10 minutes. Your answers will be sent to the programme staff. If you have registered for multiple UT or VU-programmes, you may be asked to fill in

Write the text as you want it presented in the email. (For example, 'Please click here'.) After creating the corresponding placeholder, link it to the desired piece of text. Do this as follows:

- Select the text you want to 'hide' the (in this case) deep link under.
- Click on the icon:



- Enter the placeholder below 'URL', (case sensitive)

- Because you first selected a text to hide the deep link under, it will automatically be filled in at 'Text to display'.

Insert/Edit Link		×
URL		
{%DeepLink%})
Text to display		
Please click here		
Title		
Open link in		
New window		~
	Cancel	Save
тетрилепере	P.7	

Press "save"

Plain text

If the text in HTML Preview is set up to your liking, it can be copied to the plain text with the click of a button. It is mandatory to have the Plain text filled as well.

To do this, click on "plain text" and then on "copy from html text".

When both the HTML preview, the plain text and attachments are set up to your liking, click save.

		×
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Save × Cancel		

In plain text, the text in the email is copied exactly. To do this, click on "copy from html text". In plain text, the placeholders do not work.

If you only want to use "plain text", make sure you have checked: "Use the plain text body only".

Created email templates can be seen under "email templates".

Attachments

It is possible to attach an attachment to an email template. To do this, click on "attachments".

EDIT EMAIL TEMPLAT	E	
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P Ei Bave x Cancel		

Indicate which document should be attached to it and click on "save".

Email settings

The applicant will receive emails at different times and in response to various circumstances.

Program	Bachelor Creative Tee	chnology 2024-2025 ~		
O IN PROG	GRESS	12 ADVISED	12 ALL	CONFIG
Matching events M	latching forms Email	templates Email settings Reminder se	ttings Intro text Import / Export	
EMAIL SETTINGS Here you can select the Name	e email templates that t	will be send. You can select a template that v	vill be send for each Matching form. Email template	
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Matching forms - set Thanks template: B-CR	thank you mail EA questionnaire (Prim	2 Jary)	Bedankt	~
Matching events	3			~
Advice 4 Positive (P))		Positief advies	~
Doubts (T)			Twijfel advies	~
Negative (N)			Negatief advies	~
Exemption (V)				\checkmark
Not participated (ND)				~
				Save

- 1. The welcome email will be sent automatically after the applicant has registered and been referred to the questionnaire. This can only be set up after the go-live has taken place. In this email the deep link is placed that leads to the "landing page". The landing page shows the link(s) to all questionnaires to be completed.
- 2. Link a thank you letter here that will be sent automatically when a questionnaire is submitted. This can be linked after the questionnaire has gone live.
- 3. Based on registration for a time slot at an event, it is possible to send the registrant an email with information about the event. Can only be linked after the questionnaire has gone live. This email must be sent manually by the Matching Admin at a time of your own determination (in groups).
- 4. After the advice has been issued, it is possible to send an e mail about it. Each type of advice has its own template. Sending the email is a manual action that can be carried out by the Matching advisor at a time of its own choosing. Every piece of advice needs its own email template.

Reminder settings

It is possible to automatically or manually send reminder emails to the prospective student if they have not yet submitted the questionnaire. Email reminders are only sent to prospects who have not yet submitted a questionnaire.

Emails can be sent by creating a specific email reminder template for it. The email that will be sent as a reminder is that specific email reminder. Of course the reminder email template has to be linked to "reminders" by the Matching admin.

Creating an email template can be done on the tab 'CONFIG/Email templates'. Configuring the email reminders can be done on the tab 'CONFIG/Reminder settings'.

No automatic reminders

10 IN PROGRESS	O ADVISED	11 ALL	CONFIG
Matching events Matching forms E	mail templates Email settings Hemi	nder settings Intro text Import / Export	
Automatic reminder	Yes O No		Send reminder
Email template	Reminder template		~
			Save

Choose "no" and link the appropriate template. The Send reminder button will then become visible. If the Matching Admin presses that button, all prospects who have not yet submitted a questionnaire at that moment will automatically receive an email from the template linked to it.

Automatic reminders

10 IN PROGRESS	O ADVISED	11 ALL	CONFIG							
Matching events Matching forms Em	nail templates Email settings Reminder s	ettings Intro text Import / Export								
Automatic reminder										
Period	Monthly									
Maximum reminders	2	2								
Email template	Reminder template	Reminder template \checkmark								

If you want to send automatic reminders, choose Yes. And then choose

- Period: weekly, biweekly or monthly
- Maximum reminders: The maximum number of times a prospective student will receive such a reminder
- Email template: Select the email reminder template you'd like to use.

The prospective student who has not yet submitted a questionnaire will then receive a reminder email periodically after that period from the template linked to it.

Intro Text

Each programme has its own landing page for the prospective student. A programme can place its own introductory text here, for example about its own programme, about the process or an explanation of how to fill out the questionnaire. For example: intro text from Advanced Technology:



Import/Export

The Matching type of the programme determines which buttons the Matching admin is shown on the Import/Export screen:



Button [Export data]

When you press the [Export data] button, an export is created. (csv document) **Use this document to fill in advices and import them into Matching.** Each form of Matching has its own data export. The alternating use of Dutch and English words is a deliberate choice. This has to do with preparation for importing into Osiris.

Matching	Mandatory matching	Numerus Fixus
Student nr	Studentnummer	Studentnummer
First name	Opleiding	Last name
Initials	Collegejaar	Collegejaar
Last name	Voltijd/deeltijd	brincode
Infixes	Datum SKC	CROHO
Birth date	Resultaat SKC	Voltijd/deeltijd
Emailadress	First name	Rangnummer
Residence country	Initials	First name
Birth country	Last name	Initials
Language	Infixes	Infixes
Advice	Birth date	Birth date
Academic year	Emailadress	Emailadress
Application date	Residence country	Residence_country
Deficient	Birth country	Birth_country
	Language	Language
+ additional export questions	Application date	Application date
and answers	Deficient	Deficient
	+ additional export questions	+ additional export
	and answers	questions
		and answers

These exports contain the following data:

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Note: The answers will only appear in the export if the questionnaire has been submitted.

After you have created the export document:

1. enter the advice in the 'Advice' column.

	Α	В	С	D	E	F	G	Н	1	J	K	L	М	Ν	0	Р	Q	
1	Student n	r First nam	<pre>Initials</pre>	Last name	Infixes	Birth date	Emailadre	Residence	Birth cour	Language	Advice	Academic	Applicatio	Deficient	Alphanum	Numeric	Table que	e Tab
2	1.000	April 1	A	Constant		24,286	10 10 10 10 10 10 10 10 10 10 10 10 10 1	t RoemeniÃ	RoemeniÅ	EN	Р	2024	28-2-2024		States.	1	10.00	
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5	1000	Sec.	1	10.00		10.0 Albert	1000	Nederland	Zuid-Kore	EN	Р	2024	18-2-2024		Barbin Ba	100	10.00	100
6	1000	10.0	1	Part No.	100 C	16. J. Mark	10.00	Nederland	Belarus	EN	Р	2024	3-2-2024		100	1.1	10.00	dia.
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11																		
12																		

- 2. Save the document
- 3. Use this document to import the advices in Matching. (Click here for instructions)

Value (Resultaat SKC)	Description
Ρ	Positive advice (P= Positief)
Ν	Negative advice (N= Negatief)
Т	Doubt but may come (T= Twijfel)
V	Exemption (V= Vrijstelling)
ND	Not participated (ND= Niet deelgenomen)

Notice: when entering the advice, only use the values P, N, T, V and NV

When entering rank numbers:

Only numbers are entered in the "rank number" column. Be careful not to enter words. **Note**: Additions and exceptions should be passed through email. These should not be entered in the Excel document.

Button [Import advice]

You can use this button to import given advices/rankings into Matching. There is only one document suitable to import advices into Matching.

- **Export data** \rightarrow fill in the data (rank numbers/advice), save the document and import this document via the [Import advice] button.

Importing advice/rank numbers into Matching

In order for advices/rank numbers to be imported into Osiris, they will first need to be imported into Matching. Only after the advices/rank numbers have been imported into Matching, they will be properly processed in the export for Osiris - document.

- Once you have incorporated the advices into the export data file:
- Save the file
- Then click the "import advice" button

IMPORT / EXPORT	
CSV with questionnaire	Advice export
Here you can export the data Matching type of this progra	a of the prospects to CSV, fill in the advice/ranking and import the CSV. m is Mandatory matching
🕒 Export data	Import advice
- Specify the location	of the file you'd like to import
	×
CSV IMPORT	
File	Q Browse
D Import × Cancel	

- Click on Import

Be aware that it's only possible to import advices/rankings from documents where all the students have an advice/rank number.

Documents with "empty" advises/rank numbers cannot be imported in Matching and Osiris. This will result in an error:

.csv docun	nent				Result after import in Matching:	
A B Studentur Opteiding B.met Studentur Opteiding B.met Statestation B.met Statesta	C D Cotlegejaa Vottijd/de 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024 2024	E Solution SKC Not attend Not attend Not attend Not attend Not attend Not attend Not attend Not attend Not attend	F Resultant V V ND ed ed ed ed ed	G t SKC	Result arter import in Matching: × ERROR There was an error importing the csv file for student number s3359352. The given Result can not be empty (provided value: ") Please update the csv file and try again. ✓ OK	
					OK OK	

.csv c	docum	ent			Result after import in Matching:
Studentnu C	Opleiding Colle	gejaa Voltijd/de	ee Datum SKC	Resultaat SKC	
10065062 6	1646	2024 V	Not attended	P	×
\$3368345.6	LISHT :	2024 V	Not attended	N	
COMPACT OF	LANT .	2024 V	Not attended	Т	
CONCINE.		2024 V	Not attended	V	INFORMATION
10000190	HOME	2024 V	Not attended	ND	
					Succesfully imported file!
					Please nav attention to the following:
					The endloading of accession and here here altered
					ine application of prospect: nas been skipped
					because this application already has an advice.
					The application of prospect: has been skipped
					because this application already has an advice.
					The application of prospect: has been skipped
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					The application of prospect: has been skipped
					because this application already has an advice.
					The application of prospect: has been skipped
					because this application already has an advice.
					~ ок

Export files can only be imported from complete lists:

The file above is imported successfully.

Students whose advice have been previously imported are skipped.

For numerus fixus/ rank numbers the steps to follow are the same, but it will look like this:

.c	sv doc	umen	t					Result after import in Matching:
	Α	В	С	D	E	F	G	
1	Studentnu	Naam	Collegejaa	Brincode	CROHO	Voltijd/de	Rangnummer	
2	00000	Patro de	2024	21PH	33198	V	5	
3	1.000	Acres 1	2024	21PH	33198	V	1	
4	0.000	100	2024	21PH	33198	V	4	INFORMATION
5	12002	Non-	2024	21PH	33198	V	2	Succesfully imported file
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7								
8								
								(✓ ок

TAB: Advice export > Export for Osiris

When you press the [Export for Osiris] button, an advice export document (.txt) is created, suitable for SAS to import the advices in Osiris.

Note: the order in the .txt document from left to right is a fixed order. If this is deviated from, it is not possible to import the results into Osiris.

You can only use this export file as a

• **Document** to pass advices/rank numbers to SAS employees so they can use the file to import advices/rank numbers into Osiris.

With this document, a number of things are important to know:

• If additional data is placed in this document, it is not possible for the SAS employee to import the document into Osiris.

32

• If the data/values to be filled in are deviated, the document cannot be used to import advices/rank numbers in Osiris

To export advices:

DASHBOAR	D		
Program	r Trainenings 2010-2020 V) _	
O IN PROGRESS	13 ADVISED	13 ALL	CONFIG
Matching events Matching forms E IMPORT / EXPORT CSV with questionnaire Advice expo	imail templates Email settings Reminder s	ettings Intro text Import / Export	
E+ Export for Osiris			4 1 to 13 of 13 >> >> Q

- Press the button "export for Osiris"
- Select "no" if you'd like to have a complete list of all prospects with an advice

	×
EXPORT ADVICE	-
Do you want to export advices from a specific date? Yes O No	r -
Save × Cancel	

- Select "yes" to create a list with advices given to students with a "from date".

Be aware: the from date is the specified date till now that prospects have <u>submitted</u> the questionnaire.

Diakrites in documents

Good to know (not strictly necessary to use):

a csv document containing diacritics (special characters such as ö in 'Özman') will not display properly by default when a csv file is opened with Excel. However, there is a way to do this correctly:

- Open a blank Excel document
- Select the "data" or "gegevens" tab
- Click on 'from text file/CSV" or "Uit teksbestand/CSV"

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1 2 3 4 5 6 7 8														

- Select the export document you'd like to open and press "Import"/"Importeren"

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	B-BRT	2024	V	null		Sec. 1		Contraction of the Contraction o		30-5-2006	osiris-test@utwente.nl	()
	B-BRT	2024	V	null		Sec.	10.00	theme in the second sec	÷.	26-7-2006	osiris-test@utwente.nl	()
-	B-BRT	2024	V	8-1-2025 13:30:00		1000	10. C	dest.		1-1-2006	osiris-test@utwente.nl	()
1000	B-BRT	2024	V	null		170.000 A	10 A	1785		21-9-2006	osiris-test@utwente.nl	1
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- Select "load/ laden" or "Transform data/ gegevens transformeren"

After "load/laden" the result will be:

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Be	stand Start Inv	oegen Pagina	a-indeling Formules	Gegevens	Controleren E	eeld Automatis	eren Help Acro	bat <u>Tabelo</u>	ontwerp Query				
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1	Studentnummer	✓ Opleiding	🕶 Collegejaar 💌 Volti	ijd/deeltijd	🛛 Datum SKC 💌	Resultaat SKC 🔽	First name	✓ Initials ✓	Last name	✓ Infixes	Birth date 🔽	Emailadress 🔹	Residence country
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3	-Dense De	B-BRT	2024 V				And an	A.,	Course and the second s		7-6-2004	osiris-test@utwente.nl	Roemenië
4	10000	B-BRT	2024 V				Sec.	- N	and the second s		23-7-2007	osiris-test@utwente.nl	Verenigde Arabische Emirate
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6	- 10 C - 10 C	B-BRT	2024 V		8-1-2025 08:00		the second se	1. C	Received and a second sec		17-11-2006	osiris-test@utwente.nl	Oman
7	10.00	B-BRT	2024 V				Mark 1	10.	Photo: Sector Sector		24-7-2006	osiris-test@utwente.nl	Nederland
8	CONTRACTOR OF	B-BRT	2024 V				lates -		Distantion 1		17-5-2005	osiris-test@utwente.nl	Noorwegen
9	of Charles	B-BRT	2024 V				late the	1.55	Name and a first to an discipation		6-10-2003	osiris-test@utwente.nl	Frankrijk
10	100000	B-BRT	2024 V				Sample .		Name		30-5-2006	osiris-test@utwente.nl	India
11	1000	B-BRT	2024 V				March 1	10.00 A	House .	100	26-7-2006	osiris-test@utwente.nl	Nederland
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17	LA STREET	B-BRT	2024 V				Real Property lies	n 8.	No. of Concession, Name		30-11-2005	osiris-test@utwente.nl	Nederland
18	10000	B-BRT	2024 V				Second Se		Networks		28-10-2005	osiris-test@utwente.nl	Nederland
19	1000	B-BRT	2024 V				Registra .	1.	Taria a		13-2-2005	osiris-test@utwente.nl	Turkije
20													

Give the document a name and save document as CSV (Comma delimited(*.csv) / CSV (gescheiden door lijstscheidingsteken)(*.csv)

Now the edited document is ready to import in the Matching application.

↑ E⇒ OneDrive - University of Twente	
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XML Spreadsheet 2003 (*.xml)	
Microsoft Excel 5.0/95 Workbook (*.xls)	
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After "Transform data/ gegevens transformeren" the result will be:

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Press "Sluiten en laden"/ "Close and load" Save the document as described above.

Good to know

After submitting a questionnaire, prospects can always return to their "tile" at any time (by clicking the deep link they've received in the welcome email).



Here you can see that the tile is green and it says "completed". It has been submitted. The questionnaire can no longer be edited.

If the student clicks on the tile, he/she will end up here. When the student hovers over the questionnaire with the mouse pointer, a button to a downloadable pdf document of the questionnaire will appear. The bordered text also indicates that this link will always be available.

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Questions

If you have any questions, you can send an email to matching-ces@utwente.nl

Clearly state which programme and whether it concerns an issue, proposed change in a questionnaire or a possible request for a new functionality.