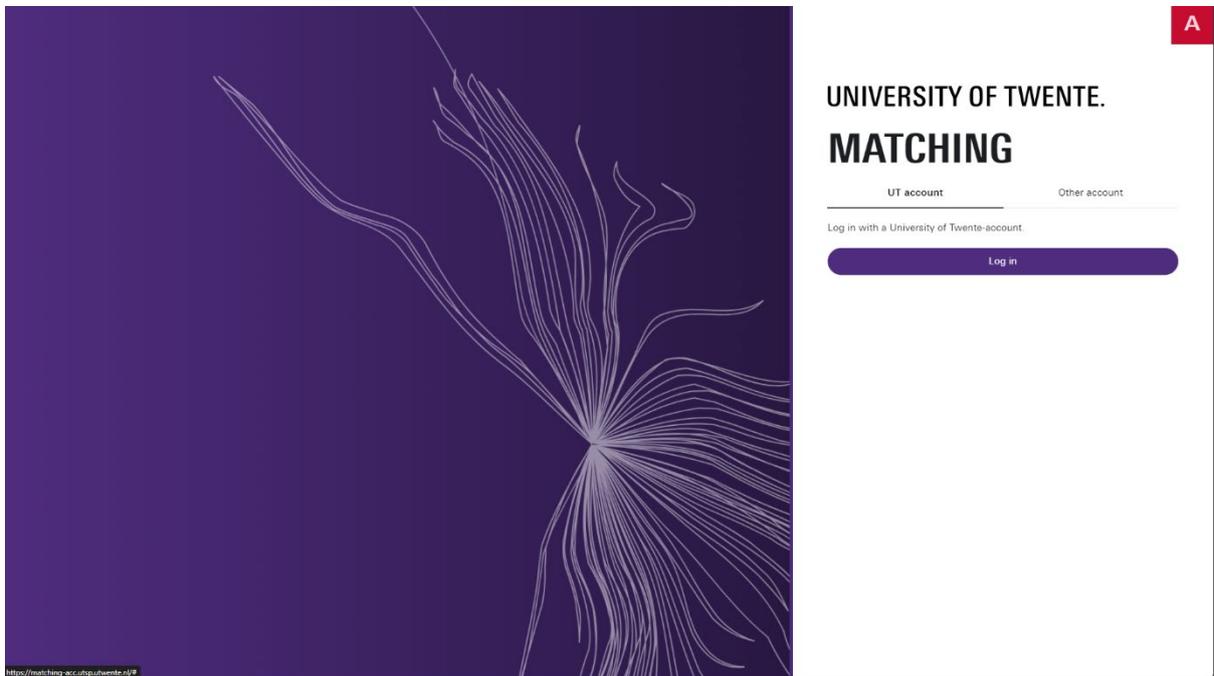
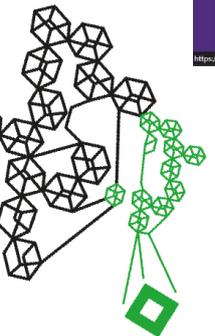
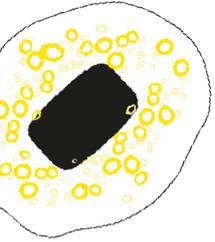


# Manual Matching Application for Matching admin



February 2025

## Table of Contents

Version management .....	3
Question types .....	4
Mandatory .....	4
Trigger question.....	4
Show in excel export.....	5
Matching event .....	6
Creating or changing a matching event .....	7
Tab details .....	7
Tab Timeslots .....	7
Maintaining a scheduled timeslot .....	8
Maintaining an unscheduled timeslot.....	9
Tab Participants.....	10
Matching Forms .....	14
Preview Matching forms.....	14
Editing trigger and export questions .....	15
Email templates.....	16
HTML Preview .....	16
Links .....	18
Placeholders/Fishhook Fields .....	18
Plain text.....	22
Attachments .....	23
Email settings .....	24
Reminder settings.....	25
No automatic reminders .....	25
Automatic reminders.....	25
Intro Text .....	27
Import/Export .....	28
Button [Export data].....	29
Button [Import advice] .....	30
Importing advice/rank numbers into Matching .....	31
TAB: Advice export > Export for Osiris.....	32
Diakrites in documents .....	33
Good to know .....	37
Questions .....	38

# 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 must 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.

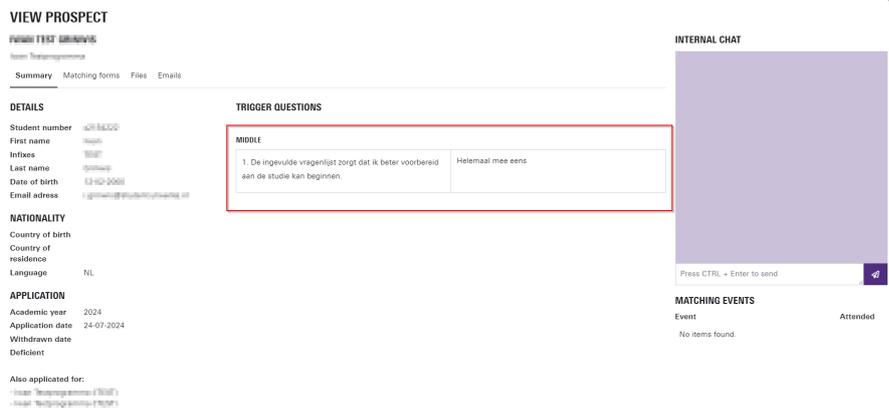
Below you can register for one of the matching events we are organising. Applicants located in the Netherlands are expected to register for one of the on-campus matching events. Applicants located outside the Netherlands are of course welcome to join us on campus as well. \*

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".



## 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

Grade ⓘ  Trigger question ⓘ  Show in excel export ⓘ

Mandatory

Excel label  
Wiskunde B cijfer ⓘ

1st Sort # Question  
1 9. Wiskunde B cijfer:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S		
1	Student nr	Program	Academic year	Program intensity	Date	Matching event	Result	Matching event	First name	Initials	Last name	Inflixes	Birth date	Emailaddress	Residence country	Birth country	Language	Application date	Deficient	Wiskunde B cijfer
2	1000000000	B-TN	2024	V					Wiskunde	W	Wiskunde	W	11-11-2005 00:00	Wiskunde@wiskunde.nl	Nederland	Nederland	NL	1-11-2023 00:00		
3	1000000000	B-TN	2024	V					Wiskunde	W	Wiskunde	W	16-10-2006 00:00	Wiskunde@wiskunde.nl	Nederland	Nederland	NL	25-12-2023 00:00		
4	1000000000	B-TN	2024	V					Wiskunde	W	Wiskunde	W	3-3-2006 00:00	Wiskunde@wiskunde.nl	Nederland	Nederland	NL	29-10-2023 00:00		
5	1000000000	B-TN	2024	V	11-8-2024	13:00			Wiskunde	W	Wiskunde	W	8-7-1978 00:00	Wiskunde@wiskunde.nl	..	NL	NL	18-7-2024 13:38		6
6	1000000000	B-TN	2024	V	30-8-2024	17:00			Wiskunde	W	Wiskunde	W	19-6-1973 00:00	Wiskunde@wiskunde.nl	NL	NL	NL	1-7-2024 00:00		

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.

Name	Description
Matching event voorjaar	Matching event voorjaar, het leukste matching event op de UT.
Matching event najaar	Matching event najaar voor de vroege vogels

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.

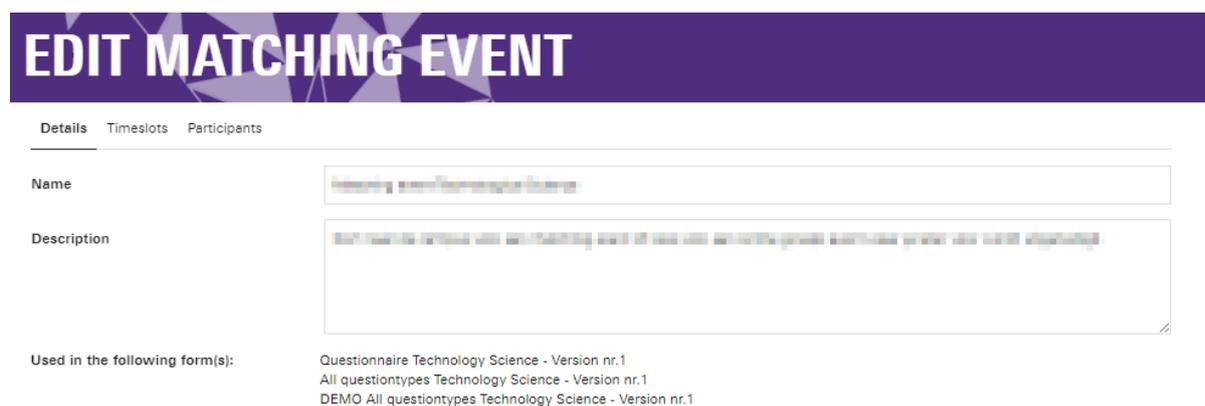
- 'New': Creates a new matching event
- 'Edit': Changes the selected matching event
- 'Delete': Deletes the selected matching event. Be careful if it has been used in a questionnaire and prospective students have subscribed to it. What you delete is no longer available.

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 MATCHING EVENT**

Details Timeslots Participants

Name:

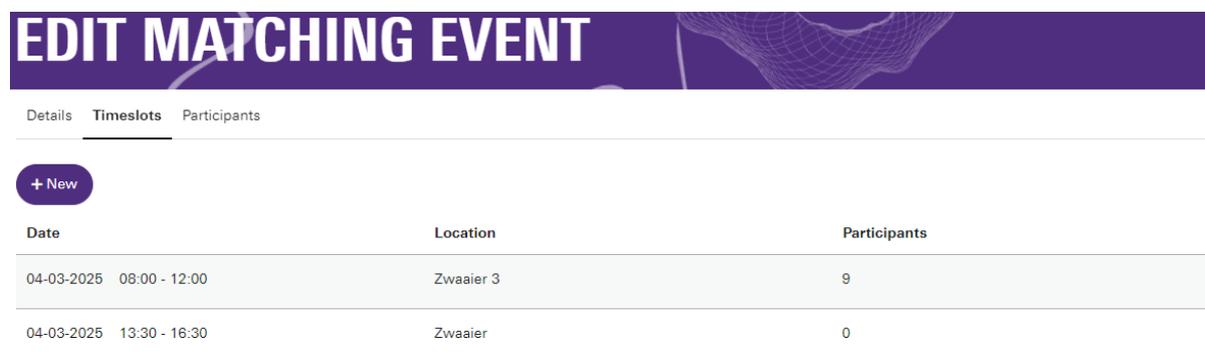
Description:

Used in the following form(s):

- Questionnaire Technology Science - Version nr.1
- All 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:

[+ New](#)

Date	Location	Participants	
18-03-2025, 08:00 - 12:00	De Waaijer	3/20	
18-03-2025, 13:00 - 17:00	De Waaijer	2/20	
18-03-2025, 08:00 - 12:00	Interaggregatietoernooi (Hore)	0	
18-03-2025	Interaggregatietoernooi (Hore)	0	
18-03-2025	Interaggregatietoernooi (Hore)	0	

## Maintaining a scheduled timeslot



### NEW TIME SLOT

Location

Online  Yes  No

Date  

Specify time  Yes  No

Start time  

End time  

Registration close date  

Specify max participants  Yes  No

Max participants

---

[Save](#) [Cancel](#)

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

✕

**NEW TIME SLOT**

Location

Online  Yes  No

Date

Specify time  Yes  No

Registration close date

Specify max participants  Yes  No

---

Save ✕ Cancel

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 Participants/Prospects

First name	Last name	Email	Timeslot	Attended
[Redacted]	[Redacted]	osiris-test@utwente.nl	10-02-2025 08:00 – 12:00   De Zwaaijer	No
[Redacted]	[Redacted]	osiris-test@utwente.nl	10-02-2025 08:00 – 12:00   De Zwaaijer	Yes
[Redacted]	[Redacted]	osiris-test@utwente.nl	10-02-2025 08:00 – 12:00   De Zwaaijer	No
[Redacted]	[Redacted]	osiris-test@utwente.nl	10-02-2025 13:00 – 17:00   De Zwaaijer	No
[Redacted]	[Redacted]	osiris-test@utwente.nl	10-02-2025 13:00 – 17:00   De Zwaaijer	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.
- **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.

Prospects Not sent Sent

First name [ ] Last name [ ] Email [ ] Timeslot [ ]

Attended [ ]

Export to Excel Select all Deselect all Toggle attendance Change timeslot

1 to 9 of 9 Hide search ^

## Mailing about matching event: Tab Participants/not sent

# EDIT MATCHING EVENT

Details Timeslots **Participants**

Prospects **Not sent** Sent

First name  Last name  Email  Timeslot

Attended

Select all  Deselect all

1 to 20 of 23 Hide search ^

First name	Last name	Email	Timeslot	Attended
Henry	Walker	h.walker@purdue.edu	04-04-2025   online	No
Walker	Henry	h.walker@purdue.edu	12-06-2025   online	No
Walker	Henry Walker	h.walker@purdue.edu	04-04-2025   online	No
Henry	Walker	h.walker@purdue.edu	14-03-2025   on campus UT	No
Walker	Henry	h.walker@purdue.edu	12-06-2025   online	No
Walker	Henry	h.walker@purdue.edu	14-03-2025   on campus UT	No
Henry	Walker	h.walker@purdue.edu	04-04-2025   online	No
Walker	Henry Walker	h.walker@purdue.edu	04-04-2025   online	No
Walker	Henry	h.walker@purdue.edu	25-04-2025   on campus UT	No
Walker	Henry	h.walker@purdue.edu	14-03-2025   on campus UT	No
Walker	Henry	h.walker@purdue.edu	04-04-2025   online	No
Walker	Henry	h.walker@purdue.edu	04-04-2025   online	No
Walker	Henry	h.walker@purdue.edu	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 sent** Sent

First name  Last name  Email  Timeslot **14-03-2025 | on campus L**

Attended

Select all  Deselect all

1 to 5 of 5 Hide search ^

First name	Last name	Email	Timeslot	Attended
John	De Vries	john.de.vries@univ.nl	14-03-2025   on campus UT	No
Anna	De Vries	anna.de.vries@univ.nl	14-03-2025   on campus UT	No
Janneke	De Vries	janneke.de.vries@univ.nl	14-03-2025   on campus UT	No
Mark	De Vries	mark.de.vries@univ.nl	14-03-2025   on campus UT	No
Thijs	De Vries	thijs.de.vries@univ.nl	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 MATCHING EVENT

Details Timeslots **Participants**

Prospects Not sent **Sent**

Select all  Deselect all

1 to 4 of 4

First name	Last name	Email	Timeslot	Email sent	Attended
John	De Vries	john.de.vries@univ.nl	10-02-2025 08:00 – 12:00   De Zwaaijer	24-09-2024 ...	No
Anna	De Vries	anna.de.vries@univ.nl	10-02-2025 08:00 – 12:00   De Zwaaijer	12-12-2024 ...	Yes
Janneke	De Vries	janneke.de.vries@univ.nl	10-02-2025 08:00 – 12:00   De Zwaaijer	12-12-2024 ...	No
Thijs	De Vries	thijs.de.vries@univ.nl	10-02-2025 13:00 – 17:00   De Zwaaijer	25-09-2024 ...	Yes

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".

Name	Status	Form type	Version	Last changed by	Changed date	Primary
Outro B-PSY	Current	Outro	1	Functional Admin	19-07-2024	No
Intro B-PSY	Current	Intro	2	Functional Admin	03-10-2024	No
Middle B-PSY	Current	Middle	4	Functional Admin	03-10-2024	Yes
Outro (draft) B-PSY	Draft	Middle	2	Functional Admin	30-10-2024	No
Middle (draft) B-PSY	Current	Middle	2	Functional Admin	30-10-2024	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.

**ORIENTATION**

1. How did you form an opinion about this programme? (more than one answer is possible)

- Websites of one or more educational institutions
- Attendance at Open Days
- Student-For-a-Day
- Conversations with friends or family members
- Conversations with a lecturer/student counsellor at my previous institution
- Conversations with a lecturer/student counsellor at this institution
- Conversations with students who have followed, or who are currently following, the programme
- Conversations with people employed in this field
- Information in the media
- Other, namely ...

2. What were the main reasons for selecting this programme? (more than one answer is possible)

- The content of the programme appeals to me
- The quality of the programme
- The programme offers me good career prospects and the chance to earn a high salary
- Other, namely ...
- On the recommendation of a family member, friend or acquaintance
- On the recommendation of a student counsellor
- Friends/acquaintances follow this programme/attend the University of Twente
- The traveling distance
- I think Enschede is a nice town for students
- I did not want to work yet
- Other, namely...

X Close preview   Previous   Next

## 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 Ⓢ A

### DASHBOARD

Program: Psychology 2024-2025 1

Matching events: Matching forms 2 | Email templates | Email settings | Intro text | Import / Export

#### MATCHING FORMS

Preview Edit trigger- and excel questions 3 1 to 3 of 3

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:

## PSYCHOLOGY 2024-2025 - MIDDLE B-PSY

Below you can choose which questions and answers will be shown on the prospect overview as so called trigger questions. And which questions (and answers) will be in the export. The label is mandatory and will be shown as column header in the export.

Question	Is trigger question	Show in excel	Excel label
Alphanumeric	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Numeriek	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Likert English	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="123434"/>
Likert Dutch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Likert Dutch"/>
Multiple choice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="MC"/>
Multi select	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="ddd"/>
Matching event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
File upload	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Date Picker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Date Picker"/>
Date period	<input type="checkbox"/>	<input type="checkbox"/>	
Table 2 headers	<input type="checkbox"/>	<input type="checkbox"/>	
Multiple choice met vervolgvraag	<input type="checkbox"/>	<input type="checkbox"/>	
Hoe laat is het?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

X Close

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.

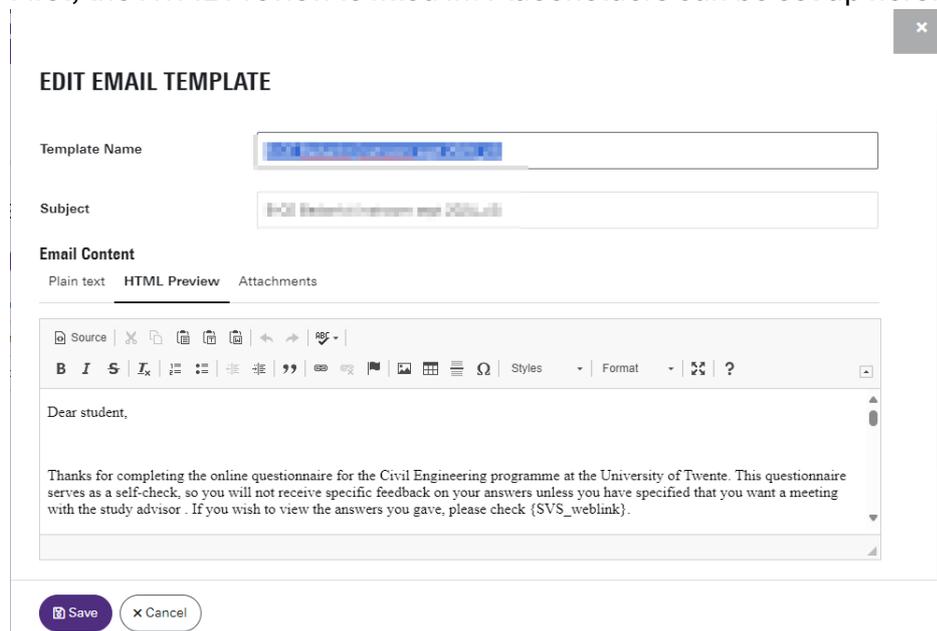
There are two types of text in an email template:

- 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.



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 Google Chrome and Microsoft Edge. Please use one of these browsers for the best experience

Program Technische Natuurkunde 2024 - 2025 2024-2025

1 IN PROGRESS 0 ADVISED 1 ALL CONFIG

Matching events **Email templates** Email settings TEMP Create questionnaire Export

## EMAIL TEMPLATES

+ New Edit Delete Duplicate Refresh tokens 1 to 3 of 3

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:

**EDIT EMAIL TEMPLATE**

1. Template Name: B-CE Bedankt (instroom sept 2024\_v2)

2. Subject: B-CE Bedankt (instroom sept 2024\_v2)

3. Email Content: Plain text HTML Preview Attachments

4. Placeholders: Select Placeholder Entity: Core.EmailTemplateHelper

Placeholder Name: (%DeepLink%) Value: Core.EmailTemplateHelper/DeepLink

Save Cancel

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.

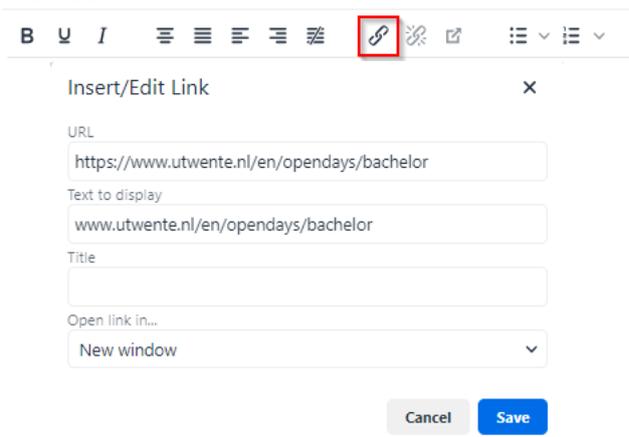
2. Fill in the subject of the template here.  
The subject line will be shown to the recipient.
3. Fill in the HTML Preview first and create the plain text later.

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

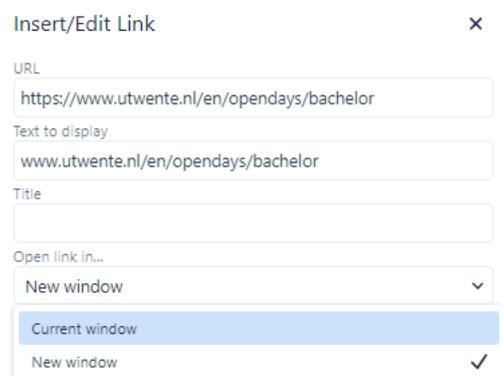
## Links

To link a text to a link, do this:

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



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



## 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:



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".

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**

Module

Object name

Persistence

Select 1 to 20 of 30

Module	Object name	Persistence
Core	AccountCustom	Persistable
Core	CollegeYear	Persistable
Core	EmailTemplateHelper	Non-persistent
Core	Settings	Persistable
Matching	ChatMessage	Persistable
Matching	DashboardHelper	Persistable
Matching	FormVersionHelper	Non-persistent
Matching	MatchingEvent	Persistable
Matching	Member	Persistable
Matching	Program	Persistable
Matching	ProgramEmailTemplate	Persistable
Matching	ProgramYear	Persistable
Matching	ProspectApplication	Persistable
Matching	ProspectFile	Persistable
Matching	ProspEmailMessage	Persistable
Matching	TimeSlot	Persistable

- Then click on "+new"

Placeholder

Select Placeholder Entity Core.EmailTemplateHelper

+ New Edit Delete 0 to 0 of 0

Placeholder Name	Value
No items found.	

Save Cancel

- Select "type": attribute

## TOKEN DETAILS

Token

Description

Type

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 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 DETAILS

Token

Description

Type

Objecttype

Attribute

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 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](#)

**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 [Please click here](#) 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’.

 A screenshot of the 'Insert/Edit Link' dialog box. It has a title bar with a close button (X). The fields are:
 

- URL: Contains the placeholder {%DeepLink%}. This field is highlighted with a red box.
- Text to display: Contains the text 'Please click here'. This field is also highlighted with a red box.
- Title: An empty text field.
- Open link in...: A dropdown menu currently set to 'New window'.

 At the bottom, there are 'Cancel' and 'Save' buttons.

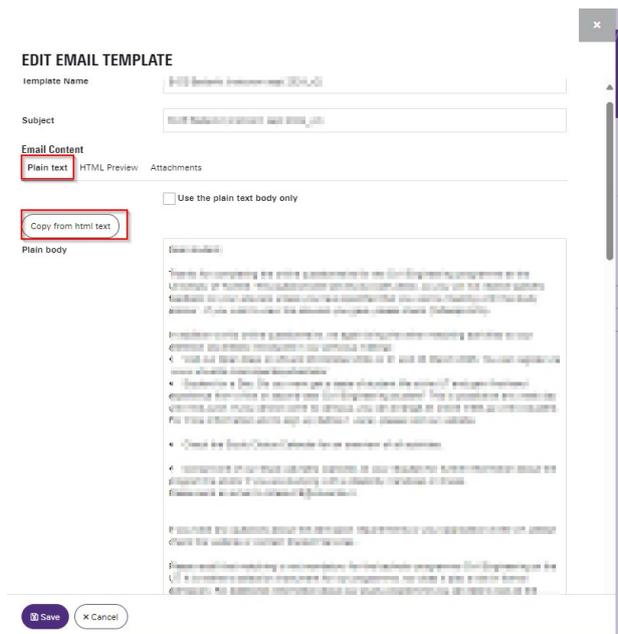
- Press “save”

### 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.



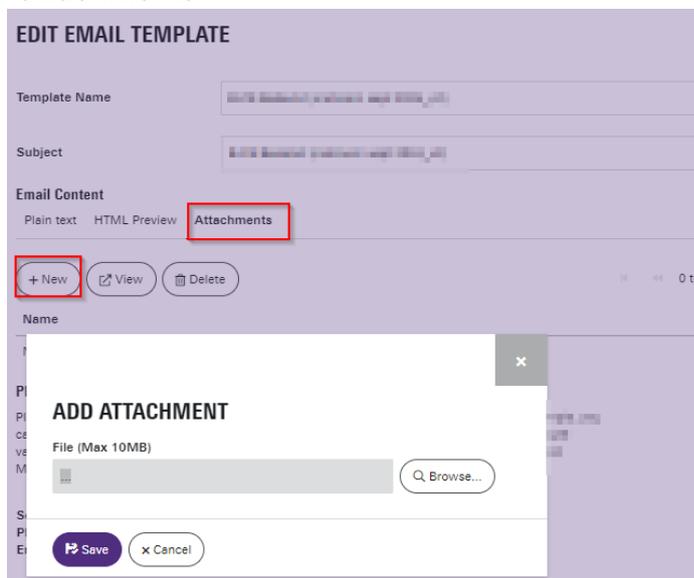
In plain text, the text in the email is copied exactly. To do this, click on "copy from html text". In plain text, the placeholders do not work.

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".



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

0  
IN PROGRESS 12  
ADVISED 12  
ALL CONFIG

Matching events Matching forms Email templates **Email settings** Reminder settings Intro text Import / Export

## EMAIL SETTINGS

Here you can select the email templates that will be send. You can select a template that will be send for each Matching form.

Name	Email template
<b>Matching forms - set welcome mail</b> <span>1</span> B-CREA questionnaire (Primary)	<input type="text" value="Uitnodiging"/>
<b>Matching forms - set thank you mail</b> <span>2</span> Thanks template: B-CREA questionnaire (Primary)	<input type="text" value="Bedankt"/>
<b>Matching events</b> <span>3</span>	<input type="text"/>
<b>Advice</b> <span>4</span>	
Positive (P)	<input type="text" value="Positief advies"/>
Doubts (T)	<input type="text" value="Twijfel advies"/>
Negative (N)	<input type="text" value="Negatief advies"/>
Exemption (V)	<input type="text"/>
Not participated (ND)	<input type="text"/>

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

The screenshot shows the 'Reminder settings' interface. At the top, there are four boxes: '10 IN PROGRESS', '0 ADVISED', '11 ALL', and a 'CONFIG' button with a gear icon. Below these is a navigation bar with tabs: 'Matching events', 'Matching forms', 'Email templates', 'Email settings', 'Reminder settings' (active), 'Intro text', and 'Import / Export'. The main content area has 'Automatic reminder' set to 'No' (selected with a radio button). There is a 'Send reminder' button with an envelope icon. Below that, 'Email template' is set to 'Reminder template' in a dropdown menu. A 'Save' button is at the bottom right.

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

The screenshot shows the 'Reminder settings' interface for automatic reminders. It has the same top navigation and boxes as the previous screenshot. In the 'Automatic reminder' section, 'Yes' is selected with a radio button. The 'Period' is set to 'Biweekly' (selected with a radio button). The 'Maximum reminders' is set to '2' in a text input field. The 'Email template' is set to 'Reminder template' in a dropdown menu. A 'Save' button is at the bottom right.

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:

UNIVERSITY OF TWENTE | MATCHING ®

[Back / B-AT Matching](#)

## B-AT MATCHING

**Welcome to the Advanced Technology matching page!**

Advanced Technology is a three-year Bachelor's programme that focuses on a broad range of science and engineering disciplines. During the first year, you will become familiar with the basics of technical and scientific disciplines. In the projects and practical assignments – which together make up around 20% of your programme – you can immediately apply the knowledge you gain. The second year is about broadening and deepening your knowledge and you can start to pursue your own interests by getting familiar with popular master's programmes. The third year is made up of elective modules in which you will prepare yourself for the master's of your choice and for your graduation assignment – the final step you must take before you can call yourself a Bachelor of Science. If you would like to know more about our programme or our curriculum, please visit our website.

The community of Advanced Technology students is very diverse, with students coming from very different backgrounds. Our study association is a very important factor in creating a nice community, by organising extracurricular activities and opportunities for educational and personal development. If you would like to take a look at what they do, please take a look at their website.

We are looking forward to meeting you at one of our matching events this year. In case of questions, please reach out to [advanced\\_technology@utwente.nl](mailto:advanced_technology@utwente.nl).

### MATCHING FORMS

Form nr	Form name	Program	Last changed	Status
1	B-AT questionnaire 2025	Bachelor Advanced Technology	2025-01-28 10:00	Open

# Import/Export

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

## Matching:

16  
IN PROGRESS

0  
ADVISED

17  
ALL

CONFIG

Matching events Matching forms Email templates Email settings Reminder settings Intro text **Import / Export**

**IMPORT / EXPORT**

CSV with questionnaire

Here you can export the data of the prospects to CSV, fill in the advice/ranking and import the CSV.  
Matching type of this program is Matching

Export data Import advice

1 to 16 of 16

## CSV with questionnaire:

- Export data
- import advice

## Mandatory Matching:

Matching events Matching forms Email templates Email settings Reminder settings Intro text **Import / Export**

**IMPORT / EXPORT**

CSV with questionnaire Advice export

Here you can export the data of the prospects to CSV, fill in the advice/ranking and import the CSV.  
Matching type of this program is Mandatory matching

Export data Import advice

## CSV with questionnaire:

- Export data
- Import advice

## Advice export:

- Export for Osiris

## Numerus Fixus:

Matching events Matching forms Email templates Email settings Reminder settings Intro text **Import / Export**

**IMPORT / EXPORT**

CSV with questionnaire Advice export

Here you can export the data of the prospects to CSV, fill in the advice/ranking and import the CSV.  
Matching type of this program is Numerus fixus

Export data Import advice

## CSV with questionnaire:

- Export data
- Import advice

## Advice export:

- Export to CSV

## 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.

These exports contain the following data:

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 and answers	Application date	Application date
	Deficient	Deficient
	+ additional export questions and answers	+ additional export questions and answers

**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.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Student nr	First name	Initials	Last name	Infixes	Birth date	Emailadres	Residence	Roemeni	Roemeni	EN	Academic	Applicatie	Deficient	Alphabetic	Numerical	Table que Tab
2						20-01-2004					P	2024	28-2-2024				
3						1-10-2004					P	2024	#####				
4						1-04-1999					T	2024	3-3-2024	VWO - N			
5						01-01-2004					P	2024	18-2-2024				
6						04-11-2000					P	2024	3-2-2024				
7						20-11-2004					P	2024	#####				
8						01-01-2004					P	2024	#####				
9						01-01-2004					P	2024	19-2-2024				
10						15-08-2000					P	2024	30-1-2024				
11																	
12																	

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

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

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

**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** → 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.

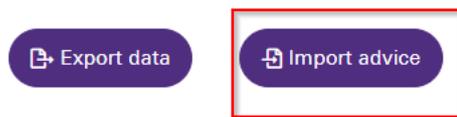
Once you have incorporated the advices into the export data file:

- Save the file
- Then click the “import advice” button

## IMPORT / EXPORT

CSV with questionnaire    Advice export

Here you can export the data of the prospects to CSV, fill in the advice/ranking and import the CSV. Matching type of this program is Mandatory matching



- Specify the location of the file you’d like to import



- 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 document							Result after import in Matching:
A	B	C	D	E	F	G	
Studentnu	Opleiding	Collegejaar	Volgtijd/dec	Datum SK	Resultaat SK	SKC	
10000000	B-BHT	2024		Not attend	P		
10000000	B-BHT	2024		Not attend	N		
10000001	B-BHT	2024		Not attend	T		
10344004	B-BHT	2024		Not attend	V		
10000000	B-BHT	2024	V	Not attend	ND		
10000000	B-BHT	2024	V	Not attend			
10000000	B-BHT	2024	V	Not attend			
10000000	B-BHT	2024	V	Not attend			
10344000	B-BHT	2024	V	Not attend			
10000004	B-BHT	2024	V	Not attend			

**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.

Export files can only be imported from complete lists:

.csv document				Result after import in Matching:
Studentnu	Opleiding	Collegejaar	Voltijd/de Datum SKC	Resultaat SKC
10000000000000000000	2024 V	Not attended	P	
10000000000000000000	2024 V	Not attended	N	
10000000000000000000	2024 V	Not attended	T	
10000000000000000000	2024 V	Not attended	V	
10000000000000000000	2024 V	Not attended	ND	

**INFORMATION**

Successfully imported file!

Please pay attention to the following:

The application of prospect: [redacted] has been skipped because this application already has an advice.

The application of prospect: [redacted] has been skipped because this application already has an advice.

The application of prospect: [redacted] has been skipped because this application already has an advice.

The application of prospect: [redacted] has been skipped because this application already has an advice.

The application of prospect: [redacted] has been skipped because this application already has an advice.

The application of prospect: [redacted] has been skipped because this application already has an advice.

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:

.csv document							Result after import in Matching:
	A	B	C	D	E	F	G
1	Studentnu	Naam	Collegejaar	Brincode	CROHO	Voltijd/de	Rangnummer
2	10000000000000000000	10000000000000000000	2024	21PH	33198	V	5
3	10000000000000000000	10000000000000000000	2024	21PH	33198	V	1
4	10000000000000000000	10000000000000000000	2024	21PH	33198	V	4
5	10000000000000000000	10000000000000000000	2024	21PH	33198	V	2
6	10000000000000000000	10000000000000000000	2024	21PH	33198	V	3
7							
8							

**INFORMATION**

Successfully imported file!

## 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.

- 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:

The screenshot shows the Osiris Dashboard interface. At the top, there's a purple header with the word 'DASHBOARD' in white. Below the header, there's a navigation menu with several options: 'Matching events', 'Matching forms', 'Email templates', 'Email settings', 'Reminder settings', 'Intro text', and 'Import / Export'. The 'Import / Export' option is highlighted with a red box. Below the navigation menu, there are three large cards: the first shows '0 IN PROGRESS', the second shows '13 ADVISED', and the third shows '13 ALL'. To the right of these cards is a 'CONFIG' button with a gear icon, also highlighted with a red box. Below the cards, there's a section titled 'IMPORT / EXPORT' with a sub-section 'Advice export' highlighted. At the bottom of this section, there's a button labeled 'Export for Osiris' with a document icon, also highlighted with a red box. The page number '1 to 13 of 13' is visible at the bottom right.

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

The screenshot shows a dialog box titled 'EXPORT ADVICE'. The dialog contains the question 'Do you want to export advices from a specific date?' with two radio button options: 'Yes' and 'No'. The 'No' option is selected. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

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

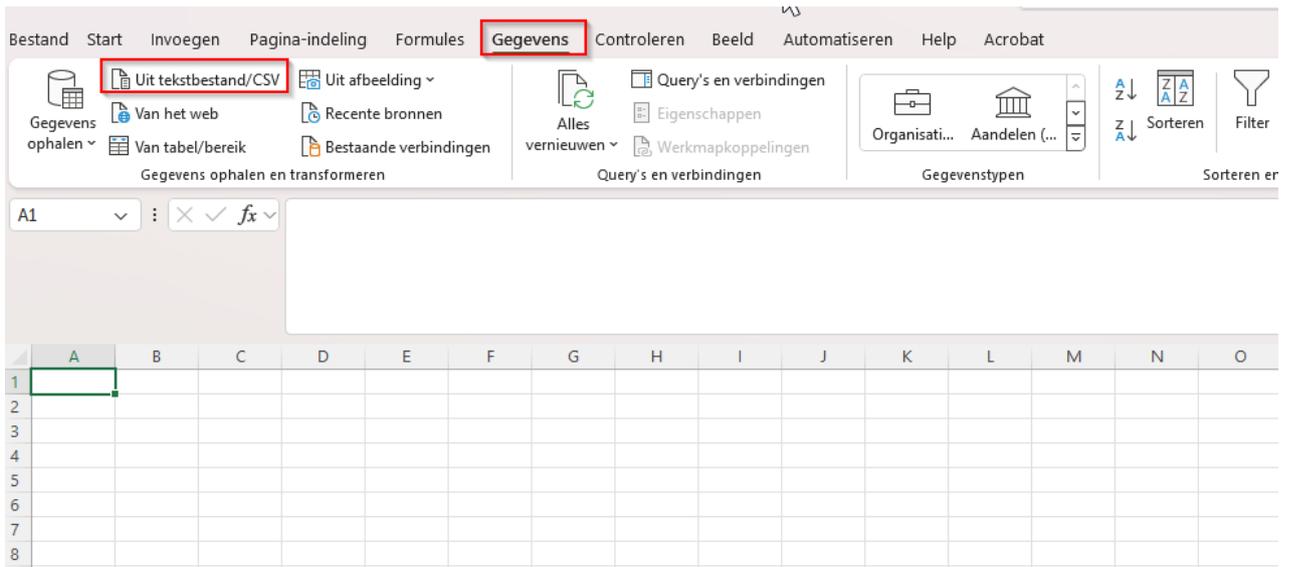
Be aware: the from date is the specified date till now that prospects have submitted the questionnaire.

## Diakrites in documents

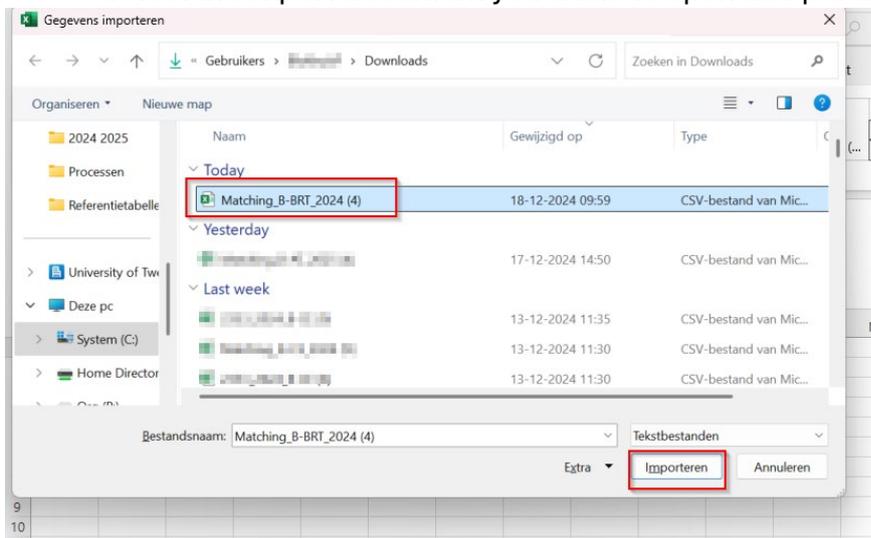
Good to know (not strictly necessary to use):

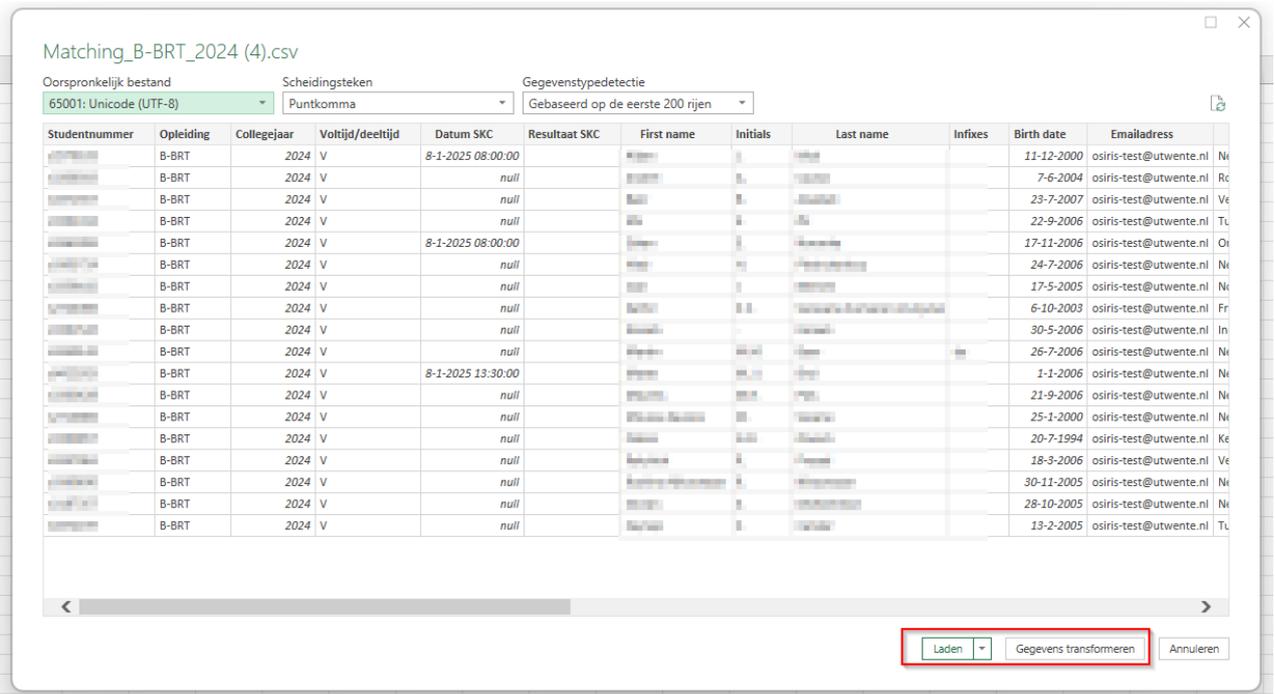
a csv document containing diacritics (special characters such as ö in ‘Özman’) will not display properly by default when a csv file is opened with Excel. However, there is a way to do this correctly:

- Open a blank Excel document
- Select the “data” or “gegevens” tab
- Click on ‘from text file/CSV’ or “Uit teksbestand/CSV”



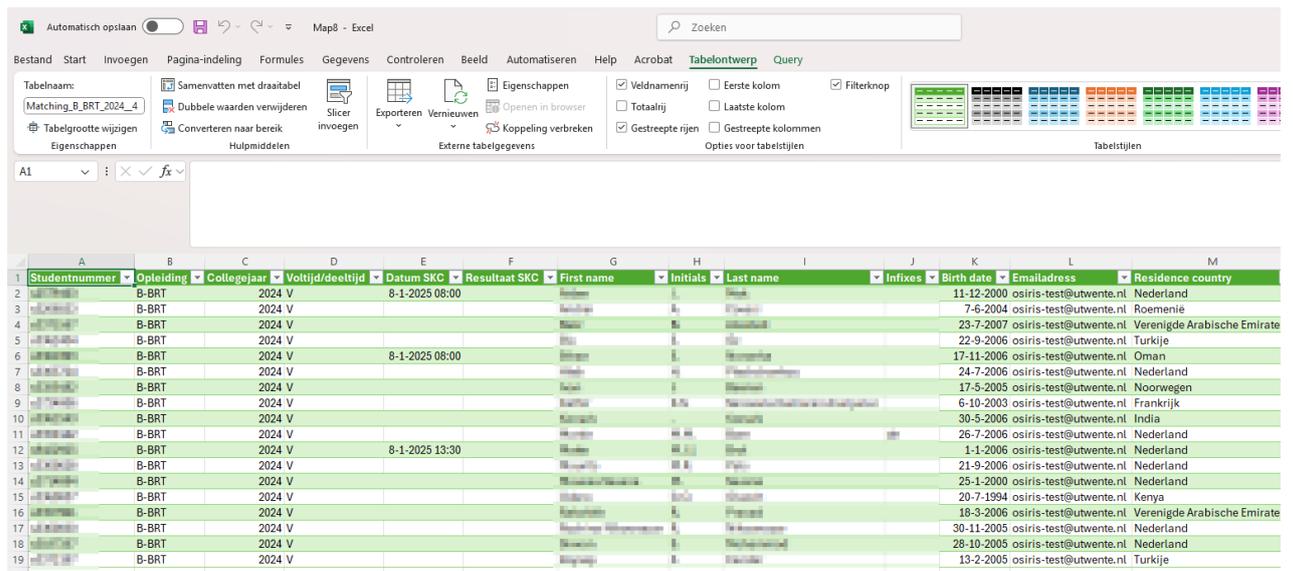
- Select the export document you'd like to open and press "Import"/"Importeren"



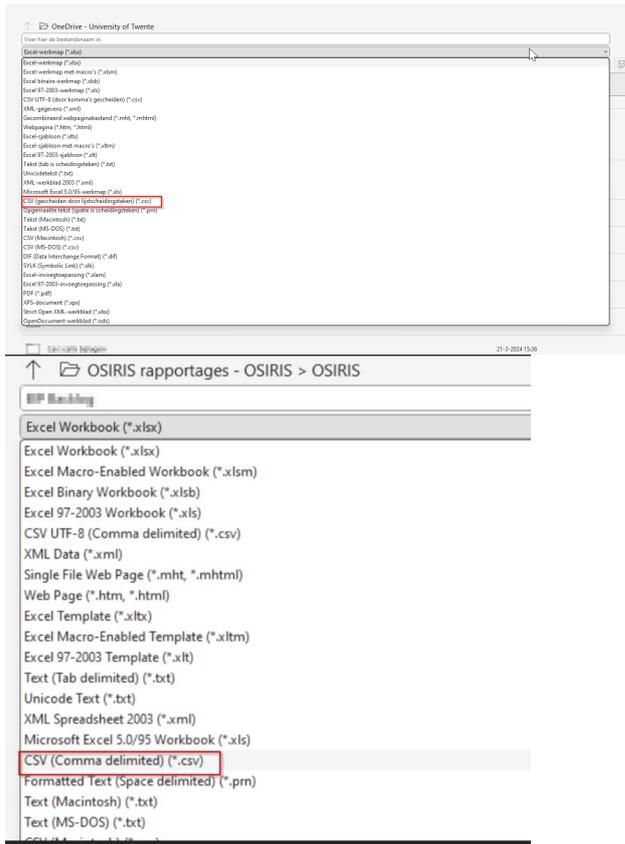


- Select “load/ laden” or “Transform data/ gegevens transformeren”

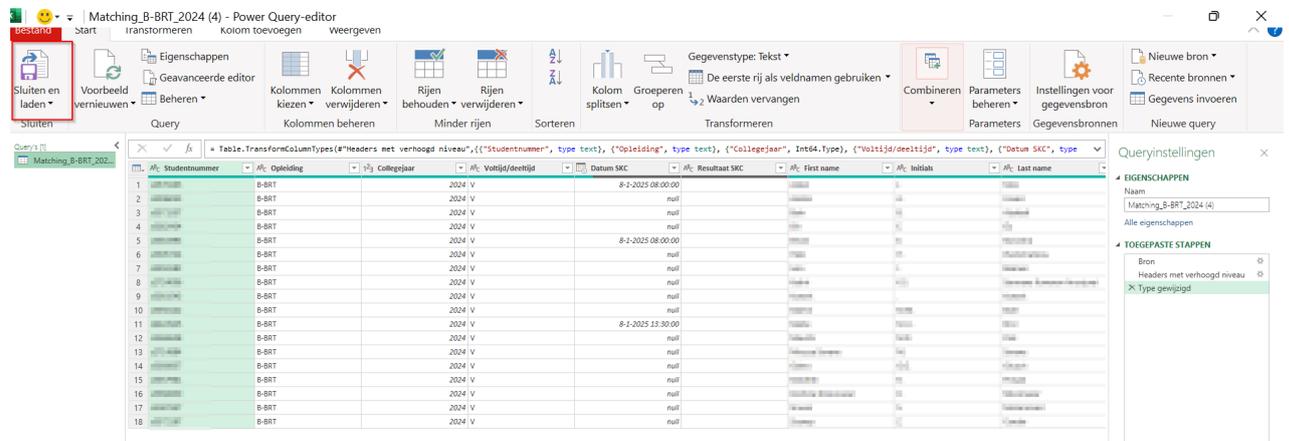
After “load/laden” the result will be:



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.



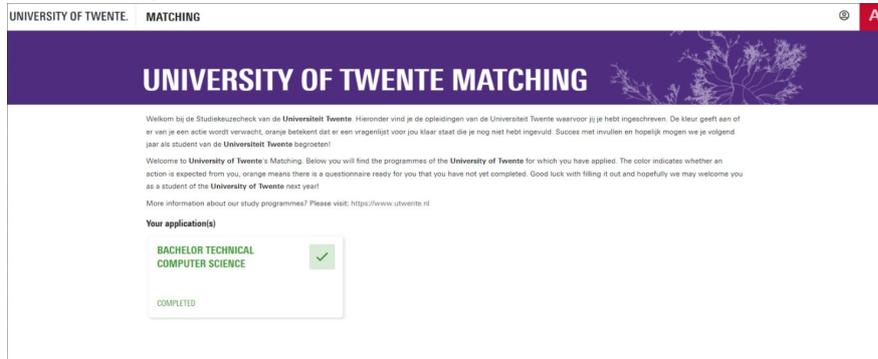
After “Transform data/ gegevens transformeren” the result will be:



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

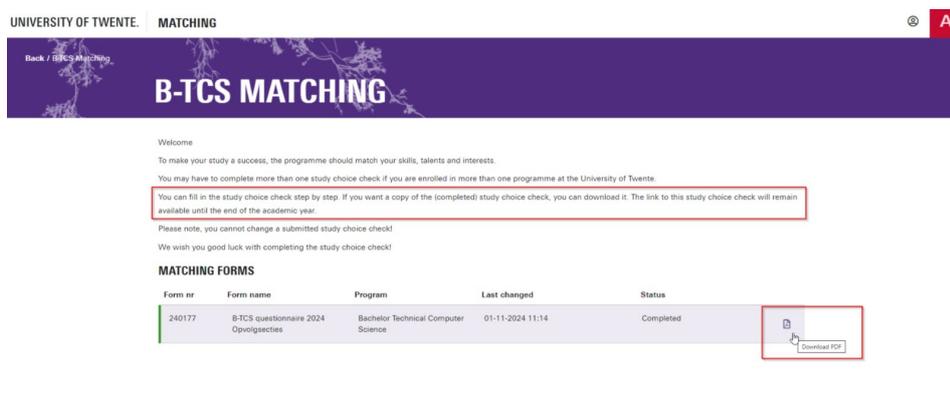
## Good to know

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.



## Questions

If you have any questions, you can send an email to **[matching-ces@utwente.nl](mailto: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.