MANUAL MATCHING APPLICATION
FOR MATCHING ADMINS

Version 2025-05

CES-IM

UNIVERSITY OF TWENTE.

Introduction

This manual describes functionalities for matching admins concerning the Matching application. The matching admin is responsible for creating and editing events, for the content of the matching forms (i.e. questionnaires), mailings, reminder mailings, importing and exporting data on behalf of the matching advisors and CES-SAS.

For matching advisors there is a separate manual. Both manuals are published on the service portal: https://www.utwente.nl/en/service-portal/educational-support/about-ut-education/matching

The manual follows – more or less – the sequence of the matching activities throughout the academic year.

Version management
Compared to the previous version (February 2025), the whole manual has been modified:

- set up based on the actions the matching admins have to do throughout the academic year
- new layout
- new functionalities incorporated

Contact
If you have any questions, you can send an email to matching-ces@utwente.nl. Please mention the programme it involves and whether it concerns an issue, proposed change in a questionnaire or a possible request for a new functionality.

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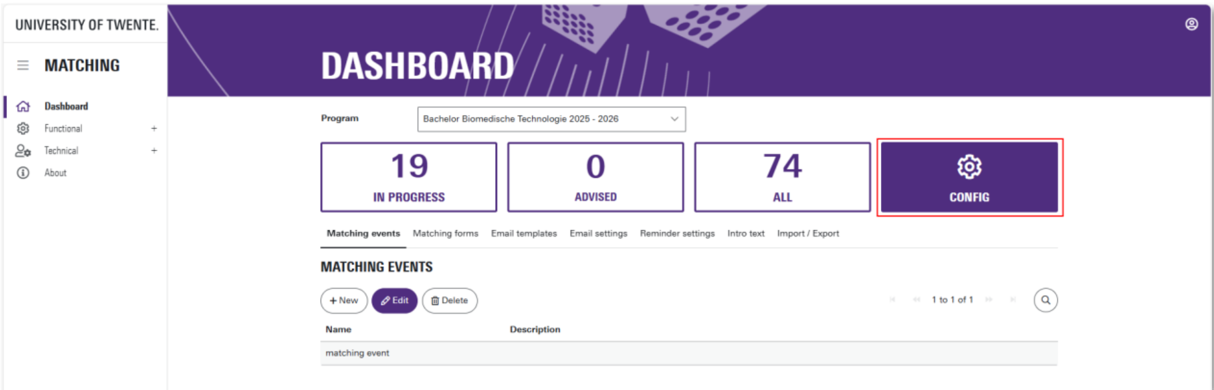
1. DASHBOARD

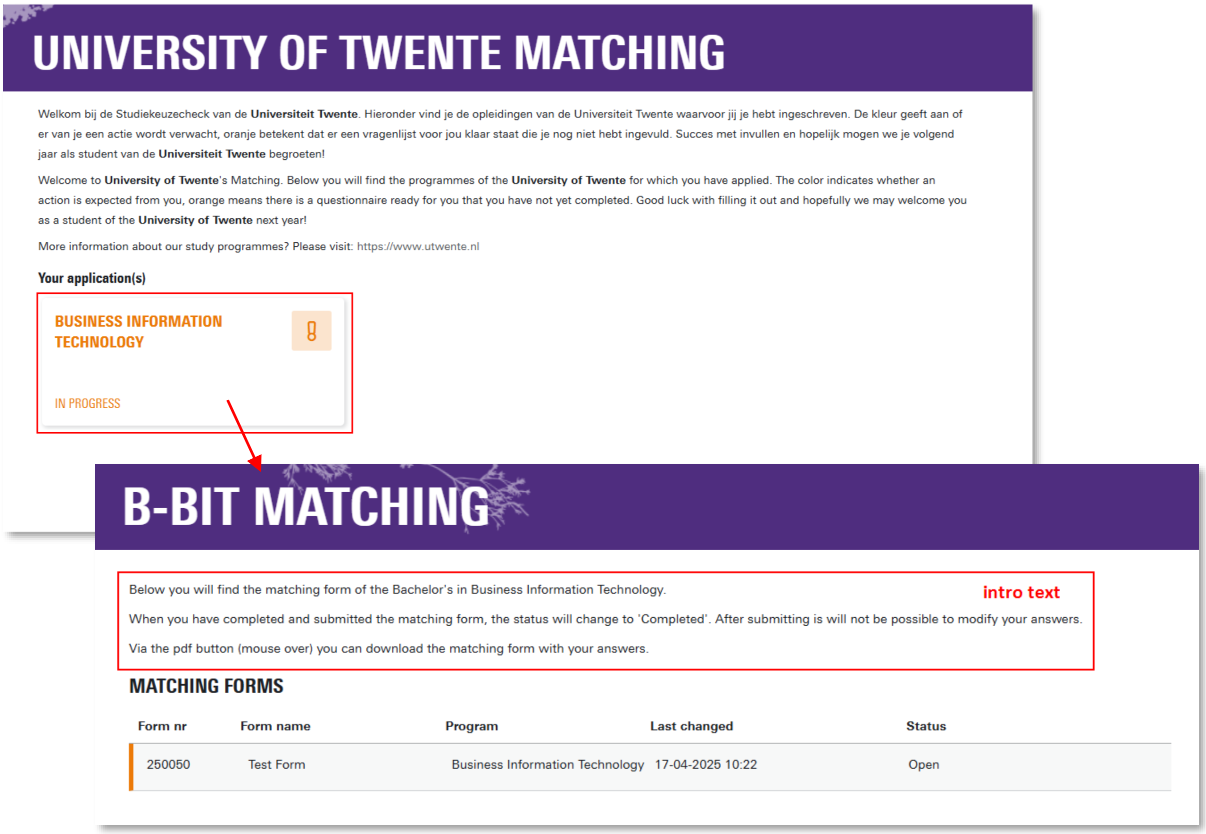
As matching admin, you perform your tasks in the [CONFIG] menu of the programme(s) you are assigned to:



The other three menus, [IN PROGRESS], [ADVISED] and [ALL] are for matching advisors.

2. INTRO TEXT ON LANDING PAGE

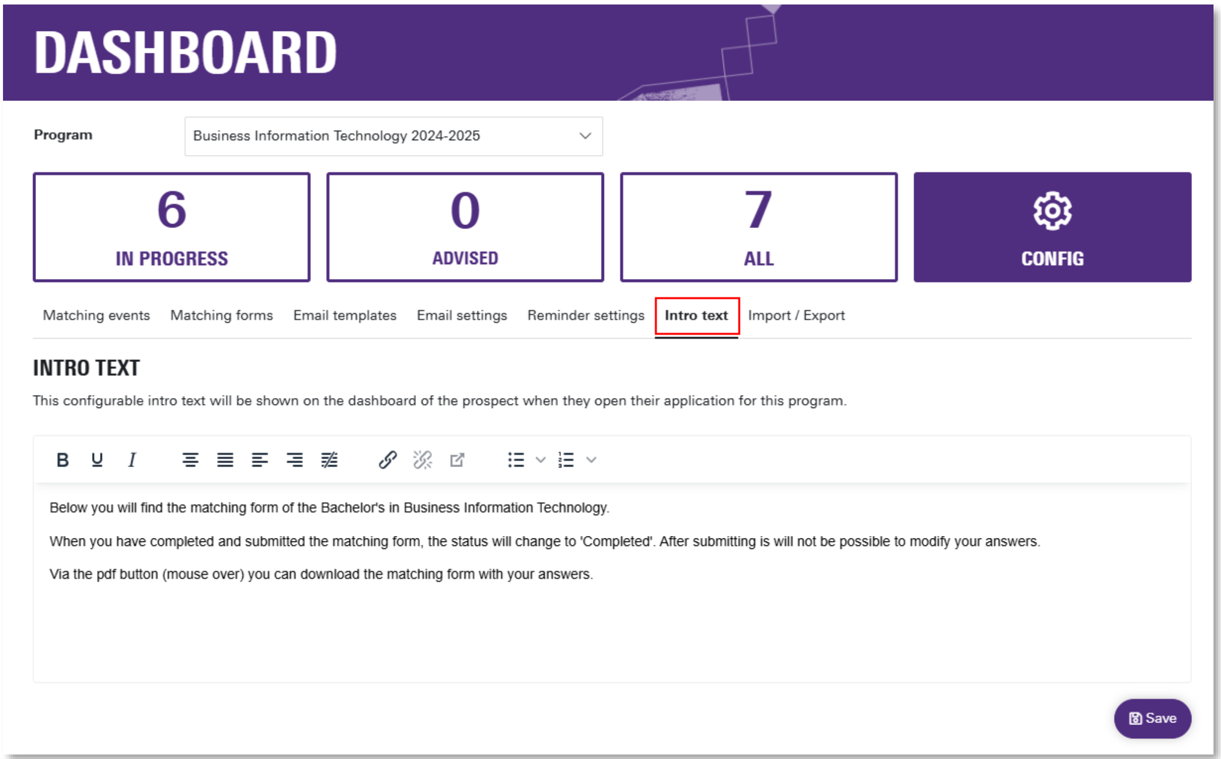
Each programme has its own landing page for the prospective students, which is shown when the prospect has clicked on the application tile. On this landing page an introduction text can be placed:



This introduction text can be created and maintained by the matching admin.

2.1 Creating an intro text

The matching admin can create the text for this introduction on the tab 'Intro text' in the CONFIG menu:



It is advisable to keep this intro short, as the prospect is on this page just to fill in the matching form. Therefore just a short explanation about this step in the process is enough. Information about the whole matching process and about the programme has already been given to the prospect via website and mail.

Tips (see example text in the screenshot above):

- Mention that it is not possible to make any changes after submitting the questionnaire.
- Mention that the filled in questionnaire can be downloaded via the pdf button.

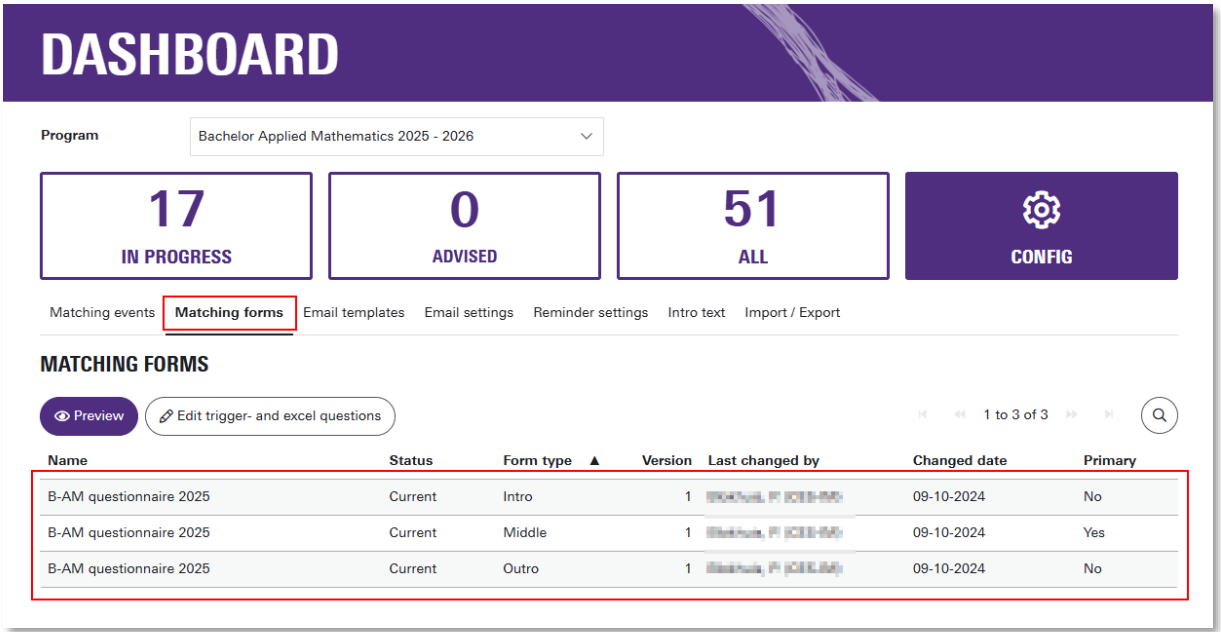
Use the format buttons above the text field to apply formatting. It is possible to copy a formatted text from Word to this text field, but that way the formatting does not always have the desired result.

3. MATCHING FORMS

For most programmes the matching process consists of a matching form and a matching event (some programmes only have a matching form). In this chapter setting up matching forms is explained and in chapter 4 the setting up of matching events.

A matching form consists of three parts, which the functional admin has to set up:

- 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



3.1 Checking a matching form

The functional admin will set up a new matching form in draft version. Before the matching form will be made public, the matching admin has to check the form. It is important to check the whole matching form thoroughly, as submitted matching forms cannot be made undone or resend.

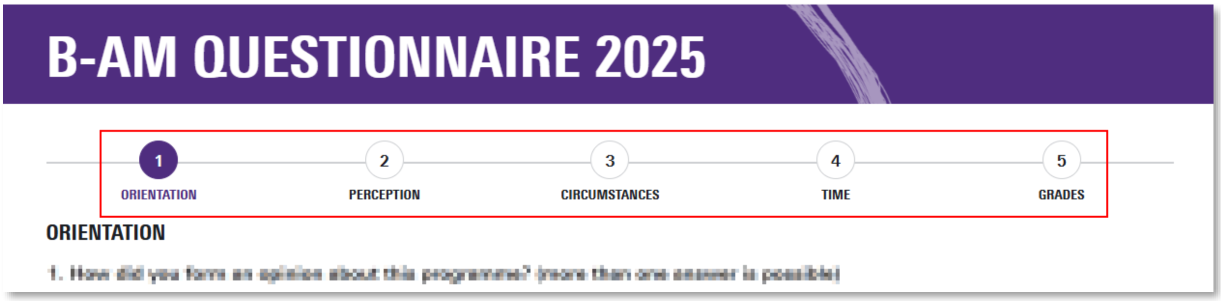
You can check a matching form as follows:

1. Select the matching form you want to check, usually the ‘Middle’ one (the actual questionnaire)
2. Click the [Preview] button

This way you are able to view the questionnaire as a prospect and you can check if the questionnaire is set up as intended:

- Is the content of questions and answer options correct?
- Are the correct questions mandatory vs optional (mandatory questions are marked with *)?
- Are follow-up questions shown correctly?

The numbers at the top are the different sections that have been set up:

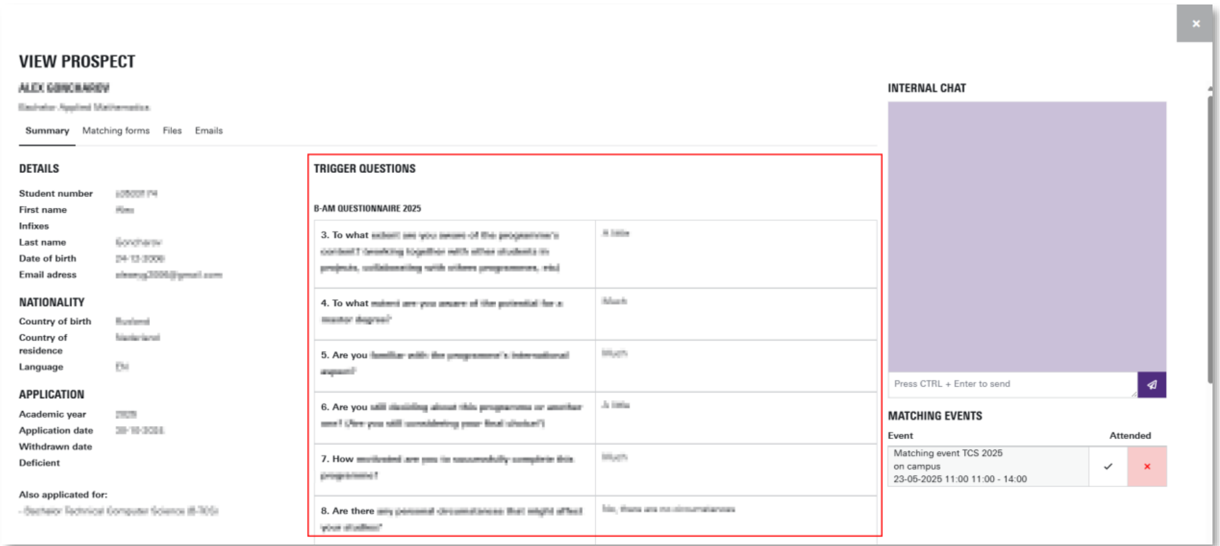


When you checked draft version of the matching form and everything is correct, then you can have the form be published by the functional admin.

3.2 Marking trigger and excel questions

In the matching form, questions can be marked as ‘trigger questions’ and ‘Excel questions’.

Trigger questions
Trigger questions are questions which are essential in the advising process and are shown on the screen ‘View prospect’. This way the matching advisor has an overview of the answers given by the prospect.

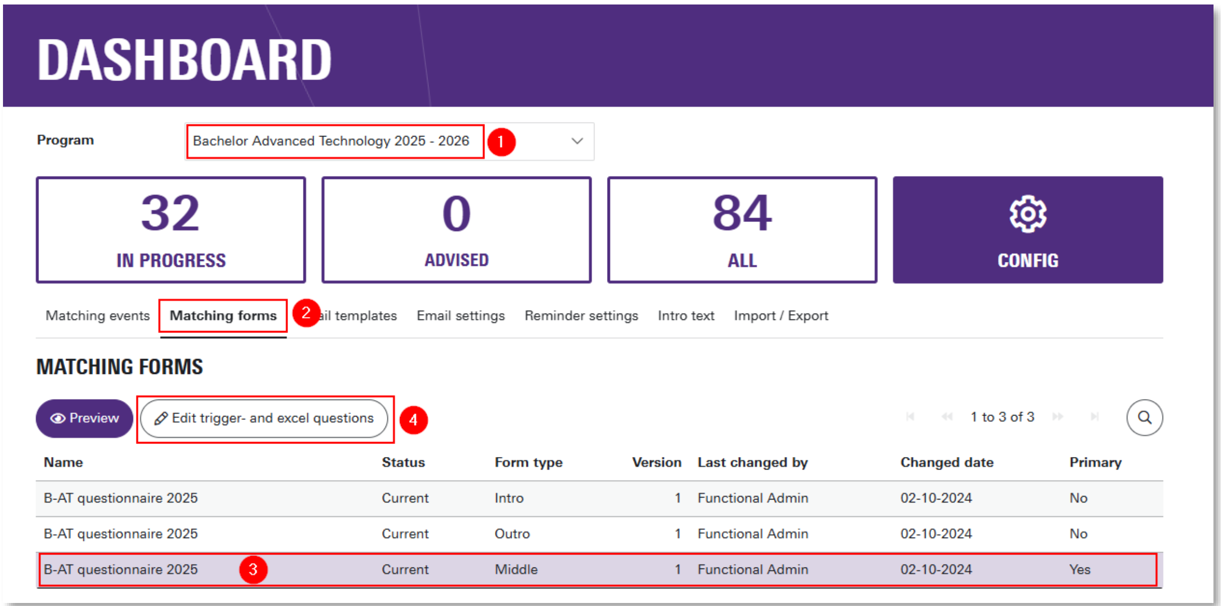


Excel questions
The answers of questions marked as ‘Show in export’ will be included in the Excel export for the matching advisor.

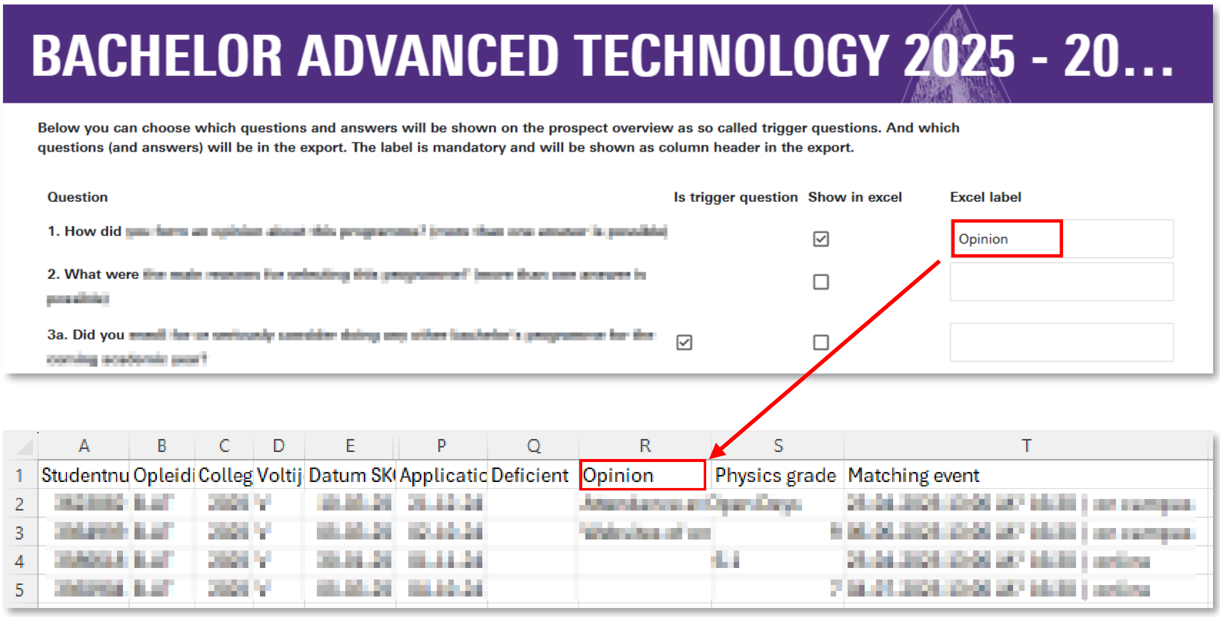
Marking trigger and Excel questions
While setting up a matching form, the functional admin can mark questions as ‘trigger question’ and/or ‘Excel question’. After the matching form has been made public (status ‘Current’), both functional admin as matching admin can check and edit these options on the ‘Matching Forms’ tab. The changes made will be immediately active.

You can check and edit trigger and Excel questions as follows:

1. Select the concerning programme
2. Click the ‘Matching Forms’ tab
3. Select the matching form with type ‘Middle’
4. Click the button [Edit trigger- and excel questions]

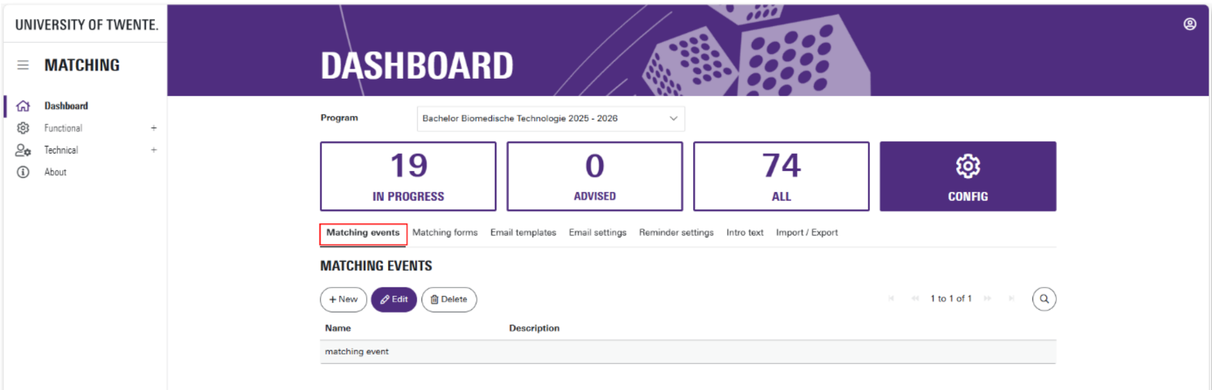


In the screen shown you can check or uncheck each question in the columns ‘Is trigger question’ and ‘Show in excel’. If you want to check a question as ‘Show in excel', you first need to fill in the ‘Excel label’. This label is shown on top of the concerning column in the Excel export.



4. MATCHING EVENTS

Matching events are used to organise scheduled or unscheduled information sessions given online or on campus. The prospectives students have to register for an event when filling in the questionnaire. The matching event, therefore, has to be created before it can be added as a question in the matching form.

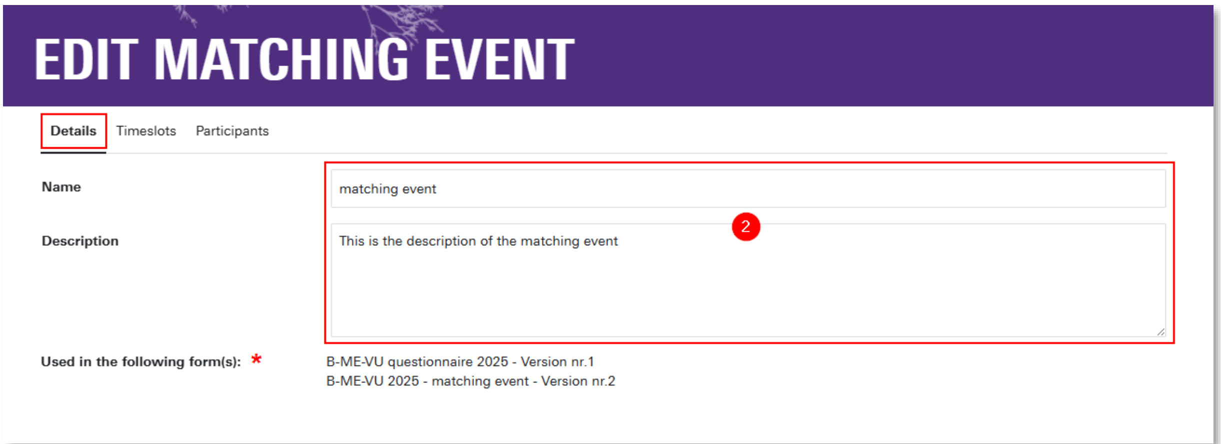


In most cases, only one matching event with multiple timeslots during the academic year is applicable, but it is possible to create more than one matching event. For each event, you can create a specific mail template and link to the specific event.

4.1 Creating and modifying a matching event

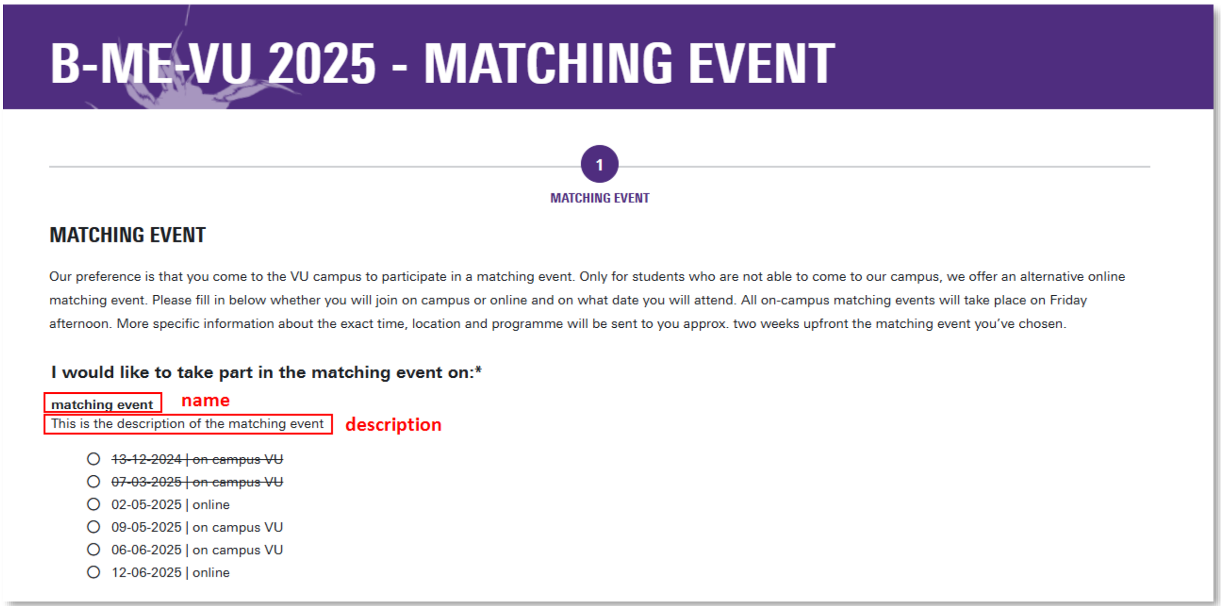
You can create or modify a matching event as follows:

1. To create a new matching event, click the [New] button, to modify an existing matching event, click the [Edit] button (or double-click the event).
2. On the 'Details' tab, fill in or modify the requested information: name of the event and optionally a description of the event.



* Used in the following form(s): When a question about this matching event has been added in a matching form, the relevant matching form is mentioned here.

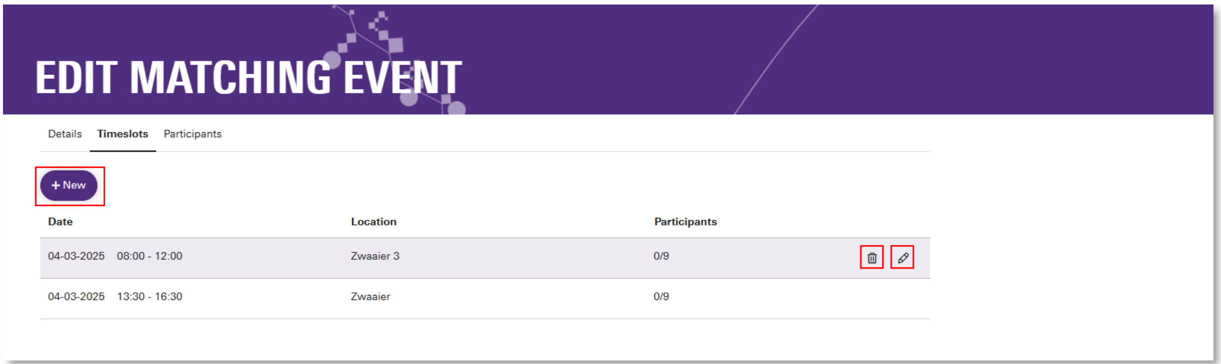
The name and description of the event are presented in the questionnaire, in the question about the matching event:



4.2 Creating and maintaining timeslots

On the Timeslots tab, you can maintain timeslots:

- Creating a new timeslot: click on the [+New] button and fill in the requested data;
- Modifying a timeslot: select the record and click on the pencil on the right;
- Deleting a timeslot: select a record and click on the recycle bin on the right.



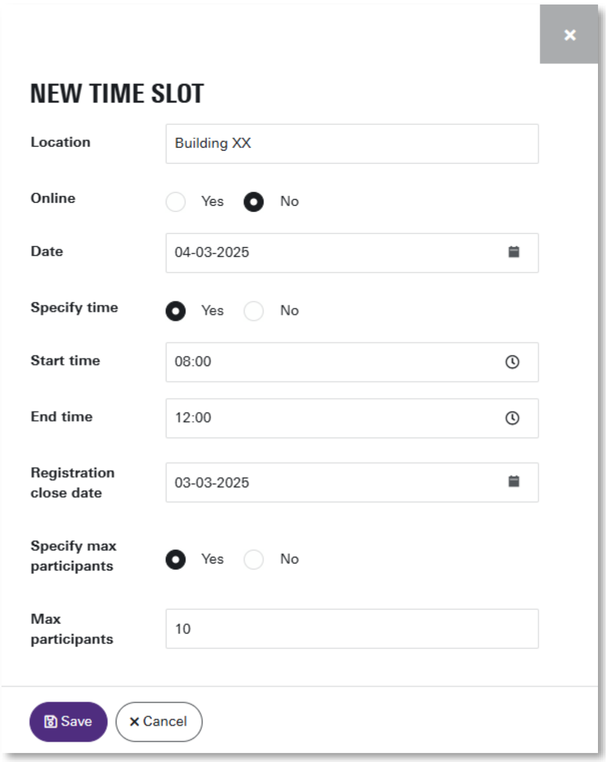
Creating a new timeslot

When creating a new timeslot, the following data is requested:

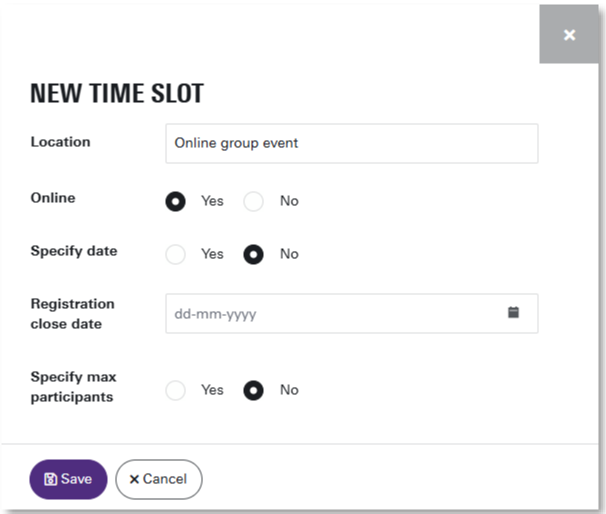
- Location: The location where the event takes place.
- Online: Whether the event is online or not. Tip: In case of an online event, mention that in the 'Location' field as well.
- Date: The date on which the event takes place (only in case the event is not online).
- Specify time: Whether the event has a specific time or not.

- Start time: The start time of the event (only in case the event has a specified start and end time).
- End time: The end time of the event (only in case the event has a specified start and end time).
- Registration close date: The date on which a prospective student can no longer subscribe for that timeslot. From that day, the timeslot will be crossed out in the questionnaire and can no longer be registered for.
- Specify max participants: Whether or not the event has a maximum number of participants.
- Max participants: The maximum number of participants (only in case the event has a maximum of participants). If this maximum has been reached, the timeslot in the questionnaire will be crossed out and can no longer be registered for.

Example of a scheduled timeslot

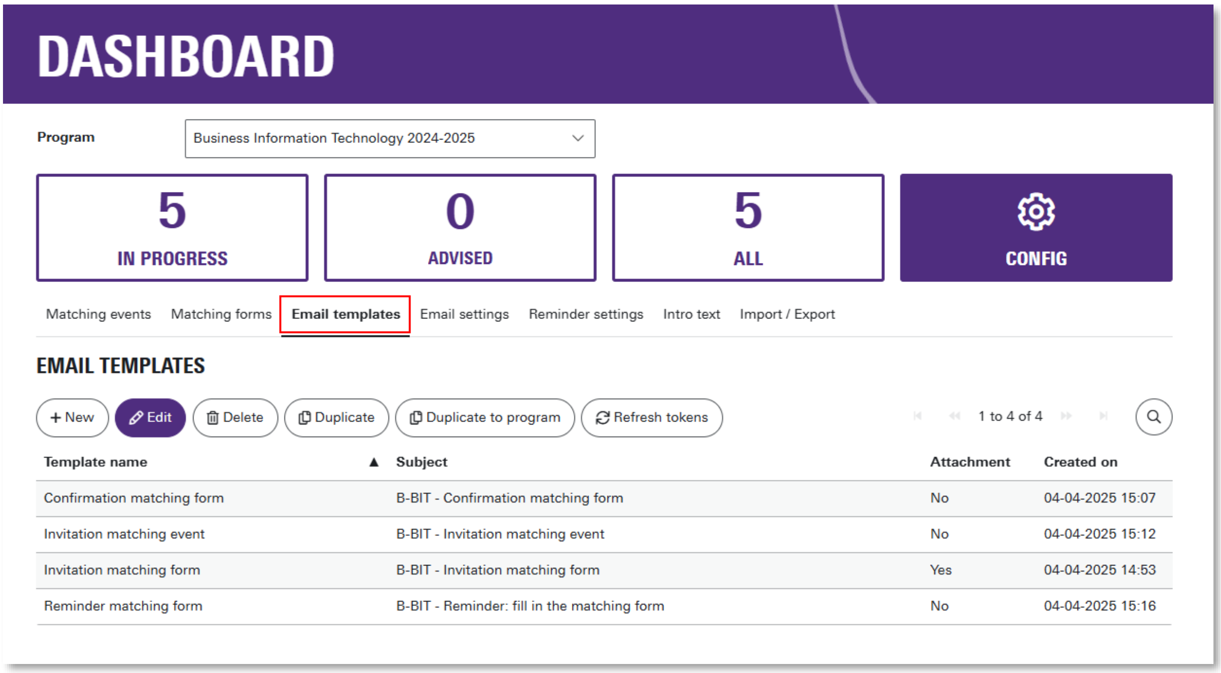


Example of an unscheduled timeslot (online)



5. EMAIL TEMPLATES

The matching admin can create and edit email templates. It is only possible to send emails linked to a matching form, an advise or other action. It is not possible to send unrelated emails.



You can create email templates for the following process items:

- an invitation to fill in a matching form
- a confirmation after submitting a matching form
- an invitation for the matching event the prospect has registered for
- a mail about the advice given after a matching event
- a reminder to fill in a matching form

In the tab ‘Email templates’ you can create and manage the email templates. In the tab ‘Email settings’ (chapter 6) you can link the templates to one of the process items mentioned above. Reminder templates are linked in the tab ‘Reminder settings’ (chapter 7).

Invitation mail to fill in a matching form

The invitation email will be sent automatically after the prospect has been (conditionally) admitted in Osiris and data of the applicant have been imported in the Matching application. This email will only be sent when the matching form has been published. The personal deeplink to the matching form has to be included (see paragraph 5.3).
E-mail settings: Matching forms – set welcome mail

Confirmation after submitting a matching form

The confirmation mail will be sent automatically when a prospective has submitted the matching form. If the prospect has been asked about the desired timeslot, you can include placeholders for the timeslot which the prospective has chosen (see paragraph 5.3). For this, the ‘matching event question’ in the matching form should be set as mandatory, which is always advisable.
E-mail settings: Matching forms – set thank you mail

Invitation for the matching event the prospective has registered for
The invitation mails for the matching event have to be sent manually and can be used to inform applicants about the event (or timeslot) the applicant registered for.
E-mail settings: Matching events

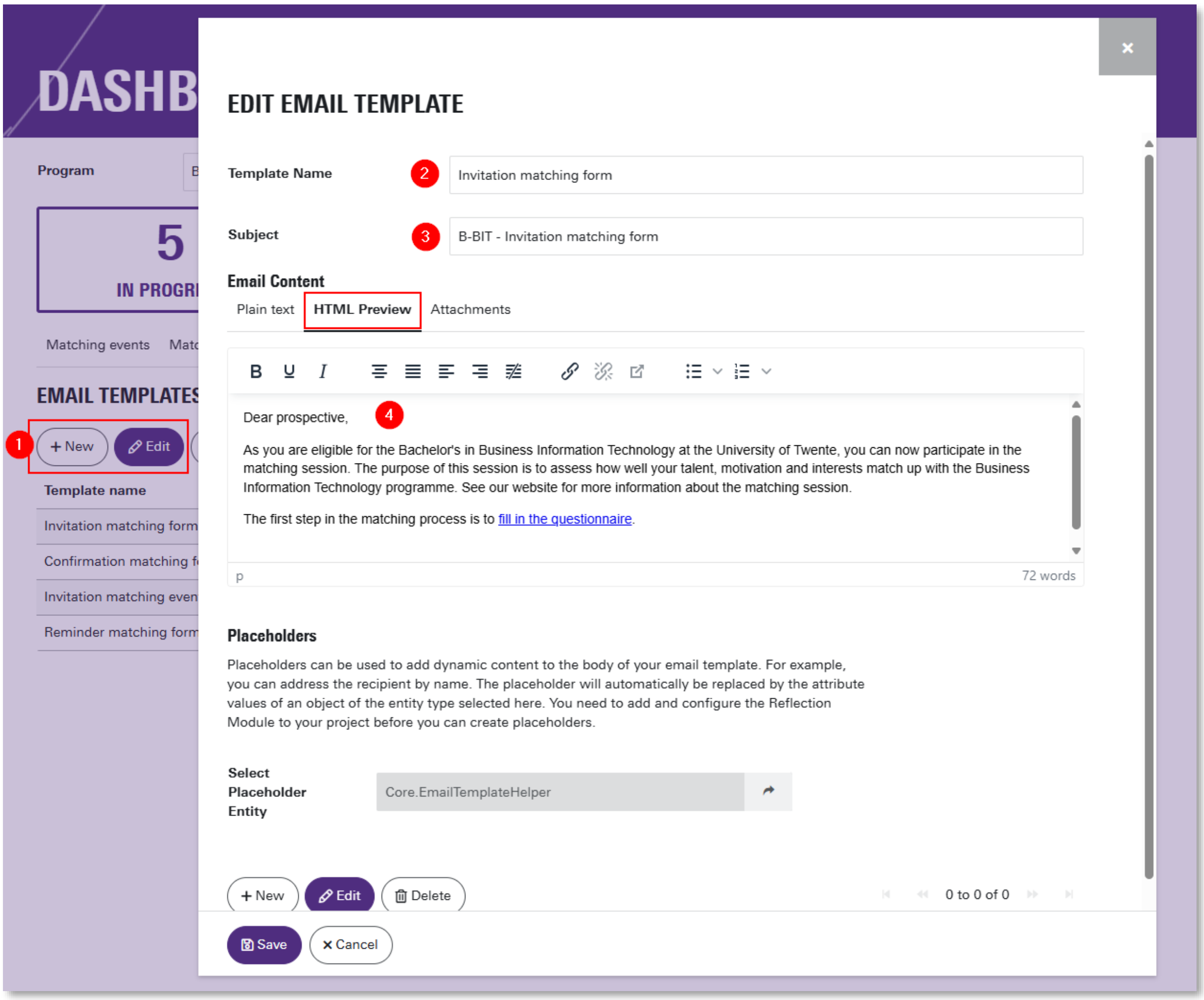
Advice mail
The advice mail has to be sent manually and can be used to inform the applicant about the advice given. This is mandatory in case of mandatory matching. For each type of advice (e.g. positive or negative) a different template can be set up.
E-mail settings: Advice

Reminder to fill in a matching form
Reminder emails can be sent automatically or manually to remind the prospective to fill in the matching form. The reminder emails will only be sent to prospects who have not yet submitted the matching form.
Reminder settings

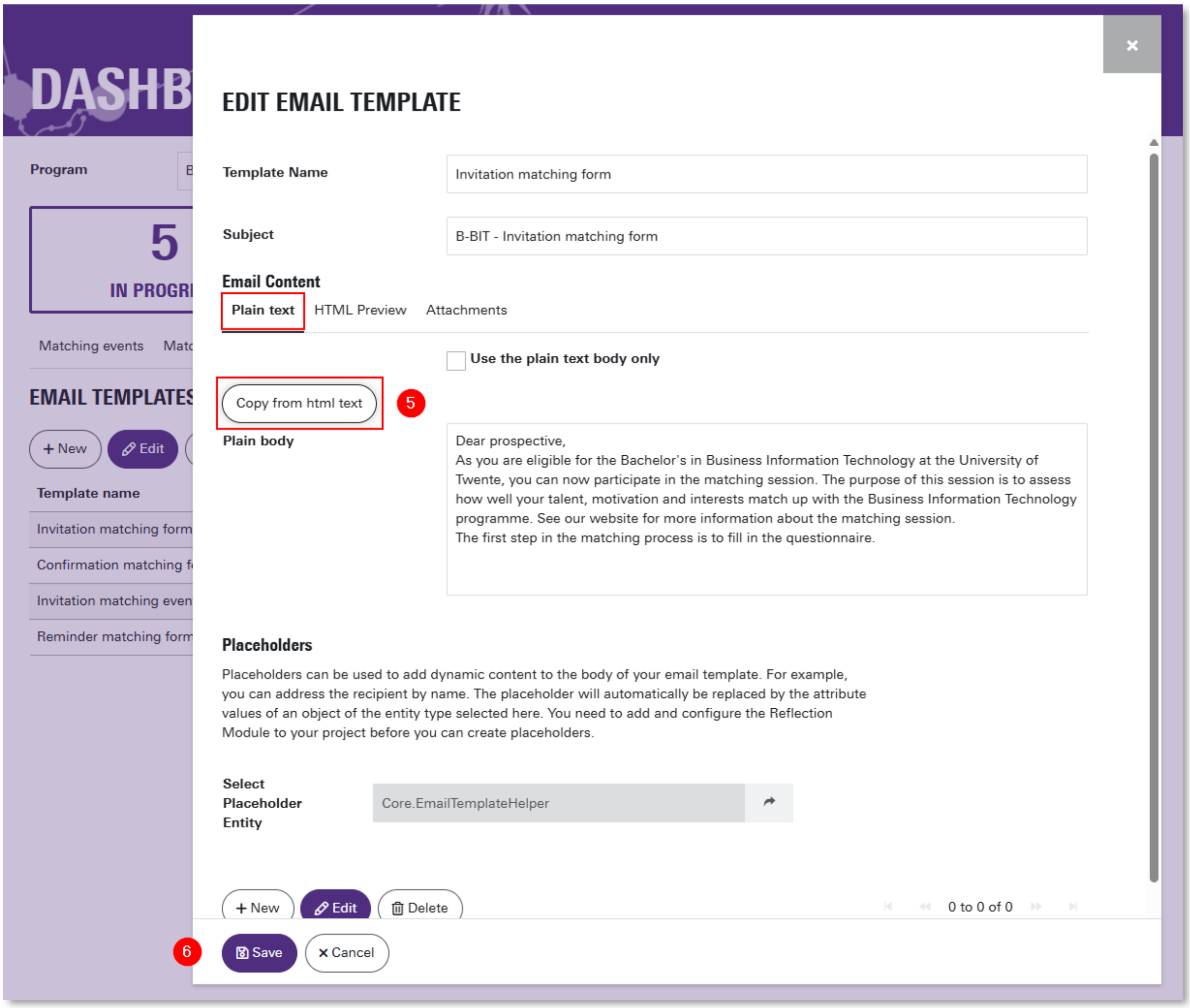
5.1 Creating and maintaining email templates

You can create or modify an email template as follows:

1. Click the [+New] button to create a new email template (of use the [Edit] button to modify an existing template).
   Tip: use the [Duplicate] button to create a variant of an already existing template. The complete content, including links and placeholders, will be replicated in the new variant.
2. Fill in the 'Template Name'. This name is only for your administration.
3. Fill in the 'Subject': this is the subject of mail to the prospect.
   Tip: start the subject with the programme (B-XXX). In case a prospect participates in more than one programme, they can see the programme concerned in the subject of the mail.
4. Fill in the text in the 'HTML Preview'. See paragraphs 5.2 and 5.3 to create links and placeholders.
   Tip: use the format buttons above the text field to apply formatting, such as a bulleted or numbered list. It is possible to copy a formatted text from Word to this text field, but that way the formatting does not always have the desired result.



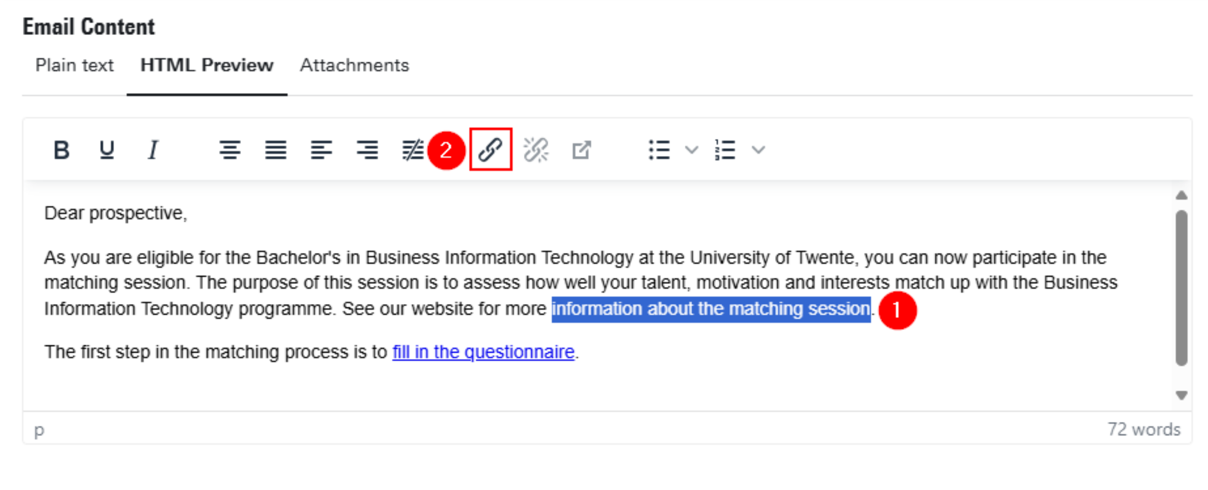
5. On the ‘Plain text' tab click the button [Copy from html text]. The plain text has to be filled in before you can save the email template.
   If you only want to use ‘Plain text’, make sure you check the box ‘Use the plain text body only’. Please know that links and placeholders do not work in plain text.
6. Click the [Save] button



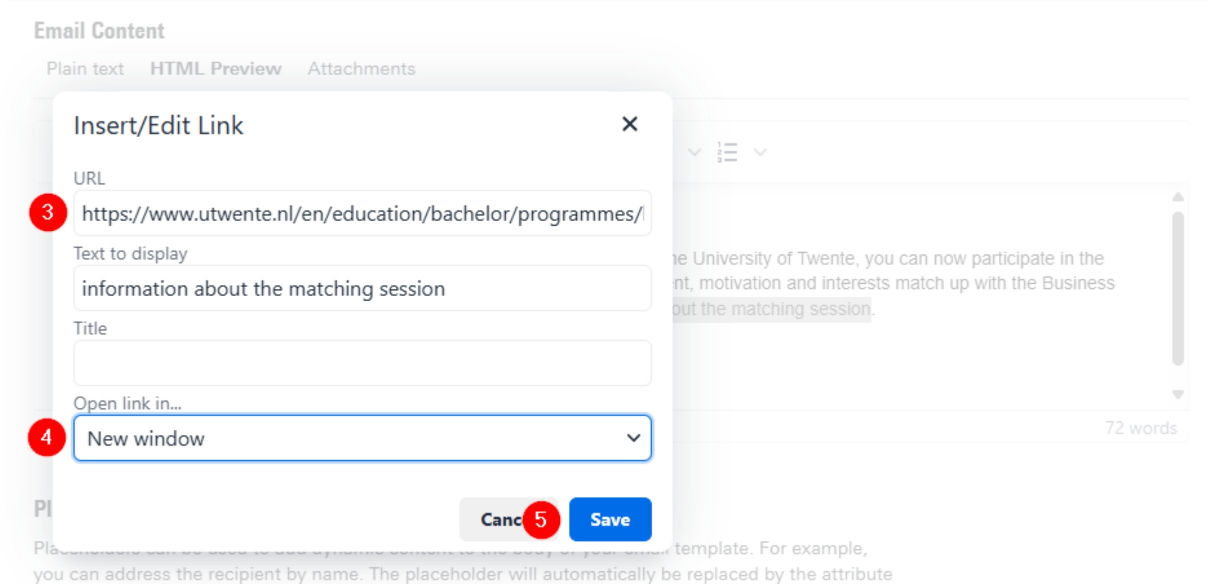
5.2 Adding links in the text

To link a text to a URL

1. Select the text on which you want to create the link. Note: do not include spaces or a full stop in the selection.
2. Click the 'Insert/edit link' button



3. Fill in the URL
4. Select 'New window' to open a new window when the link is clicked
5. Click [Save]



To create a link to an email address

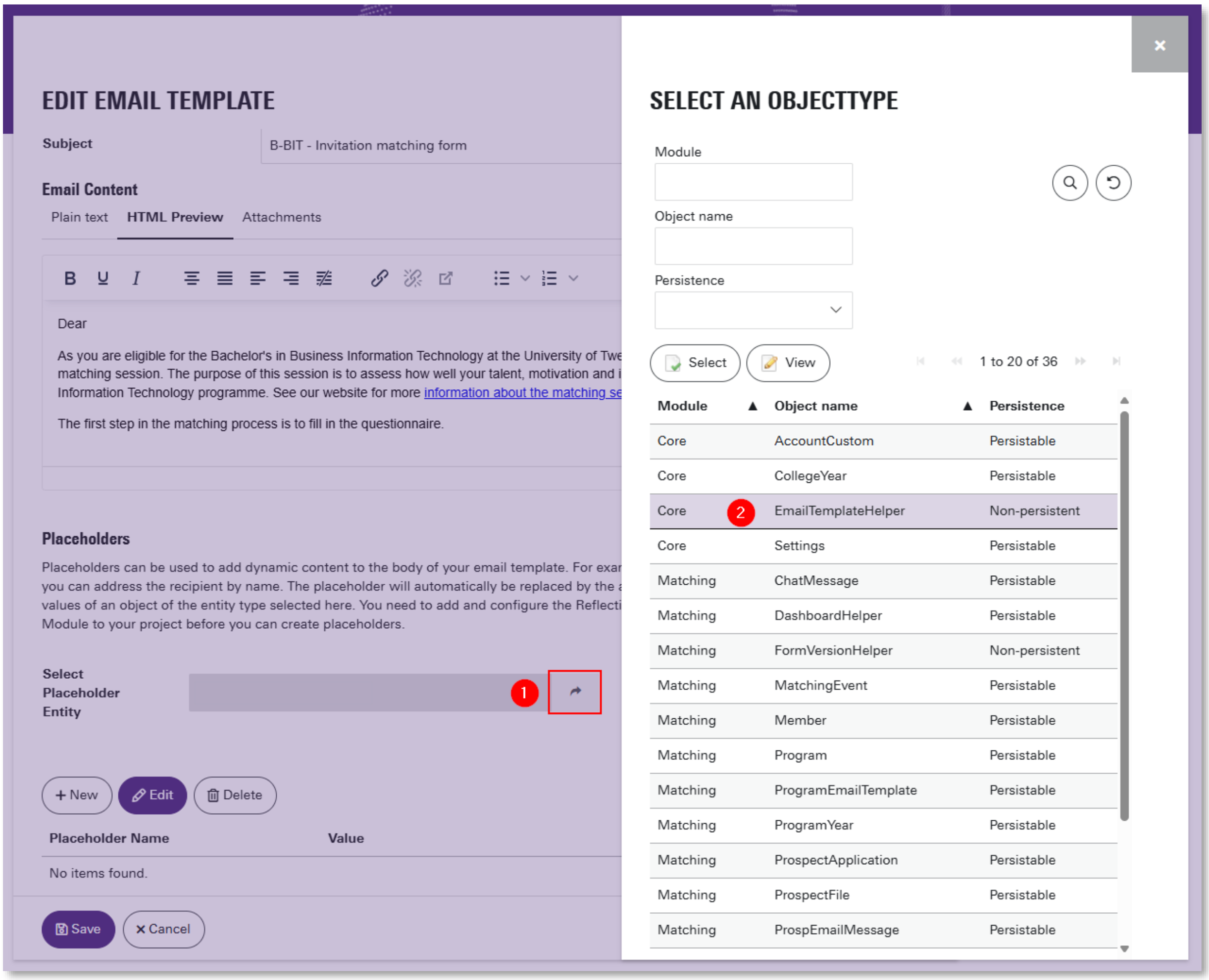
1. Type the email address in the text; the link will be created automatically after typing the email address in the text.
2. Click the 'Insert/edit link' button and select 'New window' to open a new window when the link is clicked. In the URL input field the URL of the email address is shown: mailto:xxx@utwente.nl

5.3 Adding placeholders

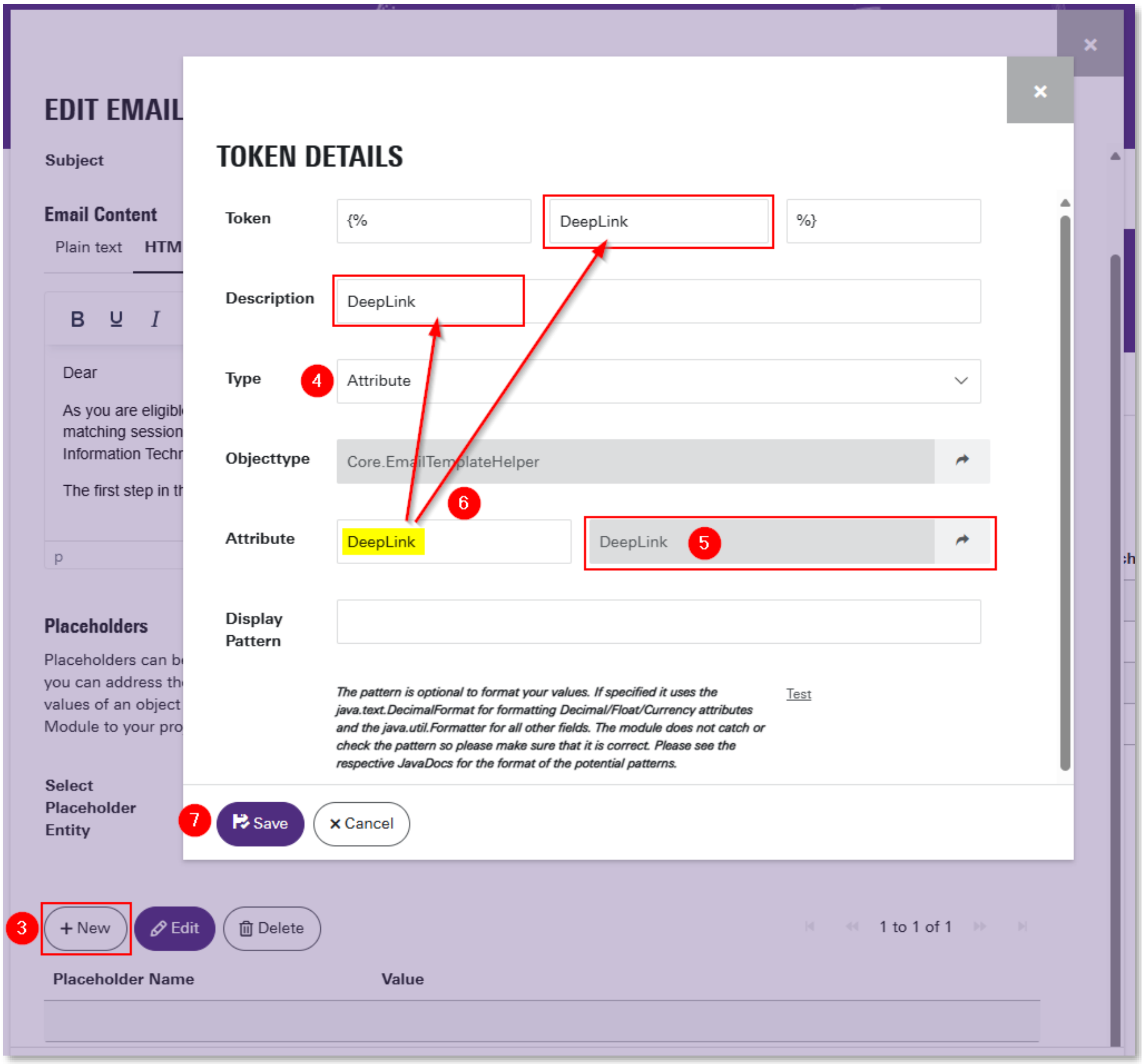
A placeholder is a coded text by which specific data is filled in automatically, for example the name of the prospect, the timeslot the prospect has registered for or the personal deeplink to the matching form.

You can set up a placeholder as follows:

1. Click the arrow-button next to 'Select Placeholder Entity'
2. Select 'object name' you wish to use. If the placeholder is not available, then double-click the 'EmailTemplateHelper' to create the desired placeholder.



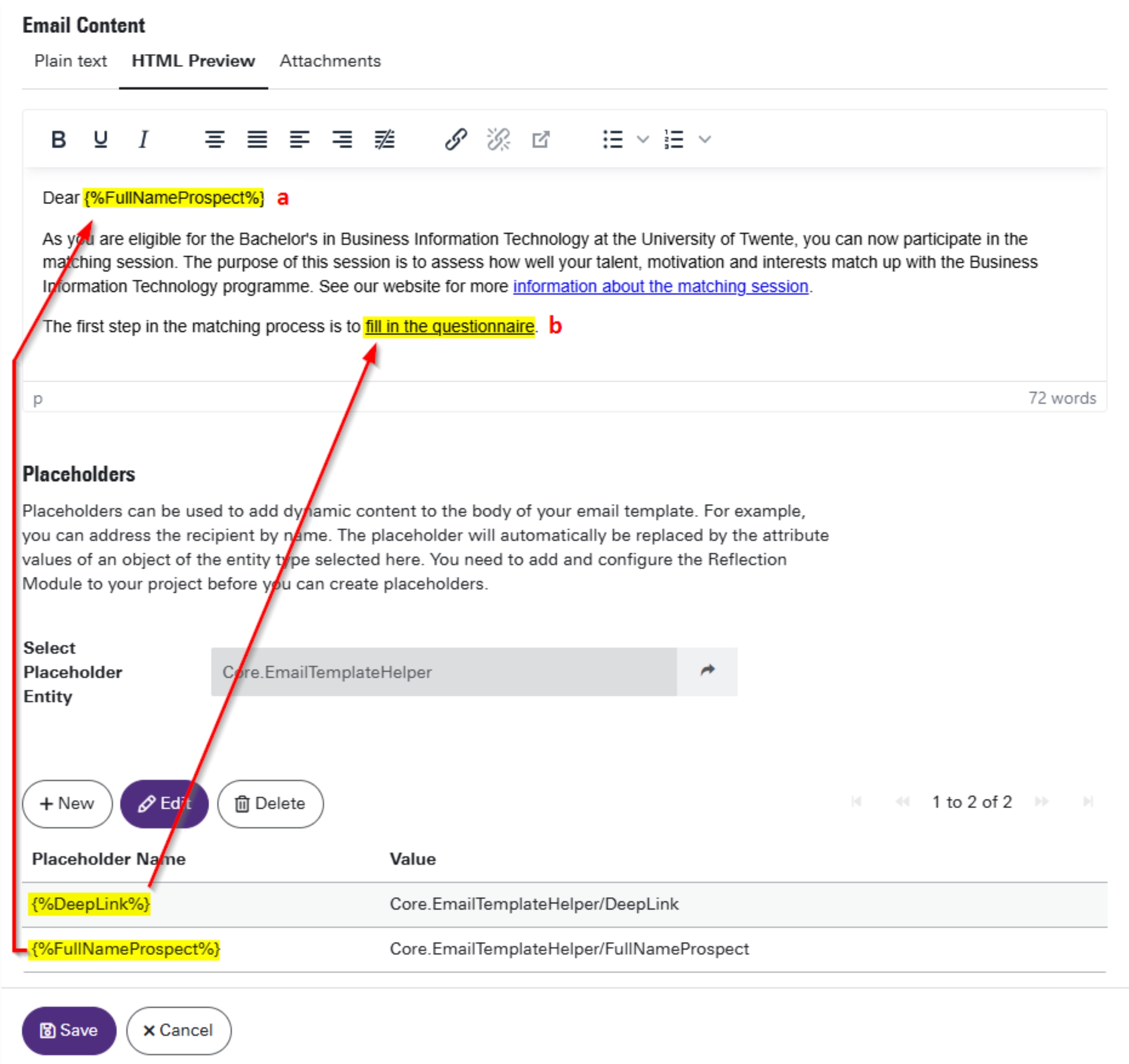
3. Click the [+ New] button
4. Select type: Attibute
5. Select the attribute you want to use as a placeholder
6. Copy the attribute to input fields of ‘Token’ and ‘Description’
   Note: do not fill in the ‘Display Pattern’, as this will cause a malfunction.
7. Click on Save



The placeholder is now shown at the bottom of the 'Edit email template' screen and is available to be added in the text. You can add a placeholder directly in the text or as a link:

a. Directly in the text: copy the text of the placeholder {%XXX%} and paste it in the text.
Tip: use the placeholder {%FullNameProspect%} to personalise the message.
Tip: use the placeholders {%TimeslotDate%} and {%TimeSlotStartTime%} in the 'thank you' mail, so the prospects receives the chosen timeslot per mail (only possible in case the matching event question has been added in the matching form as mandatory).

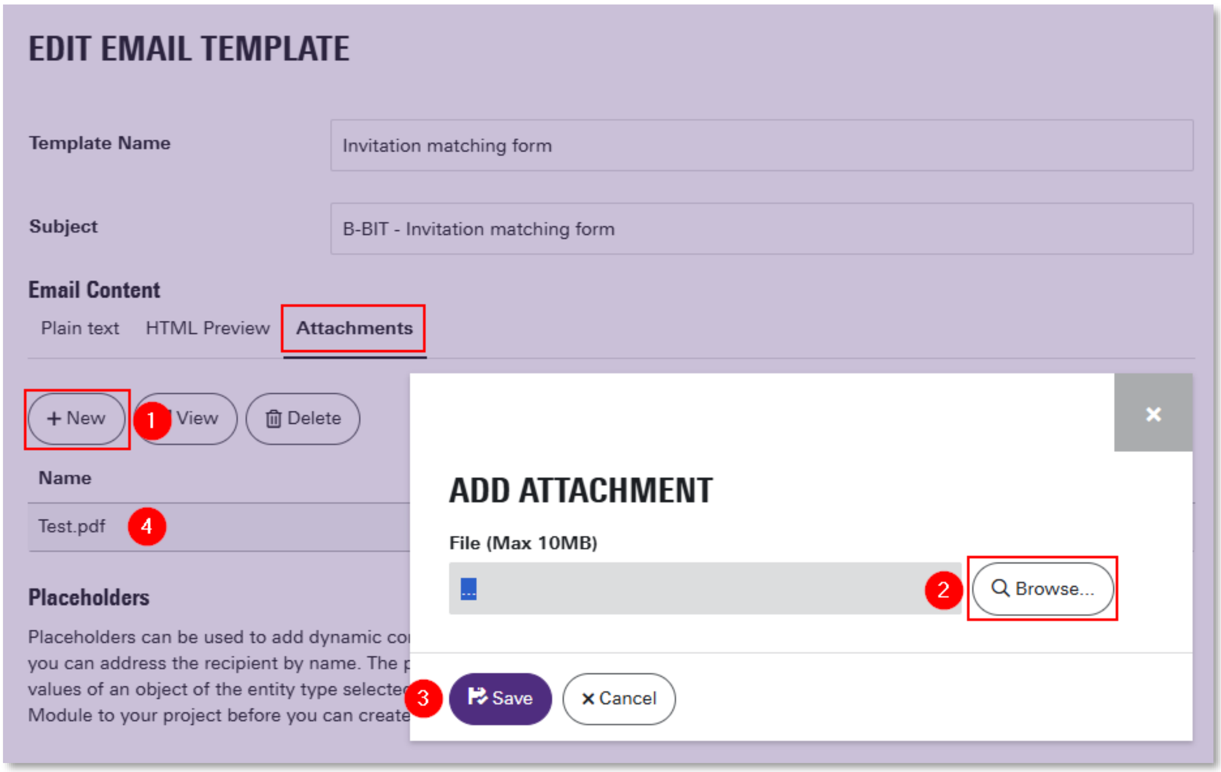
b. As a link: copy the text of the placeholder {%XXX%}, click the 'Insert/edit link' button and paste it in the URL field



5.4 Adding attachments

You can add an attachment to an email template via the 'Attachment' tab:

1. Click the [+ New] button
2. Click the [Browse] button and select the document you want to attach
3. Click on [Save]
4. The selected document is now shown as attachment

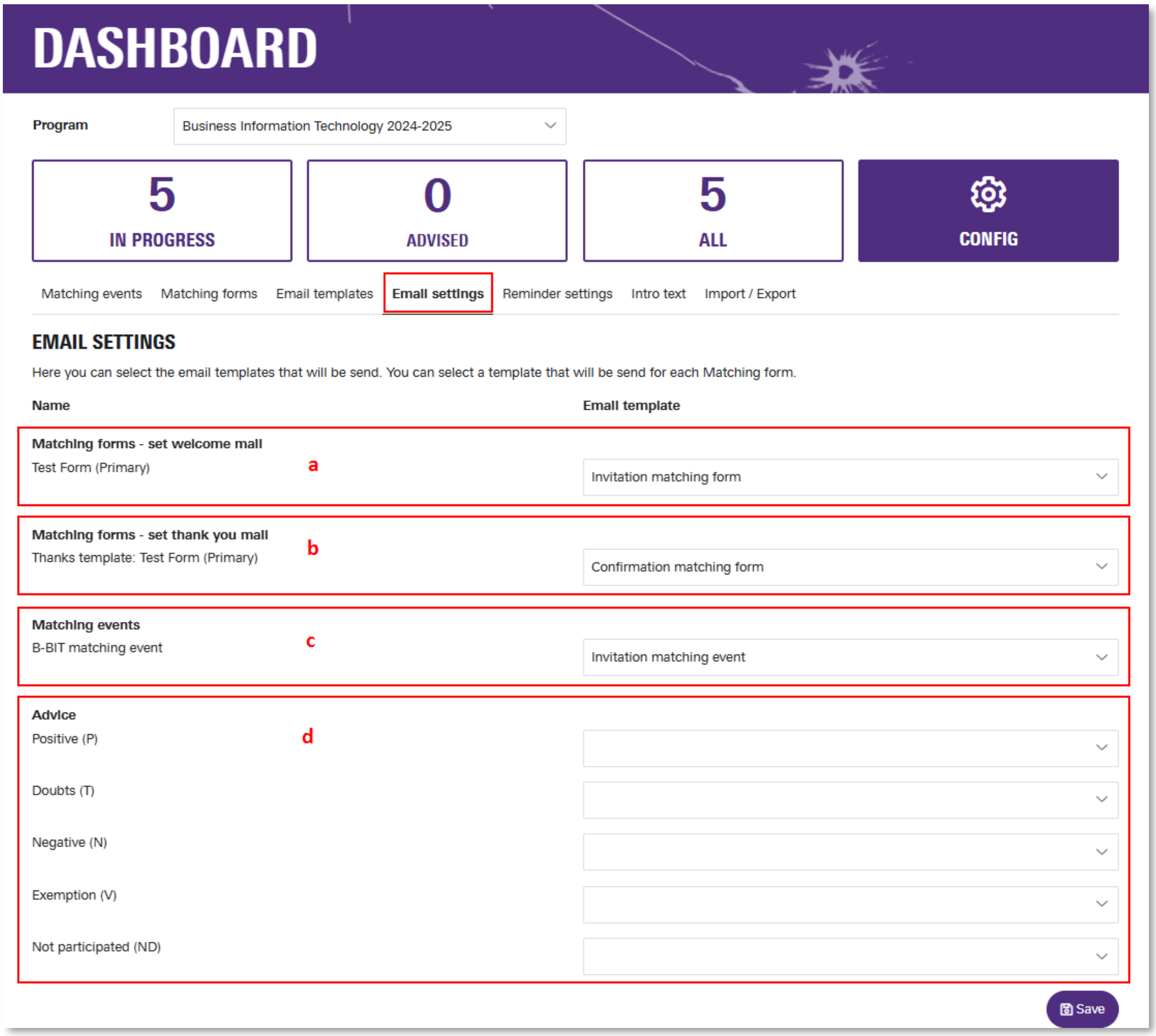


6. EMAIL SETTINGS

After you created the email templates, you can link them to the different process items in the tab ‘Email settings’. Without this step it is not possible to send email messages.

Select the relevant email template for each process item:

a. Matching forms – set welcome mail: the invitation mail to fill in a matching form
b. Matching forms – set thank you mail: the confirmation mail after submitting a matching form
c. Matching events: the invitation for the matching event the prospect has registered for
d. Advice: mail about the advice given after a matching event



7. REMINDER SETTINGS

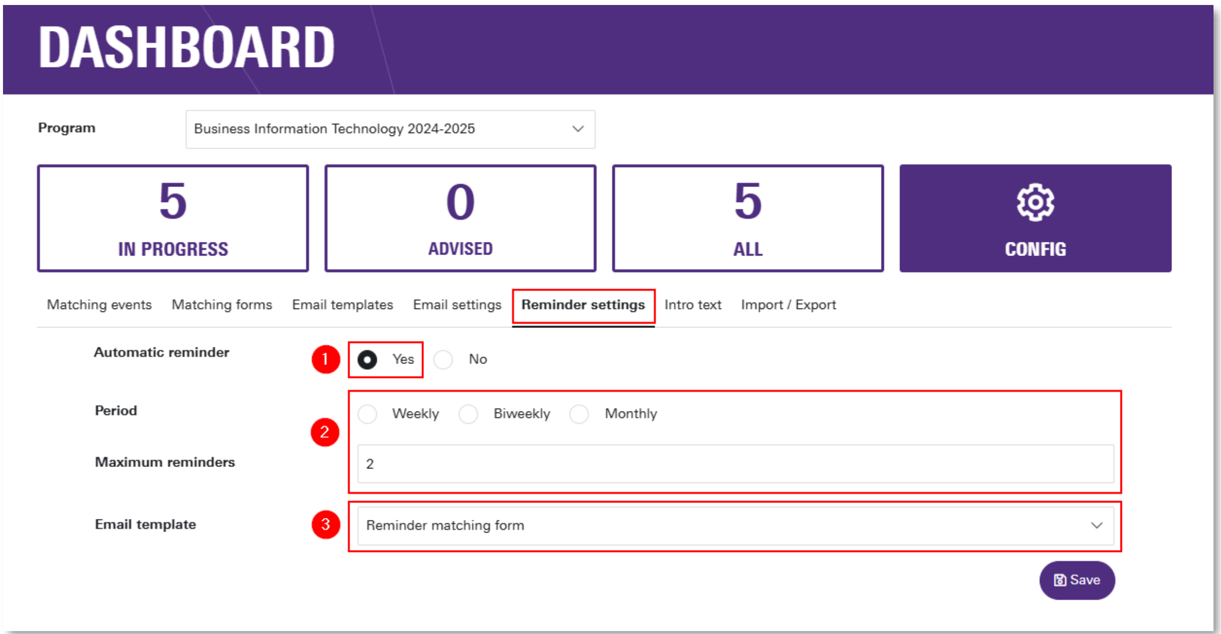
If you created a reminder email template, you can configure the settings of the reminder email in the tab ‘Reminder settings’. You can choose to send reminders automatically or manually.

7.1 Setting up automatic reminders

You can set up automatic reminders as follows:

1. Check Yes at ‘Automatic reminder’
2. Configure how you want to the automatic reminders be sent:
   - Period: weekly, biweekly or monthly
   - Maximum reminders: the maximum number of times you want a prospect to receive a reminder
3. Select the email template you want to send as a reminder email

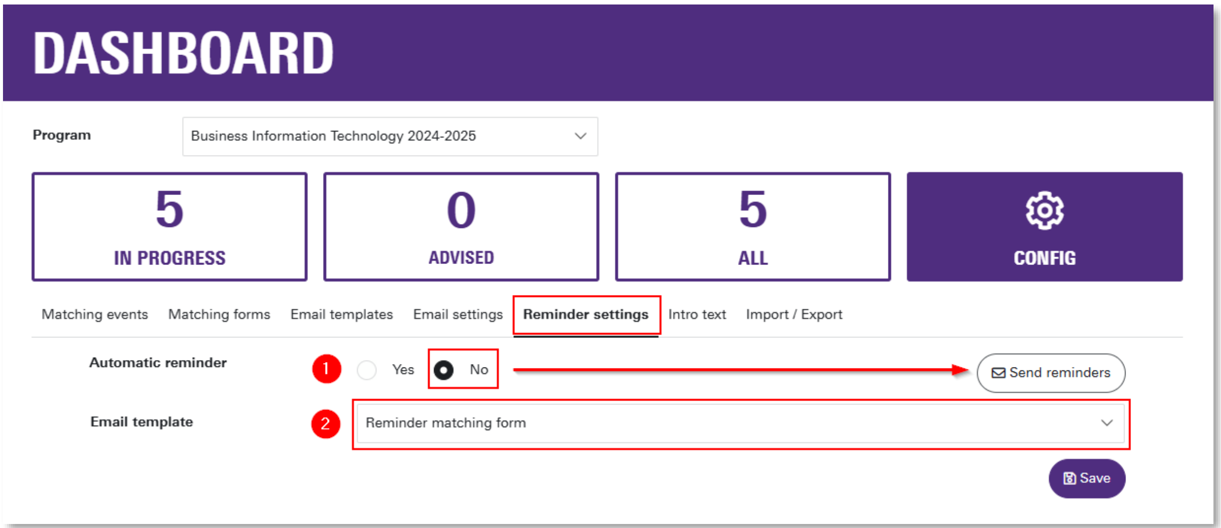
As of the moment you have saved these settings, the reminder emails will be send.



7.2 Manual reminders

You can set up manual reminders as follows:

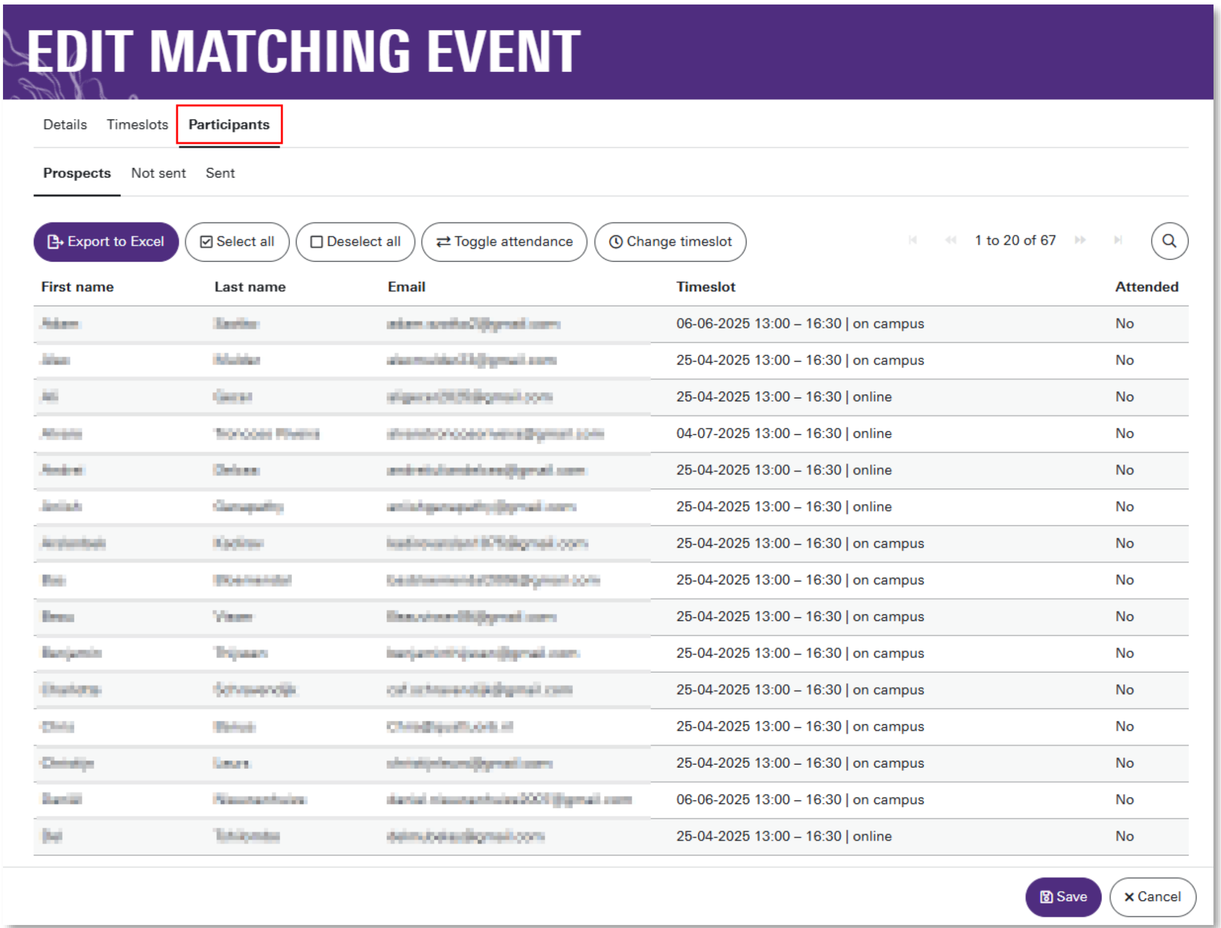
1. Check No at 'Automatic reminder'. By this the [Send reminders] button will become visible.
2. Select the email template you want to send as a reminder email



When you click the [Send reminders] button, the selected email template will be sent to all prospects who have not yet submitted the matching form.

8. PARTICIPANTS FOR AN EVENT

On the tab ‘Participants’ in the ‘Edit matching event’ menu, you can view the registrations of prospects for the matching event(s), maintain them and email them individually or in groups to inform them in more detail about the matching event they have registered for.



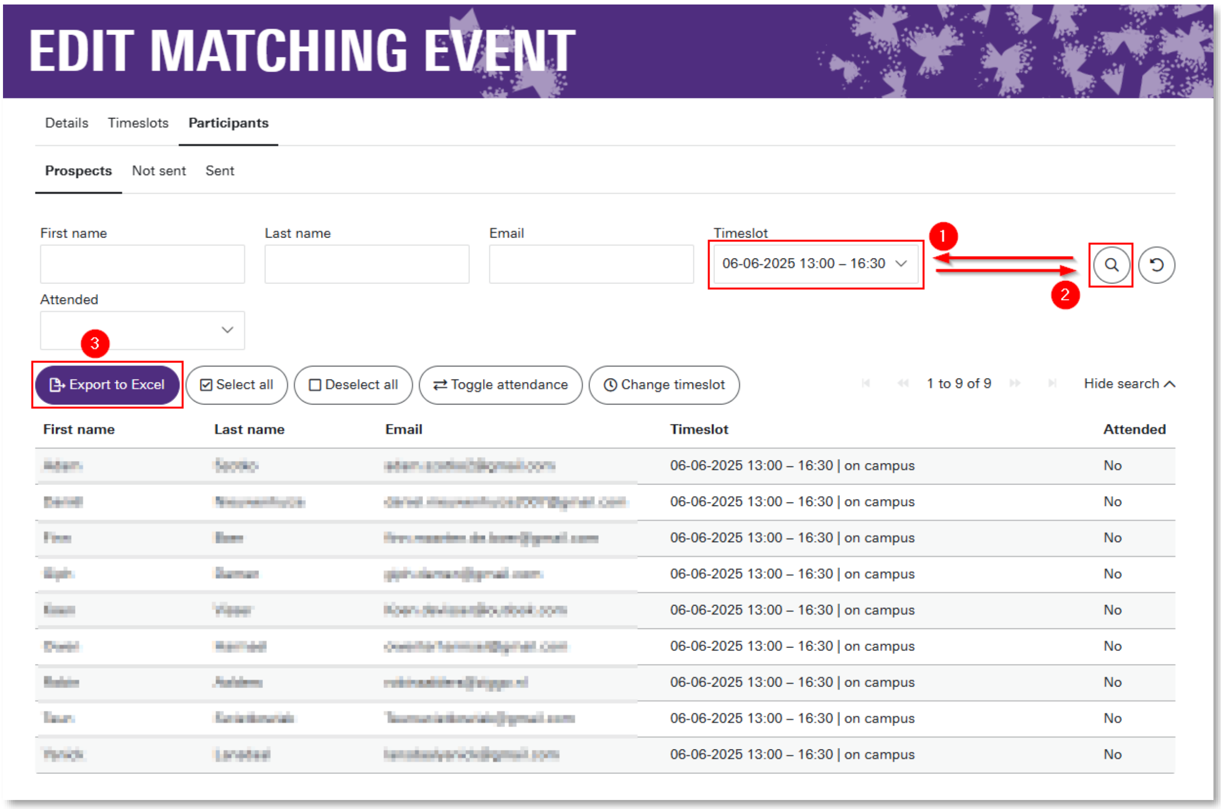
8.1 Viewing and maintaining prospects

On the tab ‘Prospects’ all prospective students who have registered for a timeslot are shown. For this, it is required that the matching event question has been included in the matching form and preferably also set up as a mandatory question. If a prospect has submitted the matching form, but has not filled in the matching event question, the prospect will not be included in this overview.

Creating an export for an event

Via the [Export to Excel] button you can create a .csv file containing an overview of all registrations. You can also create a list of registrations for a specific timeslot, e.g. as an attendance list:

1. Click the [Search] button and select the timeslot of which you want an overview
2. Click the [Search] button again. By this only the prospects who have registered for the timeslot concerned are shown.
3. Click the [Export to Excel] button.



Changing the attendance of a prospect

Via the [Toggle attendance] button you can change the indication whether the prospective student was present at the event or not.

Changing the timeslot

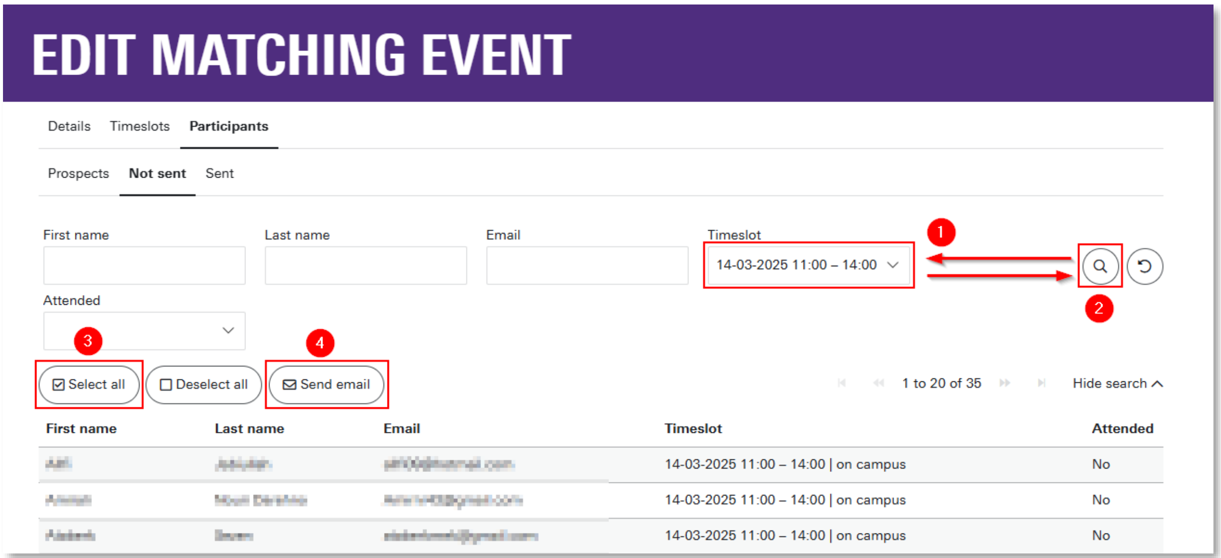
Via the [Change timeslot] you can, if necessary, change the timeslot a prospect had indicated in the matching form. Please note:

- The prospective student will not receive a notification via this action.
- The original timeslot will still be shown in the export file ‘CSV with questionnaire’, as this is an overview of the answers given by the prospect. The same goes for the ‘View prospect’ screen (for matching advisors).

8.2 Sending a first event mail to participants

The tab ‘Not sent’ shows the prospects who have not yet received an email about the matching event they have registered for. In this screen you can send emails about matching events, provided that an email template has been created and linked to the matching event (see chapters 5 and 6).

To send a message to the prospects who applied for a specific timeslot, you first have to select the relevant prospects via the Timeslot-filter:
1. Click the search button and select the timeslot you want to mail about
2. Click the search button again to show the prospects of only the selected timeslot
3. Click [Select all]
4. Click the [Send email] button



5. Confirm by clicking the [Proceed] button.

After this, the selected participants are moved from the screen ‘Not sent’ to the screen ‘Sent’.

8.3 Sending a follow-up event mail to participants

The tab ‘Sent’ shows the prospects who already received an email about the matching event they registered for. At ‘Email sent’ the date is shown when that email was sent. If necessary, a follow-up email can be sent about the matching event, e.g. to notify the participants about a modification in the program.

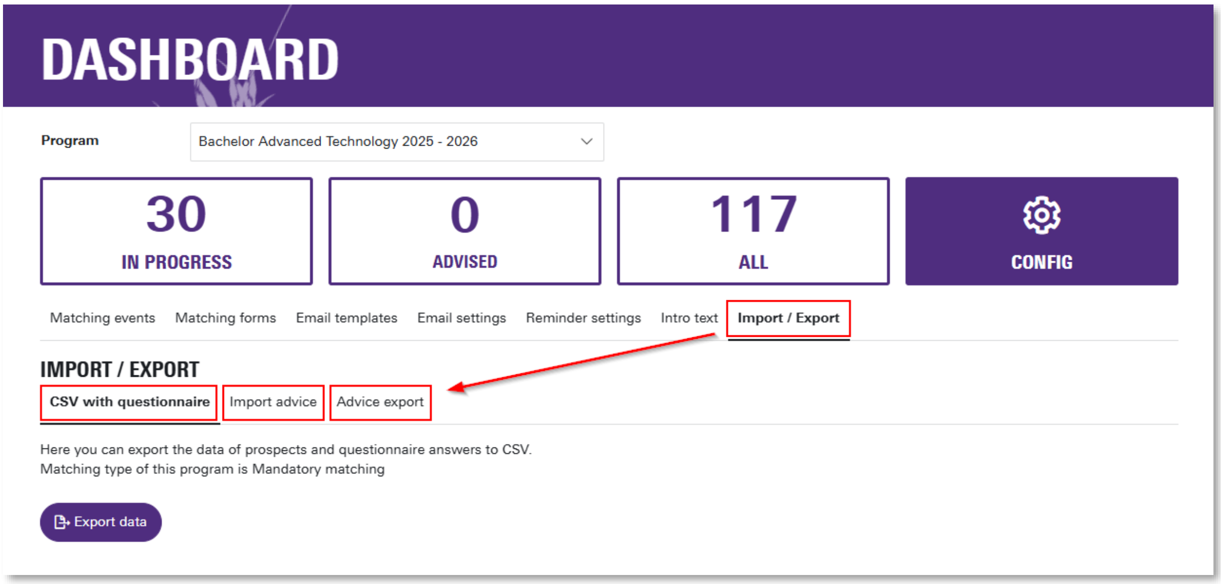
Before you send an email in this screen, make sure the correct email template is linked to the matching event (see chapter 6). You can send follow-up email as follows:
1. Select the participant(s) to whom you want to send the mail
2. Click the [Send email] button
3. Confirm by clicking the [Proceed] button.

9. IMPORT/EXPORT

On the tab 'Import / Export' data can be imported in the Matching application or be exported from it.

For non-mandatory matching, there are two options (two tabs):
- exporting CSV with questionnaire (see paragraph 9.1) to fill in the advice (see paragraph 9.2)
- importing advice or ranking (see paragraph 9.3)

For mandatory matching and numerus fixus, there is a third option (third tab):
- exporting advice or ranking for Osiris (see paragraph 9.4)



9.1 Exporting CSV with questionnaire

Via the [Export data] button on the 'CSV with questionnaire' tab you can create an csv document with the data of prospects and questionnaire answers. This document is needed to fill in the advice or ranking and import those into the Matching application.

Each matching type has its own data export; see table below. The alternating use of Dutch and English terms is a deliberate choice. The column headings in the csv document must contain exactly these terms to be able to import the data into Osiris.

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

* Only questions marked as ‘Excel question’ (see paragraph 3.2) are included in the csv document. Concerning the matching event question: in case the timeslot for a prospect has been changed via the [Change timeslot] button (see paragraph 8.1), the timeslot filled in by the prospect is shown in the matching event column, not the timeslot changed by the matching admin.

9.2 Filling in advice or ranking in the csv document

After you have created the csv document, the advice or ranking can be filled in as follows:

1. Matching: Enter the advice in the ‘Advice’ column (K), using only the values P, N, T, V and NV
   Mandatory matching: Enter the advice in the ‘Resultaat SKC’ column (F), using only the values P, N, T, V and NV
   Numerus Fixus: Enter numbers in the ‘Rangnummer’ column (G), using only numbers.
   Additions and exceptions should be passed through email, not be entered in the Excel document.

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

2. Delete rows in which you have not (yet) filled in advice or a ranking number. A document with blank advices or ranking numbers cannot be imported in Matching.
3. Save the document.
4. Use this document to import the advices in Matching.

9.3 Importing advice or ranking

Via the [Import advice] button on the 'Import advice' tab you can import the csv document with the filled in advices or rankings into Matching. Applications of which the advice or ranking number have previously been imported, are skipped.

9.4 Exporting advice or ranking for Osiris

In case of mandatory matching or numerus fixus the advice resp. ranking will have to be read into Osiris. The required document for this can be exported via the 'Export for Osiris' button on the 'Advice export' tab. When you click this button, a txt document will be created. Please note that you should not make modifications in this document, otherwise it is not possible to read the data into Osiris.

Send the exported txt document to the key-users of SAS, who will read the data into Osiris.