



# 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

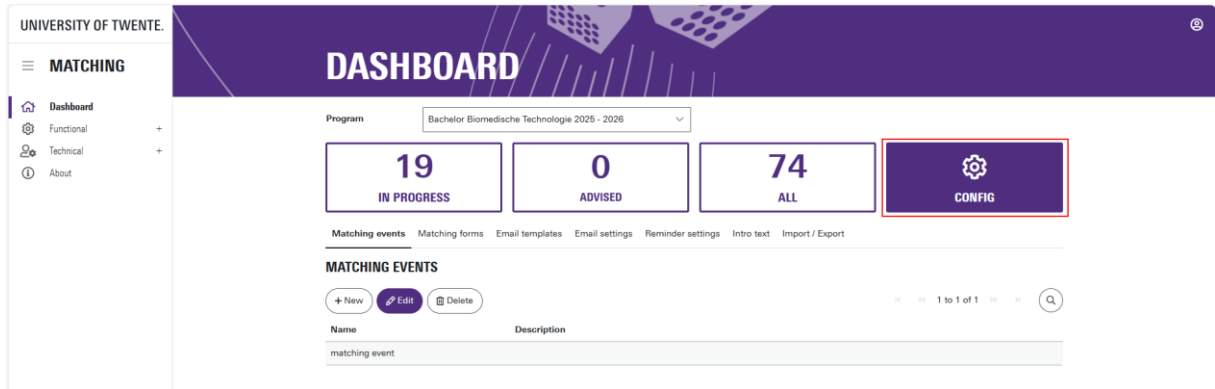
If you have any questions, you can send an email to [matching-ces@utwente.nl](mailto:matching-ces@utwente.nl). Please mention the programme it involves and whether it concerns an issue, proposed change in a questionnaire or a possible request for a new functionality.

# TABLE OF CONTENTS

<b>1. Dashboard .....</b>	<b>2</b>
<b>2. Intro text on landing page .....</b>	<b>3</b>
2.1 Creating an intro text .....	4
<b>3. Matching forms .....</b>	<b>5</b>
3.1 Checking a matching form.....	5
3.2 Marking trigger and excel questions.....	6
<b>4. Matching events .....</b>	<b>8</b>
4.1 Creating and modifying a matching event .....	8
4.2 Creating and maintaining timeslots .....	9
<b>5. Email templates .....</b>	<b>11</b>
5.1 Creating and maintaining email templates .....	13
5.2 Adding links in the text.....	15
5.3 Adding placeholders.....	16
5.4 Adding attachments .....	19
<b>6. Email settings .....</b>	<b>20</b>
<b>7. Reminder settings.....</b>	<b>21</b>
7.1 Setting up automatic reminders.....	21
7.2 Manual reminders .....	22
<b>8. Participants for an event .....</b>	<b>23</b>
8.1 Viewing and maintaining prospects .....	23
8.2 Sending a first event mail to participants .....	25
8.3 Sending a follow-up event mail to participants .....	25
<b>9. Import/Export.....</b>	<b>26</b>
9.1 Exporting CSV with questionnaire.....	26
9.2 Filling in advice or ranking in the csv document .....	27
9.3 Importing advice or ranking .....	28
9.4 Exporting advice or ranking for Osiris .....	28

# 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:


**UNIVERSITY OF TWENTE MATCHING**

Welkom bij de Studiekeuzecheck van de **Universiteit Twente**. Hieronder vind je de opleidingen van de Universiteit Twente waarvoor jij je hebt ingeschreven. De kleur geeft aan of er van je een actie wordt verwacht, oranje betekent dat er een vragenlijst voor jou klaar staat die je nog niet hebt ingevuld. Succes met invullen en hopelijk mogen we je volgend jaar als student van de **Universiteit Twente** begroeten!

Welcome to **University of Twente's** Matching. Below you will find the programmes of the **University of Twente** for which you have applied. The color indicates whether an action is expected from you, orange means there is a questionnaire ready for you that you have not yet completed. Good luck with filling it out and hopefully we may welcome you as a student of the **University of Twente** next year!

More information about our study programmes? Please visit: <https://www.utwente.nl>

**Your application(s)**

**BUSINESS INFORMATION TECHNOLOGY**   
IN PROGRESS

**B-BIT MATCHING**

Below you will find the matching form of the Bachelor's in Business Information Technology. **intro text**

When you have completed and submitted the matching form, the status will change to 'Completed'. After submitting it will not be possible to modify your answers.

Via the pdf button (mouse over) you can download the matching form with your answers.

**MATCHING FORMS**

Form nr	Form name	Program	Last changed	Status
250050	Test Form	Business Information Technology	17-04-2025 10:22	Open

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:

The screenshot shows a web application interface. At the top is a purple header with the word "DASHBOARD" in white. Below the header, there's a "Program" dropdown menu set to "Business Information Technology 2024-2025". Below this are three white boxes with purple borders: the first contains "6 IN PROGRESS", the second contains "0 ADVISED", and the third contains "7 ALL". To the right of these is a purple button with a gear icon and the text "CONFIG". Below these elements is a horizontal menu with several items: "Matching events", "Matching forms", "Email templates", "Email settings", "Reminder settings", "Intro text" (which is highlighted with a red box), and "Import / Export". Below the menu is a section titled "INTRO TEXT". A small text block says: "This configurable intro text will be shown on the dashboard of the prospect when they open their application for this program." Below this is a text editor with a toolbar containing icons for bold, italic, underline, bulleted list, numbered list, link, unlink, insert image, and two dropdown menus. The text area contains the following text: "Below you will find the matching form of the Bachelor's in Business Information Technology.", "When you have completed and submitted the matching form, the status will change to 'Completed'. After submitting is will not be possible to modify your answers.", and "Via the pdf button (mouse over) you can download the matching form with your answers." At the bottom right of the text editor is a purple button with a floppy disk icon and the text "Save".

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

The screenshot shows a dashboard for the 'Bachelor Applied Mathematics 2025 - 2026' program. It features three main statistics: 17 IN PROGRESS, 0 ADVISED, and 51 ALL. Below these are navigation links: Matching events, Matching forms (highlighted with a red box), Email templates, Email settings, Reminder settings, Intro text, and Import / Export. The 'MATCHING FORMS' section includes a 'Preview' button and a table of matching forms. The table has columns for Name, Status, Form type, Version, Last changed by, Changed date, and Primary. Three rows are listed, all for 'B-AM questionnaire 2025' with status 'Current' and changed on '09-10-2024'. The first row is 'Intro' (Primary: No), the second is 'Middle' (Primary: Yes), and the third is 'Outro' (Primary: No). The 'Middle' row is highlighted with a red box.

Name	Status	Form type	Version	Last changed by	Changed date	Primary
B-AM questionnaire 2025	Current	Intro	1	[Redacted]	09-10-2024	No
B-AM questionnaire 2025	Current	Middle	1	[Redacted]	09-10-2024	Yes
B-AM questionnaire 2025	Current	Outro	1	[Redacted]	09-10-2024	No

### 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.

TRIGGER QUESTIONS	
B-AM QUESTIONNAIRE 2025	
3. To what extent are you aware of the programme's content? (working together with other students in projects, collaborating with other programmes, etc)	A little
4. To what extent are you aware of the potential for a master degree?	Much
5. Are you familiar with the programme's international aspect?	Much
6. Are you still deciding about this programme or another one? (Are you still considering your final choice?)	A little
7. How motivated are you to successfully complete this programme?	Much
8. Are there any personal circumstances that might affect your studies?	No, there are no circumstances

MATCHING EVENTS	
Event	Attended
Matching event TCS 2025 on campus 23-06-2025 11:00 - 14:00	<input checked="" type="checkbox"/>

### 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]

# DASHBOARD

Program
Bachelor Advanced Technology 2025 - 2026

32  
IN PROGRESS

0  
ADVISED

84  
ALL

CONFIG

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

## MATCHING FORMS

Preview
Edit trigger- and excel questions

1 to 3 of 3

Name	Status	Form type	Version	Last changed by	Changed date	Primary
B-AT questionnaire 2025	Current	Intro	1	Functional Admin	02-10-2024	No
B-AT questionnaire 2025	Current	Outro	1	Functional Admin	02-10-2024	No
B-AT questionnaire 2025	Current	Middle	1	Functional Admin	02-10-2024	Yes

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.

# BACHELOR ADVANCED TECHNOLOGY 2025 - 20...

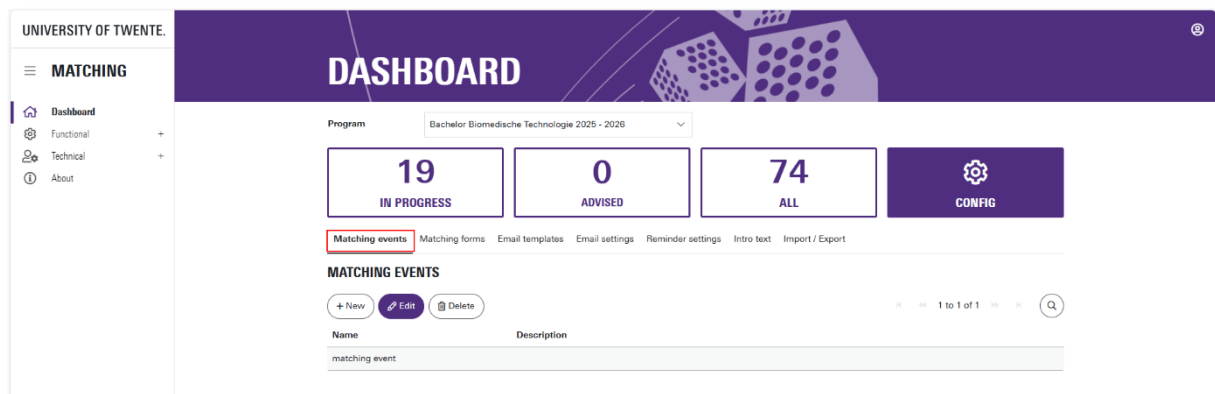
Below you can choose which questions and answers will be shown on the prospect overview as so called trigger questions. And which questions (and answers) will be in the export. The label is mandatory and will be shown as column header in the export.

Question	Is trigger question	Show in excel	Excel label
1. How did you form an opinion about this programme? (more than one answer is possible)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Opinion
2. What were the main reasons for selecting this programme? (more than one answer is possible)	<input type="checkbox"/>	<input type="checkbox"/>	
3a. Did you want to seriously consider doing any other bachelor's programme for the coming academic year?	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

	A	B	C	D	E	P	Q	R	S	T
1	Studentnu	Opleidi	Colleg	Voltij	Datum SKI	Applicatie	Deficient	Opinion	Physics grade	Matching event
2	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01
3	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01
4	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01
5	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01	2024-01-01

## 4. MATCHING EVENTS

Matching events are used to organise scheduled or unscheduled information sessions given online or on campus. The prospective 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.

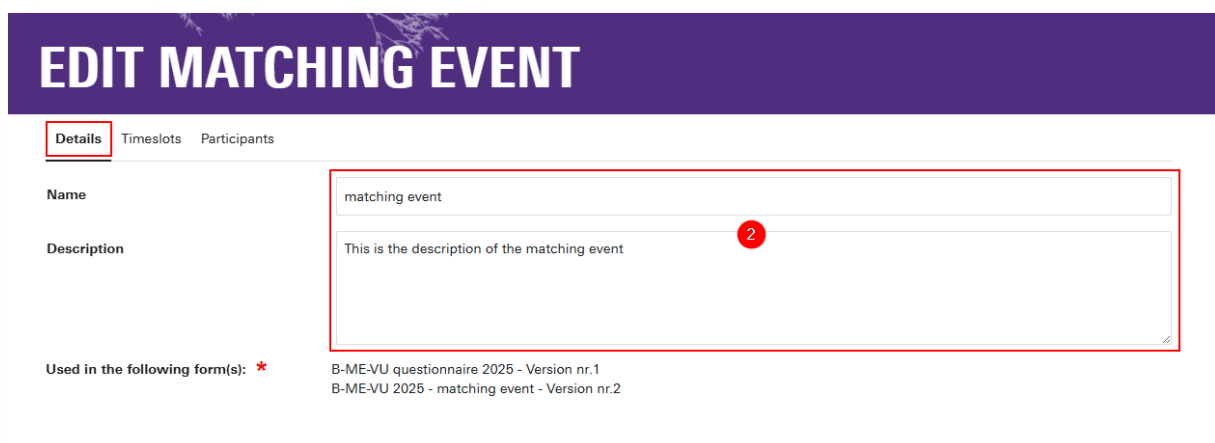


In most cases, only one matching event with multiple timeslots during the academic year is applicable, but it is possible to create more than one matching event. For each event, you can create a specific mail template and link to the specific event.

### 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:

## B-ME-VU 2025 - MATCHING EVENT

1

MATCHING EVENT

### MATCHING EVENT

Our preference is that you come to the VU campus to participate in a matching event. Only for students who are not able to come to our campus, we offer an alternative online matching event. Please fill in below whether you will join on campus or online and on what date you will attend. All on-campus matching events will take place on Friday afternoon. More specific information about the exact time, location and programme will be sent to you approx. two weeks upfront the matching event you've chosen.

I would like to take part in the matching event on:\*

matching event	name	
This is the description of the matching event		description
<input type="radio"/>	13-12-2024   on-campus VU	
<input type="radio"/>	07-03-2025   on-campus VU	
<input type="radio"/>	02-05-2025   online	
<input type="radio"/>	09-05-2025   on campus VU	
<input type="radio"/>	06-06-2025   on campus VU	
<input type="radio"/>	12-06-2025   online	

## 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.

## EDIT MATCHING EVENT

Details Timeslots Participants

+ New

Date	Location	Participants	
04-03-2025 08:00 - 12:00	Zwaaiier 3	0/9	 
04-03-2025 13:30 - 16:30	Zwaaiier	0/9	

### 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

×

### NEW TIME SLOT

Location

Building XX

Online

☐ Yes
☒ No

Date

04-03-2025

📅

Specify time

☒ Yes
☐ No

Start time

08:00

🕒

End time

12:00

🕒

Registration close date

03-03-2025

📅

Specify max participants

☒ Yes
☐ No

Max participants

10

Save

Cancel

#### Example of an unscheduled timeslot (online)

×

### NEW TIME SLOT

Location

Online group event

Online

☒ Yes
☐ No

Specify date

☐ Yes
☒ No

Registration close date

dd-mm-yyyy

📅

Specify max participants

☐ Yes
☒ No

Save

Cancel

## 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.

Template name	Subject	Attachment	Created on
Confirmation matching form	B-BIT - Confirmation matching form	No	04-04-2025 15:07
Invitation matching event	B-BIT - Invitation matching event	No	04-04-2025 15:12
Invitation matching form	B-BIT - Invitation matching form	Yes	04-04-2025 14:53
Reminder matching form	B-BIT - Reminder: fill in the matching form	No	04-04-2025 15:16

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 (or 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.*

**DASHB**

Program

**5**  
IN PROGR

Matching events

**EMAIL TEMPLATES**

+ New Edit

Template name

Invitation matching form

Confirmation matching f

Invitation matching even

Reminder matching form

### EDIT EMAIL TEMPLATE

Template Name 2 Invitation matching form

Subject 3 B-BIT - Invitation matching form

**Email Content**

Plain text **HTML Preview** Attachments

B U I [List Icons]

Dear prospective, 4

As you are eligible for the Bachelor's in Business Information Technology at the University of Twente, you can now participate in the matching session. The purpose of this session is to assess how well your talent, motivation and interests match up with the Business Information Technology programme. See our website for more information about the matching session.

The first step in the matching process is to [fill in the questionnaire](#).

p 72 words

**Placeholders**

Placeholders can be used to add dynamic content to the body of your email template. For example, you can address the recipient by name. The placeholder will automatically be replaced by the attribute values of an object of the entity type selected here. You need to add and configure the Reflection Module to your project before you can create placeholders.

Select Placeholder Entity

Core.EmailTemplateHelper

+ New Edit Delete

Save Cancel

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

**DASHBOARD**

Program

**5**  
IN PROGRESS

Matching events

**EMAIL TEMPLATES**

+ New Edit

Template name

Invitation matching form

Confirmation matching form

Invitation matching event

Reminder matching form

**EDIT EMAIL TEMPLATE**

Template Name: Invitation matching form

Subject: B-BIT - Invitation matching form

**Email Content**

Plain text HTML Preview Attachments

☐ Use the plain text body only

Copy from html text

**Plain body**

Dear prospective,  
As you are eligible for the Bachelor's in Business Information Technology at the University of Twente, you can now participate in the matching session. The purpose of this session is to assess how well your talent, motivation and interests match up with the Business Information Technology programme. See our website for more information about the matching session.  
The first step in the matching process is to fill in the questionnaire.

**Placeholders**

Placeholders can be used to add dynamic content to the body of your email template. For example, you can address the recipient by name. The placeholder will automatically be replaced by the attribute values of an object of the entity type selected here. You need to add and configure the Reflection Module to your project before you can create placeholders.

Select Placeholder Entity: Core.EmailTemplateHelper

+ New Edit Delete

0 to 0 of 0

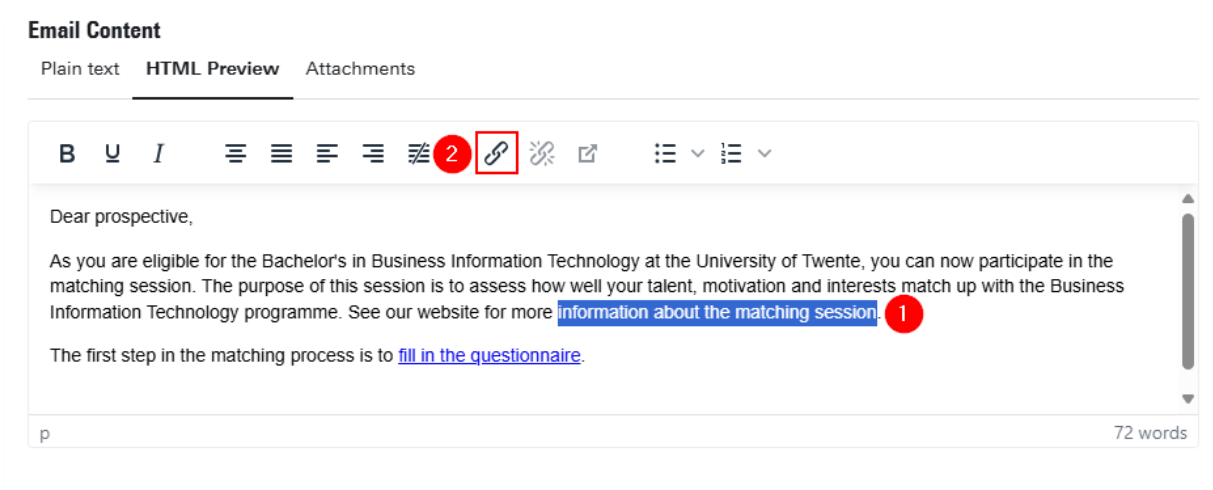
Save Cancel



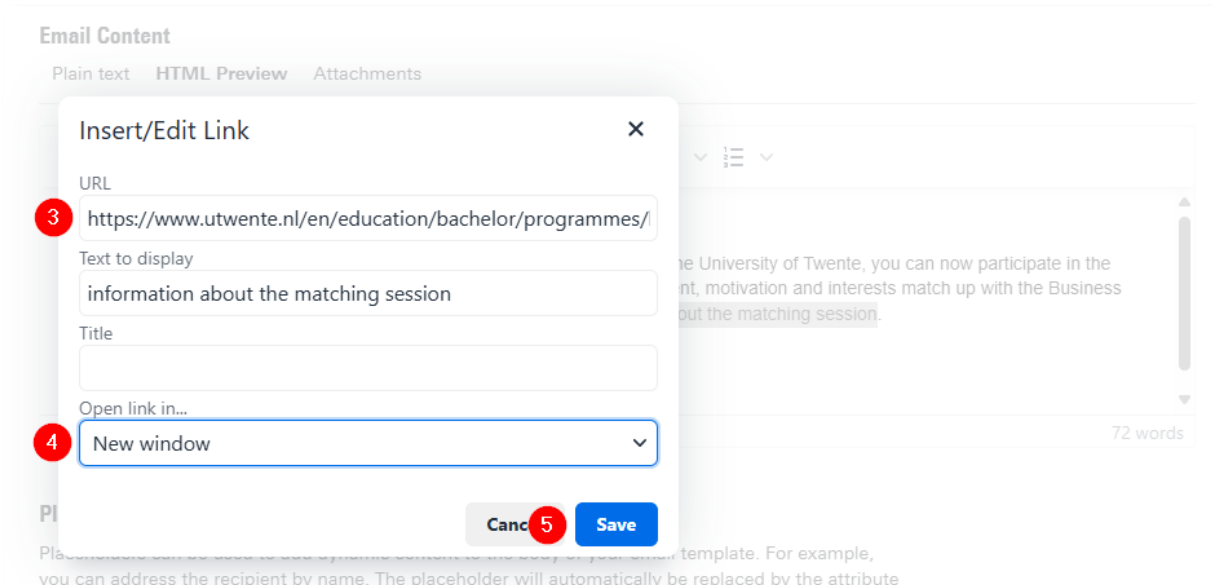
## 5.2 Adding links in the text

### 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.

The screenshot shows the 'EDIT EMAIL TEMPLATE' interface. The 'Subject' field contains 'B-BIT - Invitation matching form'. The 'Email Content' section is in 'HTML Preview' mode, showing a draft email with a 'Dear' salutation and a paragraph about the Bachelor's in Business Information Technology program. Below the email content is the 'Placeholders' section, which includes a description of placeholders and a 'Select Placeholder Entity' button. A red circle with the number '1' highlights the 'Select Placeholder Entity' button. A red square highlights the arrow button next to it. Below the 'Select Placeholder Entity' button are '+ New', 'Edit', and 'Delete' buttons. The 'Placeholder Name' and 'Value' fields are empty, and a message 'No items found.' is displayed. At the bottom are 'Save' and 'Cancel' buttons.

The modal titled 'SELECT AN OBJECTTYPE' is open on the right. It has a search bar and a 'Persistence' dropdown. Below the search bar are 'Select' and 'View' buttons. A table lists object types with columns for 'Module', 'Object name', and 'Persistence'. A red circle with the number '2' highlights the 'EmailTemplateHelper' row.

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

3. Click the [+ New] button
4. Select type: Attribute
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

**EDIT EMAIL**

Subject

**Email Content**

Plain text HTML

**B U I**

Dear

As you are eligible for a matching session...

Information Technology

The first step in the process is to...

P

**Placeholders**

Placeholders can be used to insert dynamic content into your email. You can address the values of an object or a module to your project.

Select Placeholder Entity

**3** [+ New] [Edit] [Delete]

**TOKEN DETAILS**

Token { % DeepLink % }

Description DeepLink

Type **4** Attribute

Objecttype Core.EmailTemplateHelper

Attribute DeepLink **6** DeepLink **5**

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.*

**7** [Save] [Cancel]

1 to 1 of 1

Placeholder Name	Value

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

The screenshot shows the 'Edit email template' interface. At the top, there's a tabbed interface with 'Plain text', 'HTML Preview' (selected), and 'Attachments'. Below the tabs is a rich text editor with various formatting tools (bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, insert link, etc.). The email content is displayed in the editor. It starts with 'Dear {%FullNameProspect%}' followed by a paragraph about the Bachelor's in Business Information Technology at the University of Twente. A link 'information about the matching session' is present. The next line says 'The first step in the matching process is to fill in the questionnaire.' Below the editor, there's a 'Placeholders' section. It explains that placeholders can be used to add dynamic content and lists the 'Core.EmailTemplateHelper' entity. Below this, there are buttons for '+ New', 'Edit' (highlighted with a red arrow), and 'Delete'. A table lists the placeholders:

Placeholder Name	Value
{%DeepLink%}	Core.EmailTemplateHelper/DeepLink
{%FullNameProspect%}	Core.EmailTemplateHelper/FullNameProspect

At the bottom, there are 'Save' and 'Cancel' buttons. Red arrows point from the 'Edit' button in the placeholders list to the placeholder text in the email body and to the 'fill in the questionnaire' text.

## 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

The screenshot displays the 'EDIT EMAIL TEMPLATE' interface. The 'Attachments' tab is selected and highlighted with a red box. In the background, the '+ New' button is circled in red, and the 'Test.pdf' attachment is marked with a red circle containing the number 4. An 'ADD ATTACHMENT' modal is open in the foreground. Inside this modal, the 'Browse...' button is circled in red and marked with a red circle containing the number 2. The 'Save' button at the bottom of the modal is marked with a red circle containing the number 3. The modal also shows a file input field labeled 'File (Max 10MB)' and a 'Cancel' button.

## 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:

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

**DASHBOARD**

Program: Business Information Technology 2024-2025

5 IN PROGRESS    0 ADVISED    5 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
Matching forms - set welcome mail Test Form (Primary) <b>a</b>	Invitation matching form
Matching forms - set thank you mail Thanks template: Test Form (Primary) <b>b</b>	Confirmation matching form
Matching events B-BIT matching event <b>c</b>	Invitation matching event
Advice <b>d</b>	
Positive (P)	
Doubts (T)	
Negative (N)	
Exemption (V)	
Not participated (ND)	

Save

## 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 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 sent.

**DASHBOARD**

Program: Business Information Technology 2024-2025

5 IN PROGRESS | 0 ADVISED | 5 ALL | CONFIG

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

**Automatic reminder** 1 ☒ Yes ☐ No

**Period** 2 ☐ Weekly ☐ Biweekly ☐ Monthly

**Maximum reminders** 2

**Email template** 3 Reminder matching form

Save

## 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

The screenshot shows a web dashboard with a purple header labeled "DASHBOARD". Below the header, there's a "Program" dropdown menu set to "Business Information Technology 2024-2025". The dashboard features four main cards: "5 IN PROGRESS", "0 ADVISED", "5 ALL", and a "CONFIG" button with a gear icon. A navigation bar includes links for "Matching events", "Matching forms", "Email templates", "Email settings", "Reminder settings" (which is highlighted with a red box), "Intro text", and "Import / Export". The "Reminder settings" section contains two fields: "Automatic reminder" with radio buttons for "Yes" and "No" (the "No" button is selected and highlighted with a red box and a red circle with the number 1), and "Email template" with a dropdown menu showing "Reminder matching form" (highlighted with a red box and a red circle with the number 2). A red arrow points from the "No" radio button to a "Send reminders" button. A "Save" button is located at the bottom right of the form.

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.

### EDIT MATCHING EVENT

Details
Timeslots
**Participants**

Prospects
Not sent
Sent

Export to Excel
Select all
Deselect all
Toggle attendance
Change timeslot

1 to 20 of 67

First name	Last name	Email	Timeslot	Attended
Adam	Barlow	adam.barlow2@gmail.com	06-06-2025 13:00 – 16:30   on campus	No
Alan	Bolton	alanbolton11@gmail.com	25-04-2025 13:00 – 16:30   on campus	No
Ali	Qasbi	aliqasbi0905@gmail.com	25-04-2025 13:00 – 16:30   online	No
Alvin	Thiruvadi Prasad	alvinthiruvadi@gmail.com	04-07-2025 13:00 – 16:30   online	No
Andrei	Delava	andreiandela@gmail.com	25-04-2025 13:00 – 16:30   online	No
Antish	Ganapathy	antishganapathy@gmail.com	25-04-2025 13:00 – 16:30   online	No
Arjunbabu	Kupfer	arjunbabu107@gmail.com	25-04-2025 13:00 – 16:30   on campus	No
Bai	Boonvongchai	bai.boonvongchai@gmail.com	25-04-2025 13:00 – 16:30   on campus	No
Beno	Vicari	benovicari@gmail.com	25-04-2025 13:00 – 16:30   on campus	No
Benjamin	Trijwan	benjamintrijwan@gmail.com	25-04-2025 13:00 – 16:30   on campus	No
Chaitanya	Chinnaveedu	chaitanyachinnaveedu@gmail.com	25-04-2025 13:00 – 16:30   on campus	No
Chris	Wheeler	Chris@wheeler.it	25-04-2025 13:00 – 16:30   on campus	No
Christophe	Leun	christopheleun@gmail.com	25-04-2025 13:00 – 16:30   on campus	No
Daniel	Neenanhuwa	daniel.neenanhuwa2001@gmail.com	06-06-2025 13:00 – 16:30   on campus	No
Dei	Takimada	deitakimada@gmail.com	25-04-2025 13:00 – 16:30   online	No

Save
Cancel

### 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.

**EDIT MATCHING EVENT**

Details Timeslots **Participants**

Prospects Not sent Sent

First name Last name Email Timeslot

06-06-2025 13:00 - 16:30

Attended

**Export to Excel** ☒ Select all ☐ Deselect all ☒ Toggle attendance  1 to 9 of 9 Hide search ^

First name	Last name	Email	Timeslot	Attended
Adam	Scott	adam.scott@gmail.com	06-06-2025 13:00 - 16:30   on campus	No
Daniël	Meunier	daniel.meunier@outlook.com	06-06-2025 13:00 - 16:30   on campus	No
Finn	Lee	finn.lee@outlook.com	06-06-2025 13:00 - 16:30   on campus	No
Ilja	Reuter	ilja.reuter@gmail.com	06-06-2025 13:00 - 16:30   on campus	No
Koen	De Vries	koen.devries@outlook.com	06-06-2025 13:00 - 16:30   on campus	No
Owen	Reuter	owen.reuter@outlook.com	06-06-2025 13:00 - 16:30   on campus	No
Ruben	Adams	ruben.adams@outlook.com	06-06-2025 13:00 - 16:30   on campus	No
Sam	Reuter	sam.reuter@gmail.com	06-06-2025 13:00 - 16:30   on campus	No
Tim	Reuter	tim.reuter@gmail.com	06-06-2025 13:00 - 16:30   on campus	No

### 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

The screenshot shows the 'EDIT MATCHING EVENT' interface. The 'Participants' tab is active, and the 'Not sent' filter is selected. The search bar is empty. The timeslot dropdown is set to '14-03-2025 11:00 - 14:00'. The 'Attendee' dropdown is set to 'All'. The 'Select all' button is highlighted with a red box and number 3. The 'Send email' button is highlighted with a red box and number 4. The table below shows the list of participants.

First name	Last name	Email	Timeslot	Attended
John	Johnson	john@domain.com	14-03-2025 11:00 - 14:00   on campus	No
Anna	Must Dorian	anna403@gmail.com	14-03-2025 11:00 - 14:00   on campus	No
Adrian	Boon	adrianboon@gmail.com	14-03-2025 11:00 - 14:00   on campus	No

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)

The screenshot shows the 'DASHBOARD' of the Matching application. At the top, there's a purple header with the word 'DASHBOARD' in white. Below it, a 'Program' dropdown menu is set to 'Bachelor Advanced Technology 2025 - 2026'. Three large white boxes with purple borders display statistics: '30 IN PROGRESS', '0 ADVISED', and '117 ALL'. To the right is a purple 'CONFIG' button with a gear icon. Below these are navigation tabs: 'Matching events', 'Matching forms', 'Email templates', 'Email settings', 'Reminder settings', 'Intro text', and 'Import / Export'. The 'Import / Export' tab is selected and highlighted with a red box. Below the tabs, the 'IMPORT / EXPORT' section has three sub-tabs: 'CSV with questionnaire', 'Import advice', and 'Advice export'. The 'CSV with questionnaire' tab is selected and highlighted with a red box. A red arrow points from the 'Import / Export' tab to the 'Advice export' sub-tab. Below the sub-tabs, there's a text block: 'Here you can export the data of prospects and questionnaire answers to CSV. Matching type of this program is Mandatory matching.' At the bottom, there's a purple button with a white icon and the text 'Export data'.

### 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	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
	Application date	Application date
	Deficient	Deficient
+ additional export questions and answers *	+ additional export questions and answers *	+ 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
<b>P</b>	Positive advice (P= <i>Positief</i> )
<b>N</b>	Negative advice (N= <i>Negatief</i> )
<b>T</b>	Doubt but may come (T= <i>Twijfel</i> )
<b>V</b>	Exemption (V= <i>Vrijstelling</i> )
<b>ND</b>	Not participated (ND= <i>Niet deelgenomen</i> )

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.