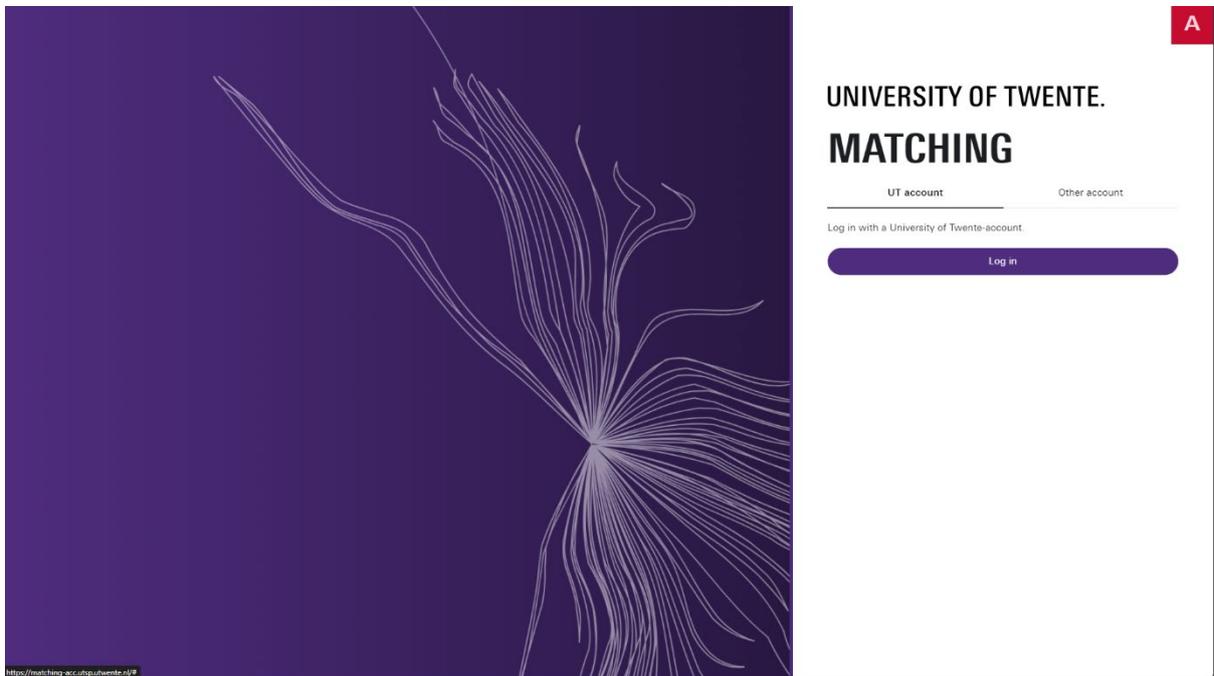
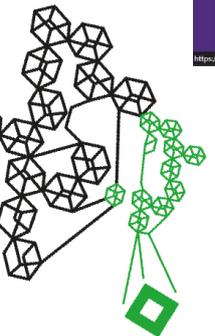
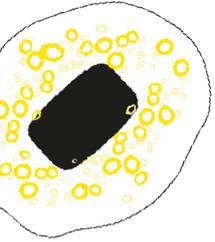


# Manual Matching Application for Matching advisor



February 2025

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# Version management

[Click here for the latest version of the manual](#)

Changes in the manual compared to the previous version:

- Screenshots updated
- 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.

# Dashboard

If you have authorisation for matching advisor only, the dashboard of Matching is shown as below, with the three tiles [IN PROGRESS], [ADVISED] and [ALL]:

**DASHBOARD**

Program:

**5** IN PROGRESS    **4** ADVISED    **11** ALL

Open    Completed    All

Open 1 to 9 of 9

| S-number | First name | Infixes | Last name | Application date | Date send        | Status |
|----------|------------|---------|-----------|------------------|------------------|--------|
| u0000001 | Alan       |         | Alphard   | 13-11-2023       | 10-09-2024 11:34 | Sent   |
| u0000002 | Ella       |         | Ola       | 31-10-2023       | 18-07-2024 10:53 | Sent   |
| u0000003 | Isac       |         | Marcus    | 26-10-2023       | 10-09-2024 11:26 | Sent   |
| u0000004 | Kenneth    |         | Kenneth   | 30-10-2023       | 18-07-2024 08:50 | Sent   |
| u0000005 | Marlene    |         | Paul      | 29-10-2023       | 18-07-2024 08:50 | Sent   |
| u0000006 | Oliver     |         | Quinten   | 29-10-2023       | 18-07-2024 08:50 | Sent   |
| u0000007 | Robbert    |         | Pransky   | 24-10-2023       | 10-09-2024 11:17 | Sent   |
| u0000008 | Robbert    |         | Pransky   | 29-10-2023       | 18-07-2024 08:50 | Sent   |
| u0000009 | David      |         | Carsten   | 13-11-2023       | 18-07-2024 14:43 | Sent   |

If you have authorisation for both matching advisor and matching admin, an extra tile [CONFIG] is visible:

**DASHBOARD**

Program:

**6** IN PROGRESS    **4** ADVISED    **12** ALL    **CONFIG**

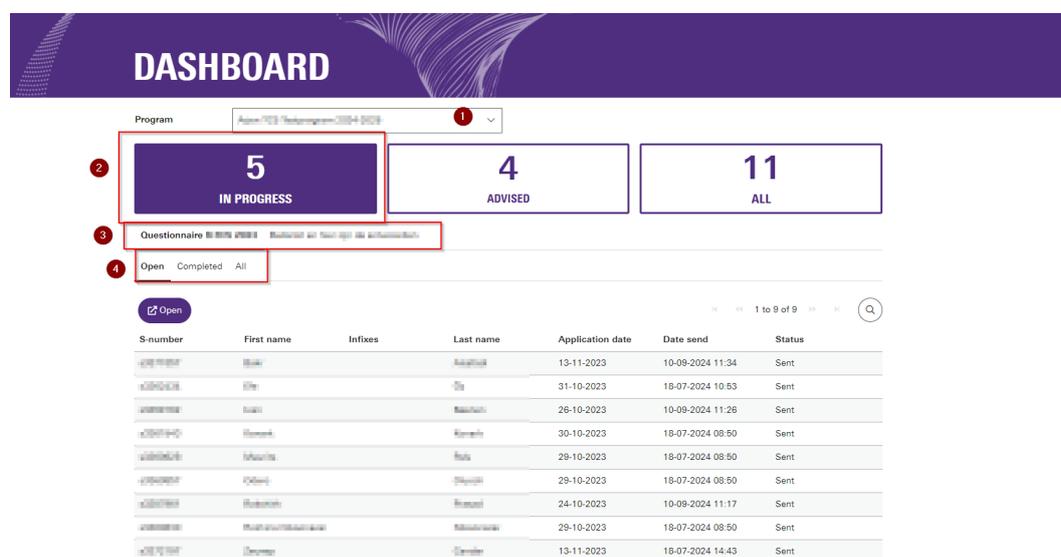
Open    Completed    All

Open 1 to 10 of 10

| S-number | First name | Infixes | Last name | Application date | Date send        | Status |
|----------|------------|---------|-----------|------------------|------------------|--------|
| u0000001 | Alvin      |         | Pransky   | 02-10-2024       | 02-10-2024 15:59 | Sent   |
| u0000002 | Alan       |         | Alphard   | 13-11-2023       | 10-09-2024 11:34 | Sent   |
| u0000003 | Ella       |         | Ola       | 31-10-2023       | 18-07-2024 10:53 | Sent   |
| u0000004 | Isac       |         | Marcus    | 26-10-2023       | 10-09-2024 11:26 | Sent   |
| u0000005 | Kenneth    |         | Kenneth   | 30-10-2023       | 18-07-2024 08:50 | Sent   |
| u0000006 | Marlene    |         | Paul      | 29-10-2023       | 18-07-2024 08:50 | Sent   |
| u0000007 | Oliver     |         | Quinten   | 29-10-2023       | 18-07-2024 08:50 | Sent   |
| u0000008 | Robbert    |         | Pransky   | 24-10-2023       | 10-09-2024 11:17 | Sent   |
| u0000009 | Robbert    |         | Pransky   | 29-10-2023       | 18-07-2024 08:50 | Sent   |
| u0000010 | David      |         | Carsten   | 13-11-2023       | 18-07-2024 14:43 | Sent   |

# Description of Tiles

## Tile IN PROGRESS



### 1. *Program:*

Here you can see the active programme for which you are currently performing the role of Matching advisor. If you are linked to several programmes, you can select which programme you want to be active for via a drop-down menu.

### 2. *IN PROGRESS:*

The purple tile is the tile that is active.

The number on this tile indicates how many prospective students still have an open questionnaire in this programme.

### 3. *Questionnaires:*

This block contains the questionnaire of the form type 'middle'. In many cases, this will be one middle form (the primary). However, it is possible to create several middle forms as a follow-up. The prospective student can fill in the follow up once he or she has completed the original questionnaire. The left 'questionnaire' is the primary.

### 4. *Status of questionnaire:*

By pressing the 'Open', 'Completed' and 'All' tabs, you can indicate which overview to prospective students is presented below.

- **Open:** lists prospective students who have received a questionnaire for the selected programme but have not yet submitted it.
- **Completed:** gives an overview of prospective students who have submitted the questionnaire for the selected programme. It's possible to send another questionnaire to prospective students who have finished the primary questionnaire. How to send a follow-up is described further on.

- **All:** provides an overview of all prospective students who have received the questionnaire for the selected programme.

## Tile ADVISED

The screenshot shows a dashboard with a purple header labeled 'DASHBOARD'. Below the header is a 'Program' dropdown menu (1). There are four tiles: 'IN PROGRESS' (1), 'ADVISED' (7) (2), 'ALL' (9), and 'CONFIG'. Below the tiles are tabs for 'Positive (P)', 'Doubts (T)', 'Negative (N)', 'Exemption (V)', and 'Not participated (ND)' (3). Below the tabs are buttons for 'Open' and 'Send email' (4). Below the buttons is a table with columns: S-number, First name, Infixes, Last name, Application date, and Email sent. The table contains two rows of data.

| S-number | First name | Infixes | Last name | Application date | Email sent |
|----------|------------|---------|-----------|------------------|------------|
| 10000001 | John       |         | John      | 05-11-2023       |            |
| 10000002 | John       |         | John      | 05-12-2024       |            |

### 1. *Program:*

Here you can see the active programme for which you are currently performing the role of Matching advisor. If you are linked to several programmes, you can select which programme you want to be active for via a drop-down menu.

### 2. *ADVISED:*

The purple tile is the tile that is active. The number on this tile indicates how many prospective students have been assigned an advice within this programme. Note that only a Matching Admin can import advises.

### 3. *Types of advises:*

Prospective students can be assigned an advice:

- **Positive (P):** the prospective students in the list below, have a positive advice: there seems to be a good match between prospective student and programme
- **Doubts (T):** the prospective students in the list below have an advice “Doubt” but may come.
- **Negative(N):** the prospective students in the list below, have a negative advice: there is a negative match between prospective student and programme

The selected tab displays a list of prospective students with a corresponding advice.

**Note:** Linking the advice to the prospective student, can only be done by the **Matching Admin**.

The following advises are also set up as options for Osiris but are not common for most programmes.

- **Exemption (V):** the prospective students in the list below, have an advice “exemption”: there is an exemption

- **Not participated (ND):** the prospective students in the list below, have an advice “Not participated”: The prospective student did not attend one or more matching activities.

4. *Open/ email prospective student:*

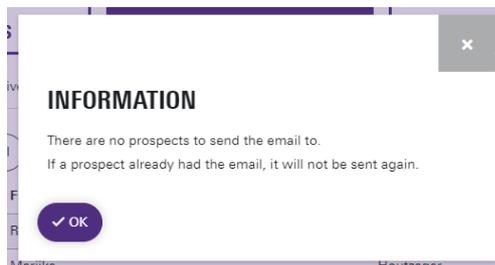
You can select a prospective student within the indicated list of prospective students and click on ‘open’ to get more information about that student. You will then enter the so-called “[VIEW PROSPECT](#)”. There will be a more detailed description of this below.

## Sending an email about advices

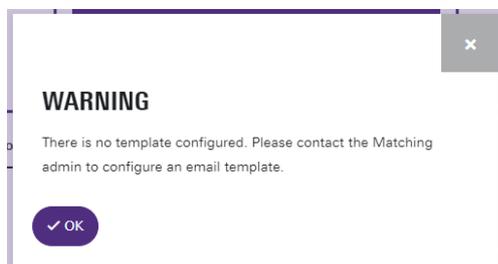
Based on the different advices, it is possible to mail selected prospective students with a corresponding email template. (Linking the corresponding email templates is a task of the Matching Admin).

- To send the linked email to the prospective students in the list, first choose the correct advice tab.
- Then press ‘Send email’. The email will now be sent to all prospective students who have not yet received the corresponding mail.

If prospective students from the list have already received an email, you will see this notification:



Of course, sending an email is only possible if the Matching admin has linked a corresponding email template to it. If no template has been set up, you will see this message:



Title: ALL

The screenshot shows a dashboard with a purple header labeled 'DASHBOARD'. Below the header is a 'Program' dropdown menu. There are three summary tiles: '5 IN PROGRESS', '4 ADVISED', and '11 ALL' (highlighted in purple). Below these are two tabs: 'Applications' and 'Withdrawn'. Under 'Applications', there are two buttons: 'Open' and 'Send follow-up'. Below the buttons is a table with columns: S-number, First name, Infixes, Last name, and Application date. The table contains 11 rows of data.

| S-number | First name    | Infixes | Last name | Application date |
|----------|---------------|---------|-----------|------------------|
| x000000  | Infany        |         | Pia       | 29-10-2023       |
| x000001  | Burrow/Burrow |         | Wendy     | 29-10-2023       |
| x000002  | Olav          |         | Olav      | 29-10-2023       |
| x000003  | Samuel        |         | Matias    | 30-10-2023       |
| x000004  | Emilia        |         | Veronica  | 31-10-2023       |
| x000005  | Die           |         | Die       | 31-10-2023       |
| x000006  | Jasper        |         | Emile     | 13-11-2023       |
| x000007  | Maria         |         | Em        | 29-08-2024       |
| x000008  | Subram        |         | Prasad    | 24-10-2023       |
| x000009  | Van           |         | Steven    | 28-10-2023       |
| x000010  | Ben           |         | Stefan    | 13-11-2023       |

1. *Program:*

Here you can see the active programme for which you are currently performing the role of Matching advisor. If you are linked to several programmes, you can select which programme you want to be active for via a drop-down menu.

2. *ALL:*

The purple tile is the tile that is active. The number next to this tile indicates how many prospective students were sent a questionnaire. (including withdrawals)

3. *List of applicants:* Here are two tabs that allow you to present a list of prospective students:

**Applicants:** list of prospective students who have applied for the programme and have not yet withdrawn this application.

**Withdrawn:** list of prospective students who applied for the programme and withdrew this application.

4. *Open view prospect/ Send follow up:*

**Open:** You can select a prospective student within the indicated list of prospective students and click on 'open' to get more information about that student. You will then enter the so-called "[VIEW PROSPECT](#)". There will be a more detailed description of this below.

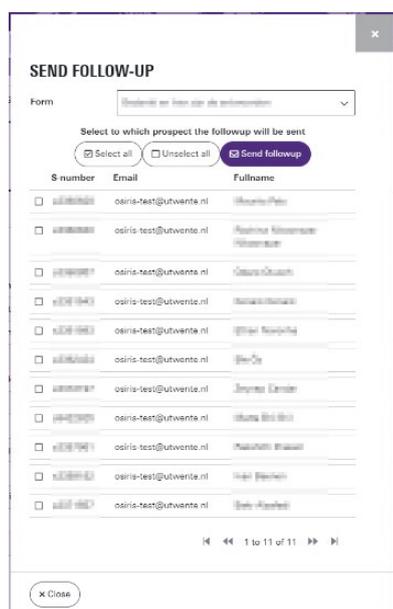
**Send follow up:** Sometimes a programme chooses to send another questionnaire to the prospective student after the first questionnaire. For this, the following is important to know:

## Sending a follow up questionnaire

- The follow-up questionnaire will be set up **by the functional admin** as requested by the programme (create another (middle) form).
- The **matching admin** links the follow up questionnaire to a corresponding email template that again contains the deeplink for the questionnaire.
  - o Once you have pressed 'send follow up', you will be asked which template you want to use to send as a follow up.



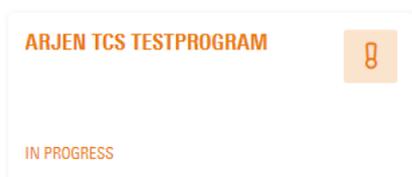
Select the desired template. You will see the following screen:



Here you can select (select all) or deselect (unselect all) all prospective students from the list at once. It is also possible to select an individual prospective student. If you hold down CTRL while clicking, you can make a selection of several prospective students. After you have made the selection of prospective students you want to write to, click on 'sent follow up'.

After sending a follow-up, the tile of the questionnaire turns orange again:

Your application(s)



When the student clicks on the tile, it sees the following:

## B-BRT MATCHING

Hier kan je marketing informatie kwijt of invulinstructie als je het niet begrijpt. Maar dan heb je ook niets te zoeken op een academische opleiding.

### MATCHING FORMS

| Form nr | Form name                          | Program               | Last changed     | Status    |   |
|---------|------------------------------------|-----------------------|------------------|-----------|---|
| 240182  | Bedankt en hier zijn de antwoorden | Arjen TCS Testprogram | 13-12-2024 13:13 | Open      |    |
| 240171  | Questionnaire B-TCS 2024           | Arjen TCS Testprogram | 13-12-2024 13:13 | Completed |   |

The part with the orange line in front of it, is the follow-up. It has become available and fillable within the questionnaire.

The part with the green line in front of it is a previously submitted questionnaire. It cannot be edited and can only be downloaded.

## B-BRT MATCHING

Hier kan je marketing informatie kwijt of invulinstructie als je het niet begrijpt. Maar dan heb je ook niets te zoeken op een academische opleiding.

### MATCHING FORMS

| Form nr | Form name                          | Program               | Last changed     | Status    |   |
|---------|------------------------------------|-----------------------|------------------|-----------|---|
| 240182  | Bedankt en hier zijn de antwoorden | Arjen TCS Testprogram | 13-12-2024 13:13 | Open      |   |
| 240171  | Questionnaire B-TCS 2024           | Arjen TCS Testprogram | 13-12-2024 13:13 | Completed |  |

# VIEW PROSPECT

The Matching advisor can view more detailed data on prospective students. The description of the different tiles already described how "view prospect" can be opened.

## View prospect – Summary

If you have clicked on a prospective student to see more information, you will see this screen:

The screenshot shows the 'VIEW PROSPECT' interface. At the top left, the title 'VIEW PROSPECT' and the student's name 'SARA HOUTLAGER' are displayed (callout 1). Below this is a navigation bar with tabs for 'Summary', 'Matching forms', 'Files', and 'Emails' (callout 2). The 'Summary' tab is active. The main content area is divided into several sections: 'DETAILS' (callout 3) containing personal information like student number, name, and address; 'TRIGGER QUESTIONS' (callout 4) showing a table of questions and answers for 'MIDDLE TECHNISCHE NATUURKUNDE'; 'INTERNAL CHAT' (callout 5) for communication; and 'MATCHING EVENTS' (callout 6) showing a table of events. A 'Close' button is located at the bottom left.

1. Here is the name of the prospective student and the programme he or she has applied for.
2. Here are tabs with the functionalities 'Summary', 'Matching Forms', 'files' and 'emails'. The elaboration of these tabs takes place below. The active tab is **Summary**.

### Student details

3. These are transferred from Osiris (Studielink as source). Data which may not have been entered correctly should be changed by the student in Studielink. If a prospective student has made a change at Studielink, this will also be processed via Osiris at Matching. This takes a couple of days.

### Trigger questions

4. In the questionnaire, questions are designated as 'trigger question' at the request of the programme. This is set by the Matching admin. Under trigger questions in the 'view prospect', an overview is presented of the questions that are designated as 'trigger question'. The prospective student's answers are not visible until he or she has submitted the questionnaire.

### Internal chat

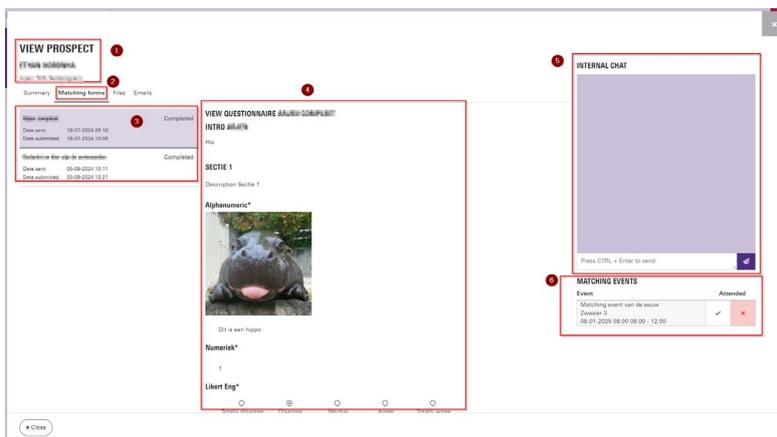
5. The internal chat is for Matching advisors to write notes specific about this student. This way Matching advisors of this programme can share notes. (For

example, posting a note like 'This student could not attend the matching event due to health reasons'. Posted notes cannot be deleted.

### Matching event

6. If a question type 'Matching event' is placed in a questionnaire, a prospective student can indicate which time slot he or she wants to register for. Here you can see which time slot the prospective student has chosen. The Matching advisor can also indicate here whether someone has attended or not.

## View prospect – Matching forms



1. Here is the name of the prospective student and the programme he or she has applied for.
2. This is the active tab. (Bold and underlined)

### Submitted questionnaires

3. These are the (middle) questionnaires submitted by the prospective student. If there are several below each other, the top one is the primary middle.
4. Here you can see the complete, completed questionnaire with all questions and answers as the prospective student sees them. Answers to questions in the questionnaires are only visible after the prospective student presses 'submit'. Once the questionnaire has been submitted, the prospective student cannot make any changes to it.

### Internal chat

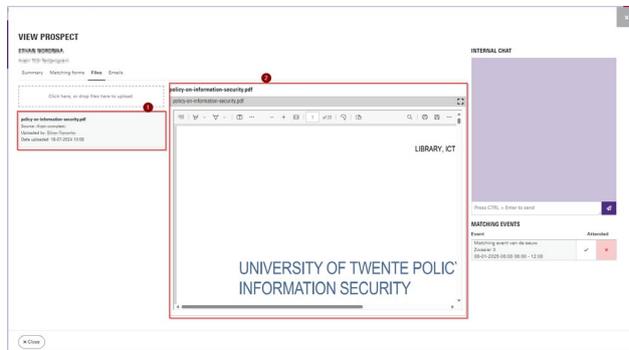
5. The internal chat is for Matching advisors to write notes specific about this student. This way Matching advisors of this programme can share notes. (For example, posting a note like 'This student could not attend the matching event due to health reasons'). Posted notes cannot be deleted.

### Matching event

6. If a question type 'Matching event' is placed in a questionnaire, a prospective student can indicate which time slot he or she wants to register for. Here you

can see which time slot the prospective student has chosen. The Matching advisor can also indicate here whether someone has attended or not.

## View prospect – files

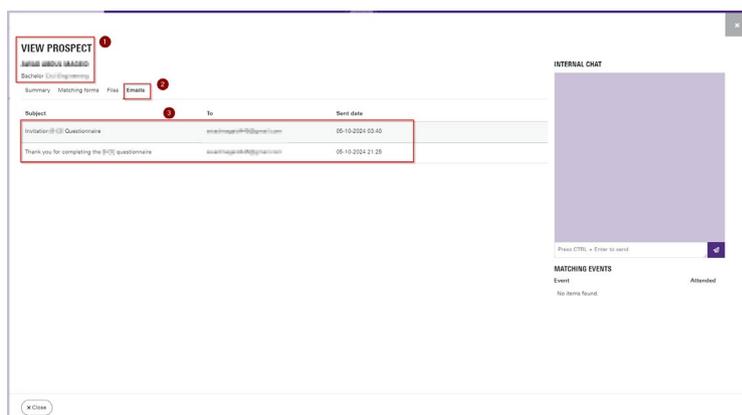


## Upload/ uploaded files

In the 'Click here, or drop files here to upload' box, the Matching Advisor can upload files.

1. Here you can see all files uploaded by the prospective student and the Matching advisor. Files uploaded by the prospective student are not removable. Files uploaded by the Matching advisor are removable.
2. Preview of the file selected on the left.

## View prospect – Emails

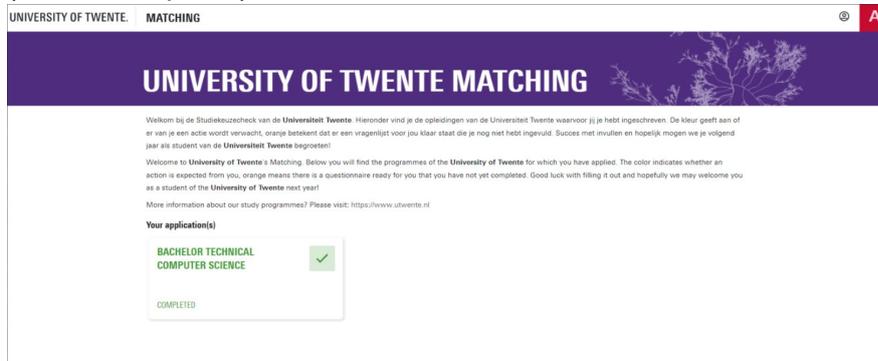


1. Here is the name of the prospective student and the programme he or she has applied for.
2. This is the active tab. (Bold and underlined)
3. Here is a summary of emails sent to this prospective student regarding:
  - Subject of the email
  - To (to which email address the email was sent)
  - Sent date

**Note:** The content of the emails listed here is not shown due to privacy-sensitive information. Especially the personal deeplink is information we do not want to share with others.

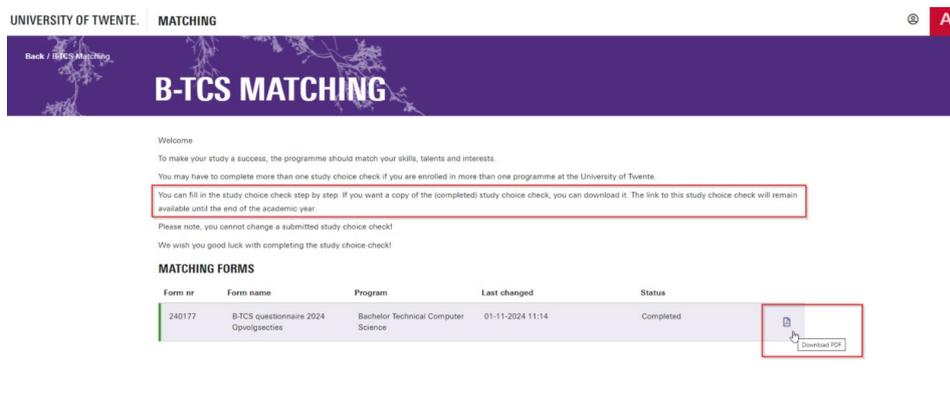
# Good to know

After submitting a questionnaire, prospects can always return to their “tile” at any time (via the deep link).



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.