



# WISER ID System User's Guide

Powered By  
ESP Solutions Group,  
eScholar's *Uniq-ID* Version 3.2,  
and  
Edustructure's *Student Locator Framework*



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## ABOUT THIS MANUAL

This manual is designed to be used as a reference guide to help the user in using the Wyoming Student Record Identification and Locator System (WISER ID System). This application will help the user to:

- Understand the Wyoming Student Locator Framework Functionality and interact with it.
- Assign a unique statewide student identifier for every student in pre-kindergarten, kindergarten, elementary and secondary public education in the state. This identifier is called the WISER ID.
- Identify and locate a student record from the WISER ID database either using the WISER ID or the basic details of a student like last name and first name.
- Resolve students who have transferred to a new school and/or district. In addition, the gaining and losing schools/districts will be able to communicate with each other via emails generated by the Student Locator Agent.

This manual includes extra space on each page for the user to make notes. We have also included some notes and tips that are designed to highlight important topics.

To make it easier for the user to find information in this manual, each topic begins on a new page.



**NOTE:** *This box will mention things that require special attention. The symbol to the left indicates an important note to remember.*



**TIP:** *This box will include useful advice as the user works through the WISER ID System. The pointing hand always indicates a "TIP".*

## IMPORTANT TERMS

A number of terms will be used throughout this manual that may be unfamiliar to the user. Take a minute to review these important terms before beginning:

Term	Meaning
<b>Batch File</b>	<p>An operating system file that will contain a group of student records in a pre-defined format. Five different types of batch files are used in the WISER ID System. They are:</p> <ol style="list-style-type: none"> <li>1. Input file that contains student information. This file is also called the "Student Batch File."</li> <li>2. Output "IDs Assigned" file.</li> <li>3. Output "Errors to Fix" file.</li> <li>4. Output "Near Matches/Duplicates to Resolve" file.</li> <li>5. Output "Cancelled Records" file.</li> </ol> <p>Refer to "Input and Output Files Interfaces" section at the end of this document for more information about these types of files.</p>
<b>Duplicate/Match</b>	<p>Match probability that falls above the upper threshold value. For example, if the upper threshold value is 0.9, then all matching records reported with a match probability between 0.9 and 0.9999 will be considered a duplicate/match.</p>
<b>Edit</b>	<p>An action to be performed by the user for fixing any data validation errors in the Student Batch File before the WISER ID assignment process. Users will be in a position to fix these errors using the application's online screen interface.</p>
<b>Error</b>	<p>Incorrect / incomplete / missing information in the Student Batch File identified by the WISER ID System validation process. Errors in the input records need to be fixed before creating an ID for a student.</p>
<b>Gender</b>	<p>Indicates the gender of the students being reported, either Male or Female.</p>
<b>WISER ID</b>	<p>State Record Identification Number; an 8 digit state-assigned identifier for every unique PK-12 student record in the state database.</p>
<b>ID</b>	<p>Same as WISER ID.</p>
<b>Identifier</b>	<p>A number that represents an individual.</p>

Term	Meaning
<b>Match Probability</b>	A fractional value (less than 1) that represents the matching level of a pair of student records. The WISER ID System gives this value as the outcome of matching a pair of student records using probabilistic methods.
<b>NCLB</b>	The No Child Left Behind federal legislation signed into law on January 8, 2002.
<b>Near Match</b>	Match probability that falls below the upper threshold value but above the lower threshold value.
<b>PK-12</b>	Grades pre-kindergarten through 12 <sup>th</sup> .
<b>Radio Button</b>	A screen interface in most applications that allows a user to choose only one choice from a group of many choices.
<b>SLF</b>	Student Locator Framework.
<b>Status Column</b>	The column that appears in most of the screens in the WISER ID System that displays the current status of a batch.
<b>Student Information System (SIS)</b>	A software application that administers and maintains student information in a school / school district, such as enrollment, scheduling, attendance, accounting and grade reporting.

# The Wyoming Student Locator Framework

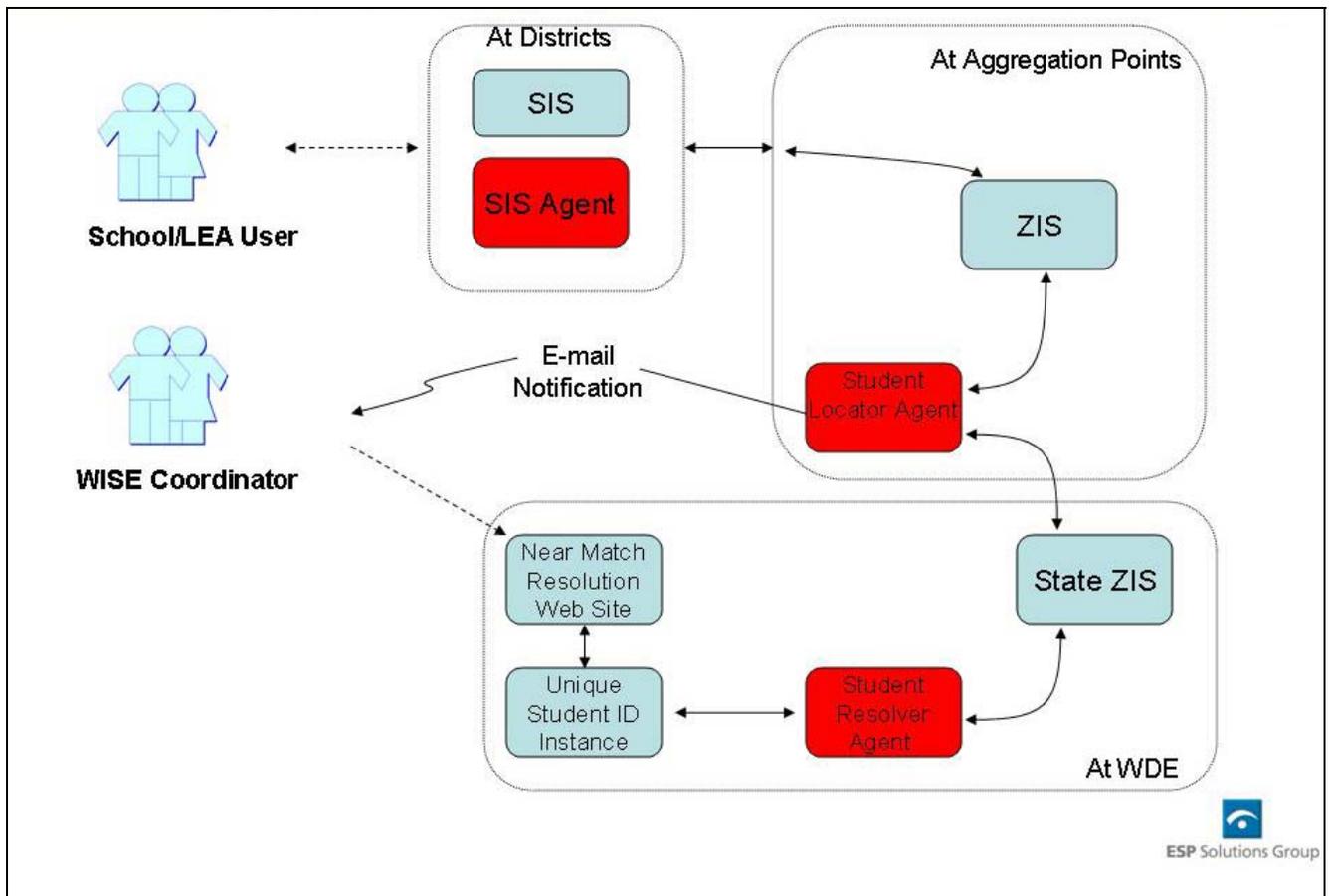
- **The Invisible Tool**
  - **The Process Flow**
  - **The “Zone”**
  - **The SIS Agent**
  - **The Student Locator Agent**
  - **The Student Resolver Agent**
- **Data Guidelines**
- **Resolving Near Matches**

# The Invisible Tool

## THE PROCESS FLOW

The Student Locator Framework is like plumbing. It operates invisibly inside the walls of your house. You don't notice it until it doesn't work!

The Student Locator Framework (SLF for short) allows for an automation of the Student Record ID assignment, creation and resolution in such a way as to dramatically reduce the amount of human effort involved.



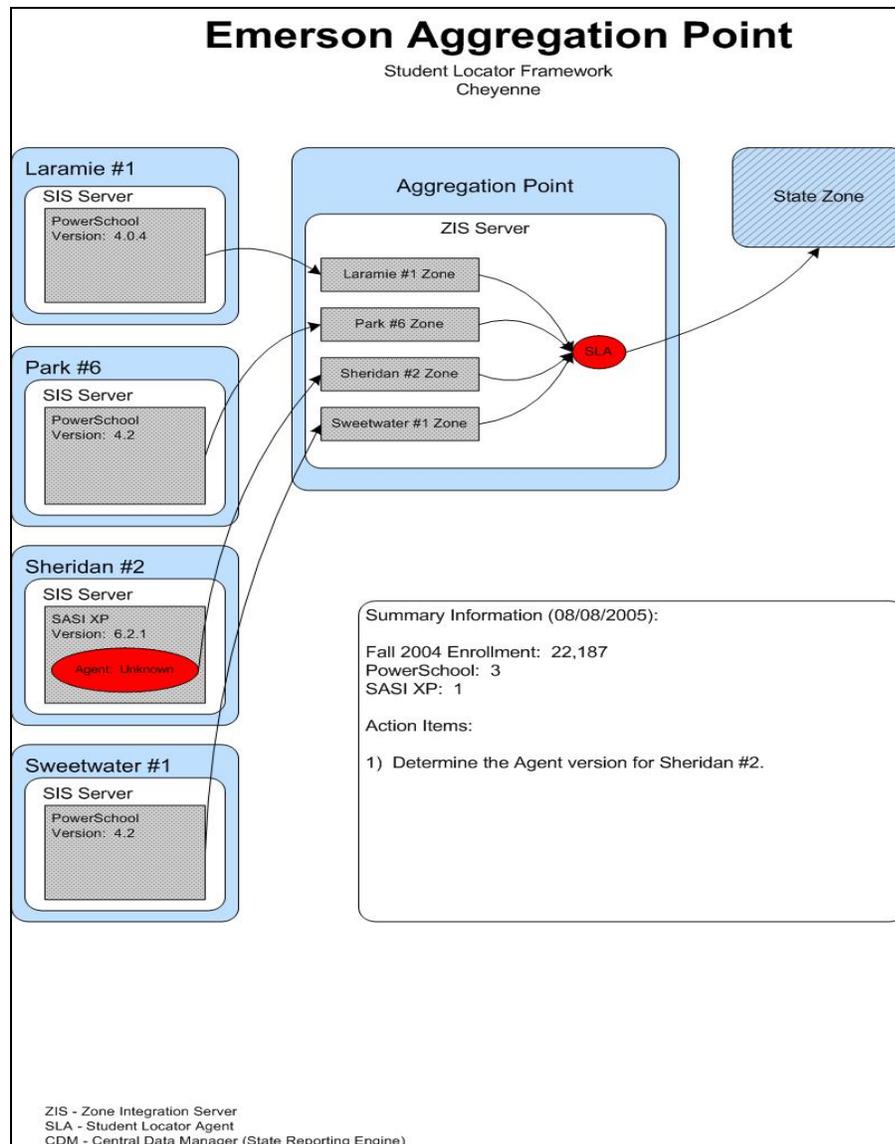
**NOTE:** This section describes the Student Locator Framework (SLF) but it requires no action on the part of the user. When the SLF is functioning there the assignment of a unique ID to a record is automatic.

**THE ZONE**

The Zone is a virtual space. Each of the ten aggregation points in Wyoming have a Zone Integration Server that houses the software that glues the framework together.

Each Zone Integration Server creates a Zone for every district associated with that Aggregation Point. Each district has its own unique, configurable zone that can be used for both horizontal and vertical SIF deployments.

As a district begins to use the Zone for applications and agents other than SLF the District Coordinator will need to become more and more knowledgeable about SIF.

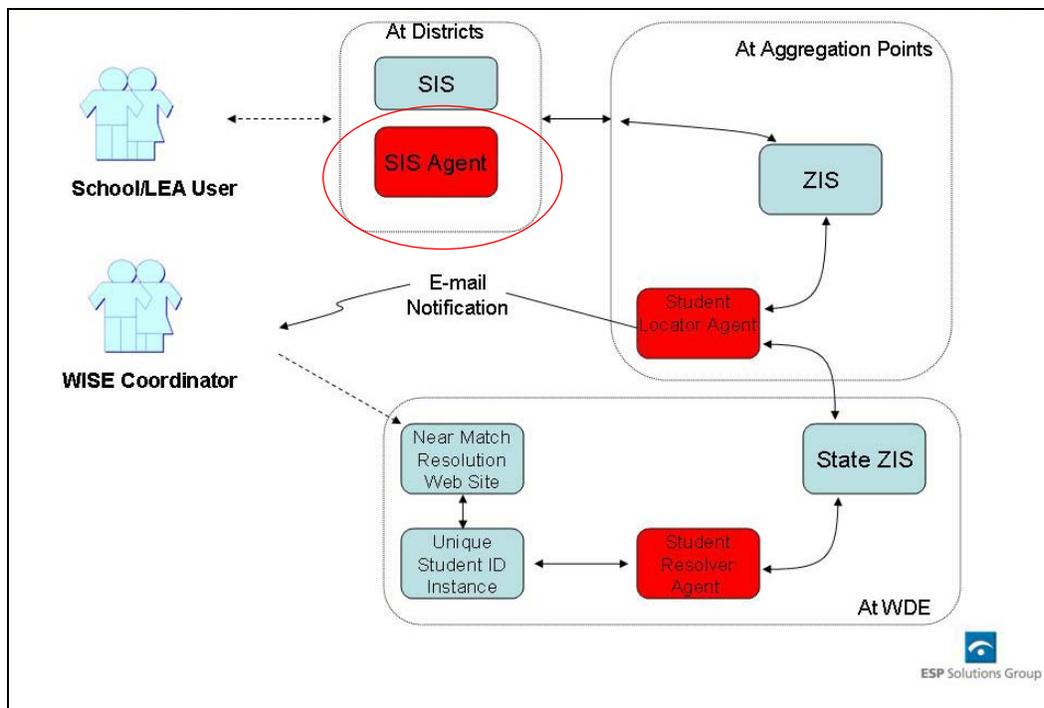


**THE STUDENT INFORMATION SYSTEM AGENT**

The Student Information System Agent (the SIS Agent) is the key piece of software that the District user must manage, maintain and customize for themselves.

Edustructures and ESP Solutions Group will work with you to select, install, and configure your SIS agent.

- In the case of PowerSchool and Infinite Campus your Agent is included in your SIS software so long as you have the right version of the SIS.
- In the case of SASxp and Chancery an agent will be installed for you to communicate your data with the Student Locator Framework
- If you have another SIS we will have been in contact with you to resolve this.



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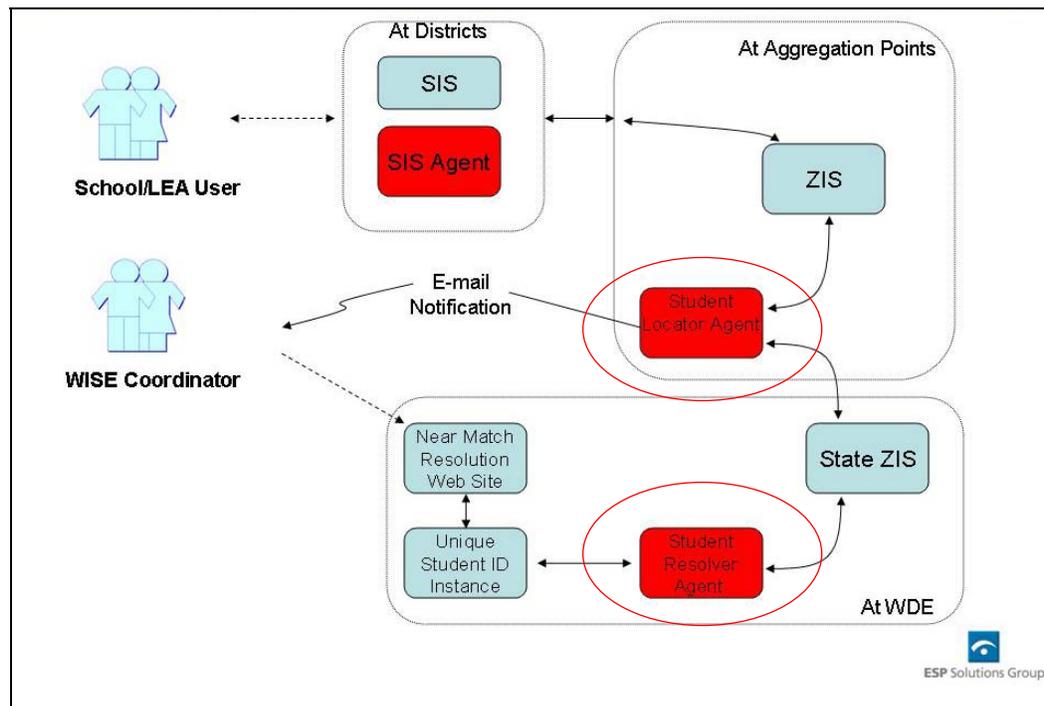
## THE STUDENT LOCATOR AGENT

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The Student Locator Agent is the work horse of the SLF. It coordinates all the message traffic between the districts and the state.

It routes all Student Locator requests up to the Student Resolver agent and it routes the results back to the SIS. Also, if there is a near matches or error conditions it sends a response email to the appropriate person in the district.

The Student Locator behavior and contact lists are configurable per each district. At first the state will manage all the Student Locator Agent configuration and customization. As each district expands its SIF presence more and more of the SLF management will be given over to the district.




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## THE STUDENT RESOLVER AGENT

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The Student Resolver agent sits in the State Zone and brokers the requests coming from the ten Student Locator Objects. It interfaces with the Uniq-ID software and generates all the error messages and output messages from the Uniq-ID.

This agent acts as a router. There is no user interface the end-user needs to be concerned about.

## WISER ID DATA GUIDELINES

WISE will require clean, accurate data from the SIS to function properly. Specifically, each student record must contain (blanks are not acceptable) the following fields:

1. Legal Last Name
2. Legal First Name
3. Gender
4. Date of Birth
5. Current Grade Level
6. Local Student ID
7. Race / Ethnicity
8. Current District ID
9. Current School Year

In addition, WISE will use the following fields, if data exists to assist in matching:

1. Legal Middle Name
2. Legal Name Suffix
3. Social Security Number
4. State ID
5. Current School ID

Districts should go through the following guidelines to ensure that their data conforms prior to submitting data. All these data elements are carried by the Student Locator object in SIF.

## STUDENT LOCATOR DATA ELEMENT TABLE

Element Name	Length	Data Type	Format Rules	Allowable Values	Blanks Allow?
Last Name	25	varchar2			n
First Name	15	varchar2			n
Gender	1	varchar2	- only one value	M, F	n
Date of Birth	10	ISO-8601 date	- must be between 3 and 22 years old - YYYY-MM-DD format	YYYY-MM-DD	n
Current Grade Level	2	varchar2	- grades 1- 9 must have a leading zero - no "KG"	PK, HK, FK, 01 ... 13	n
Local Student ID	10	varchar2	- the SIS ID number	any	n
Race/Ethnicity	1	varchar2	- only one value	A, B, H, I, W	n
Current District ID	7	varchar2			n
Current School Year	4	varchar2	- must be in "YYYY" format - School Ending Year -> '2005' for 2004-2005	YYYY	n
Middle Name	15	varchar2	- use full name		y
Name Suffix	8	varchar2	- use roman numerals for numbers (i.e. "the third" becomes "III") - use "Jr." for Junior	Jr., II, III	y
Social Security	9	varchar2	- no hyphens	XXXYYZZZZ	y
State ID	8	varchar2	- only integers - passes check digit formula		y
Current School ID	7	varchar2			y

**(1) STATE STUDENT RECORD ID FIELD**

All Wyoming Student Information Systems (SISs) will need a field in which to hold the Record ID. We recommend that if you use Powerschool or SASI XP that you contact your user group to determine which field in the SIS you should utilize. It will make supporting the process much easier if everyone using the same vendor uses the same location in which to store the ID. In South Carolina, for instance, the SASI XP users aligned on the *AltID1* Field.

The ID field should be cleared of all data. Important data should be moved to other fields. WISE will write over all data in this field. When checking for students without state IDs, it is important that this field not contain any data. In addition, it is recommended that this field be locked down to casual user input so no data can be entered directly into this field in the future.

The state student record ID number is 8 digits long: 7 digit number plus a check digit ("Checkdigit"). A Checkdigit is a digit added to a number for the purpose of detecting the sorts of errors humans typically make on data entry.

No ID will have leading zeros.

Any number that contains a string 3 or more characters long of the same digit are removed. That is, no ID will contain the string '333' or '7777'.

The Checkdigit algorithm is based on the International Standard Book Number (ISBN) check digit system. Each digit is weighted according to its position in the number and the Checkdigit is chosen so the weighted sum is evenly divisible by 11. The Checkdigit is the rightmost digit in an 8-digit number. The first, that is to leftmost, digit is multiplied by 8, the second digit is multiplied by 7, the third is multiplied by 6, all the way through to the seventh. The weighted sum is divided by 11. Since the remainder resulting from division by 11 can be any number between 0 and 10, student ID's that generate a Checkdigit of 10 are eliminated from the pool.

This scheme detects any single error and the transposition of any two digits at any distance.

**STEPS TO VALIDATE AN ID**

The above broken into steps. We will use the example number: 31524478

1. Begin with an ID in the form of :

*Digit1, Digit2, Digit3, Digit4, Digit5, Digit6, Digit7, Checkdigit*

Digit1 cannot equal zero.

No three or more consecutive digits can be the same number.

2. Apply the below formula:

$Digit1*8 + Digit2*7 + Digit3*6 + Digit4*5 + Digit5*4 + Digit6*3 + Digit7*2 + Checkdigit*1$

3. Divide the result of the formula by eleven (11).

- If the result has a non-zero remainder after dividing by eleven (i.e. does not divide evenly by eleven) the ID is bad.

**Example:**

Given the number 3 1 5 2 4 4 7 8 the check equation is:

$$(3 \times 8 + 1 \times 7 + 5 \times 6 + 2 \times 5 + 4 \times 4 + 4 \times 3 + 7 \times 2 + 8) / 11 = 121 / 11 \text{ [remainder} = 0]$$

Thus it is a valid ID.

**STEPS TO CREATE A CHECKDIGIT**

When generating a new student record ID, the following steps are used to determine the Checkdigit:

- Begin with a pre-Checkdigit ID in the form of :

*Digit1, Digit2, Digit3, Digit4, Digit5, Digit6, Digit7*

Digit1 cannot equal zero.

No three or more consecutive digits can be the same number.

- Apply the below formula:

$$Digit1 * 8 + Digit2 * 7 + Digit3 * 6 + Digit4 * 5 + Digit5 * 4 + Digit6 * 3 + Digit7 * 2$$

- Divide the result of this formula by eleven (11).

$$(Digit1 * 8 + Digit2 * 7 + Digit3 * 6 + Digit4 * 5 + Digit5 * 4 + Digit6 * 3 + Digit7 * 2) / 11$$

- Identify the remainder from the formula in step three (in this example 3/11ths is the remainder value, so the remainder is “3”).

- Subtract the remainder from 11 to get the Checkdigit.

$$Checkdigit = 11 - Remainder$$

**Example:**

If the pre-Checkdigit student record ID is 3152447 then the Checkdigit is calculated as:

11 - (3x8 + 1x7 + 5x6 + 2x5 + 4x4 + 4x3 + 7x2)/11 [determine the remainder] So:

$$11 - (113/11) \text{ [determine the remainder, in this case "3"]}$$

$$11 - 3$$

$$8$$

**(2) RECOMMENDATION: USE COMPLETE LEGAL NAMES.**

**VERY IMPORTANT:** All name changes must be made at the local level.

All name fields should be in formal case. Formal case indicates that the first letter of the first and last names are capitalized. There may be exceptions for hyphenated, apostrophized, or compound names.

The "LastName", "FirstName", and "MiddleName" fields should contain the student's legal name. The fields should not be used to contain nickname, generation code or any information other than the name as it appears on the birth certificate or subsequent legal document, if available.

If legal name contains more than one word in first, middle or last names, the name should appear with a space in between the words or a hyphen as it appears in the legal document. Although most SIS student display screens only display a limited number of characters, the SASI database, for instance, can accommodate up to 40 characters in last name field (20 characters in the first name field and 13 characters in the middle name field). The full name as it appears on the birth certificate should be entered.

All name fields including "MiddleName" should include the full name, not an abbreviation or initial unless that is what appears on the birth certificate. "NMN" should not be used to signify no middle name. In this case, the field should be left blank.

**(3) SEPARATE NICKNAMES FROM FORMAL NAMES.**

Make sure that nickname (i.e. "Buddy") is in the nickname field on the student screen.

**(4) PUT GENERATION CODE IN CORRECT FIELD.**

Make sure that generation suffix (Jr., II, III, etc.) has been removed from the name fields and placed in your SIS' "Generation" field.

**(5) REMOVE SPECIAL CHARACTERS. --> , \* () "**

Remove all commas (,), asterisks (\*), parenthesis ("("or")"), and quotes ("") from name fields. Periods should only be used when they appear on the birth certificate.

Apostrophes ('), hyphens (-), and spaces between multiple words in a name field are acceptable.

Special characters that are part of ethnic/cultural names (such as the "n" with a tilde over it in many Hispanic names, accented "e" in some French names, vowels with two dots) can be used as long as they use the ASCII US/DOS US standard.

**(6) USE OF CAPS.**

Use of ALL caps, all small case, or any combination in name fields will not impact the WISER ID System. We do however recommend using formal case.

**(7) GENDER, ETHNICITY AND DOB.**

- The gender field should only contain "M" or "F".

- The ethnicity field should contain “A”, “B”, “H”, “I”, or “W”.
- Date of birth must be in the ISO 8601 format (<http://www.w3.org/TR/NOTE-datetime>): “YYYY-MM-DD” and must use a valid date range for a student (ages 3-22).

**(8) SCHOOL AND DISTRICT ID**

This is the School ID where the student is currently enrolled. School must be located in the district that the submitting user has set as his/her current location. If not, the system will consider that record invalid upon submission and the user will have to repair the record.

This is the District ID where the student is currently enrolled. District must be the same as the district that the submitting user has set as her/her current location. If not, the system will consider that record invalid upon submission and the user will have to repair the record.

**(9) LOCAL STUDENT ID**

ID used in the local Student Information System to uniquely identify the student. The primary purpose of this field is to provide a mechanism to import student data from the Uniq-ID System back into the local Student Information System. In addition, this field is used in a limited capacity to The Process Flow.

## OPERATIONS

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### DAY-TO-DAY OPERATIONS

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Generally, you won't use or even see the WISE products in operation. As you add students to your SIS, the WISE tools will automatically send that student's information up to your aggregation point's Zone Integration Server and then on to the state for issuance of a unique student identifier. After issuance, your local SIS agent software will automatically insert that student identifier into your SIS. Occasionally you will get an email indicating that you need to resolve a "Near Match" between two or more students, or to fix an error; resolving or fixing the situation will result in the appropriate student ID being automatically inserted into your SIS.

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### END OF YEAR ROLLOVER

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In 2005, you should complete End of Year Rollover in your SIS before beginning ID assignment for the first time. In future years, you will receive instructions on the procedure.

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### BATCH MODE

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WISE SLF includes a "batch mode" that allows you to acquire IDs for all students in your school that don't already have them.

You should run Batch mode once a week or two after installation. Thereafter, you will not usually need to run Batch mode, but you can (for example, if you have formerly Inactive students who are now Active again, Batch mode is the way to get IDs for them).

The first time you run Batch mode, it can take up to several hours between one set of steps in the Batch Wizard. Subsequent batches should be significantly faster, but the first one you may wish to start one evening and finish the next day.

#### **1. Open the Student Locator Console from the Start menu**

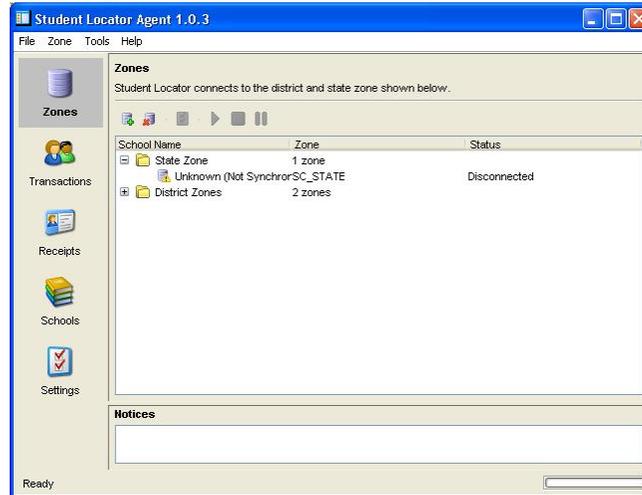
**(Start --> Edustructures --> Student Locator --> Student Locator Console).**

A small icon  is added to the "System Tray" at the lower right of your Windows desktop.

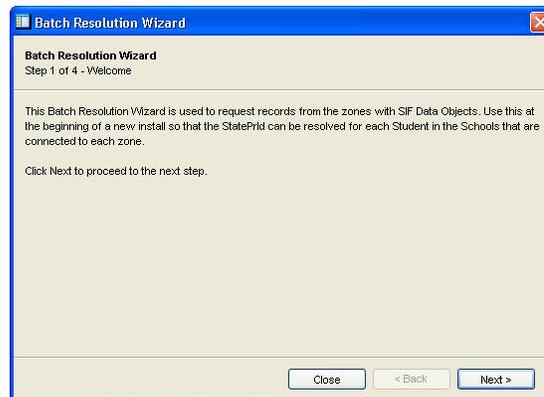
#### **2. Click the icon in the System Tray.**

You see a message asking if you want to connect the console to the agent running "On this computer" or "On a remote computer", with the button for "On this computer" selected.

3. Leave the “On this computer” button selected and click **Connect**.  
You see the Student Locator Agent console.

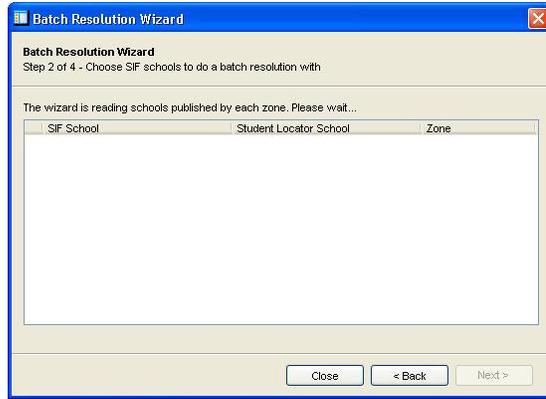


4. From the **Tools** menu in the **Student Locator Console**, select “**Batch Resolution**”.  
You see the first page of the **Batch Resolution Wizard**.



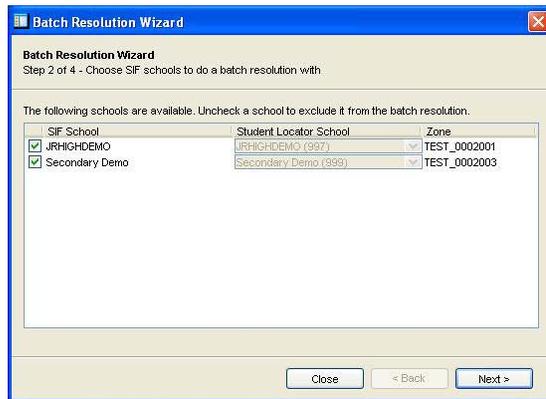
5. **Click Next.**

You see the second page of the **Batch Resolution Wizard**. At first it is empty as shown below; after a time it fills with a list of the schools in your district. Populating the list may take quite a long time, especially the first time you run a **Batch Resolution**.



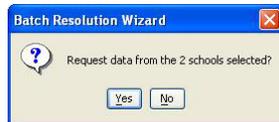
**6. When the list of schools has filled in, make sure the schools you want to include in the batch have the checkbox to the left marked.**

In the first batch you run you will want to have all marked; with later maintenance batches you'll have the option to limit the scope of the batch by selecting only specific schools.



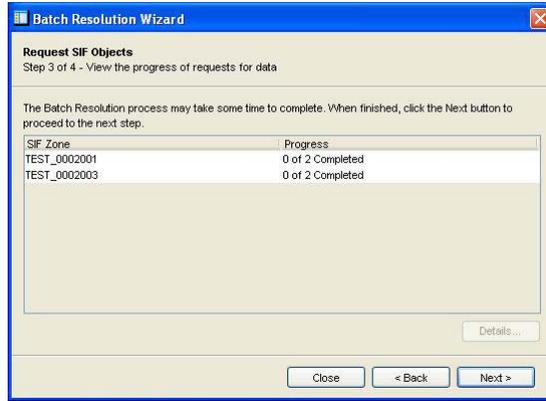
**7. When the schools you want are all marked, click Next.**

You see a window asking you to confirm that you want to request data from the selected schools.



**8. Click Yes.**

You see the third page of the Batch Resolution Wizard.

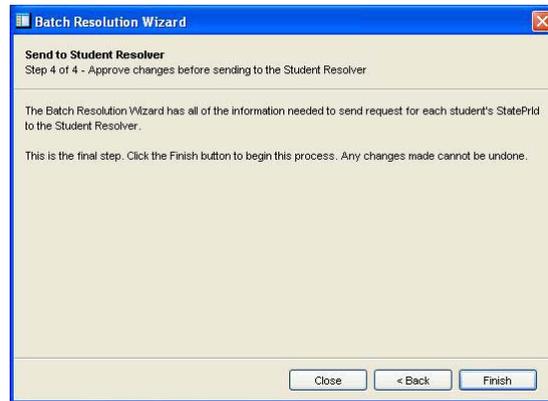


**9. The third page shows the progress as each selected school is queried for its students and other key information. You can move on when all schools listed are in the Done status.**

These queries take an especially long time the first time you run a batch. You may wish to let it run overnight.

**10. When all schools show “Done” status on the third page of the Batch Wizard, click Next.**

You see the fourth page of the Batch Resolution Wizard.



**11. Click Finish.**

The Batch Resolution Wizard sends student ID requests to the state for all students in the batch that don't already have valid student record ID numbers recorded in the SIS.

## WISE FREQUENTLY ASKED QUESTIONS

### WISE DISTRICT INSTALLATION

**Q1: What are the hardware requires for ZIS install?**

A: [Install takes 147 MB of disk space.] Windows server class machine with ample (i.e., .5 GB for small, 1 GB for large districts) RAM, 700 MHz or better. Windows NT, Windows 2000, Windows XP or Windows 2003. (Should not have Java 1.5). Install will include Java 1.4.

**Q2: Will there be a test e-mail to ensure the spam filter does not block the messaging? Although the message is coming from the local mail server, because it is using SMTP it could look like the domain is being spoofed.**

A: Yes. The WISE Student Locator Agent will enable test e-mails to be sent.

**Q3: What should districts that are running their SIS on SQL Server need to do differently?**

A: The installation process will take care of this. Districts will not need to do anything different.

**Q4: Does Citrix cause a problem?**

A: No.

**Q5: Should we lock down the Optional Field in our SIS for the State ID?**

A: Yes. The lock down is for users, not a SIF agent or administrator.

### WISE OPERATIONS

**Q6: How does the near match work? We have a set of twins with the same names and different nicknames.**

A: Near match uses 10 fields to match. Each field has a weight. If the match is not exact on all 10, an indexed match is calculated. WDE can set parameters to determine what indexed match automatically assigns an ID, what level is a near match, and what level is not a match and a new ID is assigned. In the case of the same named twins, two of the fields would be different (SSN and LocalID) and a near match would be triggered.

**Q7: Where is the state assigned unique ID stored in SASI and how will that impact Perm Num?**

A: The state assigned unique ID should be stored in the AltID1 Field. The Perm Num field stays as your unique SASI internal ID.

**Q8: How will future year roll-overs be handled?**

A: The basic process is shut down the Student Locator Framework, complete the roll over, turn back on SLF. More detailed directions will be forthcoming.

**Q9: What happens if the network connection is dropped, will the enrollment be blocked?**

A: No, enrollment will be unaffected, Enrollments that occur while the network connection is down will be queued up in the SIS agent. As soon as the connection is re-established, WISE will automatically transmit all new registrations.

**Q10: We do real time enrollment with District Integration. Will we experience delays?**

A: No. The end user will see nothing different.

**Q11: Can we use the ZIS for other applications?**

A: Yes, absolutely.

**Q12: What about transfer of records between districts?**

A: WISE does not currently support automated transfer of student record and transcript information between schools and/or districts when students move; however, WDE is beginning to make plans to enhance the system in the future to include this functionality.

### **SPECIAL CIRCUMSTANCES**

**Q13: What should Dept of Corrections do for machines without network access?**

A: DOC staff will need to conduct batch uploads from the central office. They will need to load the student record data onto media, walk it to central office, log on to Unique Student ID, get IDs assigned, resolve matches, download a file with the IDs, and walk the resulting back to their SIS installations to upload. Impacted staff will receive more detailed information.

**Q14: What should districts do with their existing SIF installs?**

A: Edustructures will work out a custom solution.

# The WISER ID Web Application

- **Opening the Web Application**
- **Functions Overview**
- **Near Match Resolution**
- **Searching for an Individual Student**
- **Appendix A - Error & Informational Messages**
- **Appendix B - Input and Output Files**
- **Appendix C - Quick Guides**
  - **Quick Guide to Assigning WISER IDs for Batch Files**
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  - **Quick Guide to Searching for an Individual Student Online**
  - **Quick Guide to Downloading Output Batch Files**

## OPENING THE WEB APPLICATION

### LOGGING INTO THE WISER ID WEB APPLICATION

After opening the browser and entering the URL, the user will see the following Login screen:

- ❶ Enter the login and password that was assigned to you.
- ❷ Click **Submit**.



**TIP:** The user should not use the “**Refresh**,” “**Back**,” or “**Forward**” browser buttons with the WISER ID System. There are links on every page to direct the user to other screens.



**NOTE:** Some users may not see or use the above login screen. Rather, they may be directed to the WISER ID System via another application (e.g., WEDGate). In such a situation, users will have to select the WISER ID System from a list of applications. Upon doing so, they will be logged into the application without seeing the above screen.

**WORKING WITH THE WISER ID SYSTEM MAIN PAGE**

Below is the WISER ID System main page:

<b>State ID Home</b>				
Current Login: 0101usr1 Location: 0009-James Madison High School				<input type="button" value="EXIT"/>
<b>Select Process to Begin ID Assignment</b>				
<input type="button" value="Upload Batch File"/>	<input type="button" value="Enter Individual Student"/>	<input type="button" value="Search Individual Student"/>	<input type="button" value="Extract &amp; Download Batch"/>	<input type="button" value="Claiming Process"/>
<b>View/Continue Processing Files Previously Uploaded</b> with the following criteria:				
<b>Processing Method:</b>		<b>Processing Stage:</b>		
<input checked="" type="radio"/> Batch	<input type="radio"/> Online	<input type="radio"/> SLF	From: <input type="text" value="04/21/2005"/> <input type="button" value=""/>	To: <input type="text" value="04/21/2005"/> <input type="button" value=""/>
			All	<input type="button" value="Submit"/>
<b>Upload Date</b>	<b>Batch Info</b>	<b>Status</b>	<b>Number of Records</b>	<b>Next Action</b>
No Batches Found.				

The WISER ID System main page consists of two main sections:

- The top section contains command buttons that allow the user to upload batch files, enter individual student records, search for students in, extract and download various types of output batch files and claim/release transferring students.
- The bottom section provides the user with a list of all batch files that have been either uploaded into the WISER ID System, entered online, or submitted using SLF. This list will show the current status of each batch and the next action to be performed. In addition, a button in the last column will allow the user to continue where he/she left off in the WISER ID assignment process.



**NOTE:** There are many functions included in the Uniq-ID software that a district user does not need to utilize in the Student Locator Framework because it is handled by SIF- Upload Batch File, Enter Individual Student, Extract & Download Batch, etc.



**NOTE:** The “**WISER ID Home**” button, provided on all other screens within the application, will allow the user to come back to this main page at any time. Once on main page, the user can choose to perform another function or exit from the application.



**NOTE:** *Some implementations may not include the SLF radio button in the bottom section of the main page.*

## FUNCTIONS OVERVIEW

The main page is the starting point of the WISER ID application. Users can perform a desired function by clicking on the appropriate button.

---

### SEARCHING FOR AN INDIVIDUAL STUDENT

---

This function provides users with the ability to search for an individual student record from the WISER ID System database. This function can be used either to verify the details of a student already given a WISER ID or verify the existence of a WISER ID for a student given certain details like last name and first name.

---

### EXTRACTING AND DOWNLOADING OUTPUT BATCH FILES

---

This function provides users with the ability to extract and download four different types of output files from the WISER ID System:

- Errors to Fix
- Near Matches / Duplicates to Resolve
- IDs Assigned
- Cancelled Records
- Accepted/Disputed/Deleted/Pending Claims

---

### VIEW/CONTINUE PROCESSING FILES PREVIOUSLY UPLOADED

---

This section shows all batch files that were previously uploaded or entered online by the user.

Users have the ability to filter which batch files will appear in this section by setting one or more of the following:

**Batch:** Show only batch file submissions.

**Online:** Show only online submissions.

**SLF:** Show only SLF submissions.

**From and To Dates:** Restrict the display of batches submitted during this date range. By default, all batches appear.

**Processing Stage:** Restrict the display of batches that are currently at a specific stage of processing. Possible stages are:

**All:** All ID creation stages – the default option.

**Validate data:** File Uploaded. Begin Validation Stage.

**Fix Errors:** Data Validation Incomplete. Fix Data Errors.

**Assign WISER ID:** Data Validation Complete. Ready to Assign WISER IDs.

**Resolve Near Matches / Duplicates:** Near Matches/Duplicates found and need to be resolved.

**Download WISER ID:** IDs assigned. Download WISER ID.

---

### *THE NON-SLF FUNCTIONS*

---

These functions are available in the WISE system but are not used by it unless necessary in the case of a data issue that cannot be resolved inside the Student Locator Framework.

#### **BATCH FILE**

*This function provides users with the ability to upload a Student Batch File in order to be fed into the WISER ID System. This batch file should have been extracted earlier from the local Student Information System.*

#### **ENTERING AN INDIVIDUAL STUDENT**

*This function provides users with the ability to input the information for one student online and assign a WISER ID. This feature uses an online interface that allows users to manually enter a student's details.*

#### **CREATING AND RESPONDING TO CLAIMS**

*This function provides users with the ability to handle situations where a student transfers from one public school to another within the state. It provides a mechanism for the gaining and losing schools to communicate with each other via automated emails in order to create and respond to claims for a transferring student.*

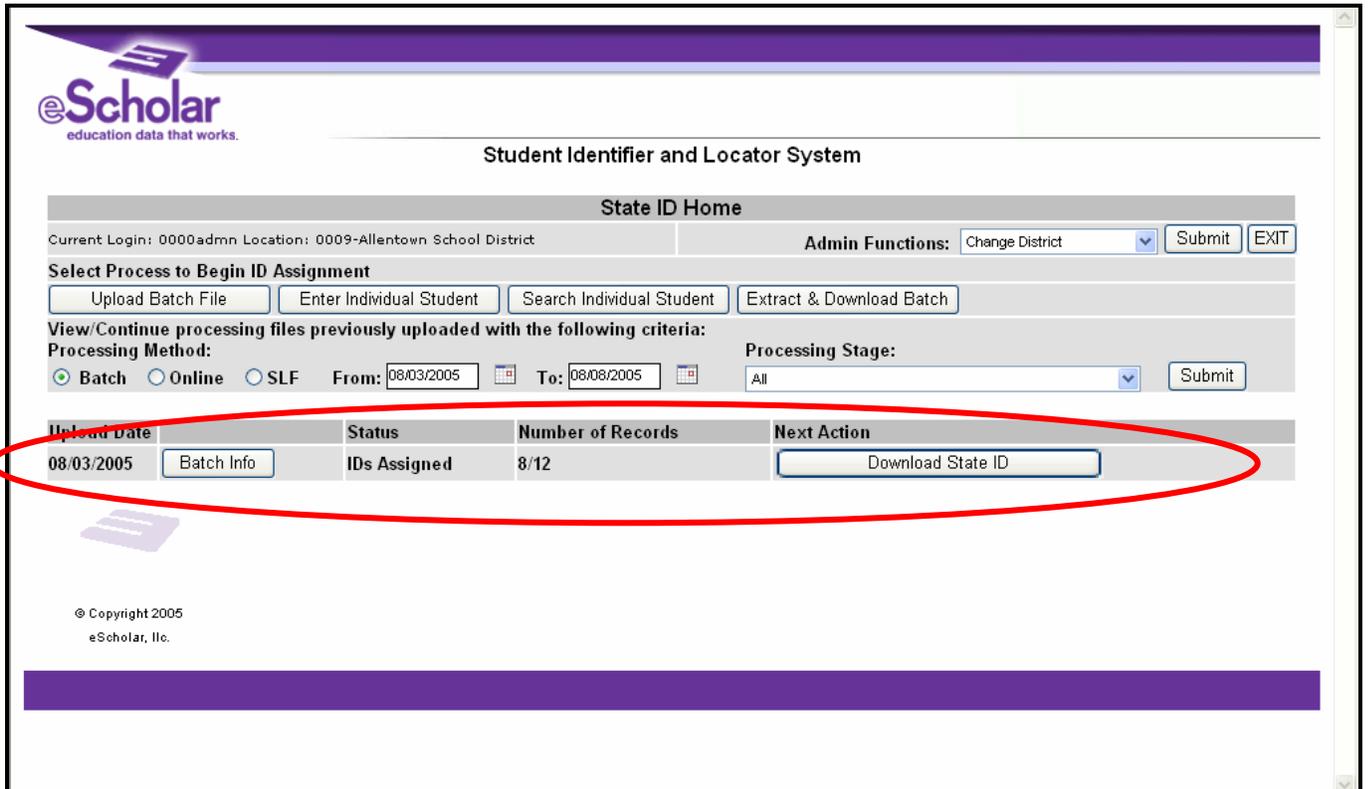


**TIP:** *For every student record entered online, the WISER ID System will create one virtual batch. This batch will contain only one record – the corresponding student record entered online.*

# NEAR MATCH RESOLUTION

The main page is the starting point of the WISER ID application. Users can perform a desired function by clicking on the appropriate button.

There are multiple buttons that you will not use. We will work with you on a situation by situation basis to use the functions not covered by this guide.



**REVIEWING THE OUTCOME OF ID ASSIGNMENT**

The application displays the outcome of the ID resolution process and guides the user to the next action. If one or more near matches/duplicates are encountered, a screen similar to below is displayed. In addition, users can download a list of all records that need resolving by clicking on the link in the "Status" column.

Assign State ID				
Current Login: 0101usr1 Location: 0009-James Madison High School				State ID Home
Upload Date	Status	Number of Records	Next Action	
03/31/2005	<a href="#">Batch Info</a> Near Matches / Duplicates Found Or Click <a href="#">here</a> to download records.	1/12	<a href="#">Resolve Near Matches / Duplicates</a>	

The first number represents the number of records that need to be resolved. The second number represents the total number of records in the batch

**1** To display the status of the batch file and its records click **Batch Info**. This will display a pop-up window similar to the following:

BATCH INFORMATION	
Batch Number	2
District Code	0009
School Code	0101
Extract Date	03/10/2004
Extract File	0009_0101_High_School.txt
Transmission ID	0071262134
Creation User ID	0101usr1
Creation Date	03/31/2005
Total Records	12
Record Delimiter	0x09
Header Delimiter	0x09
File Version	1.0
BATCH STATUS	
Canceled at Fix Errors	1
ID Assigned - No Match	10
Waiting to Resolve Near Matches	1
<a href="#">[close]</a>	

This displays the number of records that were canceled by the user at the validation stage.

This displays the number of records in the batch file that were assigned a new State ID.

This displays the number of records that encountered duplicates or near matches. These need to be resolved in order to proceed.

**2** The user can now proceed to the next step by clicking **Resolve Near Matches/Duplicates**.



**TIP:** *If no near matches/duplicates are encountered, the user is taken directly to the "Download WISER ID" page.*

**RESOLVING NEAR MATCHES/DUPLICATES**

The screen below shows all the records in a batch that need to be resolved due to near matches/duplicates being found. These records need to be addressed one at a time.

Resolve Near Matches / Duplicates							
Current Login: 0101usr1 Location: 0009-James Madison High School							State ID Home
1 Student Record Needs Human Review							
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code
MOOTZ	MELANIE	R		10/02/1994	FEMALE	0009	0101
							Review and Select

- 1 To review and resolve a near match/duplicate record, click on **Review and Select**. This will take the user to the “Resolve Near Matches/Duplicates” interface, where the user will be in a position to compare the input record with the reported near match/duplicate record(s).



**NOTE:** All records reported as near matches/duplicates must be reviewed and resolved. Only after this will the user be in a position to extract and download the output batch file that will contain the State IDs assigned to the individual students in that file.

With some installations duplicate/match pairs (e.g., match probability is over the upper threshold) will not require user intervention. That is, the application will assume that the two records are the same student. However, this applies only if the application returns only one match for a particular record.

This is the record that needs to be resolved

The screen below is where the user will review and resolve each of the near matches/duplicate records reported during the WISER ID assignment process:

The match probability and type of match (Near Match or Match) reported by the ID assignment process

**Resolve Near Matches / Duplicates**

Current Login: 0101usr1 Location: 0009-James Madison High School [State ID Home](#)

---

**Student Record to Review and Select**

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code
MOOTZ	MELANIE	R		10/02/1994	FEMALE	0009	0101

---

**Near Matches / Duplicates Found**

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Match Probability
<a href="#">MOOTZ</a>	<a href="#">MELANIE</a>	R		10/02/1994	FEMALE	0009	0101	0.999 [MATCH]

This section contains the corresponding near match/duplicate records

**1** To compare the record to be resolved with a near match/duplicate record in detail, click on the hyperlink either in the Last Name or First Name column of the near match/duplicate record.

This is the record that needs to be resolved

This is the selected near match or duplicate record

**Resolve Near Matches / Duplicates**

Current Login: 0101usr1 Location: 0009-James Madison High School [State ID Home](#)

---

**Student Record Being Reviewed**

First Name:	MELANIE	Middle Name:	R	Last Name:	MOOTZ	Suffix:	
District:	0009 Allentown School District	School:	0101 James Madison High School	Gender:	FEMALE	Date Of Birth:	10/02/1994
Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN	Sch. Yr.:	2004	Res. Dist.:	0009	Local Student ID:	110406667
Grade:	05	Comments:	1780367988;				

---

**Near Match/ Duplicate Student [ State ID: 178-036-7988 - 0.999 MATCH ]**

First Name:	MELANIE	Middle Name:	R	Last Name:	MOOTZ	Suffix:	
District:	0009 Allentown School District	School:	0101 James Madison High School	Gender:	FEMALE	Date Of Birth:	10/02/1994
Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN	Sch. Yr.:	2004	Res. Dist.:	0009	Local Student ID:	110406667
Grade:	05	Created:	03/31/2005	Last Updated:	03/31/2005	Last Modified:	16

**2** To return to the previous page, click **Return to List of Near Matches.**

Using the above two screens, a user can compare the input record that needs to be resolved with the reported near match/duplicate records (shown in the bottom section). If a given input record can't be resolved by looking at the information displayed, the user can analyze the matching students offline by collecting and comparing more information outside the WISER ID System.

Student Record to Review and Select								
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	
MOOTZ	MELANIE	R		10/02/1994	FEMALE	0009	0101	
<input type="button" value="Assign Selected"/> <input type="button" value="Create New ID"/> <input type="button" value="Cancel Record"/> <input type="button" value="Select Another Record"/>								
Near Matches / Duplicates Found								
Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Match Probability
<input type="radio"/>	<a href="#">MOOTZ</a>	<a href="#">MELANIE</a>	R	10/02/1994	FEMALE	0009	<a href="#">0101</a>	0.999 [MATCH]

SCHOOL INFORMATION

District	0009
District Name	Allentown School District
School	0101
School Name	James Madison High School
Street	Madison St
City	Demo City
State	NY
Zip	10406
Contact	Mr. Principal
Title	Principal
Phone	(232)555-0101
Fax	(232)666-0101
Email	<a href="mailto:0101@0009.abc">0101@0009.abc</a>

[\[close\]](#)



**TIP:** *If the matching student is in a different school district/school, the user may need to contact the corresponding agency. The user can get the contact details of the corresponding agency by clicking the "School Code" hyperlink. A pop-up window will display the contact information as seen above.*

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender
MOOTZ	MELANIE	R		10/02/1989	FEMALE
<input type="radio"/> Assign Selected <input type="radio"/> Create New ID <input type="radio"/> Cancel Record <input type="radio"/> Select Another Record					

Near Matches / Duplicates Found									
	Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	District Code	School Code	Match Probability
<input type="radio"/>	MOOTZ	MELANIE	R		10/02/1989	FEMALE	0009	0101	0.999 [MATCH]

Based on the analysis:

- If the user determines that one of the students listed in the bottom near match/duplicates section is the same as the input student whose record is being resolved, the user needs to “assign” the WISER ID of that matching student to the input student. To perform this action, the user can select the radio button of the matching student and click **Assign Selected**. A popup appears asking if the user is sure that this is the same student. The user can click **Yes** to confirm it is, or click **No** to cancel the action.

When the user clicks **Yes**, the existing WISER ID of the matching student is assigned to the input student, and the matching student’s record information is logged in the history table. A new WISER ID is not created, since both the records were identified to belong to the same student. When the user clicks **No**, no action is taken and the input record will continue to remain as “Waiting to Resolve Near Matches/Duplicates”.

- If the user determines that none of the records matches the input batch file record, the user can assign a new WISER ID for the input student. To perform this action, click **Create New ID**. This will assign a new WISER ID for the input student.



**NOTE:** *With some installations the “Create New ID” button will be disabled. In such an instance, if the user attempts to click on that button the application will prompt him/her via a pop-up message and provide further instructions.*

- If the user determines that the input record should not be considered for WISER ID creation or wishes to cancel for some other reason, the user can cancel this record. To perform this action, click **Cancel Record**. Once this is done,

the record is marked as canceled in this batch and no action is taken.

Reasons to cancel could be that the user cannot resolve this case at this time, but at the same time doesn't want to hold up the rest of the batch from ID assignment. Any canceled student can be fed again through another batch or entered online later.

After performing any one of the above actions, the user will receive an appropriate confirmation message.

If there are more records to be resolved the user can proceed to another record by clicking **Select Another Record**.

A user can skip a record by clicking **Select Another Record**. In this case, the skipped record will remain as "Waiting to Resolve Near Matches/Duplicates" and the user must resolve this case later before proceeding to the next step.

Once all records are resolved, the user will be taken to the next step, which is "Download WISER ID".

# SEARCHING FOR AN INDIVIDUAL STUDENT

## SEARCHING FOR AN INDIVIDUAL STUDENT RECORD

Click **Search Individual Student** to start:

**State ID Home**  
 Current Login: 0101usr1 Location: 0009-James Madison High School EXIT

**Select Process to Begin ID Assignment**

**View/Continue Processing Files Previously Uploaded** with the following criteria:

**Processing Method:**  Batch  Online  SLF **From:** 04/21/2005 **To:** 04/21/2005 **Processing Stage:** All

Upload Date	Batch Info	Status	Number of Records	Next Action
No Batches Found.				

This module allows users to search for individual students either by entering the student's WISER ID or by entering a student's basic information like first/last name.

This is where the State ID can be entered

Below is the screen where a user can search for an individual student in the WISER ID System database.

**Search Individual Student**  
 Current Login: 0101usr1 Location: 0009-James Madison High School State ID Home

**Search Using State ID**

ID

[or]

**Search Using Student Details**

\* First Name:  Middle Name:  \* Last Name:  Suffix:

Date Of Birth:

\* Required Fields

The top part of the screen will be used to search for a student given the WISER ID. For this type of search, the result will be either an exact match or no match at all.

- 1 To search for a student based on ID, enter the WISER ID of the student and click **Search** in the top part of the screen.

The bottom part of the screen will be used to search for a student given the student details like first name, last name and date of birth.

This search is based on a probabilistic method and all matches are displayed along with the matching probability.

- ② To search for a student using this method, enter the known details about the student in the relevant fields and click **Search** in bottom part of the screen.



**NOTE:** *To search based on student details, full first name and full last name are required. Wild card characters like '%', '\_', and '?' are not supported.*

To clear the previously entered search criteria and start the search all over again click **Clear**.

Once the user clicks **Search**, the application searches for matching records in the database.

If no matches are found, the system displays feedback confirming “No matches found” and allows the user to continue searching with different criteria.

When a search is based on student details, and if one or more matches are found, the application displays the matching records, along with the match probability. The list is displayed such that the closest match is displayed as the first record and the least probable match is displayed as the last record.

**Search Individual Student**

Current Login: 0101usr1 Location: 0009-James Madison High School State ID Home

---

**Search Using State ID**

ID

[or]

**Search Using Student Details**

\* First Name:  Middle Name:  \* Last Name:  Suffix:

Date Of Birth:  /  /

\* Required Fields

---

**Query Results - [ 2 Matches / Near Matches ]. Click on Name for details**

Last Name	First Name	Middle Name	Suffix	Date Of Birth	Gender	Match Probability
<a href="#">MOOTZ</a>	<a href="#">MELANIE</a>	R		10/02/1994	FEMALE	0.985 [MATCH]
<a href="#">MOOTZ</a>	<a href="#">MELANIE</a>	R		10/02/1994	FEMALE	0.985 [MATCH]

This is the student information the user is searching for

This displays any matches from the State ID System database



**1** To see more information about a matching student click the hyperlink in Last Name or First Name column. This will take the user to a screen where the user can see more detailed information for that student (“Student Information Screen”).

**NOTE:** *If the search is based on WISER ID and if a match is found, the user is taken directly to the Student Information Screen.*

Below is the Student Information Screen:

**Search Individual Student**

Current Login: 0101usr1 Location: 0009-James Madison High School State ID Home

---

**Student Information [ State ID: 278-505-7821 ]**

First Name:	MELANIE	Middle Name:	R	Last Name:	MOOTZ	Suffix:	
School:	0009-James Madison High School	Res. Dist:	0009	Local Student ID:	110406667	Grade:	05
Gender:	FEMALE	Date Of Birth:	10/02/1994	Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN	Sch. Yr:	2004
Created:	04/08/2005	Last Updated:	04/08/2005	Update Ref#:	5		

[Search Another](#)

---

**History Information**

History Date	Last Name	First Name	Middle Name	Suffix	Gender	Date Of Birth	Race/Ethnicity	District	School
04/08/2005	MOOTZ	MELANIE	R		FEMALE	10/02/1994	WHITE, NOT OF HISPANIC ORIGIN	0009	0101

The State ID of the student

This is the match/near match history for the selected student. There will be an entry here for every time a student record has been changed

- 1 This screen provides more detailed information for the selected student, as well as any history detail that may be available. To search for another student or to modify the current search click **Search Another**. This will take the user back to the previous screen.
- 2 When history is found, clicking on the "History Date" hyperlink will show a pop-up containing the full information of the corresponding history record.

**History Information**

History Date: 03/09/2005

First Name:	MELANIE	Middle Name:	R	Last Name:	MOOTZ	Suffix:	
School:	0009-0101 James Madison High School	Res. Dist:	0009	Local Student ID:	110406667	Grade:	05
Gender:	FEMALE	Date Of Birth:	10/02/1994	Ethnicity:	WHITE, NOT OF HISPANIC ORIGIN	Sch. Yr:	2004
Created:	03/09/2005	Last Updated:	03/09/2005	Update Ref#:	71721		

[X](#)

# VIEW/CONTINUE PROCESSING FILES PREVIOUSLY UPLOADED

## VIEW/CONTINUE PROCESSING FILES PREVIOUSLY UPLOADED

When a user logs into the WISER ID System, the first screen he/she will see will be the main page. The interface shown below shows the appearance of this screen for a new user who has not uploaded any batch files and who has not entered any student information online. Hence there is nothing in progress and there are no batches to display.

This will be the starting point for a new user. The user will start work by either uploading a batch file using **Upload Batch File** or by creating an ID online using **Enter Individual Student**.

**State ID Home**

Current Login: 0101usr1 Location: 0009-James Madison High School EXIT

**Select Process to Begin ID Assignment**

Upload Batch File
Enter Individual Student
Search Individual Student
Extract & Download Batch
Claiming Process

**View/Continue Processing Files Previously Uploaded** with the following criteria:

Processing Method: Processing Stage:

Batch
 Online
 SLF
From: 
To: 
All 
Submit

Upload Date	Batch Info	Status	Number of Records	Next Action
No Batches Found.				

Once a user starts using the application, the system will show all the uploaded batch files in the main page automatically. This screen will look similar to the following. This will allow the user to begin working where he/she left off last time he/she logged into the application.

**State ID Home**

Current Login: 0101usr1 Location: 0009-James Madison High School EXIT

**Select Process to Begin ID Assignment**

**View/Continue Processing Files Previously Uploaded** with the following criteria:

**Processing Method:**  Batch  Online  SLF **From:** 04/21/2005 **To:** 04/21/2005 **Processing Stage:** All

Upload Date	Status	Number of Records	Next Action
04/08/2005	Near Matches / Duplicates Found	10/12	<input type="button" value="Resolve Near Matches / Duplicates"/>
04/08/2005	IDs Assigned	12/12	<input type="button" value="Download State ID"/>

Batch files found that meet the criteria specified in top the section

Current batch status

The first number represents the number of records to be addressed in the next action. The second number represents the total number of records in the batch

Command buttons to initiate the next action

**BATCH INFORMATION**

Batch Number	3
District Code	0009
School Code	0101
Extract Date	03/15/2005
Extract File	0009_0101_High_School_noErrors.txt
Transmission ID	0071262134
Creation User ID	0101usr1
Creation Date	04/08/2005
Total Records	12
Record Delimiter	0x09
Header Delimiter	0x09
File Version	1.0

**BATCH STATUS**

ID Assigned - No Match	10
ID Assigned - Near Match	2

By default the system shows all uploaded batch files. Users will be in a position to filter the batches displayed by entering/choosing different selections in the top portion of the screen.

File Upload Date - From

File Upload Date - To

View/Continue Processing Files Previously Uploaded with the following criteria:

Processing Method:  Batch  Online  SLF From: 04/21/2005 To: 04/21/2005 Processing Stage: All

Upload Date	Batch Info	Status	Number of Records
04/21/2005	1	IDs Assigned	12/12

**Batch:** Shows only batch submissions.  
**Online:** Shows only online submissions.  
**SLF:** Shows only SLF submissions.  
**From and To Dates:** Restricts the display of batches uploaded or created online during a specific date range. By default the system shows all batches – from the earliest to the latest  
**Processing Stage:** Restricts the display of batches that are currently at a specific processing stage. The different stages are:

- All:** All ID creation stages – the default option.
- Validate data:** File Uploaded. Begin Validation Stage.
- Fix Errors:** Data Validation Incomplete. Fix Data Errors.
- Assign WISER ID:** Data Validation Complete. Ready to Assign WISER IDs.
- Resolve Near Matches / Duplicates:** Near matches / duplicates found.
- Download WISER ID:** WISER IDs assigned.

❶ To filter the list of batches displayed, set the desired filter at the top section and click **Submit**.

Now the system will display only those batches that will fulfill the specified filter criteria.

❷ Select the batch you want to work with and click on the corresponding command button in the last column.

## APPENDIX A – ERROR & INFORMATIONAL MESSAGES

Message	Description
Authentication failed.	Login ID and/or password is incorrect.
Batch does not contain any records to process.	Make sure the file that you selected contains data.
Contact DE for Assistance.	Contact the Department of Education for assistance.
Date Of Birth is not present	Date of birth not found in a student record.
Date Of Birth is not valid	The date of birth in a student record is not in the valid "mm/dd/yyyy" format or is incorrect.
District Number is not present	District code is not found in a student record.
District Number is not valid	Not a valid State district code.
Error Record Count exceed.	Number of allowable errors in one file has been exceeded.
Filename already exists.	Filename has been used in a previous submission. This is not allowed
First Name is not present	First name not found in a student record.
Gender is not present	Gender is not found in a student record
Gender is not valid	Gender is not a valid State-defined value.
Grade Level is not present	Grade level not found in a student record.
Grade Level is not valid	Grade level is not a valid State-defined value.
Header Record is not valid	The header on the input record is not correct (e.g., missing one or more fields/columns).
Invalid file. Not meant for ID creation.	Input file is not in the specified format defined for WISER ID System. Please check your input file.
Invalid file name	File name contains invalid characters.
Last Name is not present	Last name not found in a student record.
Local Student ID is not present	Local student ID not found in a student record.
Mismatch In Record Count.	The actual number of records in the input file does not match the number of records in the trailer record of the file.
New ID successfully assigned to the Student.	The student was successfully assigned a WISER ID.
No matches found.	No matching record in the WISER ID System database for the entered search criteria.
Race/Ethnic Code is not present	Race/ethnic code not found in a student record.
Race/Ethnic Code is not valid	Race/Ethnic Code is not a valid State-defined code.
Record count greater than allowed limit	The number of records in the input file exceeded the maximum number of records allowed for a file. Re-extract into smaller files so that the number of records in the file will not exceed the specified limit.
Record(s) do not contain all fields	One or more fields are missing from the file (e.g., Gender column is missing).
Residential District is not present	Residential district not found in a student record.
Residential District is not valid	Residential district found in a student record is not valid.
School building number is not valid for current district	The school building number in a student record is not valid for the current district.
School building number is not present	School building number is not found in a student record.
School Year is not present	School Year is null.
School Year is not valid	School Year is not in "yyyy" format.
SSN is not valid	The Social Security Number in student record was not in the correct format. That is, nine characters in length with no dashes and/or slashes.
Student Record Canceled. No ID will be assigned.	The current student record is flagged as canceled and will not be considered for ID assignment in this batch.

Message	Description
Student Record Successfully Canceled. Please Click "Proceed To WISER ID Assignment" to continue.	The current student record is flagged as canceled and will not be considered for ID assignment in this batch. When "Proceed to WISER ID Assignment" is clicked, the application will take the user to the next screen where he/she can initiate the ID Assignment process.
Student Record Successfully Canceled. Please Click "Select Another Record" to continue.	The current student record is flagged as canceled and will not be considered for ID assignment in this batch. When "Select Another Record" is clicked, the user will be shown the remaining records that need to be fixed, so that the user can choose the next one to fix.
Student Record Successfully Updated. Please Click "Proceed To ID Assignment" to continue.	The current student record has been updated successfully with the changes specified in the edit screen. When "Proceed to WISER ID Assignment" is clicked, the application will take the user to the next screen where he/she can initiate the ID Assignment process.
Student Record Successfully Updated. Please Click "Select Another Record to continue".	The current student record has been updated successfully with the changes specified in the edit screen. When "Select Another Record" is clicked, the user will be shown the remaining records that need to be fixed, so that the user can choose the next one to fix.
Trailer Record is not valid	The trailer record in the input batch file is invalid (e.g., missing one or more fields).
Transmission ID is not present in Header	Transmission ID is not present in the header record in the input batch file.
Transmission ID is not present in Trailer	Transmission ID is not present in the trailer record in the input batch file.
Transmission ID Mismatch In Header And Trailer Records.	Transmission ID in the header record is different from the Transmission ID in the trailer record.

## APPENDIX B – INPUT AND OUTPUT FILES

Nine different types of batch files are used in the WISER ID System. They are:

- Input “Student Batch File”
- Output “IDs Assigned” file
- Output “Errors to Fix” file
- Output “Near Matches/Duplicates to Resolve” file
- Output “Canceled Records” file

The input file should be extracted from the local SIS and uploaded into the application for WISER ID assignment. The output files are extracted and downloaded from the WISER ID System at different stages of the ID Assignment process.

a) All of these files contain three different types of records in the following order:

- A header record with “TH” as the record type
- One or more student detail records with “ID” as the record type
- A trailer record with “TT” as the record type

b) All record types will have a predefined list of fields.

For a file to be valid, all of the requirements need to be met.

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**OUTPUT ERRORS TO FIX FILE**

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Users can download this file for offline analysis purposes after the data validation stage. Once all the errors are addressed, this file will not be accessible.

This file will have all the fields in the Student Batch File in the same order. In addition, there will be three more fields added at the end of the record that contain the following information:

**Record Status:** Will always have the value "Waiting to Fix Errors"

**Record Reference Number:** An internally generated number assigned to every input record to identify it uniquely within the WISER ID System. This is not the WISER ID.

**Error List:** Will contain a list of validation errors that the application encountered for this input record during the validation process. If more than one error was found in a record, all errors are listed with each one delimited from the other by a semicolon.

This file will contain only those records that have at least one error that needs to be fixed.

The following is a list of detail fields, in order:

Record Type  
Current School Code  
Resident District Code  
Legal Last Name  
Legal First Name  
Legal Middle Name  
Legal Name Suffix  
Gender  
Date of Birth  
Current Grade Level  
Local Student ID  
Social Security Number  
Race / Ethnicity  
WISER ID  
Current District Code  
Current School Year  
Record Status  
Record Reference Number  
Error List

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**OUTPUT NEAR MATCH/DUPLICATES TO RESOLVE FILE**

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Users can download this file for offline analysis purposes. Once all "Waiting to Resolve Near Matches/Duplicates" records are addressed, this file will not be accessible.

This file will have all the fields in the Student Batch File in the same order. In addition, there will be three more fields added at the end of the record that contain the following information:

**Record Status:** Will always have the value ""Waiting to Resolve Near Matches"

**Record Reference Number:** An internally generated number assigned to every input record to identify it uniquely within the WISER ID System. This is not the WISER ID.

**Match / Near Match List:** Will contain a list of WISER IDs of the students in the WISER ID System database that the application has returned as a near match or match. If more than one near match or match is found, all corresponding IDs will be listed with each one delimited from the other by a semicolon.

This file will contain only those records that had encountered at least one near match or match within the WISER ID System.

The following is a list of fields, in order:

Record Type  
Current School Code  
Resident District Code  
Legal Last Name  
Legal First Name  
Legal Middle Name  
Legal Name Suffix  
Gender  
Date of Birth  
Current Grade Level  
Local Student ID  
Social Security Number  
Race / Ethnicity  
WISER ID  
Current District Code  
Current School Year  
Record Status  
Record Reference Number

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**OUTPUT CANCELED RECORDS FILE**

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Users can download this file to obtain a list of all records that have been canceled during the ID Assignment process.

This file will have all the fields in the Student Batch File in the same order. In addition, there will be three more fields added at the end of the record that contain the following information:

**Record Status:** The value will be “Canceled at Fix Errors”, “Canceled - Near Match” or “Canceled – ID Invalid.”

**Record Reference Number:** An internally generated number assigned to every input record to identify it uniquely within the WISER ID System. This is not the WISER ID.

**Record Comments:** If the record was cancelled at the fix errors stage, then this field will contain a list of all the errors. If the record was cancelled at the near match/match resolution stage, then this field will contain a list of all matches/near matches. If this record was cancelled due to the ID in the record being invalid, then the value will be ‘ID is invalid’.

The following is a list of detail fields, in order:

Record Type  
Current School Code  
Resident District Code  
Legal Last Name  
Legal First Name  
Legal Middle Name  
Legal Name Suffix  
Gender  
Date of Birth  
Current Grade Level  
Local Student ID  
Social Security Number  
Race / Ethnicity  
WISER ID  
Current District Code  
Current School Year  
Record Status  
Record Reference Number  
Record Comments

## APPENDIX C – QUICK GUIDES

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### QUICK GUIDE TO ASSIGNING WISER IDS FOR BATCH FILES

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1. Extract the file from the local Student Information System.
2. Login to the WISER ID web application.
3. Click “Upload Batch File” button.
4. Click Browse.
5. Find the extracted file on your computer. Click “File” and “Open”.
6. Click “Upload”.
7. Check the status message in the confirmation page.
  - If the file was not uploaded due to errors, correct them and return to step 1.
  - If file successfully uploaded, go to step 8.
8. Click “Validate data”.
9. Wait for the process to complete.
10. Check for the status message in the confirmation page.
  - If errors were reported:
    - Click “Fix Errors” and fix each record. Once you have addressed all records, click “Proceed to ID Assignment”.
  - If no errors were found, you will be directly taken to Step 11.
11. Click “Assign WISER ID”.
12. Wait for the process to complete.
13. Check for the status message in the confirmation page.
  - If near matches/duplicates are reported, click “Resolve Near Matches/Duplicates”, review and resolve them one by one. For every record, take any one of the following actions:
    - If the input student record and one of the reported near matches/duplicates are one and the same, check the radio button of the corresponding near match/duplicate record and click “Assign Selected”.
    - If the input student record is not the same as any of the reported near matches/duplicate records, click “Create New WISER ID”.
    - If you determine that an input record came to this stage by error or cannot be resolved, click “Cancel Record”.
    - Once all records are resolved, you will be taken to Step 14.
14. Click “Download WISER ID”. The application will extract the batch and will display the link to download the extracted file to your local computer.
  - Download the file.

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**QUICK GUIDE TO ASSIGNING WISER IDS FOR INDIVIDUAL STUDENTS ONLINE**

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1. Login to the WISER ID web application.
2. Click the “Enter Individual Student” button.
3. Enter all the information for the student.
4. Click “Assign WISER ID”.
  - If near matches/duplicates are reported, click “Resolve Near Matches/Duplicates”, and resolve.
    - If the input student record and one of the reported near matches/duplicates are one and the same, check the radio button of the corresponding near match/duplicate record and click “Assign Selected”.
    - If the input student record is not the same as any of the reported near matches/duplicate records, click “Create New WISER ID”.
    - If you determine that an input record came to this stage by error or cannot be resolved, click “Cancel Record”. Canceling an online submission effectively ends the ID assignment process because there are no other records to process.
    - Once you have resolved the record, you will be taken to Step 5.
5. Make a note of the confirmation message. If a WISER ID is assigned, it will be displayed.
6. If you want to download the entered student details with the assigned WISER ID, click the “Download WISER ID” button. The application will extract the file and will show you the link to download the same to your local computer.

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**QUICK GUIDE TO SEARCHING FOR AN INDIVIDUAL STUDENT ONLINE**

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1. Login to the WISER ID web application.
2. Click the “Search Individual Student” button
3. In the Search Individual Student screen, you can do two types of searches:
  - To search for a student based on the WISER ID, use the top portion of the screen. In the WISER ID field, enter the 8-digit WISER ID of the student and click “Search”.
    - If a matching student is found in the WISER ID System database, the matching student’s information will be displayed in the next screen. If any history information is available, it is shown in the bottom portion.
    - If no matching record is found, the search screen will display the message “No Matches Found”.
  - To search for a student based on the student details, enter the details at the bottom portion of the screen and click “Search”. At a minimum, you need to enter the student’s full first name and last name to search. The system will search for the matching records in the application’s database. This search is performed using probabilistic methods and hence the results will show the matches along with the value of the match probability.
    - If no matches are found it will display “No matches found”.
    - If one or more matches are found, the application will display them in the descending order of match probability at the bottom of the Search Individual Student interface. To view the full details of a given matched record, click on the hyperlink in either the “First Name” or “Last Name” column.
      - The application will show the matching student’s information in the next screen. If any history information is available, it will be shown in the bottom portion.

**Note:** The online Search provides the user with information for only those students for whom a WISER ID has already been created. Searching for an individual student will not change any details of the student record in the WISER ID System database. To change district or any other details for a student, the student’s information would need to be entered online or uploaded in a batch file.

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**QUICK GUIDE TO DOWNLOADING OUTPUT BATCH FILES**

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1. Login to the WISER ID web application.
2. Click “Extract & Download Batch” button.
3. Enter/Select filter criteria to limit the number of batches displayed.
  - From Date (batches uploaded from this date only will be returned).
  - To Date (batches uploaded up to this date only will be returned).
  - Download Type (only the batches that are currently in the selected processing stage will be returned). Possible values are:
    - i. IDs Assigned – Student records that have been assigned WISER IDs.
    - ii. Errors To Fix – Student records that have pending validation errors to be fixed.
    - iii. Near Matches/Duplicates to Resolve - Student records that have student records waiting to be resolved.
    - iv. Canceled Errors – Student records that have been cancelled.
4. Click “Submit”. The application will display a list of batches that match the selected filter details.
5. Click the “Extract” button of a desired batch, to extract. The system will extract a file containing the selected type of records and show a link to the extracted file.
6. Download the file and verify.