



# **E-Rate Open Data Advanced Topics - Reports and Visualizations**

## *Webinar Part 2*

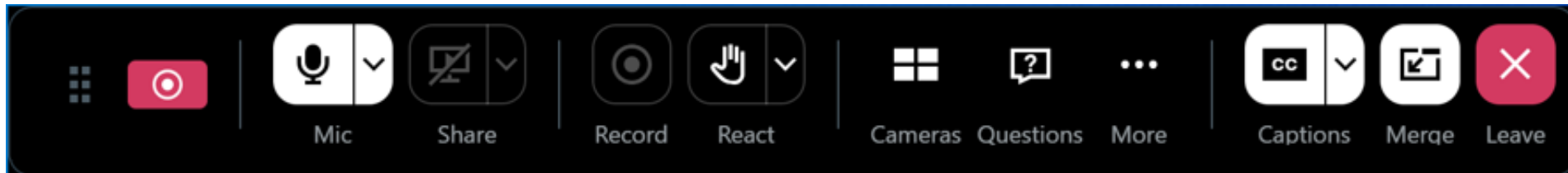
**June 25, 2026**

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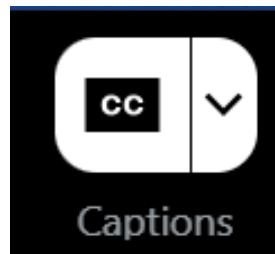
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- Each attendee has the option to turn captioning on or off.
- If you choose to use captioning, we apologize in advance for any transcription errors or distractions and appreciate your understanding.
- **Please be aware, this webinar is being recorded.**

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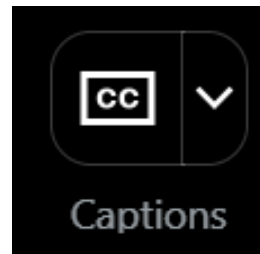
- Attendees control their own captioning.



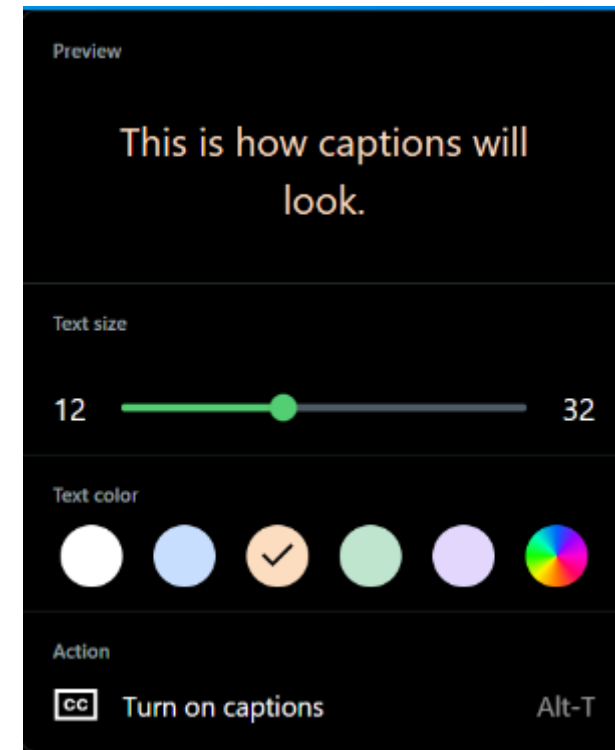
- You control the font size and color on CC.
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Captions ON



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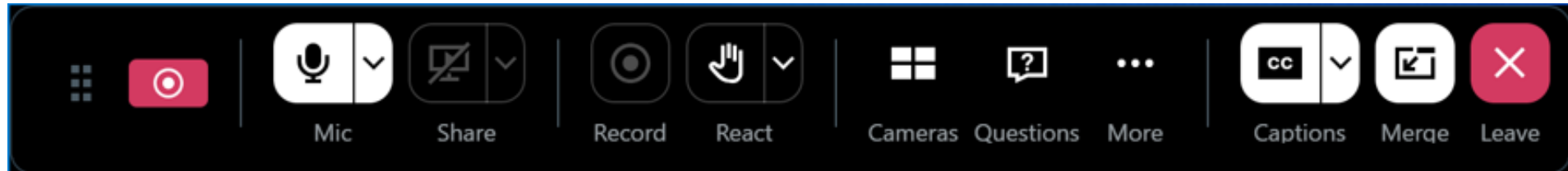
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- Audio is available through **your** computer's speakers.
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- Audience microphones are muted.

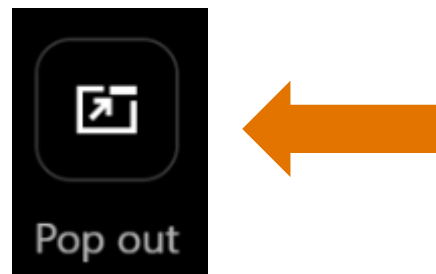


# Housekeeping – Screen Views

- Two ways to view the webinar
  1. Multiple windows open, can **merge** into one



2. One window for all content, can **pop out** into multiple windows

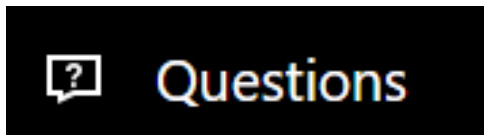


# Housekeeping – Materials & Questions

- A copy of the slide deck is in the **Materials** section of the webinar panel.



- Enter questions at any time using the **Questions** box.



Questions

×



**No questions yet**

Questions you send and answers from the staff  
will appear here

Your question will be sent to staff

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# Housekeeping – Technical Issues

- Exit the webinar and click the Check System Requirements link **in the event confirmation email** to determine whether your computer meets GoToWebinar's requirements.
- If issues persist, call (833) 851-8340 to troubleshoot with GoToWebinar.

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1. Log in to EPC.
2. Select the **Contact Us** link from the upper right menu on the landing page.

# Meet Our Team



**Phebe Carlson**

Senior Data Analyst | E-Rate



**Tom Nesbitt**

Director | E-Rate



**Nekose Wills**

Outreach | E-Rate

# Agenda

- Uses for Custom Reports
- Creating an Open Data Account
- Demo: Creating a Custom Report
- Uses for Visualizations
- Demo: Creating a Simple Chart Visualization
- Sharing Content with Other Users

# Key Learning Objectives

- Create an Open Data account
- Identify uses for custom reports and visualizations
- Create a custom report
- Create a simple chart visualization
- Share content with other Open Data users

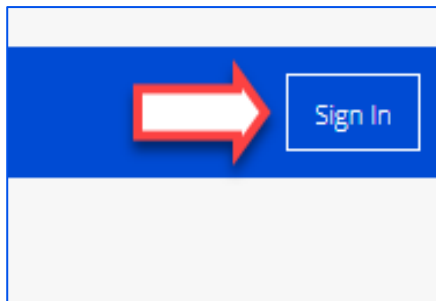
# Uses for Custom Reports

- Avoid repeating manual steps within Open Data
  - Manually filtering/sorting each time an E-Rate dataset is used
- Eliminate manual steps done outside of Open Data after exporting data
  - Filtering, sorting, and/or creating pivot tables in Excel
- Set default filters to only see data relevant to you
  - View only records for your organization or for a given state
- Summarize granular data
  - Show totals for a given organization rather than for each funding request
- Hide columns that you don't need

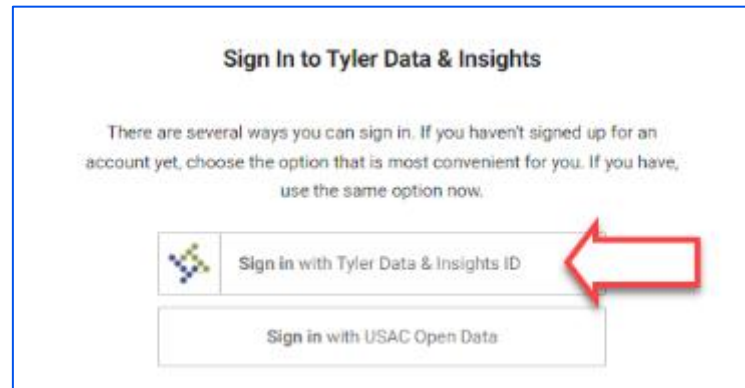
# Creating an Open Data Account (optional)

- Allows you to save customized reports (views) and summary charts/visualizations
- Access <https://opendata.usac.org/> and follow the steps below:

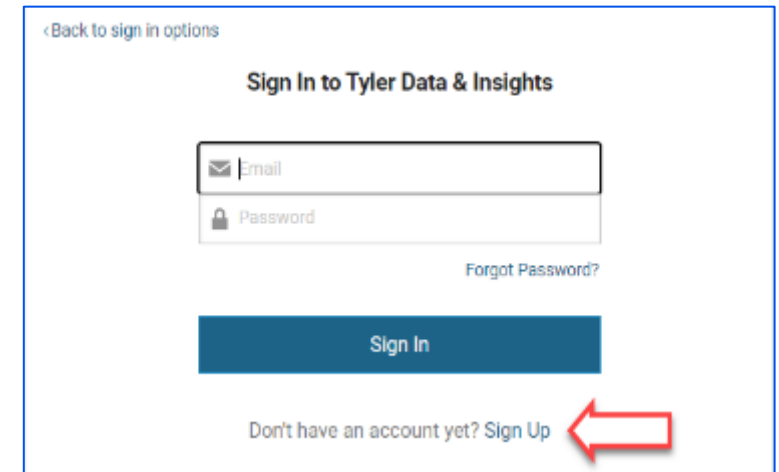
## Step 1



## Step 2

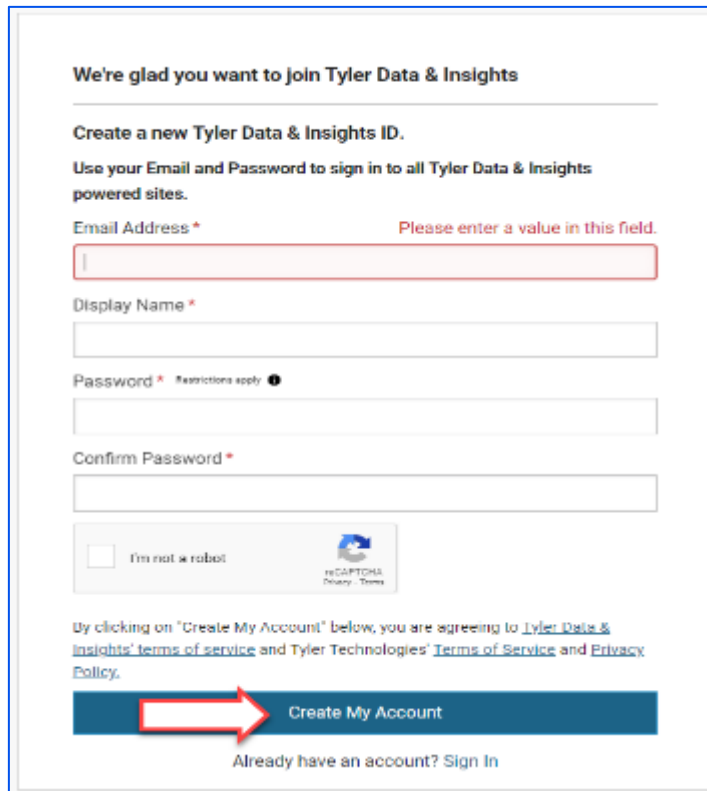


## Step 3



# Creating an Open Data Account (continued)

## Step 4



We're glad you want to join Tyler Data & Insights

Create a new Tyler Data & Insights ID.  
Use your Email and Password to sign in to all Tyler Data & Insights powered sites.

Email Address \* Please enter a value in this field.

Display Name \*

Password \* Restrictions apply

Confirm Password \*

☐ I'm not a robot 

By clicking on "Create My Account" below, you are agreeing to [Tyler Data & Insights' terms of service](#) and Tyler Technologies' [Terms of Service](#) and [Privacy Policy](#).

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## Step 5

Confirm registration email by clicking on link sent in email from Socrata (may take several minutes to receive).

# Demo: Creating a Custom Report (View)

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| T Application Number<br><i>application_number</i> | T Funding year<br><i>funding_year</i> | T Billed Entity State<br><i>state</i> | T Billed Entity Number<br><i>ben</i> | T Applicant's Organization Name<br><i>organization_name</i> | T Funding Request Number<br><i>funding_request_number</i> | T Funding Request Status<br><i>form_471_fm_status_name</i> |
|---------------------------------------------------|---------------------------------------|---------------------------------------|--------------------------------------|-------------------------------------------------------------|-----------------------------------------------------------|------------------------------------------------------------|
| 161000001                                         | 2016                                  | PA                                    | 125806                               | Donegal School District                                     | 1699000027                                                | Funded                                                     |
| 161000002                                         | 2016                                  | OK                                    | 140127                               | Adair Indep School District 2                               | 1699000001                                                | Funded                                                     |
| 161000002                                         | 2016                                  | OK                                    | 140127                               | Adair Indep School District 2                               | 1699000004                                                | Funded                                                     |
| 161000002                                         | 2016                                  | OK                                    | 140127                               | Adair Indep School District 2                               | 1699000004                                                | Funded                                                     |

< 1 of 5482 >

Column Manager

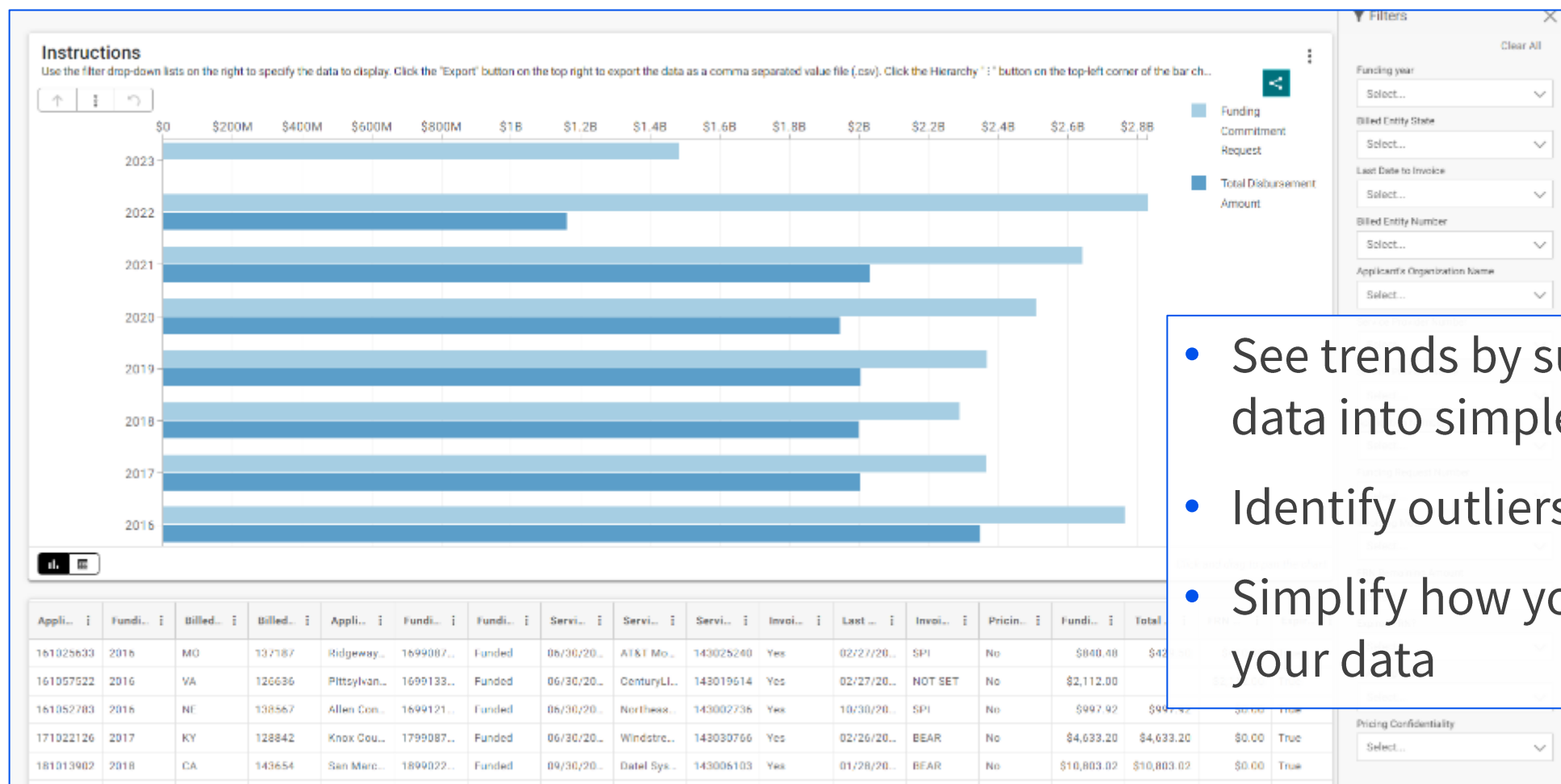
☒ Include All Columns

| Order | Include                             | Column Display Name             | API Field Name                 | Sort    | Sort Order |
|-------|-------------------------------------|---------------------------------|--------------------------------|---------|------------|
| ⋮     | <input checked="" type="checkbox"/> | T Application Number            | <i>application_number</i>      | No Sort | ▼          |
| ⋮     | <input checked="" type="checkbox"/> | T Funding year                  | <i>funding_year</i>            | No Sort | ▼          |
| ⋮     | <input checked="" type="checkbox"/> | T Billed Entity State           | <i>state</i>                   | No Sort | ▼          |
| ⋮     | <input checked="" type="checkbox"/> | T Billed Entity Number          | <i>ben</i>                     | No Sort | ▼          |
| ⋮     | <input checked="" type="checkbox"/> | T Applicant's Organization Name | <i>organization_name</i>       | No Sort | ▼          |
| ⋮     | <input checked="" type="checkbox"/> | T Funding Request Number        | <i>funding_request_number</i>  | No Sort | ▼          |
| ⋮     | <input checked="" type="checkbox"/> | T Funding Request Status        | <i>form_471_fm_status_name</i> | No Sort | ▼          |

Create a custom report from an existing E-Rate dataset by:

- Filtering
- Grouping
- Aggregating
- Sorting

# Uses for Visualizations



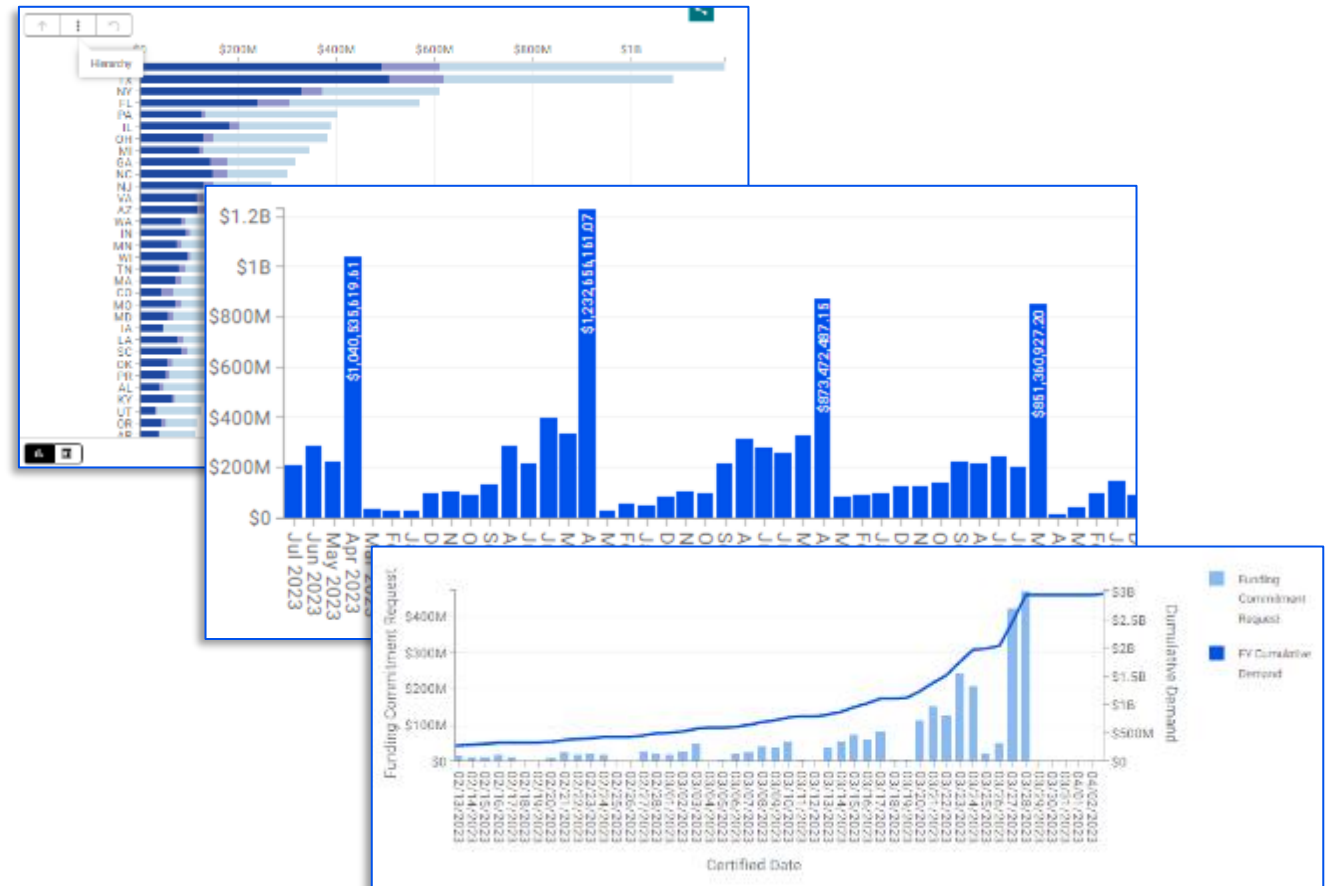
- See trends by summarizing data into simple charts
- Identify outliers
- Simplify how you monitor your data

# Demo: Creating a Simple Chart Visualization

Create a chart visualization from an existing E-Rate dataset or any of your saved custom reports (views).

## Available visualizations:

- Bar and column chart 
- Pie chart 
- Timeline chart 
- Histogram 
- Combo column & line charts 
- Scatter plot 
- Calendar 

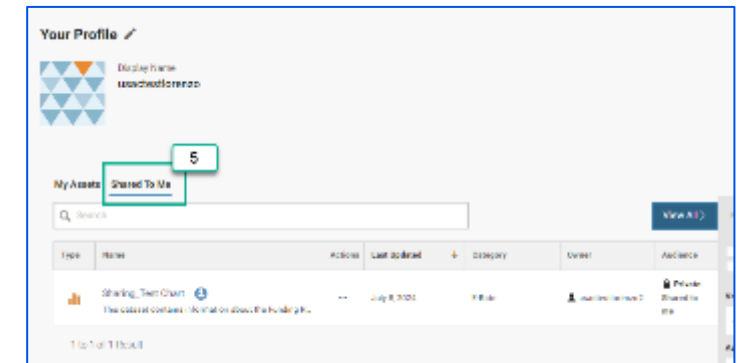
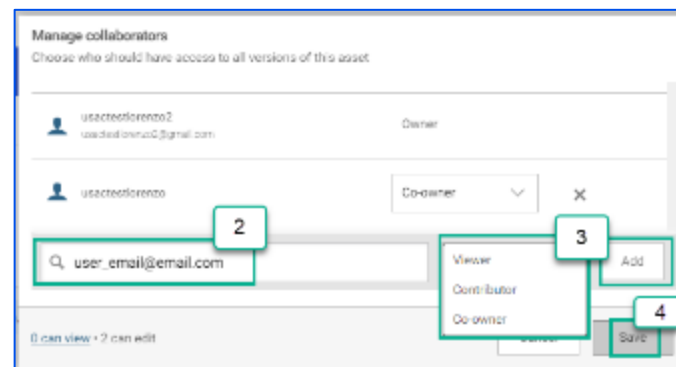
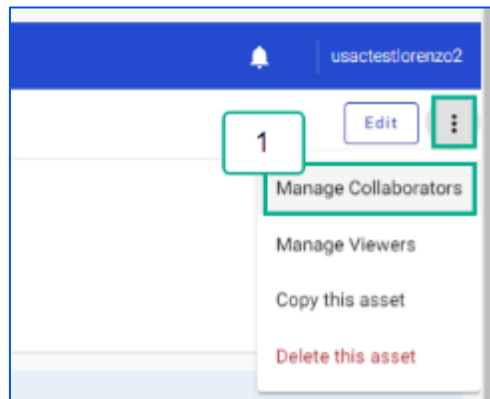


**\*Note:** Maps are not available for E-Rate data at this time.

# Sharing Content With Other Open Data Users

Users can add other users as viewers, contributors, or co-owners (can edit permissions). To share your content with another user, follow the steps below. **Both users must have an Open Data account.**

1. Near top right of the page of the content you want to share, click on three dots and then on 'Manage Collaborators'
2. Type the other user's account email **and** select it from the menu
3. Select Permission type and click "Add"
4. Click on "Save"
5. Shared content will be listed in the "Shared To Me" section of "Your Profile" page



# Key Terms

| Term                    | Definition                                                                                              |
|-------------------------|---------------------------------------------------------------------------------------------------------|
| <b>Dataset</b>          | A set of numbers or values that relate to a specific topic                                              |
| <b>View</b>             | A setting that allows the user to see data in their desired format                                      |
| <b>Filtering</b>        | Settings that remove unwanted information, leaving the user with only the information they want to view |
| <b>Aggregating data</b> | Grouping numbers or values                                                                              |
| <b>Use case</b>         | When or why someone would utilize a process                                                             |
| <b>Pivot table</b>      | A data processing tool used to organize information                                                     |
| <b>Granular data</b>    | Information that is organized in the smallest sets possible to be more defined and detailed             |

# Key Terms

| Term                                  | Definition                                                                                      |
|---------------------------------------|-------------------------------------------------------------------------------------------------|
| <b>Bar and column chart</b>           | A graph used to compare different quantities for separate categories of data or data series     |
| <b>Pie chart</b>                      | A circular graph that is divided into sections that are proportional to the data they represent |
| <b>Timeline chart</b>                 | A visual representation of events happening over time                                           |
| <b>Histogram</b>                      | A chart where bar heights represent the data frequency                                          |
| <b>Combo column &amp; line charts</b> | A visual representation that compares data in different categories over a period of time        |
| <b>Scatter plot</b>                   | A chart that shows the relationship between two variables in a set of data                      |

# Live Q&A

- Submit your questions about today's topics:
  - Uses for custom reports
  - Creating an Open Data account
  - Demo: Creating a custom report
  - Uses for visualizations
  - Demo: Creating a simple chart visualization

Questions

?

**No questions yet**  
Questions you send and answers from the staff  
will appear here

Enter your question

Your question will be sent to staff

Send

## Q&A Tips

- ✓ Type your queries into the “Questions” box in your webinar control panel.
- ✓ Write in full sentences.
- ✓ Ask one question at a time.
- ✓ Click the box to expand it and see all the written answers.

# Questions?

# Contact Us



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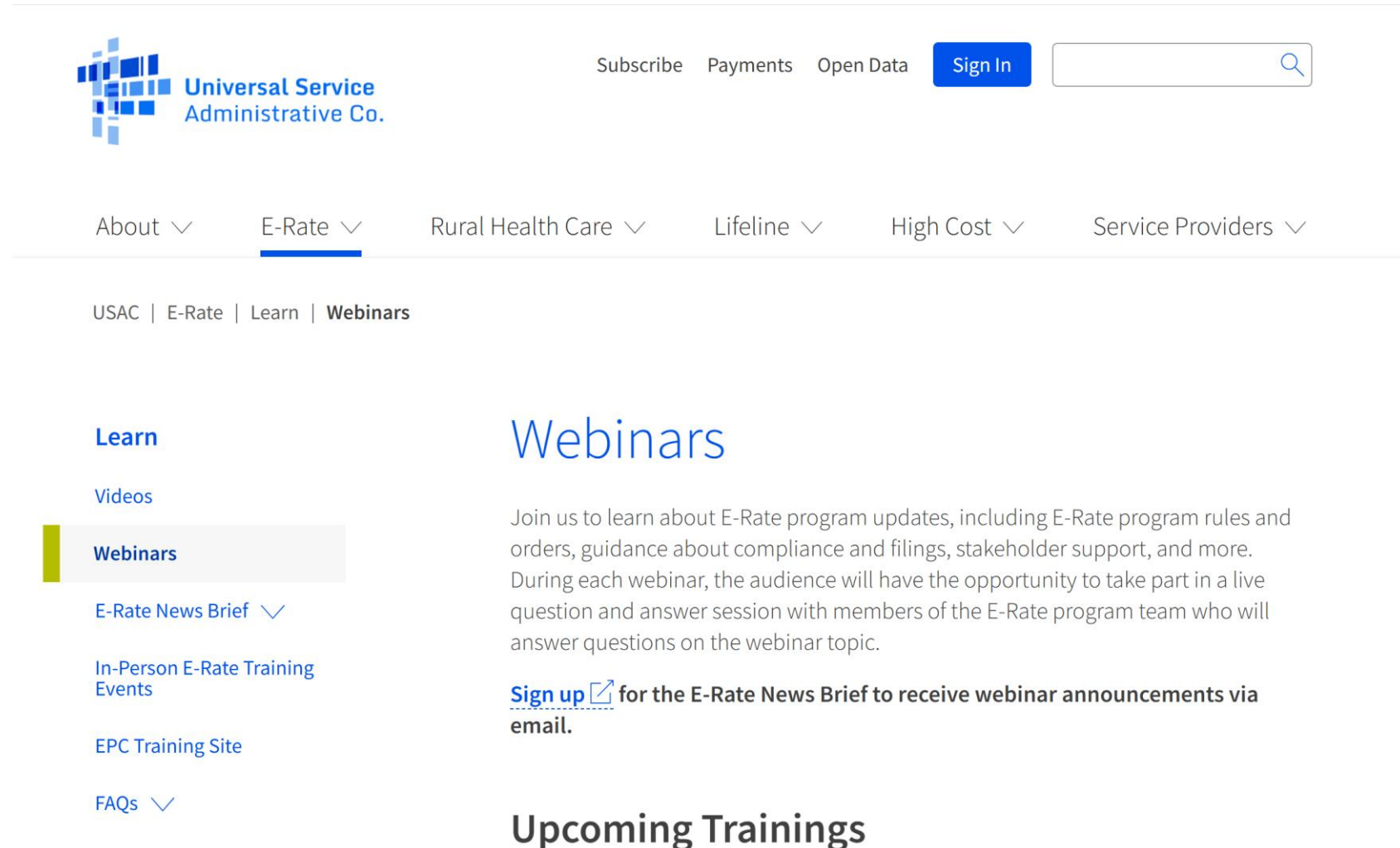
**Contact us at [opendata@usac.org](mailto:opendata@usac.org)**

## **Create a customer service case**

1. Log in to the [E-Rate Productivity Center \(EPC\)](#)
2. Select the **Contact Us** link from the upper right menu on the landing page.

# Upcoming Webinars

- Our next webinar will be on the **FCC Form 470 and Competitive Bidding Process**, *Date Forthcoming*
- Please visit the E-Rate [Webinars](#) page



The screenshot shows the Universal Service Administrative Co. website. The header includes the USAC logo, navigation links for Subscribe, Payments, Open Data, and a Sign In button, along with a search bar. A secondary navigation bar lists About, E-Rate (underlined), Rural Health Care, Lifeline, High Cost, and Service Providers. Below this, a breadcrumb trail reads USAC | E-Rate | Learn | Webinars. A left sidebar contains links for Learn, Videos, Webinars (highlighted with a yellow bar), E-Rate News Brief, In-Person E-Rate Training Events, EPC Training Site, and FAQs. The main content area features the heading 'Webinars' followed by a paragraph about E-Rate program updates and a 'Sign up' link for the E-Rate News Brief. At the bottom, the heading 'Upcoming Trainings' is visible.

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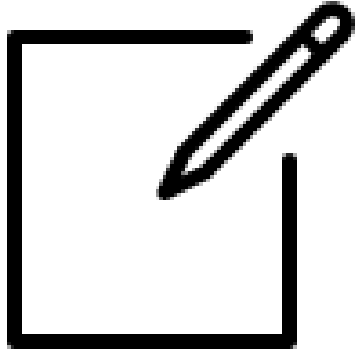
## Webinars

Join us to learn about E-Rate program updates, including E-Rate program rules and orders, guidance about compliance and filings, stakeholder support, and more. During each webinar, the audience will have the opportunity to take part in a live question and answer session with members of the E-Rate program team who will answer questions on the webinar topic.

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## Upcoming Trainings

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- We appreciate your feedback!

**Thank You!**





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