Customizing the E-Rate Invoicing Dataset

E-Rate Program Participant Webinar

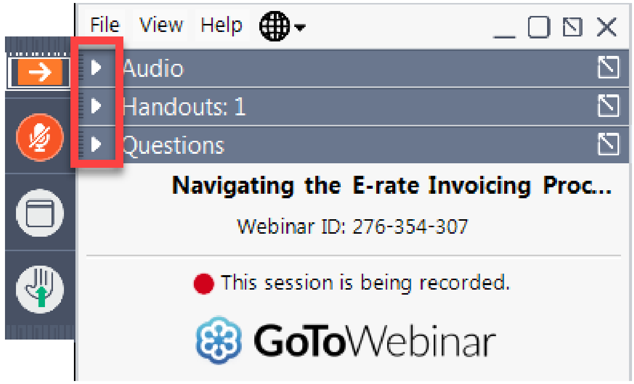
May 5, 2021

Universal Service Administrative Co.

HOUSEKEEPING – WEBINAR PANEL

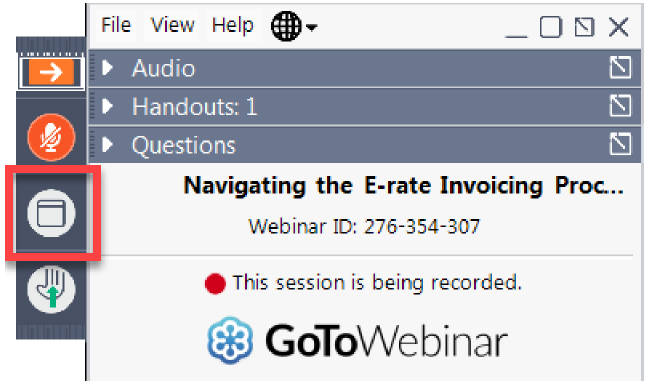
- The webinar panel is located on the right-hand side of the screen.
- Open the panel by clicking the orange arrow.

- Use the white arrows to open the sections in the panel.

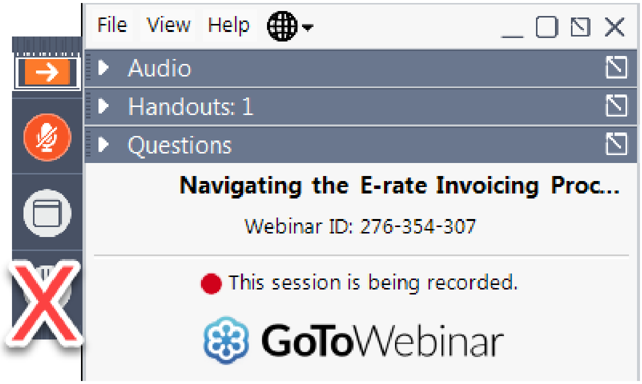


HOUSEKEEPING – WEBINAR PANEL

- You can use the panel to view the presentation in full screen or window mode.

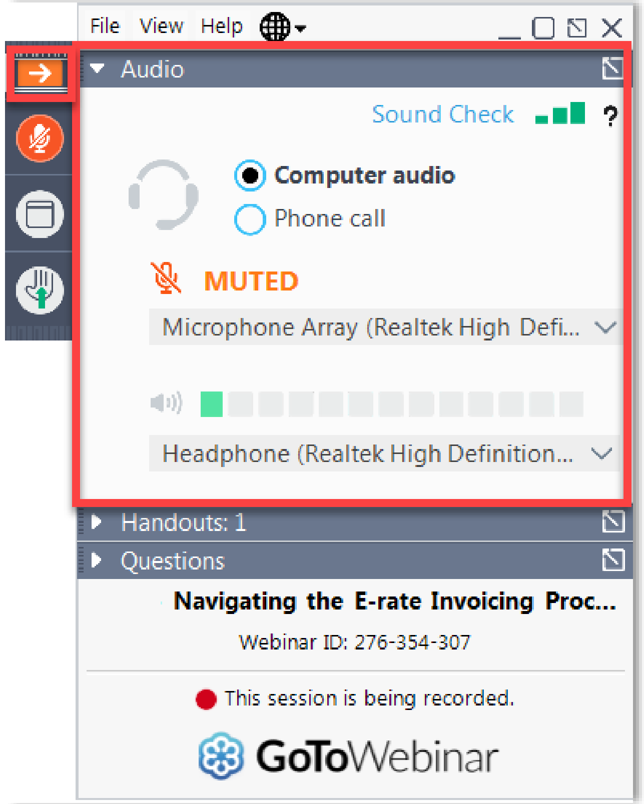


- We are not using the hand raise function.



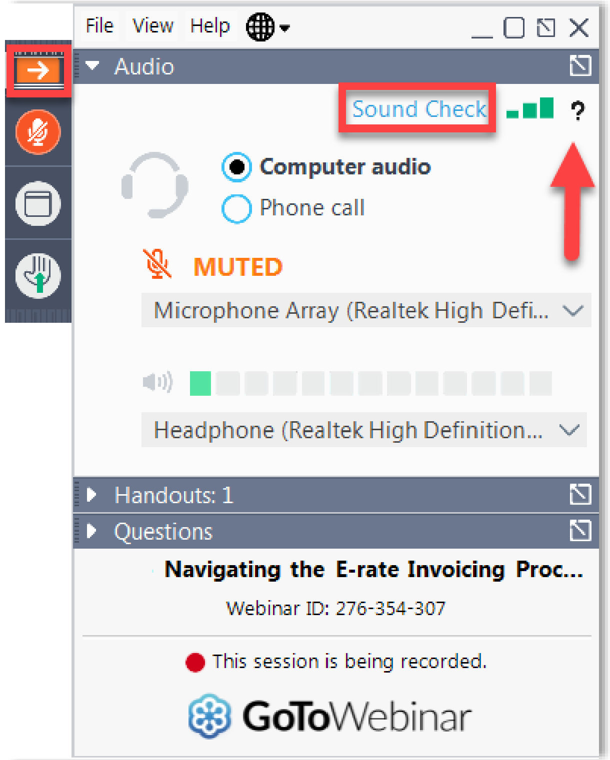
HOUSEKEEPING – AUDIO

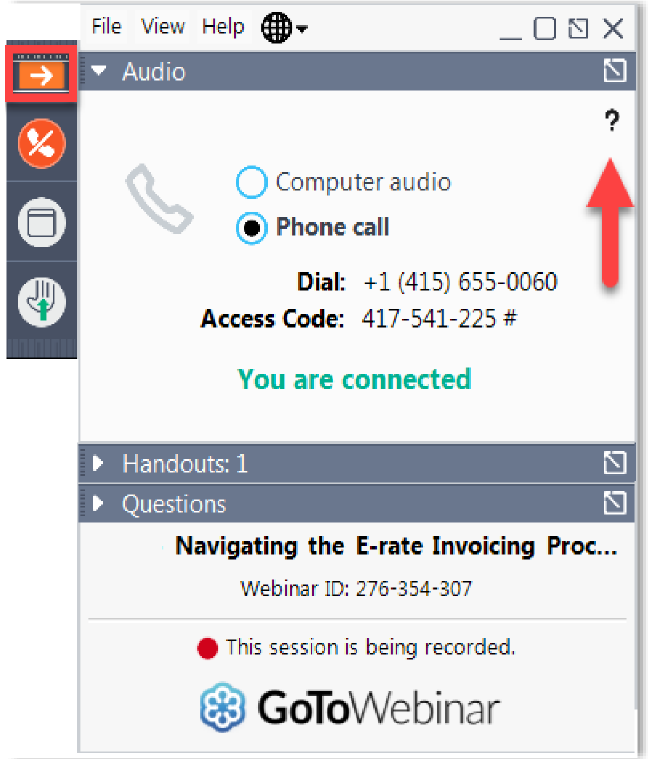
- Use the "Audio" section of your control panel to select an audio source.
- Choose one of the audio options:
  - Your computer's audio
  - Call in using an access code and audio PIN.
- The audience will remain on mute.



HOUSEKEEPING – TECHNICAL ISSUES

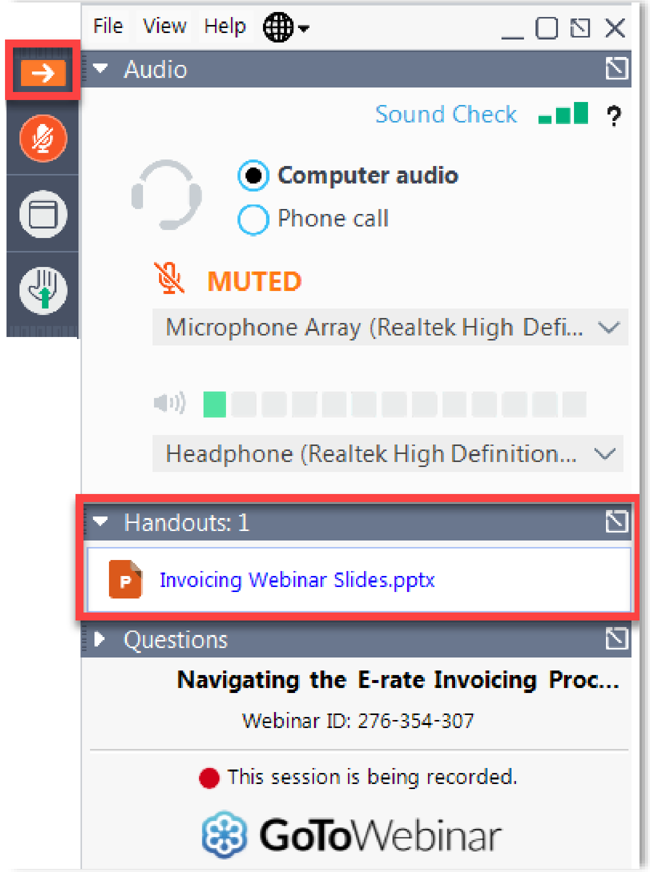
- Use the "Sound Check" link and click question mark icon for audio help.
- Exit webinar and click the check system requirements link in the event confirmation email to determine whether your computer meets the requirements to see and hear the webinar.
- If issues persist, call 833-851-8340 to troubleshoot with GoToWebinar.





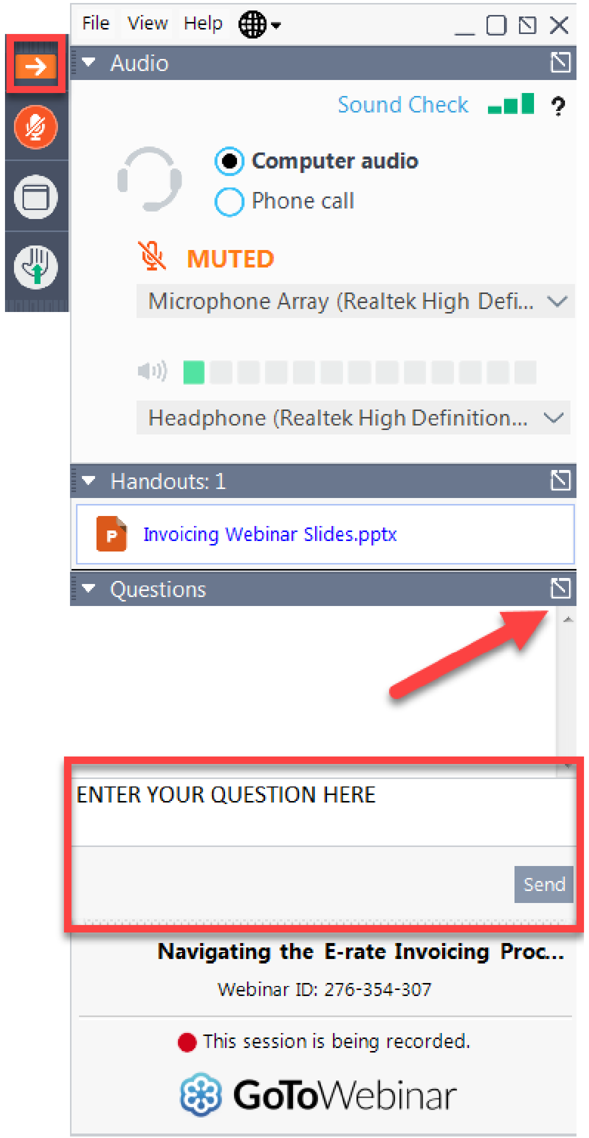
HOUSEKEEPING – RESOURCES

- The **slide deck** is available when you click the arrow to expand the "**Handouts**" tab.
- A recording of this webinar will be available after the event via the registration link.



HOUSEKEEPING – Q&A

- **There will be a live Q&A session focused on today's topics.**
- Tips for submitting questions:
  - Use the "Questions" box in your webinar control panel anytime during the presentation.
  - Click the box with the arrow above the questions box to expand it and see all written answers.
  - Write in full sentences.
  - Ask one question at a time.
  - Ask questions related to webinar content.



CLIENT SERVICE BUREAU (CSB)

Call us at (888) 203-8100

Monday – Friday 8:00 a.m. to 8:00 p.m. ET

Create a customer service case in the E-Rate Productivity Center (EPC):

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

MEET THE TEAM

Lorenzo Sanchez

Sr. Data Analyst | E-Rate

Tom Nesbitt

Senior Manager | E-Rate

Nkeshi Free

Communication Specialist | E-Rate

AGENDA

- Learning objectives
- Creating custom dataset views
- Creating chart tools
- Other resources – Advanced topics
- Submitting questions (outside this webinar session)
- Q&A

LEARNING OBJECTIVES

- Learn to create custom dataset views with:
  - Preset filters
  - Aggregated measures
  - Your own formatting
- Learn to create custom chart tools with relative date filters

We will use the ***E-Rate Invoices and Authorized Disbursements*** *dataset for this session's activities.*

RECOMMENDED PRIOR KNOWLEDGE (FROM 1ST WEBINAR)

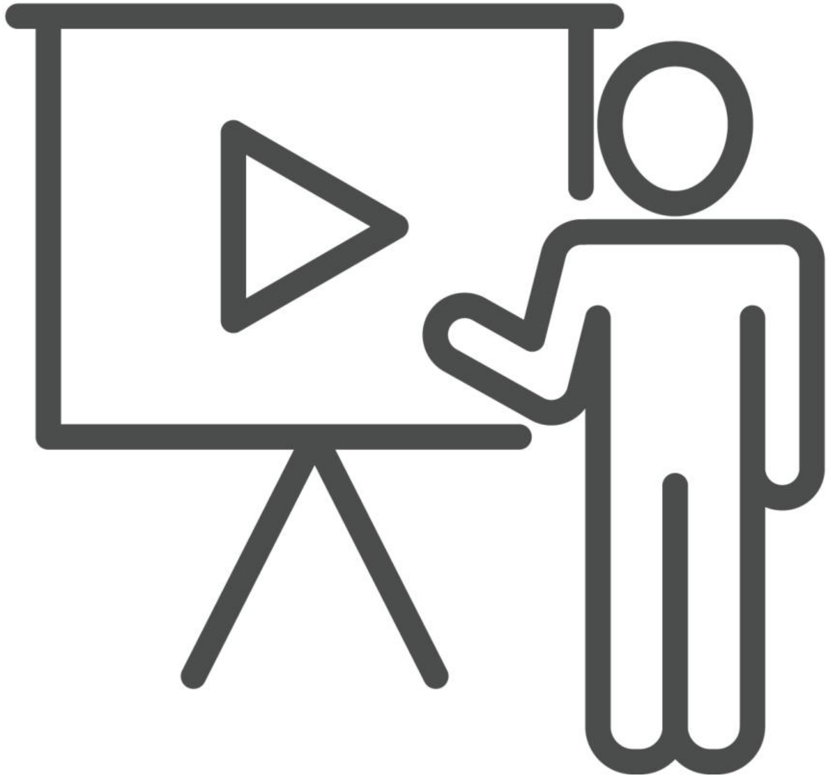
Video tutorial – E-rate Invoicing Open Data Set and Tool Demo (25:46 min. – includes chapter menu)

- Understand the invoicing tool and dataset contents
- Know how to search for invoicing data if you are an applicant, consulting firm, or service provider
- Know how to export data
- Know what resources are available for dataset and tool related questions

INVOICING OPEN DATA

Views and Chart Tools Demo

VIEWS AND CHART TOOLS DEMO

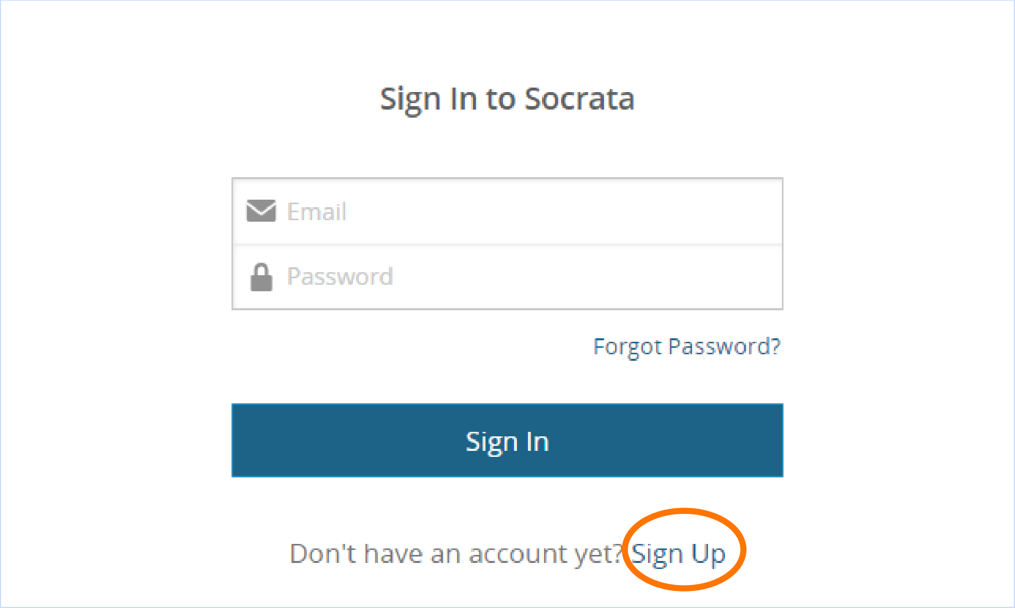


CREATING A NEW OPEN DATA USER ACCOUNT

Video tutorial - [USAC Open Data: Basic Information]() (4:00 min.)

Steps:

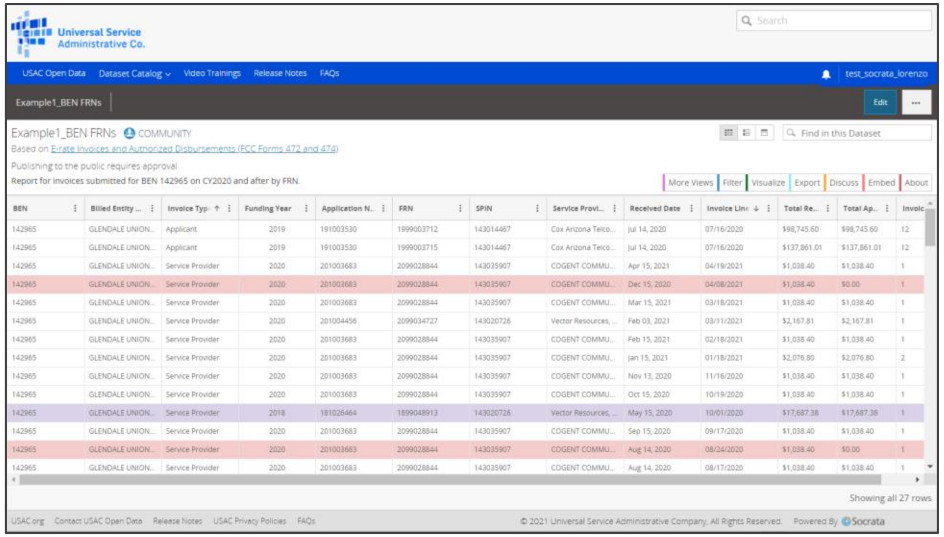
1. Go to the [Open Data main page]() > click the **Sign In** button
2. Click **Sign Up** text below the **Sign In** button.
3. Enter your email address, choose a display name, create a password, verify that you are not a robot, and click the **Create My Account** button.
4. Accept the License Agreement by clicking the **Accept** button.



CREATING CUSTOM DATASET VIEWS

Video tutorial - [USAC Open Data: Create a Report] (8:00 min.)

Use case: Report of an applicant's total approved invoicing dollars aggregated by Funding Request Number (FRN)/completion date and submitted in calendar year (CY) 2020 or after.



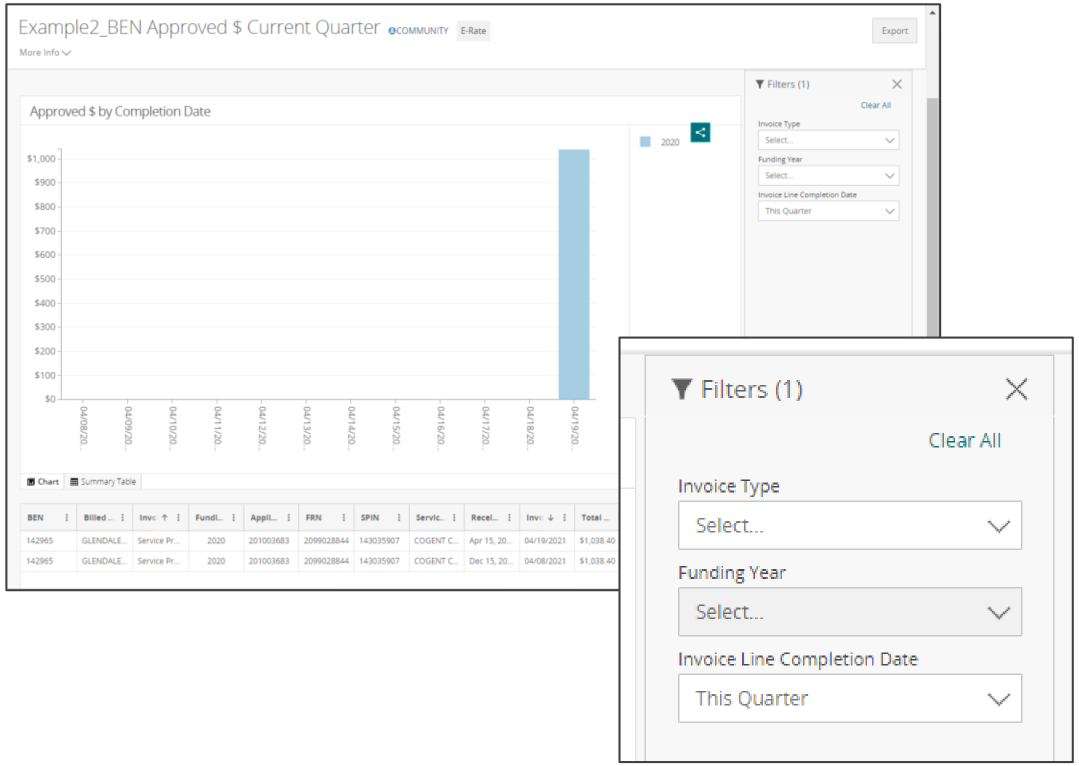
- **Default filters:** Billed Entity Number (BEN) and Received Date
- **Aggregated fields:** Sum of requested and approved invoice line amounts at FRN level; count of completed invoice lines per FRN
- **Custom formatting:** Report metadata, column formatting/order, and row conditional formatting based on rules.

CREATING CHART TOOLS

Video tutorial - [USAC Open Data: Create a Visualization] (6:53 min.)

Use case: Report with interactive chart tool for an applicant's approved invoicing dollars submitted in CY2020+ and approved in the current quarter.

- **Preset relative date filter**
- **Grouped column chart**
- **Quick filter and export steps**

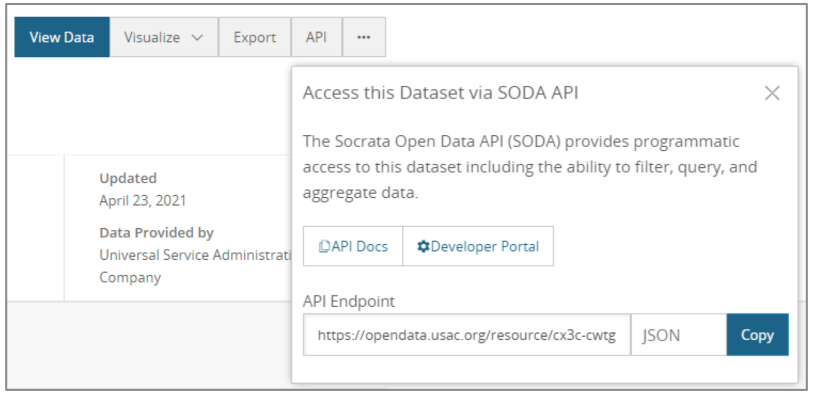


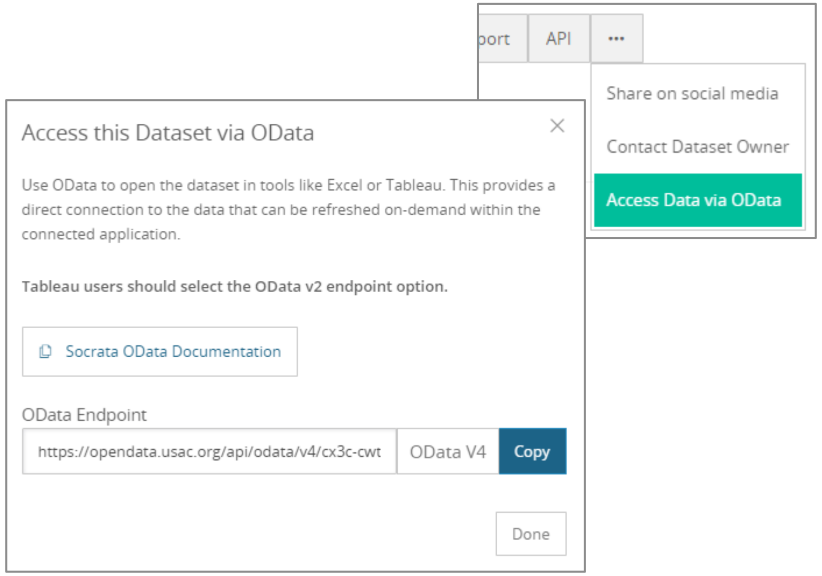
OTHER RESOURCES – ADVANCED TOPICS

- Access via Application Programming Interface (API) Calls
    - https://dev.socrata.com/
- API Client Libraries (Python, R, JavaScript, etc.)
    - https://dev.socrata.com/libraries/
- Access via OData (MS Excel)
    - https://support.socrata.com/hc/en-us/articles/115005364207

Support questions on APIs/OData:

https://support.socrata.com/hc/en-us/requests/new





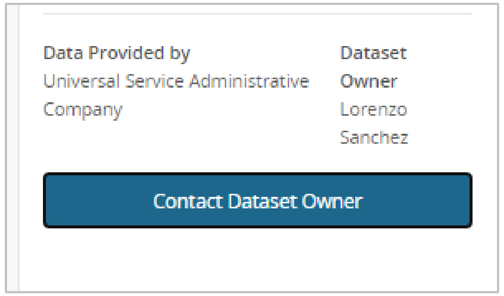
SUBMITTING QUESTIONS (AFTER THE WEBINAR)

Reminder: *Review the data glossary for column definitions – it will answer many questions.*

For generic questions or feedback about the tool or dataset
(excluding advanced topics in prior slide)

Use '*Contact Dataset Owner*' button or email us at opendata@usac.org for:

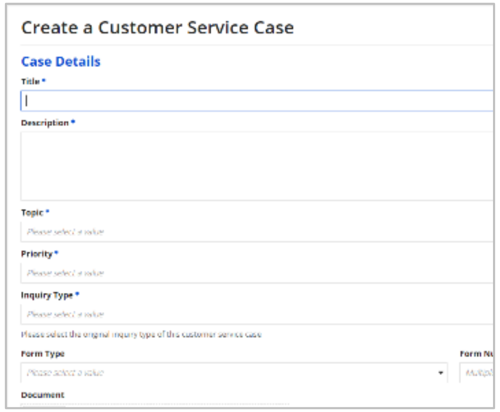
- Questions about how to use the tool or about what data is included or not included
- Feedback about tool/dataset issues not related to E-Rate program rules



For specific E-Rate questions not mentioned above

Contact** the *Client Service Bureau (CSB)* for:

- Questions about E-Rate program rules, policies, or decision codes/explanations
- Specific questions about your invoices or applications



****To contact CSB:**

File an EPC customer service case (for existing participants) or Call (888) 203-8100 M-F, 8:00 a.m. to 8:00 p.m. ET.

HOUSEKEEPING – Q&A

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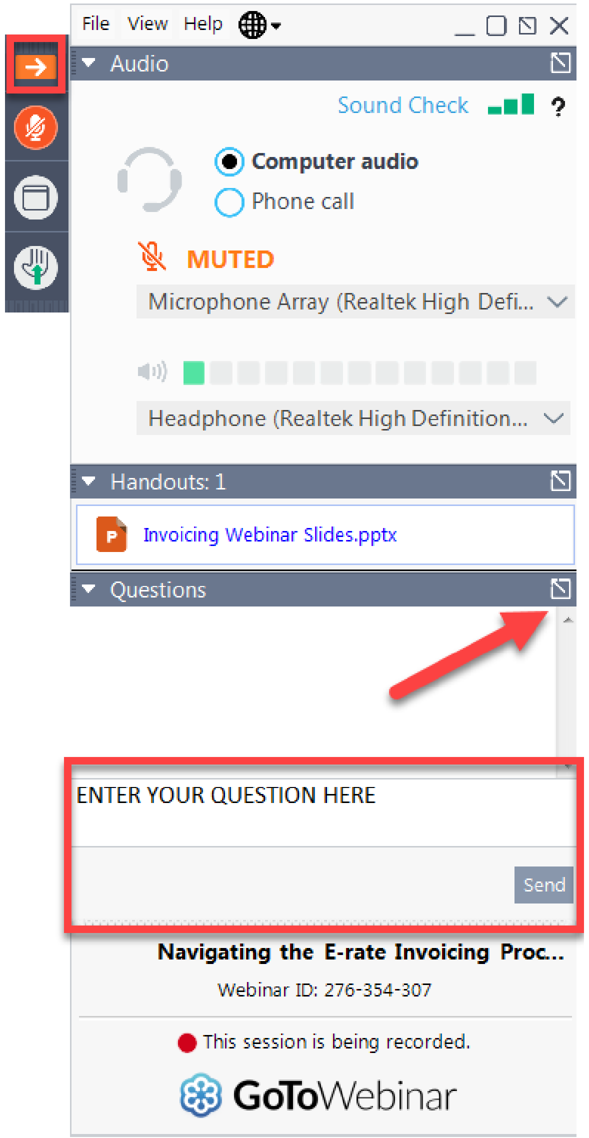

Questions?

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UPCOMING WEBINARS

May 26 at 1:00 p.m. ET

Supply Chain Office Hour Session

Recommended for:
Service providers

For information about the FCC's Supply Chain First Report and Order: April 2 SL News Brief

For the most current information: USAC's Supply Chain webpage

UPCOMING WEBINARS

May 26 at 2:00 p.m. ET

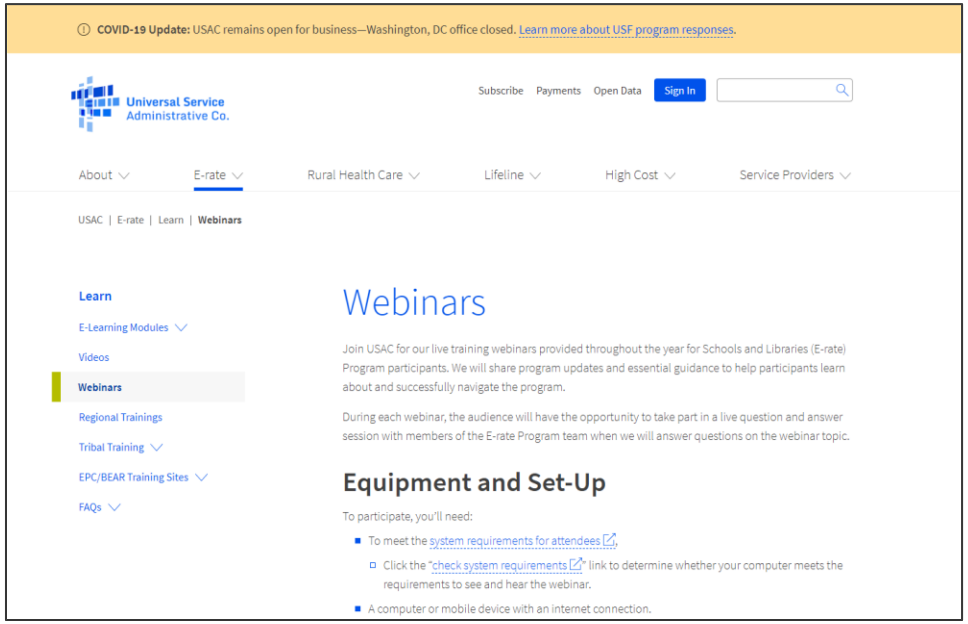
[Program Integrity Assurance (PIA) Review and Selective Review]

Recommended for:
Applicants

E-Rate Experience Level: Beginner

Prerequisite: None

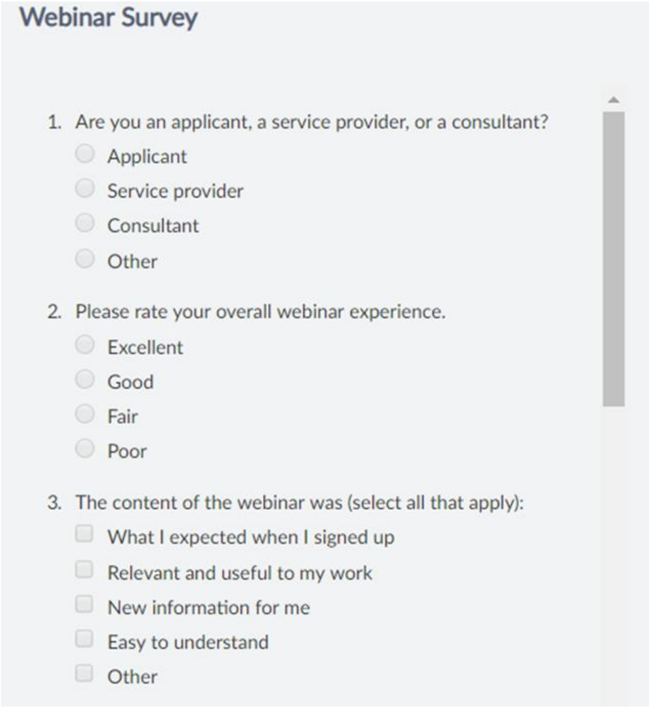
Go to the E-Rate [Webinars] page for additional information.



WEBINAR SURVEY

We would like your feedback on today's webinar.

Please fill out the webinar survey by using the link emailed to you after the event.



Webinar Survey

1. Are you an applicant, a service provider, or a consultant?
   - Applicant
   - Service provider
   - Consultant
   - Other
2. Please rate your overall webinar experience.
   - Excellent
   - Good
   - Fair
   - Poor
3. The content of the webinar was (select all that apply):
   - What I expected when I signed up
   - Relevant and useful to my work
   - New information for me
   - Easy to understand
   - Other

Thank You!

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