

Customizing the E-Rate Invoicing Dataset

E-Rate Program Participant Webinar

May 5, 2021



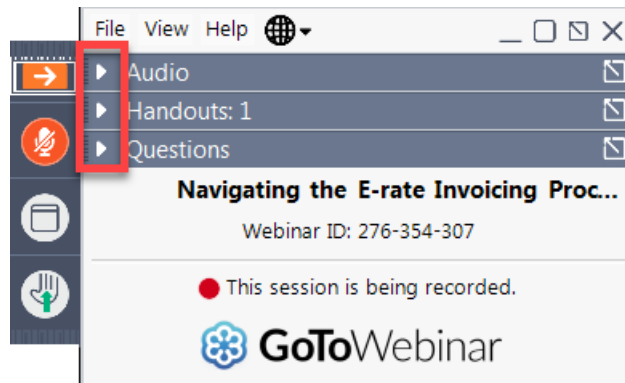
Universal Service
Administrative Co.

HOUSEKEEPING – WEBINAR PANEL

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

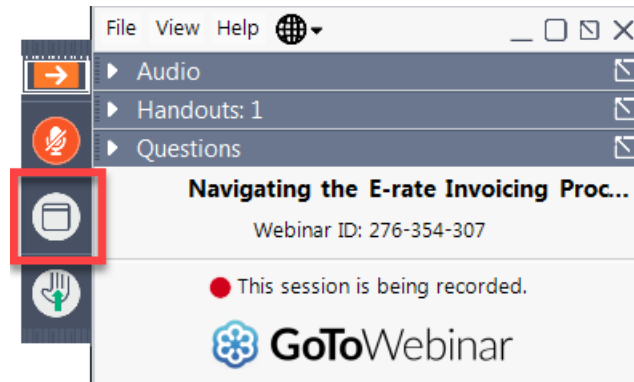


- Use the white arrows to open the sections in the panel.

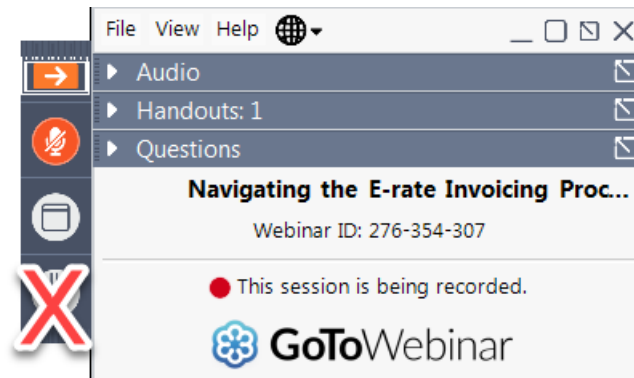


HOUSEKEEPING – WEBINAR PANEL

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

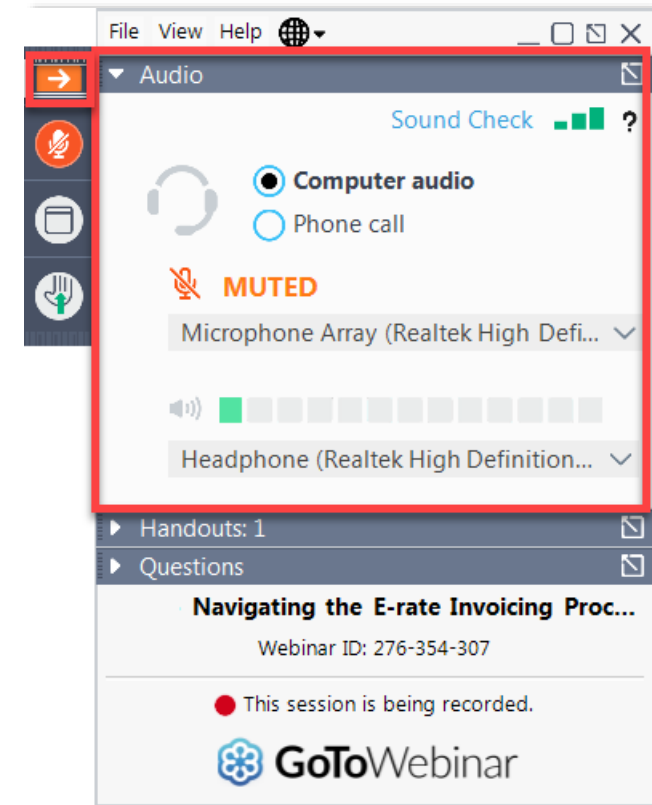


- We are not using the hand raise function.



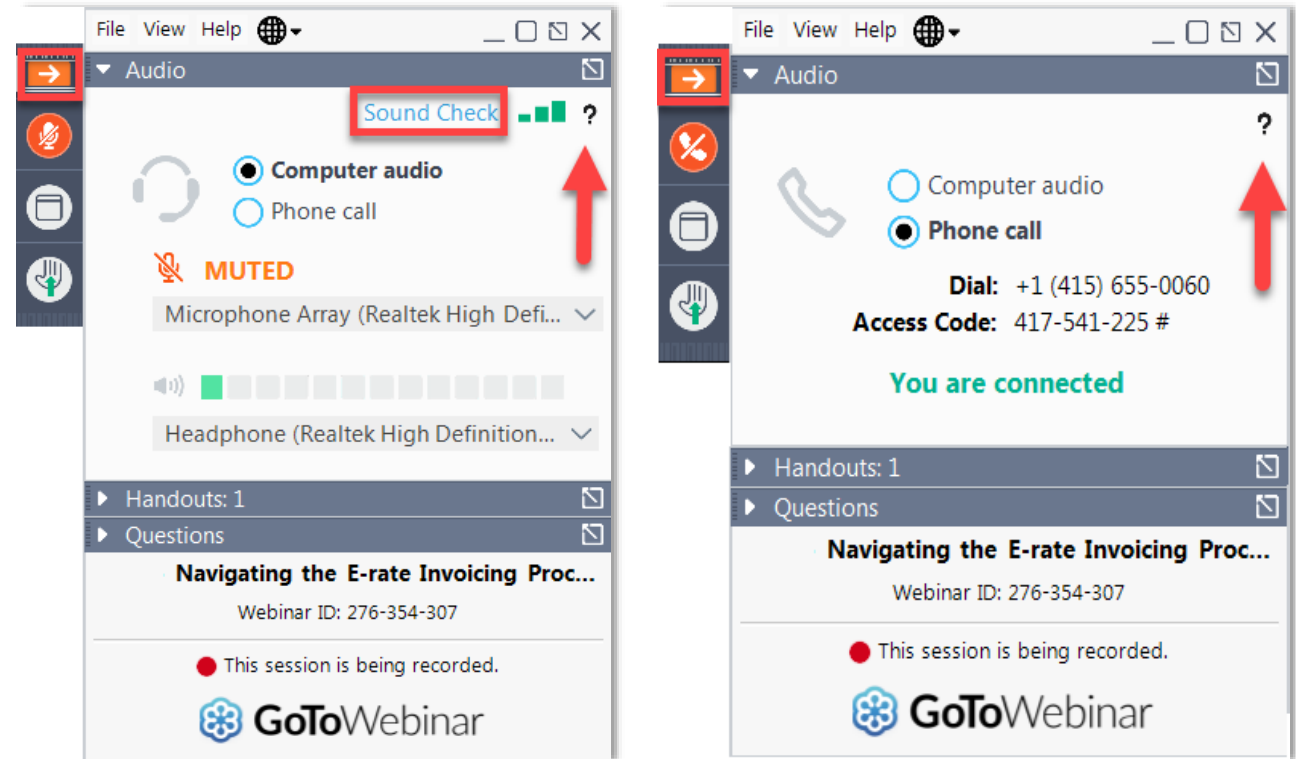
HOUSEKEEPING – AUDIO

- 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.



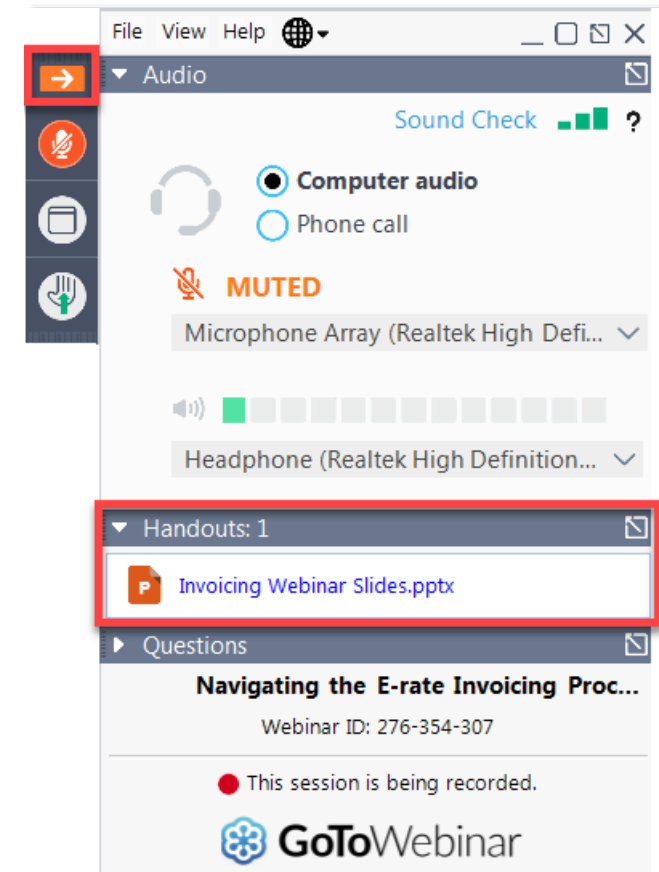
HOUSEKEEPING – TECHNICAL ISSUES

- 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.



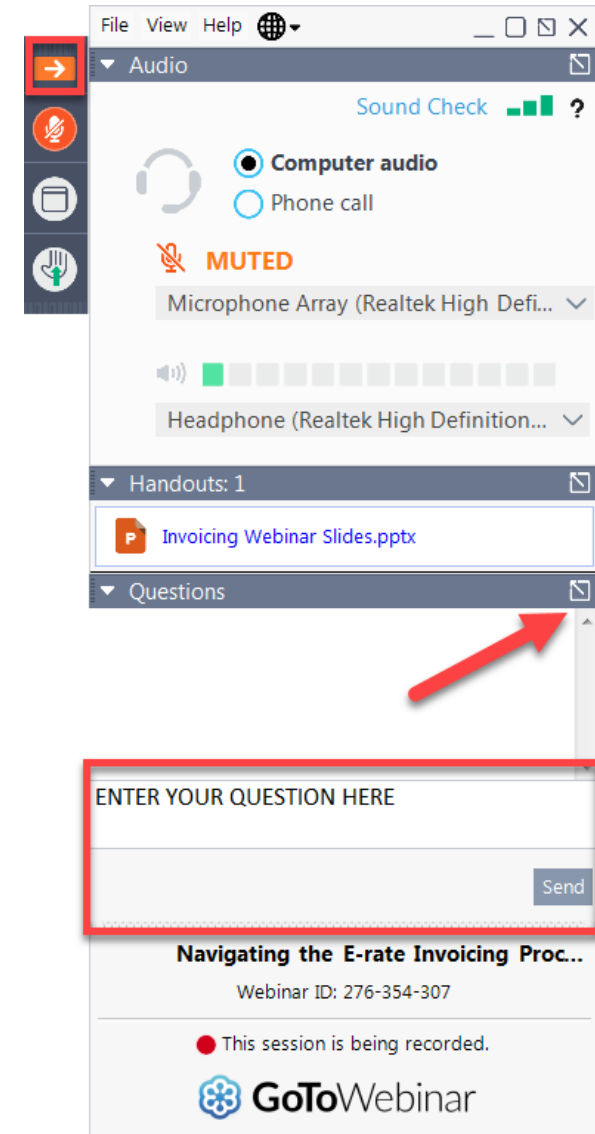
HOUSEKEEPING – RESOURCES

- 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)

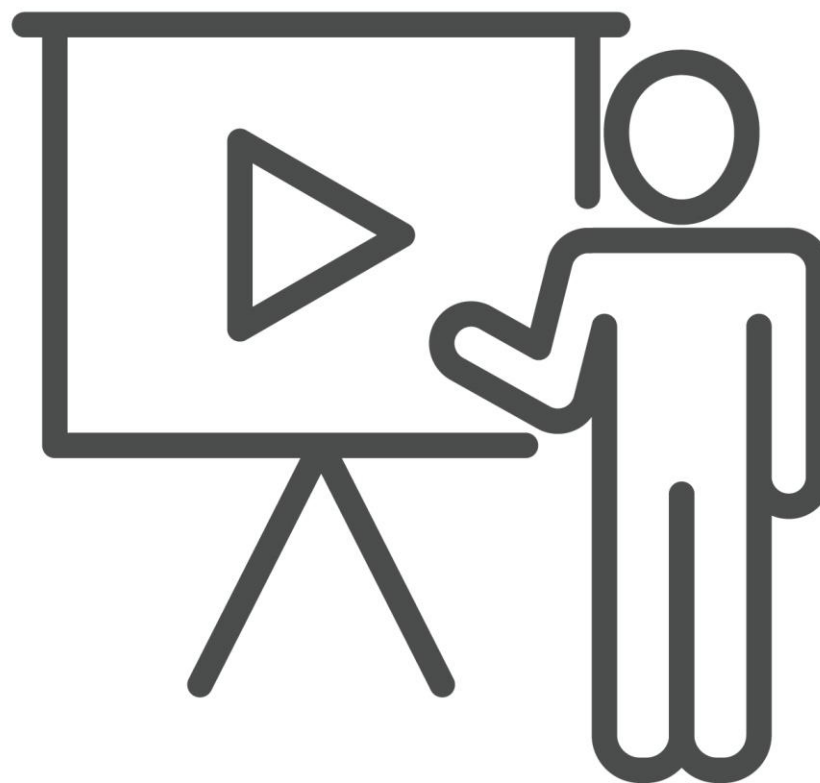
Video tutorial – [E-rate Invoicing Open Data Set and Tool Demo](#) (25:46 min. – includes chapter menu)

- 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

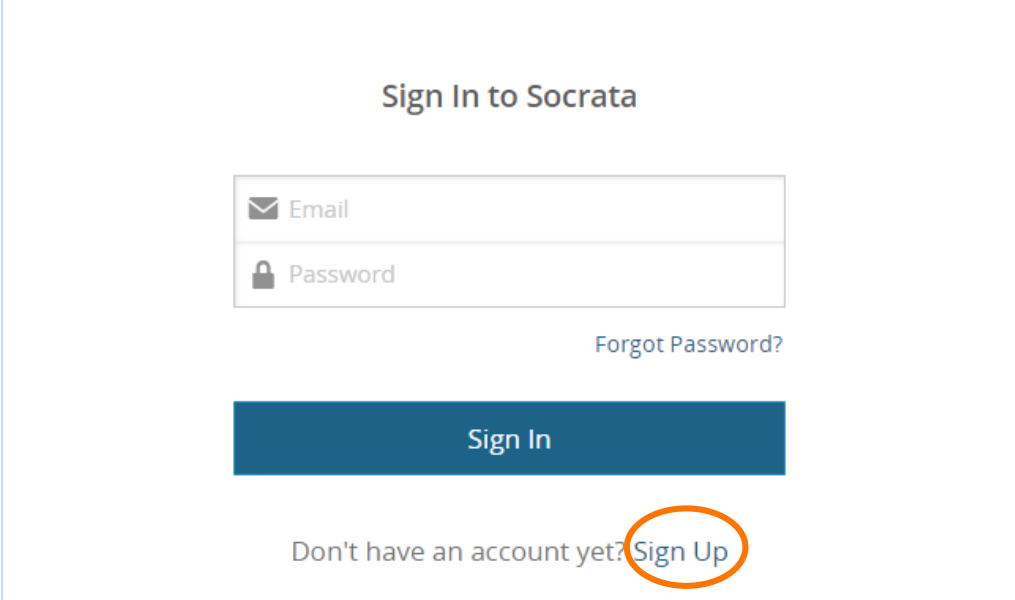


CREATING A NEW OPEN DATA USER ACCOUNT

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.



The screenshot shows the 'Sign In to Socrata' interface. It features two input fields: 'Email' with an envelope icon and 'Password' with a lock icon. A 'Forgot Password?' link is positioned to the right of the password field. Below these fields is a large blue 'Sign In' button. At the bottom, the text 'Don't have an account yet?' is followed by a 'Sign Up' link, which is circled in orange to highlight it as the next step.

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.

The screenshot displays the USAC Open Data report interface. The top navigation bar includes links for USAC Open Data, Dataset Catalog, Video Trainings, Release Notes, and FAQs. A search bar is located in the top right corner. The main content area shows a report titled "Example1_BEN FRNs" with a filter for "COMMUNITY". Below the title, there is a summary of the report: "Based on 2-rate Invoices and Authorized Disbursements (ICC Forms 471 and 474)", "Publishing to the public requires approval", and "Report for invoices submitted for BEN 142965 on CY2020 and after by FRN". The table below lists invoice data with columns: BEN, Billed Entity, Invoice Type, Funding Year, Application N., FRN, SPIN, Service Provider, Received Date, Invoice Line, Total Re., Total Ap., and Invoice. The table shows 27 rows of data, with the first row highlighted in red and the last row highlighted in purple. The footer of the table indicates "Showing all 27 rows".

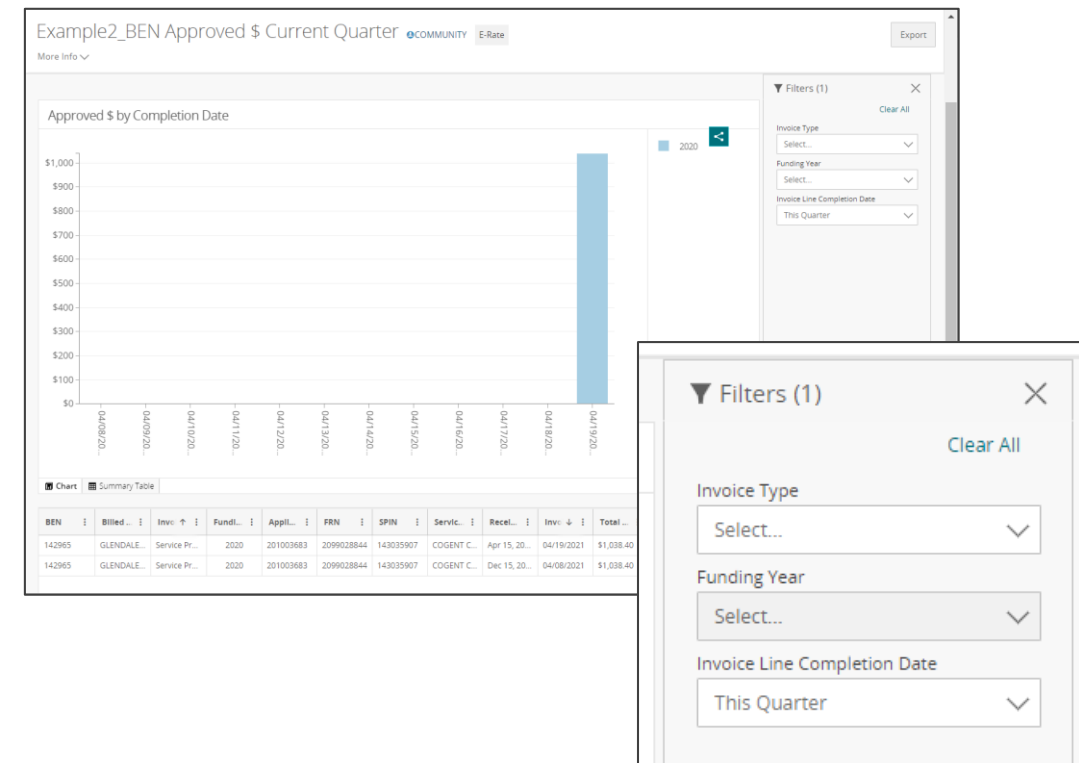
BEN	Billed Entity	Invoice Type	Funding Year	Application N.	FRN	SPIN	Service Provider	Received Date	Invoice Line	Total Re.	Total Ap.	Invoice
142965	GLENDALÉ UNION	Applicant	2019	191003530	1999003712	143014467	Cox Arizona Telco.	Jul 14, 2020	07/16/2020	\$98,745.60	\$98,745.60	12
142965	GLENDALÉ UNION	Applicant	2019	191003530	1999003715	143014467	Cox Arizona Telco.	Jul 14, 2020	07/16/2020	\$137,861.01	\$137,861.01	12
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Apr 15, 2021	04/16/2021	\$1,038.40	\$1,038.40	1
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Dec 15, 2020	04/08/2021	\$1,038.40	\$0.00	1
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Mar 15, 2021	03/18/2021	\$1,038.40	\$1,038.40	1
142965	GLENDALÉ UNION	Service Provider	2020	201004458	2099034727	143020728	Vetor Resources	Feb 08, 2021	03/11/2021	\$2,167.81	\$2,167.81	1
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Feb 15, 2021	02/18/2021	\$1,038.40	\$1,038.40	1
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Jan 15, 2021	01/18/2021	\$2,076.80	\$2,076.80	2
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Nov 13, 2020	11/16/2020	\$1,038.40	\$1,038.40	1
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Oct 15, 2020	10/19/2020	\$1,038.40	\$1,038.40	1
142965	GLENDALÉ UNION	Service Provider	2018	181026464	1999048913	143020728	Vetor Resources	May 15, 2020	10/01/2020	\$17,687.38	\$17,687.38	1
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Sep 15, 2020	09/17/2020	\$1,038.40	\$1,038.40	1
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Aug 14, 2020	08/24/2020	\$1,038.40	\$0.00	1
142965	GLENDALÉ UNION	Service Provider	2020	201003683	2099028844	143035907	COGENT COMMU.	Aug 14, 2020	08/17/2020	\$1,038.40	\$1,038.40	1

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**

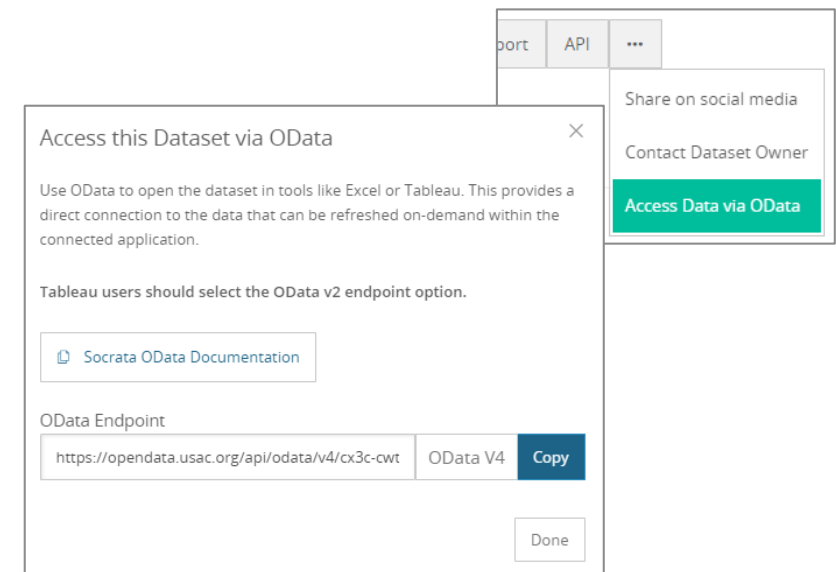
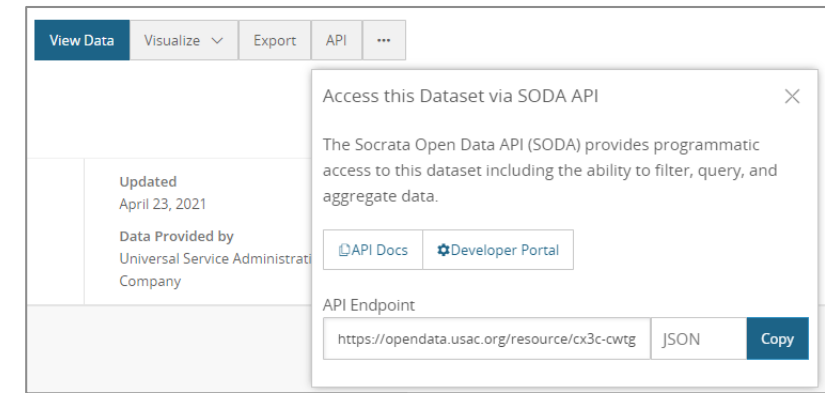


OTHER RESOURCES – ADVANCED TOPICS

- 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>



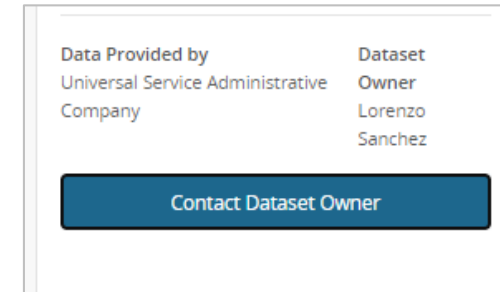
SUBMITTING QUESTIONS (AFTER THE WEBINAR)

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



The screenshot shows a user interface for contacting the dataset owner. It includes the following text:

Data Provided by	Dataset
Universal Service Administrative Company	Owner
	Lorenzo Sanchez

Below the table is a blue button labeled "Contact Dataset Owner".

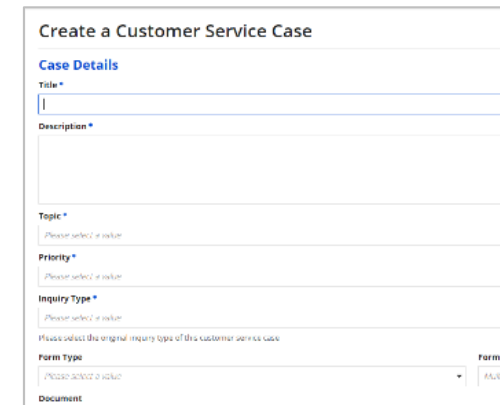
For specific E-Rate questions not mentioned above

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.



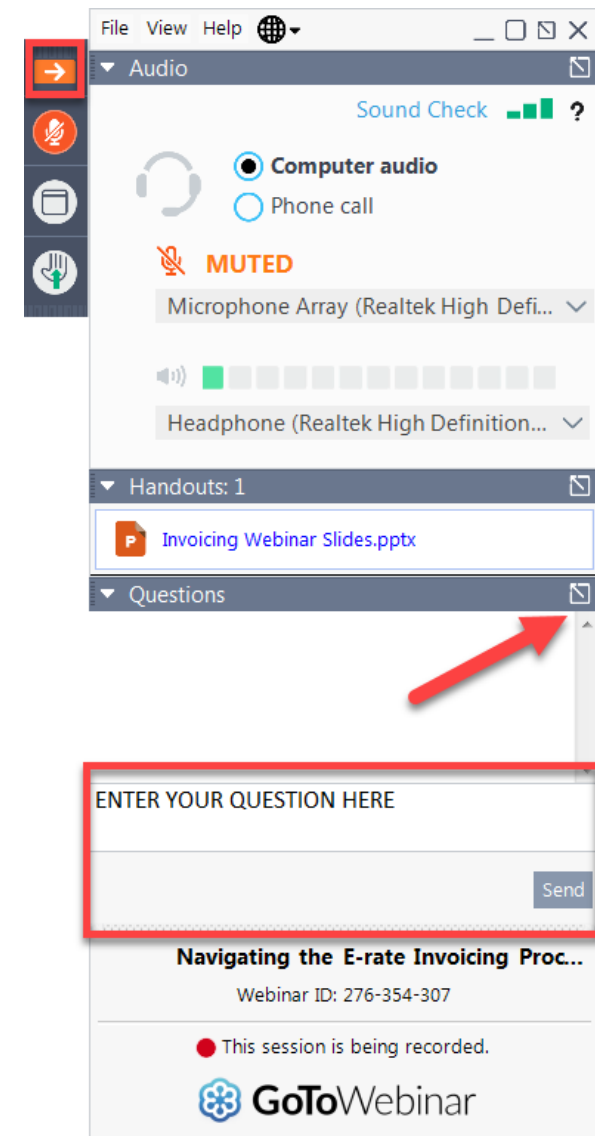
The screenshot shows a form titled "Create a Customer Service Case". The form includes the following sections:

- Case Details**
 - Title *
 - Description *
- Topic *
- Priority *
- Inquiry Type *
- Form Type *

Below the form fields, there is a note: "Please select the original inquiry type of this customer service case." and a "Form No." field.

HOUSEKEEPING – Q&A

- Use the “Questions” box in your webinar control panel to submit your question in writing.
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 - Ask questions related to webinar content.



Questions?

CLIENT SERVICE BUREAU (CSB)



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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

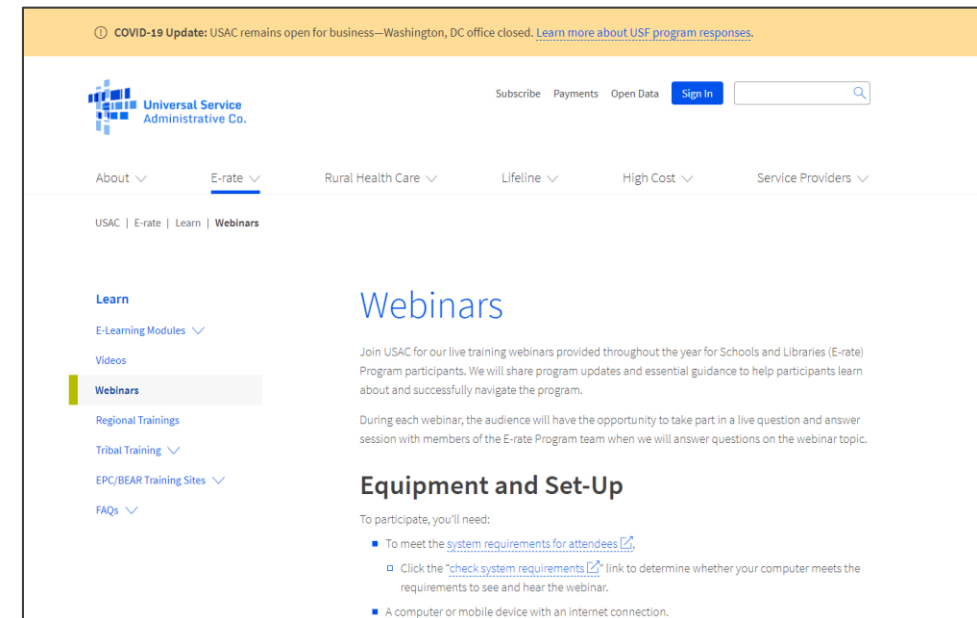
Program Integrity Assurance (PIA) Review and Selective Review

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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