E-Rate Open Data Webinar Part 2: Creating Reports and Visualizations

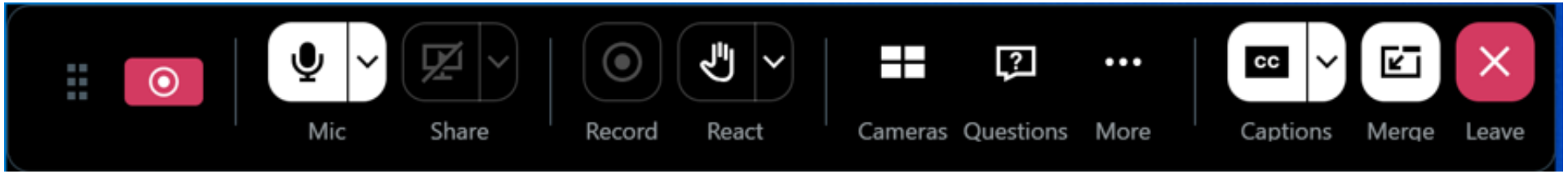
August 21, 2025

Disclaimer

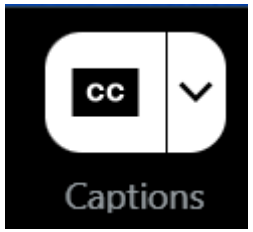
- To accommodate attendees, real-time closed caption is an option during this presentation.
- Each attendee has the option to turn captioning on or off.
- If you choose to use captioning, we apologize in advance for any transcription errors or distractions and appreciate your understanding.
- **Please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

Housekeeping – Closed Captioning (CC)

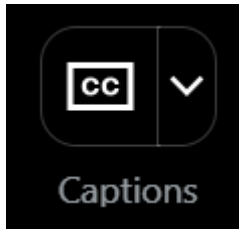
- **Attendees control their own captioning**



- You control the font size and color on CC
- Toggle CC off and on at your preference



Captions ON



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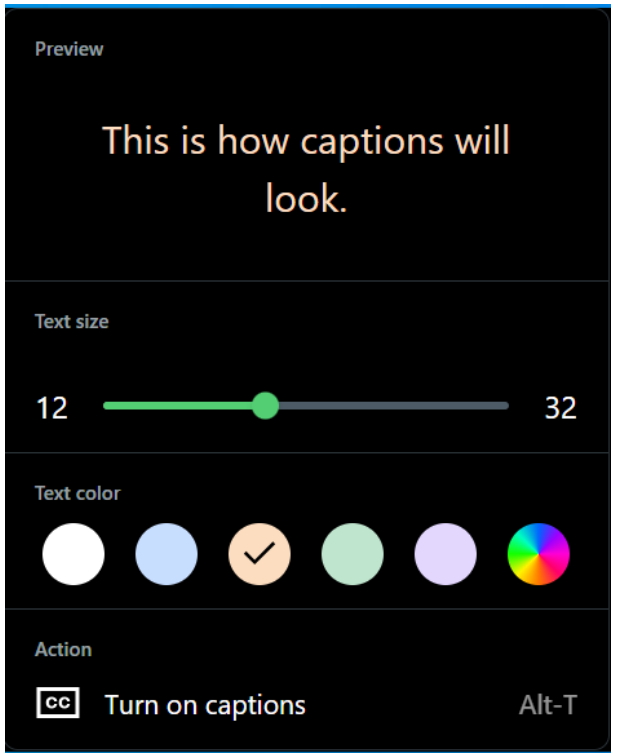
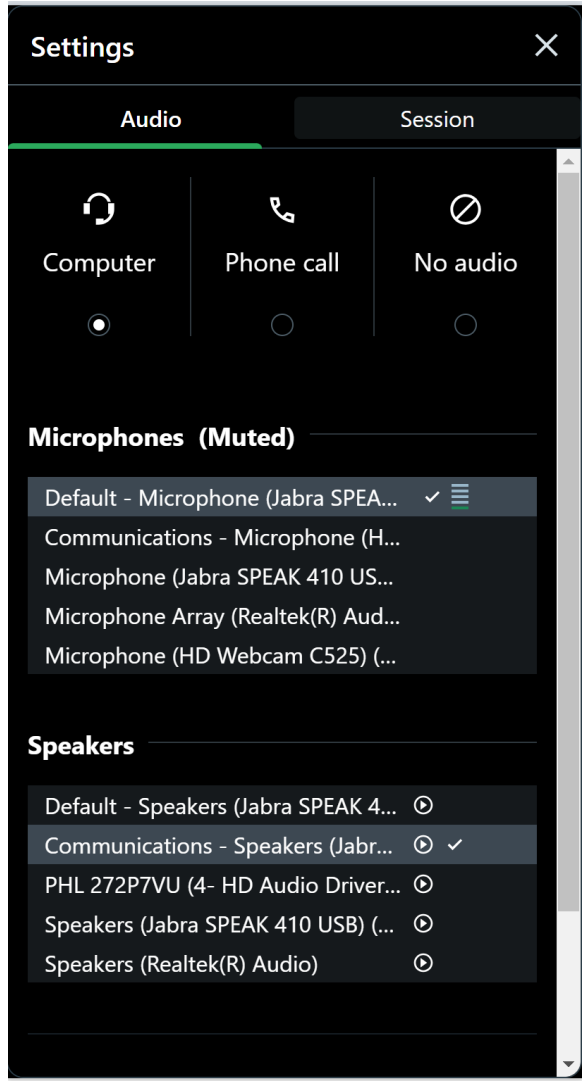


Housekeeping – Audio

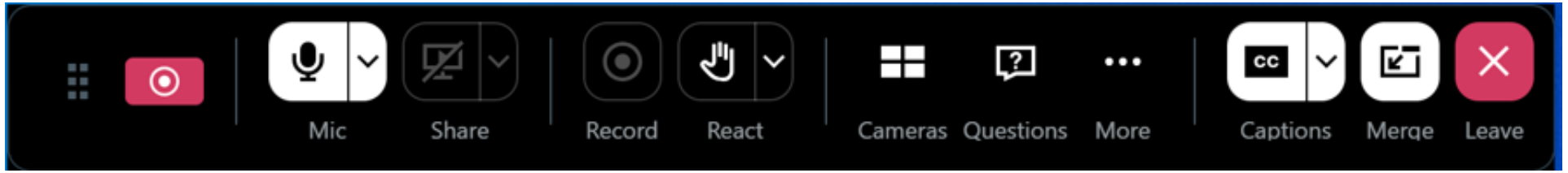
- **Audio is available through <u>your</u> computer's speakers**
- Double check your speaker settings
- Make sure you are connected to a source that works
- The audience is muted
- If your audio or slides freeze, restart the webinar



Housekeeping – Screen Views

- Two ways to view the webinar

1. Multiple windows open, can **merge** into one

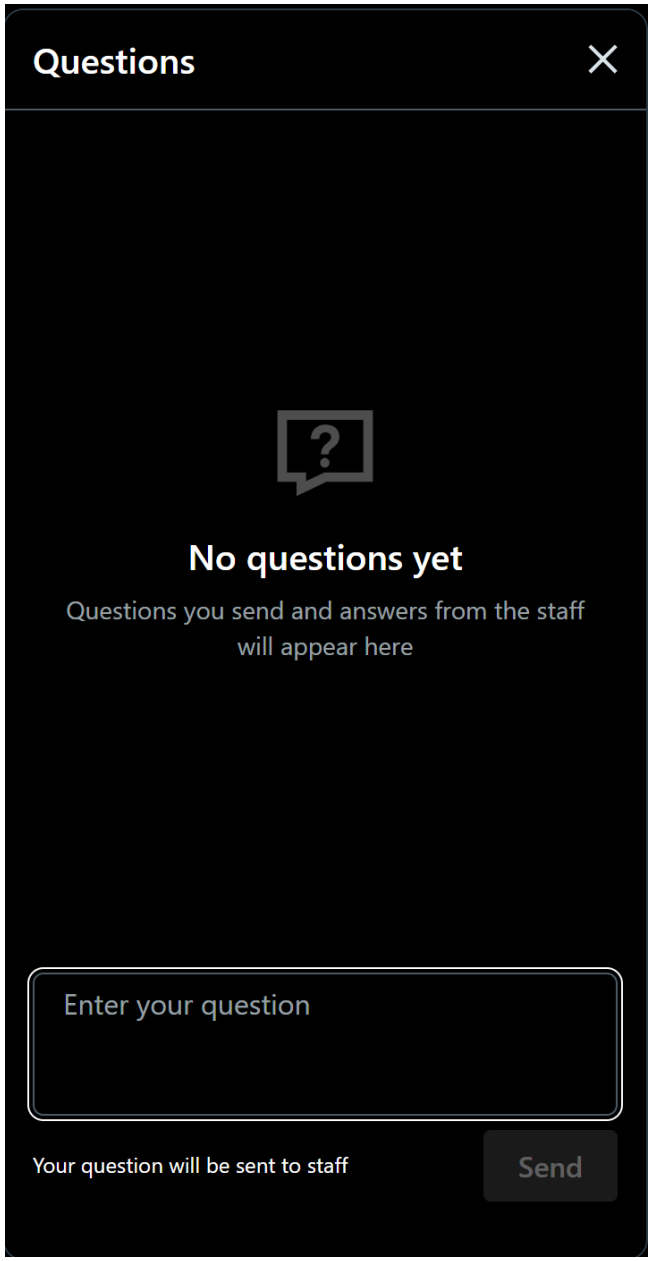


2. One window for all content, can **pop out** into multiple windows

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



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

Data Analyst | E-Rate

Tom Nesbitt

Director | E-Rate

Ian Gottesfeld

Lead Data Analyst | 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

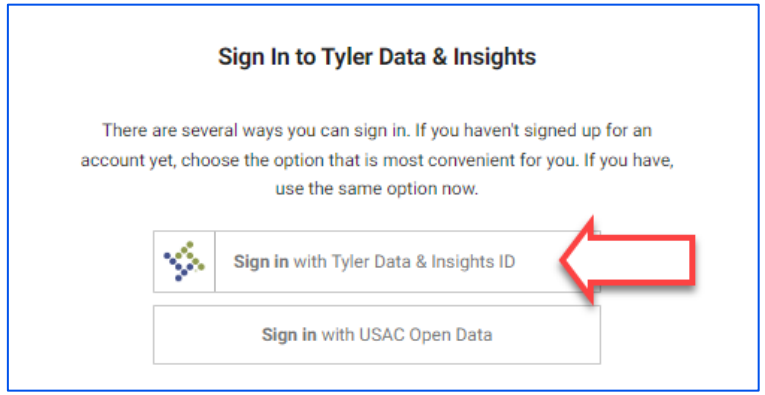
- Avoid repeating manual steps within Open Data
  - Manually filtering/sorting each time an E-Rate dataset is used
- Eliminate manual steps done outside of Open Data after exporting data
  - Filtering, sorting, and/or creating pivot tables in Excel
- Set default filters to only see data relevant to you
  - 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)

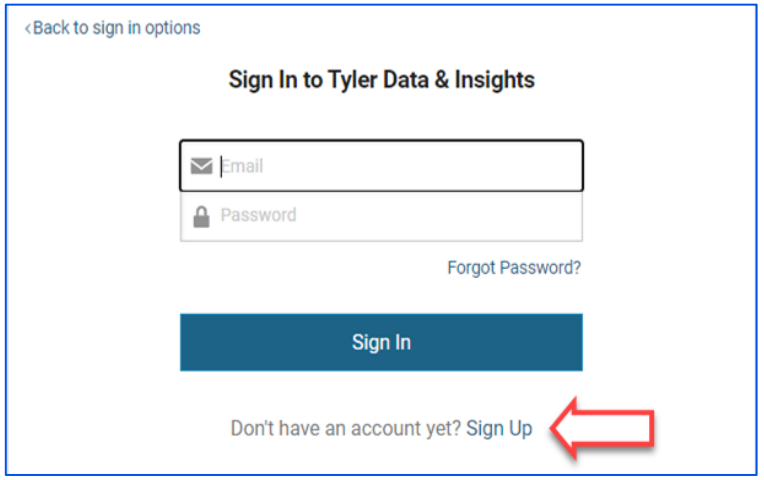
- Allows you to save customized reports (views) and summary charts/visualizations
- Access https://opendata.usac.org/ and follow the steps below:

Step 1

Step 2

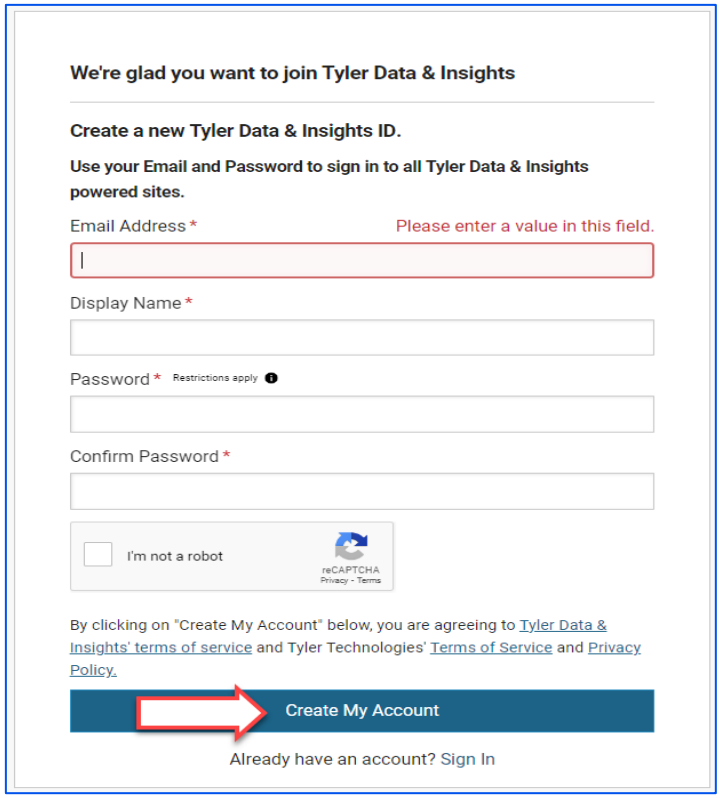


Step 3



Creating an Open Data account (continued)

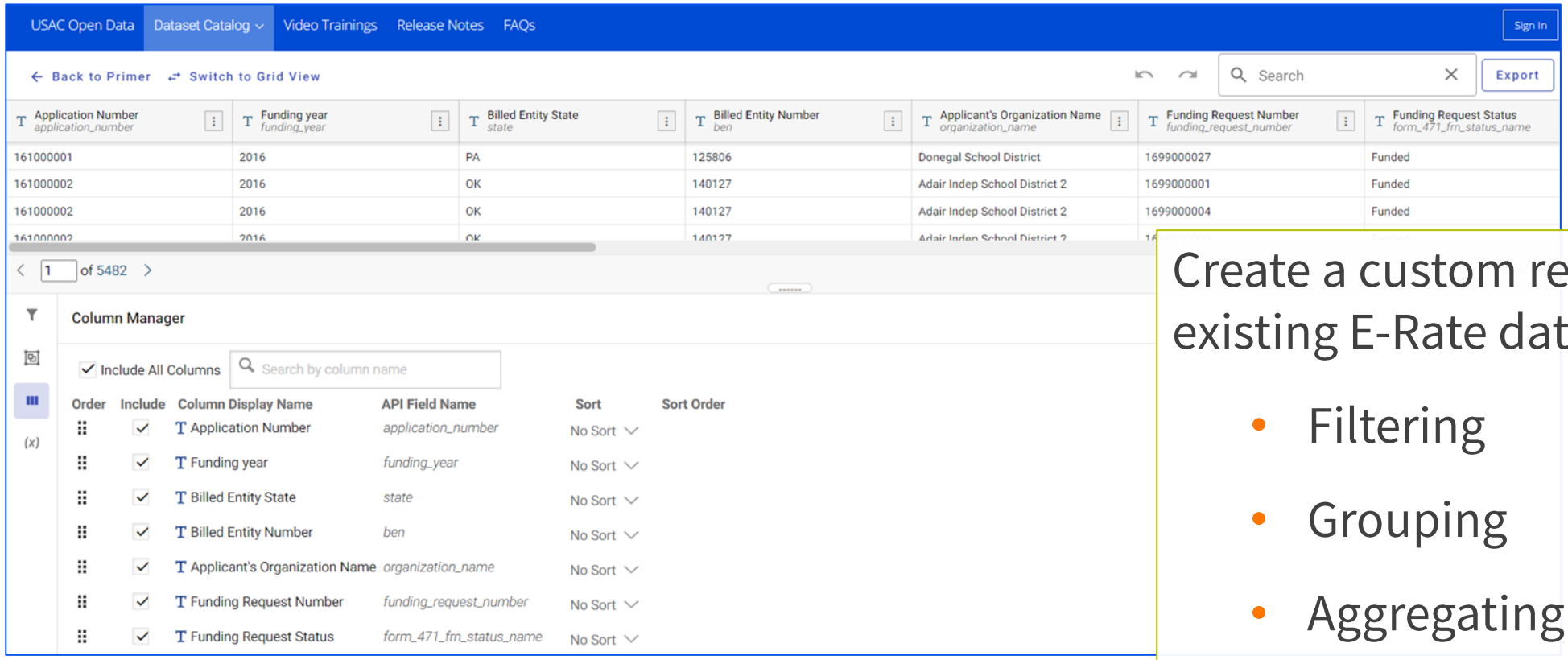
Step 4



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)



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

- Filtering
- Grouping
- Aggregating
- Sorting

Uses for visualizations

Appli...	Fundi...	Billed...	Billed...	Appli...	Fundi...	Fundi...	Servi...	Servi...	Servi...	Invoi...	Last ...	Invoi...	Pricin...	Fundi...	Total ...
161025633	2016	MO	137187	Ridgeway...	1699087...	Funded	06/30/20...	AT&T Mo...	143025240	Yes	02/27/20...	SPI	No	$840.48	$42
161057522	2016	VA	126636	Pittsylvan...	1699133...	Funded	06/30/20...	CenturyLi...	143019614	Yes	02/27/20...	NOT SET	No	$2,112.00	
161052783	2016	NE	138567	Allen Con...	1699121...	Funded	06/30/20...	Northeas...	143002736	Yes	10/30/20...	SPI	No	$997.92	$997.92
171022126	2017	KY	128842	Knox Cou...	1799087...	Funded	06/30/20...	Windstre...	143030766	Yes	02/26/20...	BEAR	No	$4,633.20	$4,633.20
181013902	2018	CA	143654	San Marc...	1899022...	Funded	09/30/20...	Datel Sys...	143006103	Yes	01/28/20...	BEAR	No	$10,803.02	$10,803.02

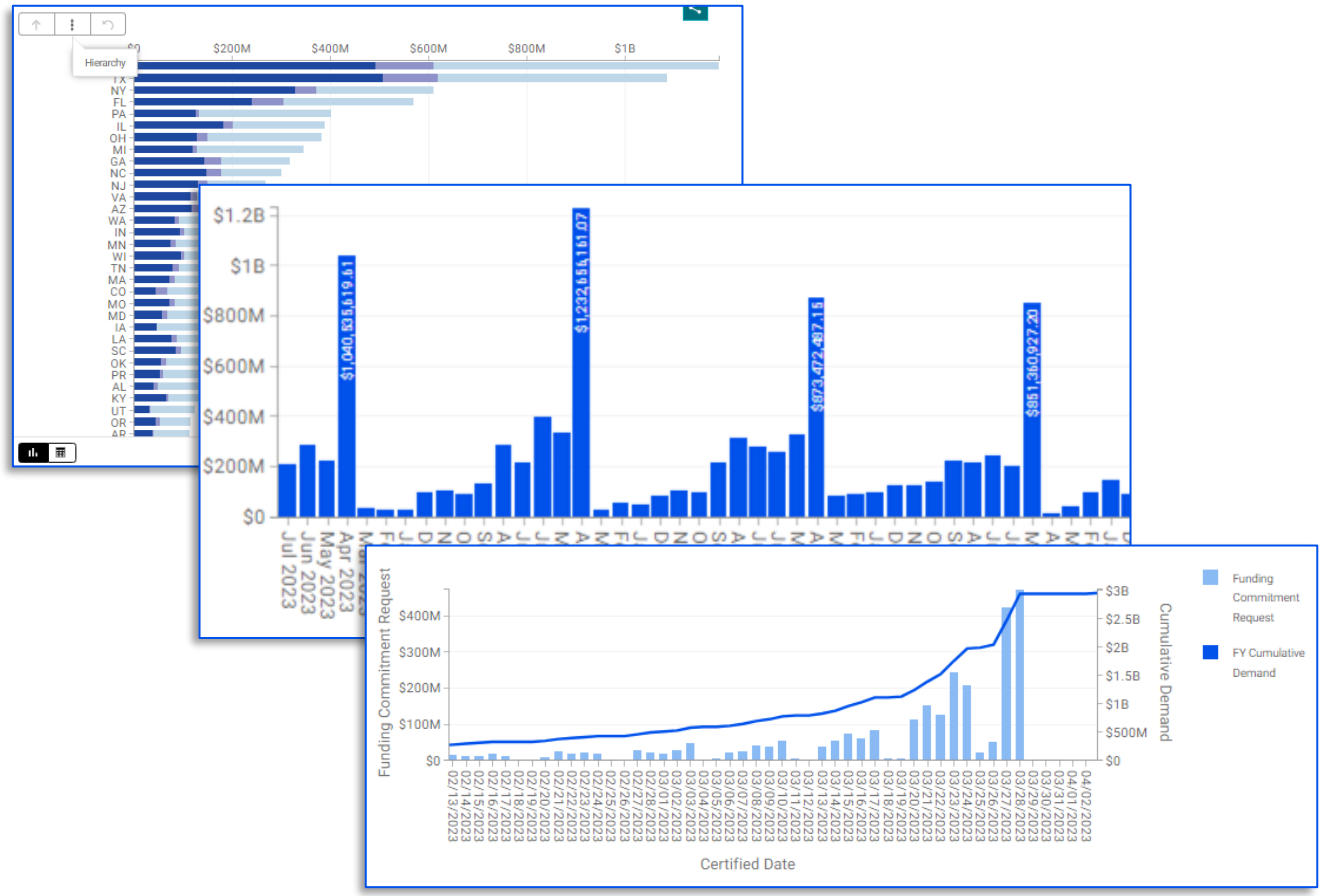
- See trends by summarizing data into simple charts
- Identify outliers
- Simplify how you monitor your data

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

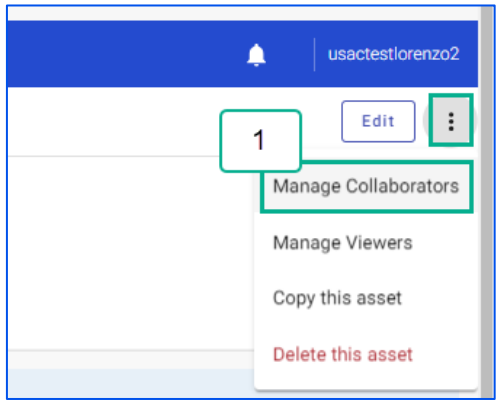


**Note:* *Maps are not available for E-Rate data at this time.*

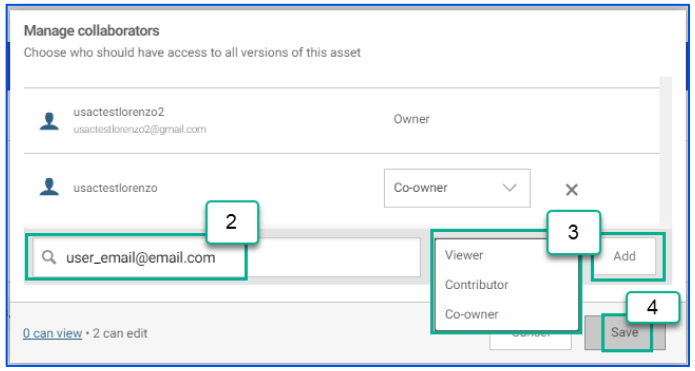
Sharing content with other Open Data users

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.**

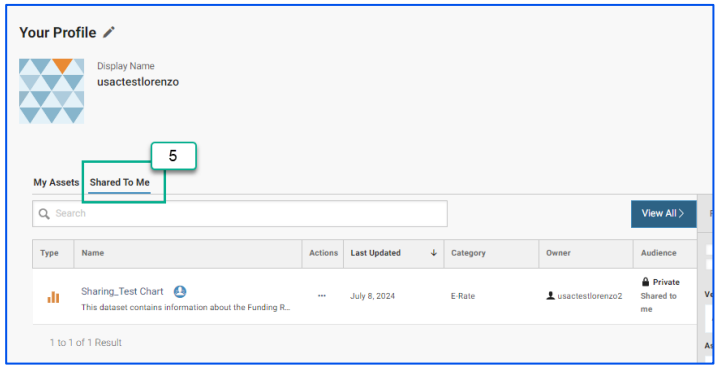
1. Near top right of the page of the content you want to share, click on three dots and then on ‘Manage Collaborators’



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

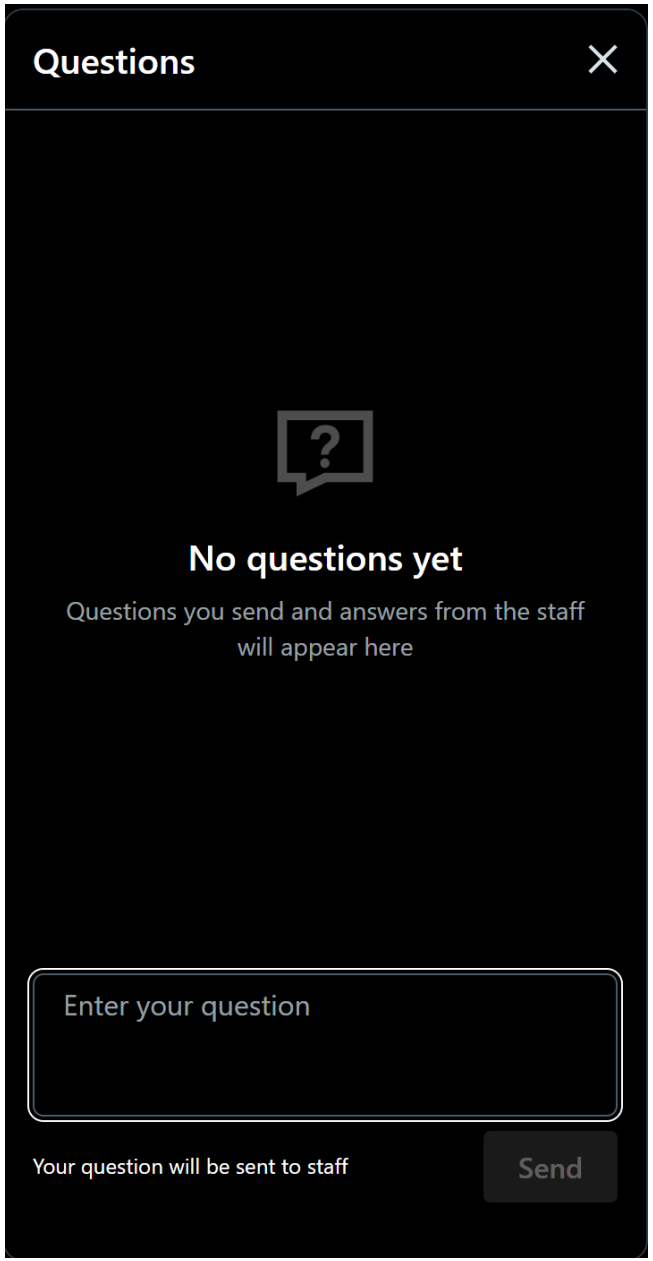
Term	Definition
Dataset	A set of numbers or values that relate to a specific topic
View	A setting that allows the user to see data in their desired format
Filtering	Settings that remove unwanted information, leaving the user with only the information they want to view
Aggregating data	Grouping numbers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

Key Terms

Term	Definition
Bar and column chart	A graph used to compare different quantities for separate categories of data or data series
Pie chart	A circular graph that is divided into sections that are proportional to the data they represent
Timeline chart	A visual representation of events happening over time
Histogram	A chart where bar heights represent the data frequency
Combo column & line charts	A visual representation that compares data in different categories over a period of time
Scatter plot	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



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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Create a customer service case

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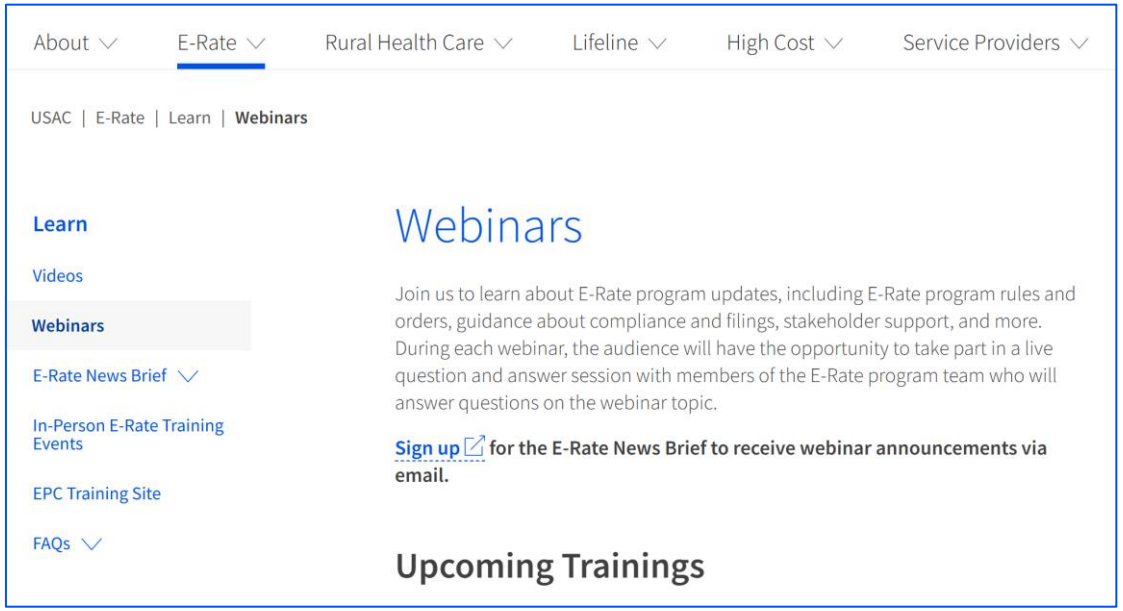
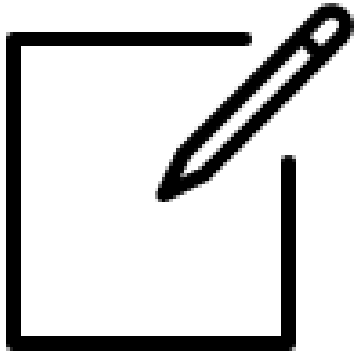
Upcoming Webinars

- Our next webinar is on **September 18, 2025**
- Fall Training E-Rate Program Overview
- Please visit the E-Rate Webinars page for additional information.



Share Your Thoughts



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- We appreciate your feedback!

Thank You!

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