

# **E-Rate Open Data Course 2: Creating Reports and Visualizations September 21, 2023**



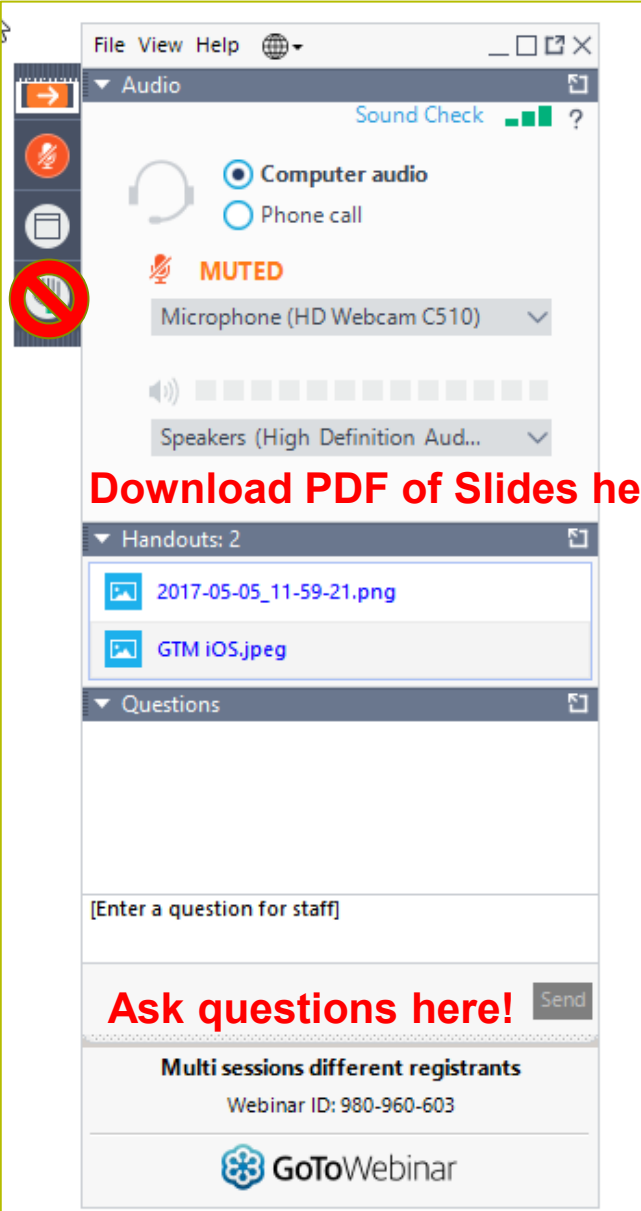
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# Disclaimer

To accommodate all attendees, real-time closed captions will be present during this presentation. We apologize in advance for any transcription errors or distractions. Thank you for your support.

# Housekeeping

- Audio is available through your computer's speakers.
- The audience will remain on mute.
- Enter questions at any time using the “**Questions**” box.
- If your audio or slides freeze, restart the webinar.
- A copy of the slide deck is in the “**Handouts**” section of webinar panel.

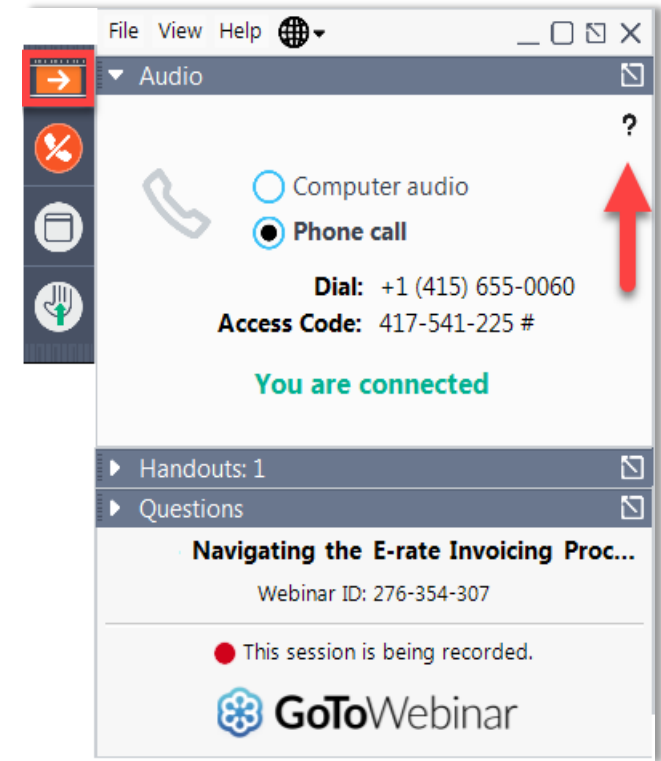
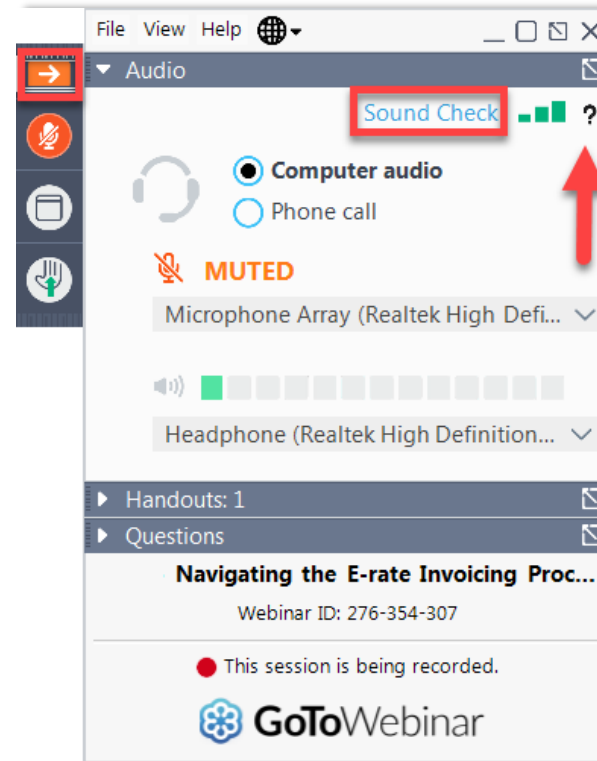


The screenshot displays the GoToWebinar control panel. At the top, there is a menu with 'File', 'View', and 'Help'. Below this is the 'Audio' section, which includes a 'Sound Check' indicator and two radio buttons: 'Computer audio' (selected) and 'Phone call'. A red 'MUTED' icon is visible next to the microphone icon. The microphone is set to 'Microphone (HD Webcam C510)' and the speakers to 'Speakers (High Definition Aud...'. A volume slider is present below the speaker selection. To the left of the audio controls, a vertical toolbar contains icons for navigation and a red 'M' icon with a slash through it, indicating a mute status. Below the audio section is the 'Handouts: 2' section, which lists two files: '2017-05-05\_11-59-21.png' and 'GTM iOS.jpeg'. The 'Questions' section is currently empty. At the bottom, there is a text input field with the placeholder '[Enter a question for staff]' and a 'Send' button. Below the input field, the text 'Ask questions here!' is displayed in red. At the very bottom, the text 'Multi sessions different registrants' and 'Webinar ID: 980-960-603' is shown, along with the GoToWebinar logo.

**Download PDF of Slides here!**

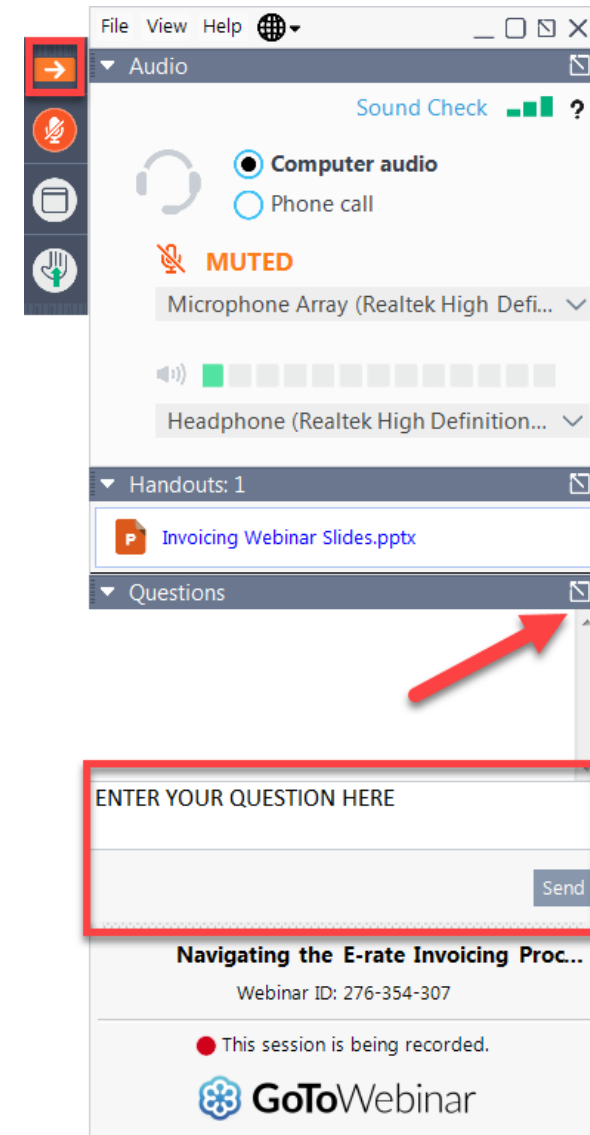
# Housekeeping – Technical Issues

- 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 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.



The screenshot displays a webinar control panel with several sections:

- Audio:** Includes a "Sound Check" indicator, a "MUTED" status, and options for "Computer audio" (selected) and "Phone call". It also shows microphone and headphone selection menus.
- Handouts:** Lists "Invoicing Webinar Slides.pptx".
- Questions:** A section with a red arrow pointing to a box containing the text "ENTER YOUR QUESTION HERE" and a "Send" button.
- Footer:** Displays the webinar title "Navigating the E-rate Invoicing Proc...", the ID "Webinar ID: 276-354-307", a recording status "This session is being recorded.", and the "GoToWebinar" logo.

# E-Rate Customer Service Center (CSC)



**Call us at (888) 203-8100**

Monday – Friday 8 a.m. to 8 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 the landing page.

# MEET THE TEAM



**Lorenzo Sanchez**

Lead Data Analyst | E-Rate



**Thomas Nesbitt**

Senior Director | E-Rate

# E-Rate Open Data Course 1 Review



USAC Open Data Dataset Catalog ▾ Video Trainings Release Notes FAQs

## USAC Open Data

Sharing the data of the universal service programs

- Can be found on the E-Rate Webinars page
- Covers:
  - Accessing Open Data (<https://opendata.usac.org/> )
  - Navigating the Open Data platform
  - Various Open Data tools and data sets available
  - Searching for assets



# What we will cover



Uses for custom reports



Creating an Open Data account



Demo: Creating a custom report



Uses for visualizations



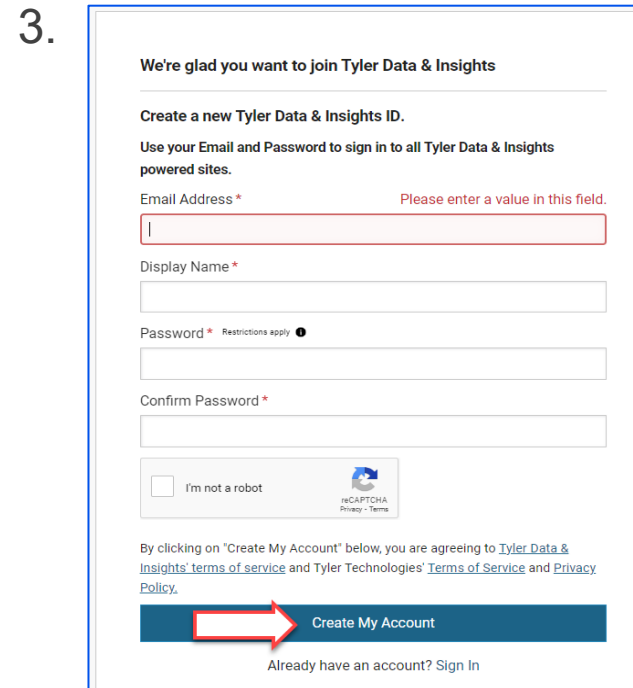
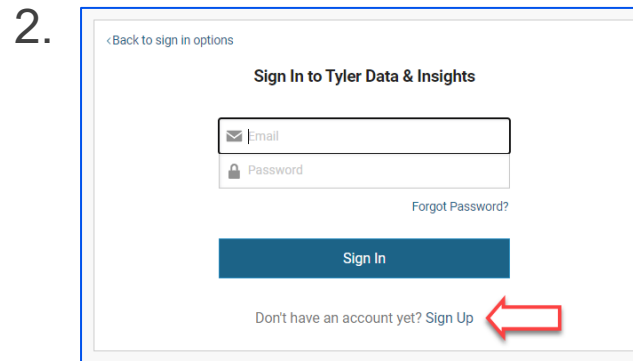
Demo: Creating a simple chart visualization

# 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 account (optional)

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



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

# Demo: Creating a custom report (view)

USAC Open Data Dataset Catalog Video Trainings Release Notes FAQs Sign In

← Back to Primer → Switch to Grid View Search Export

Application Number <i>application_number</i>	Funding year <i>funding_year</i>	Billed Entity State <i>state</i>	Billed Entity Number <i>ben</i>	Applicant's Organization Name <i>organization_name</i>	Funding Request Number <i>funding_request_number</i>	Funding Request Status <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		
161000002	2016	OK	140127	Adair Indep School District 2		

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Column Manager

Include All Columns Search by column name

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



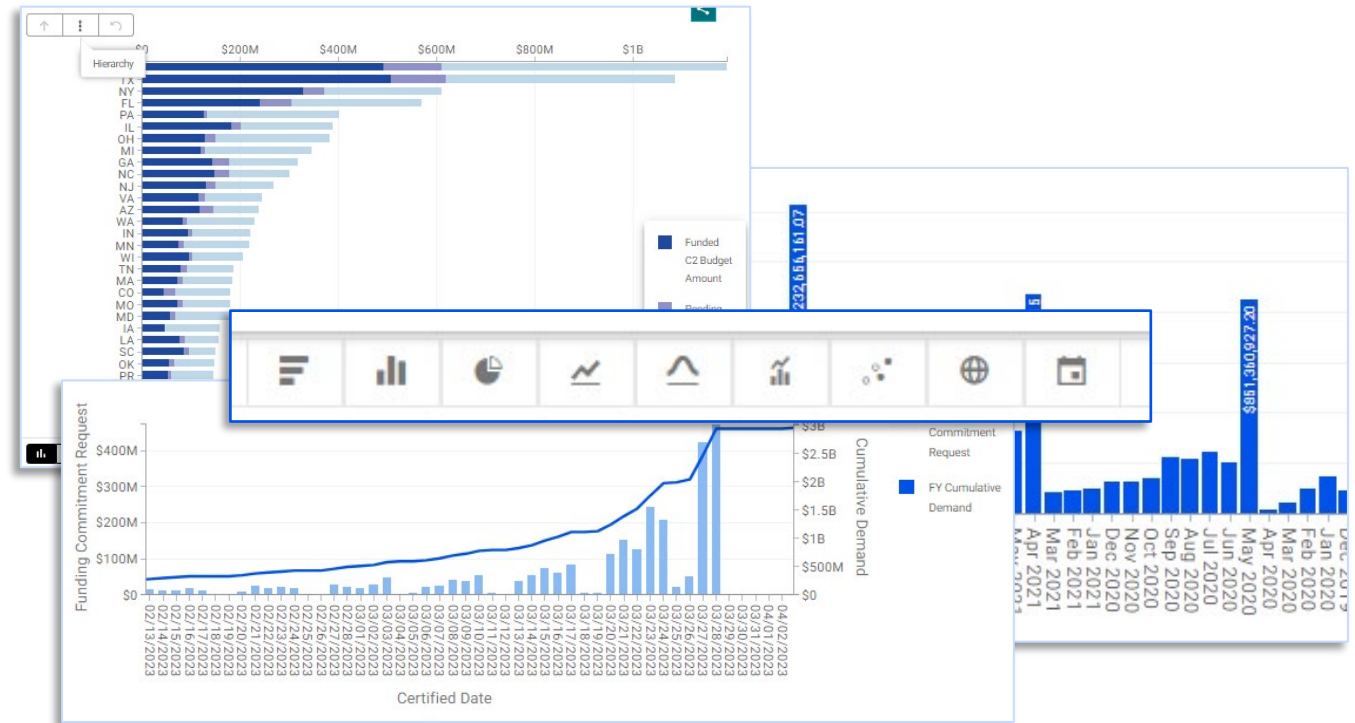
- See trends by summarizing data into simple charts
- Identify outliers
- Simplify how you monitor your data

# 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.

**Questions?**

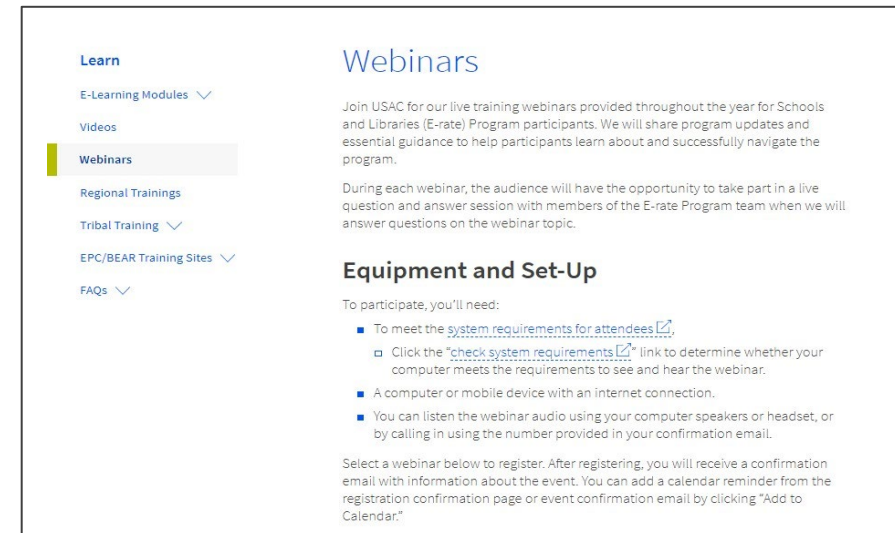
# UPCOMING WEBINARS

**Our next webinar is on:  
9/26 at 2 p.m. ET**

**Topic  
EPC Invoicing Overview**

**Recommended for:** Applicants  
and service providers

**E-Rate Experience Level:** All



The screenshot shows a navigation menu on the left with options: Learn, E-Learning Modules, Videos, Webinars (highlighted), Regional Trainings, Tribal Training, EPC/BEAR Training Sites, and FAQs. The main content area is titled 'Webinars' and includes an introductory paragraph, a paragraph about the live Q&A session, and a section titled 'Equipment and Set-Up' with a list of requirements and a registration instruction.

**Learn**

- E-Learning Modules
- Videos
- Webinars**
- Regional Trainings
- Tribal Training
- EPC/BEAR Training Sites
- FAQs

## Webinars

Join USAC for our live training webinars provided throughout the year for Schools and Libraries (E-rate) Program participants. We will share program updates and essential guidance to help participants learn about and successfully navigate the program.

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 when we will answer questions on the webinar topic.

### Equipment and Set-Up

To participate, you'll need:

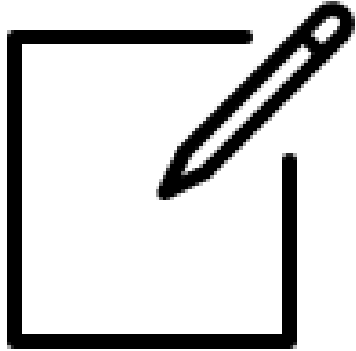
- To meet the [system requirements for attendees](#)
  - Click the ["check system requirements"](#) link to determine whether your computer meets the requirements to see and hear the webinar.
- A computer or mobile device with an internet connection.
- You can listen the webinar audio using your computer speakers or headset, or by calling in using the number provided in your confirmation email.

Select a webinar below to register. After registering, you will receive a confirmation email with information about the event. You can add a calendar reminder from the registration confirmation page or event confirmation email by clicking "Add to Calendar."

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



# Take Our Survey



- We want to hear about your webinar experience.
- A survey will appear on your screen at the end of the webinar.
- If you are not able to complete the survey today, one will be emailed to you within one to two business days.
- We appreciate your feedback!

**Thank You!**





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# 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