



# **E-Rate Open Data Course 2: Creating Reports and Visualizations August 29, 2024**

# Housekeeping: General

- Audio is available through your computer's speakers.
- The audience will remain on mute.
- Use the **Questions** box to ask questions at any time.
- You can download the slide deck from the **Handouts** section of the webinar panel.

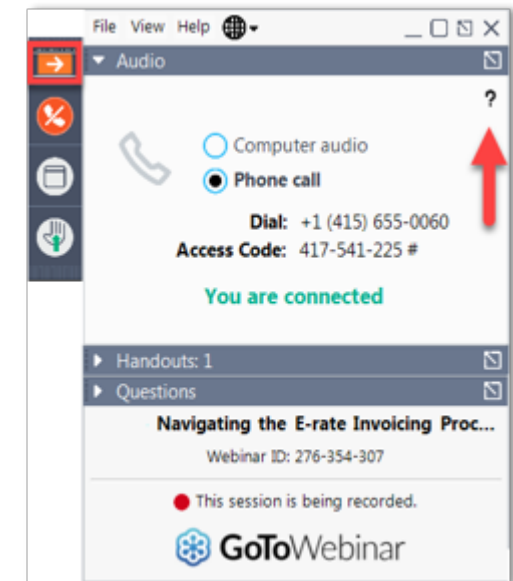
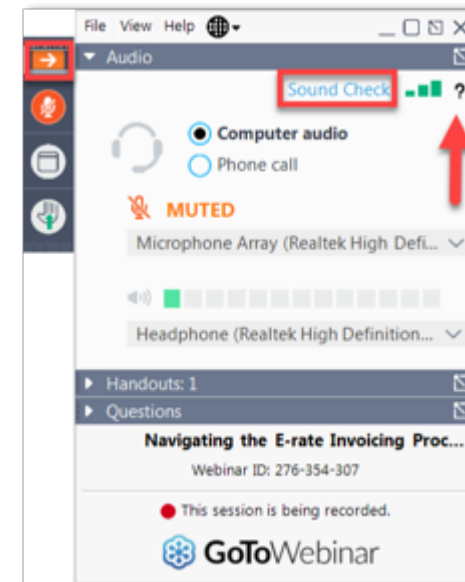


The screenshot displays the GoToWebinar interface. At the top, there is a menu bar with 'File', 'View', and 'Help'. Below this is the 'Audio' section, which includes a 'Sound Check' indicator and three radio buttons: 'Computer audio' (selected), 'Phone call', and 'MUTED'. A dropdown menu shows 'Microphone (HD Webcam C510)'. Below the microphone selection is a volume slider and another dropdown menu showing 'Speakers (High Definition Aud...'. The 'Handouts: 2' section lists two files: '2017-05-05\_11-59-21.png' and 'GTM iOS.jpeg'. The 'Questions' section features a text input field with the placeholder '[Enter a question for staff]', a 'Send' button, and the text 'Ask questions here!'. At the bottom, it displays 'Multi sessions different registrants', 'Webinar ID: 960-960-603', and the GoToWebinar logo.

**Download PDF of Slides here!**

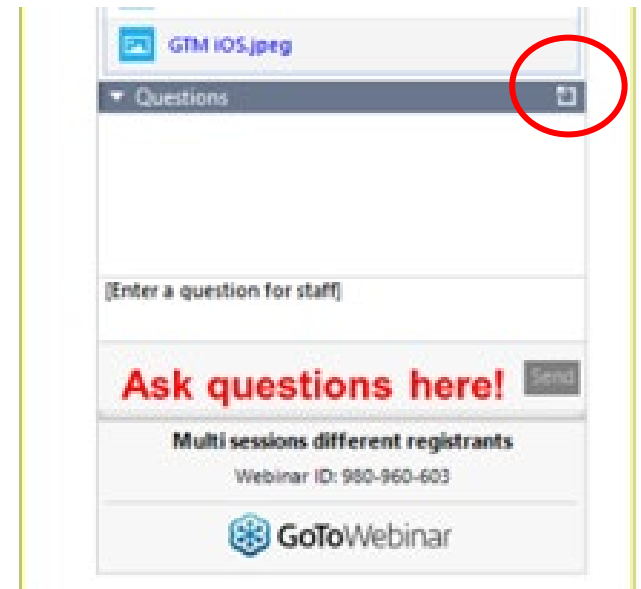
# Housekeeping: Troubleshooting

- Click the **Sound Check** link, then the question mark icon to test your audio.
- If you lose audio or the slides freeze, restart the webinar.
- Check that your computer meets GoToWebinar's system requirements by exiting the webinar and clicking the **Check System Requirements** link in your event confirmation email.
- 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.
  - Write in full sentences.
  - Ask one question at a time.
  - Ask questions related to today's webinar content.
- To view answers:
  - Click the box with the arrow icon in the top right corner of the **Questions** box to expand it and reveal all written answers.



# E-Rate Customer Service Center (CSC)



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

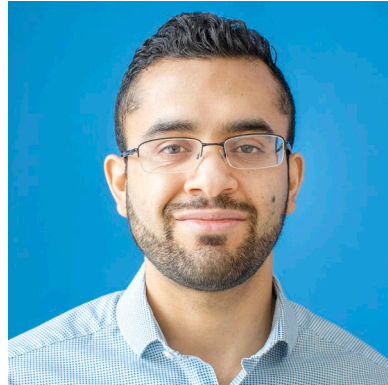
Monday – Friday 8 a.m. to 8 p.m. ET



**Create a customer service case**

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.

# Meet Our Team



**Lorenzo Sanchez**

Lead Data Analyst | E-Rate



**Thomas Nesbitt**

Director | 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

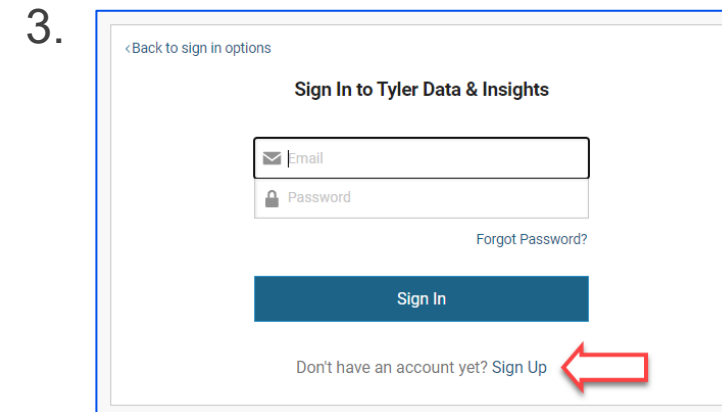
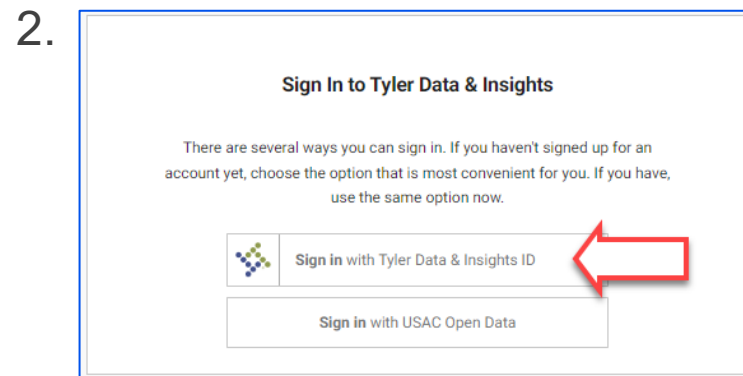
# Uses for custom reports

- 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:



# Creating an account (contd.)

3.

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

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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](#).

Already have an account? [Sign In](#)

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)

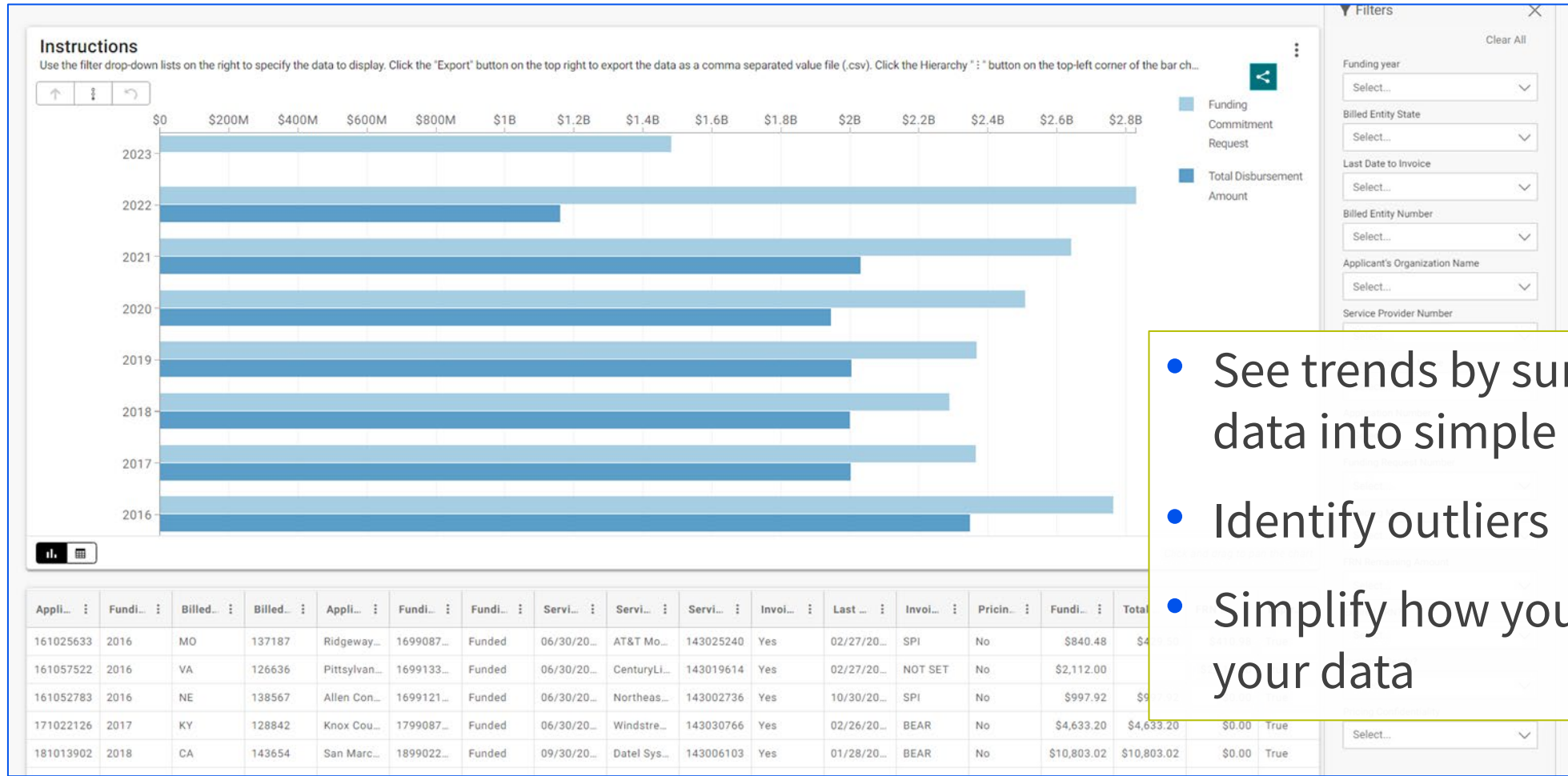
The screenshot displays the USAC Open Data interface. At the top, there is a navigation bar with links for "USAC Open Data", "Dataset Catalog", "Video Trainings", "Release Notes", and "FAQs", along with a "Sign In" button. Below the navigation bar, there are navigation options: "Back to Primer" and "Switch to Grid View". A search bar and an "Export" button are also visible. The main data table shows columns for Application Number, Funding year, Billed Entity State, Billed Entity Number, Applicant's Organization Name, Funding Request Number, and Funding Request Status. The table contains several rows of data, including entries for Donegal School District and Adair Indep School District 2. Below the table, there is a "Column Manager" section with a search bar and a table of columns to be included in the report. The "Column Manager" table has columns for Order, Include, Column Display Name, API Field Name, Sort, and Sort Order. All columns are currently checked for inclusion.

Order	Include	Column Display Name	API Field Name	Sort	Sort Order
1	<input checked="" type="checkbox"/>	T Application Number	application_number	No Sort	▼
2	<input checked="" type="checkbox"/>	T Funding year	funding_year	No Sort	▼
3	<input checked="" type="checkbox"/>	T Billed Entity State	state	No Sort	▼
4	<input checked="" type="checkbox"/>	T Billed Entity Number	ben	No Sort	▼
5	<input checked="" type="checkbox"/>	T Applicant's Organization Name	organization_name	No Sort	▼
6	<input checked="" type="checkbox"/>	T Funding Request Number	funding_request_number	No Sort	▼
7	<input checked="" type="checkbox"/>	T Funding Request Status	form_471_fm_status_name	No Sort	▼

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

- Filtering
- Grouping
- Aggregating
- Sorting

# Uses for visualizations










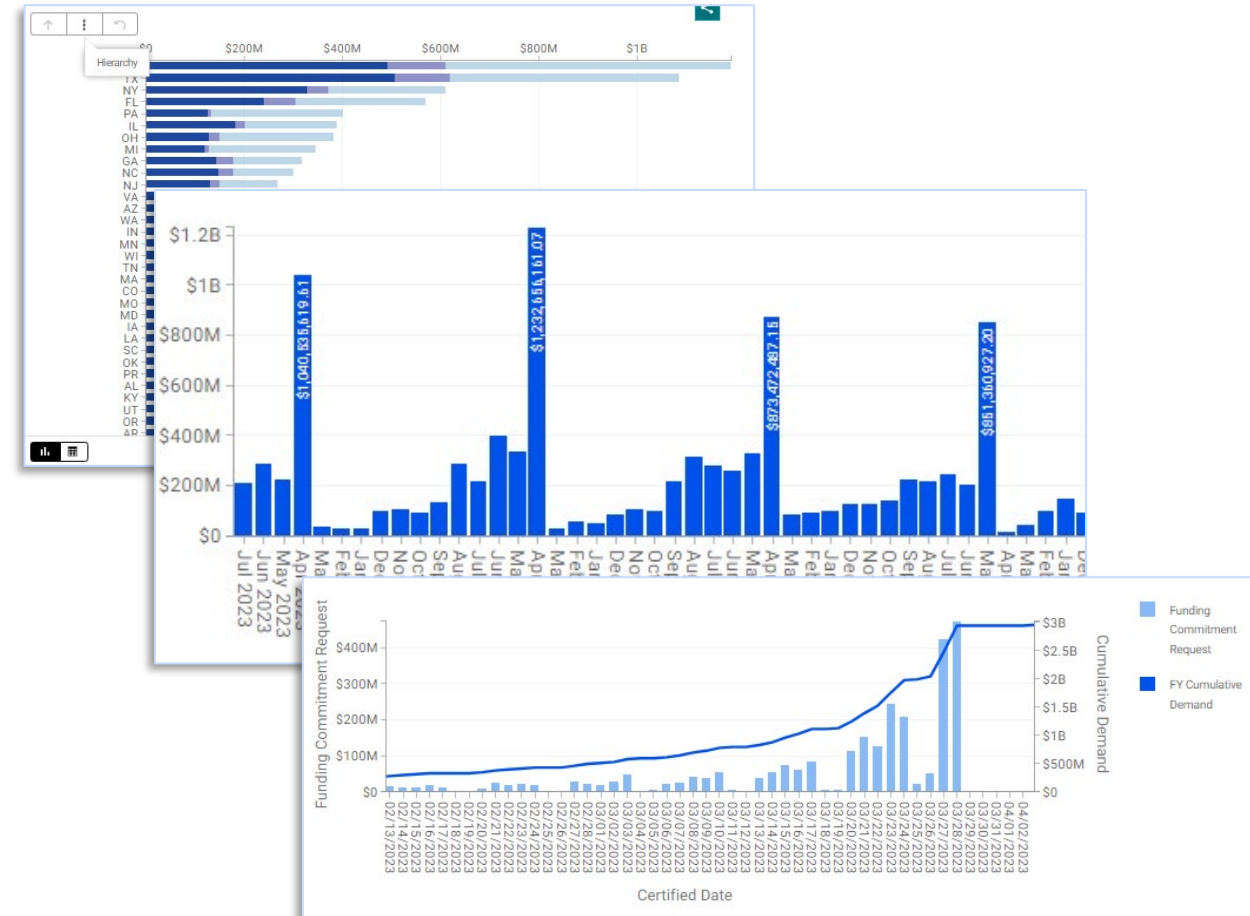
- See trends by summarizing data into simple charts
- Identify outliers
- Simplify how you monitor your data

# 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 

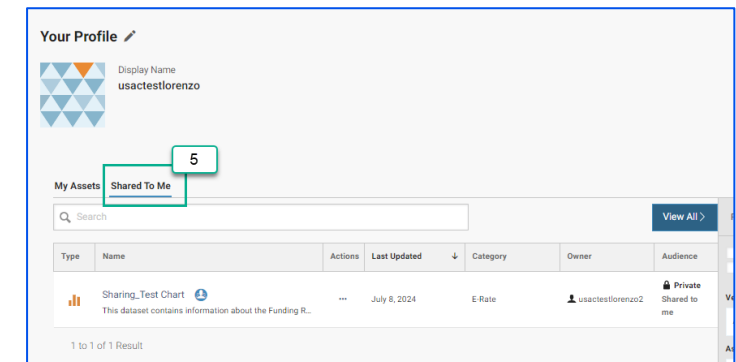
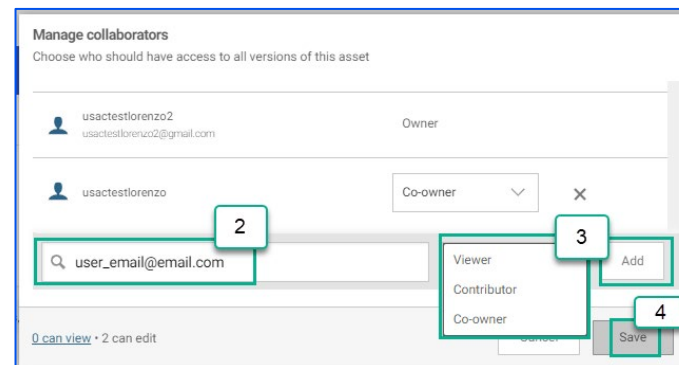
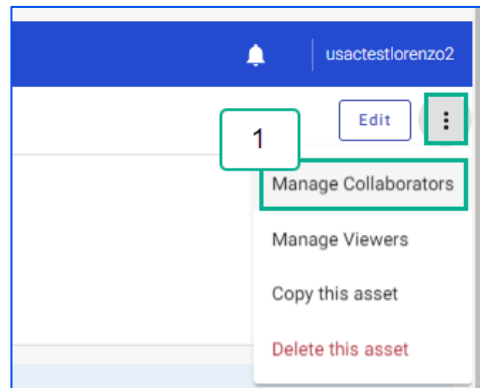


**\*Note:** Maps are not available for E-Rate data at this time.

# Sharing content with other 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

<b>Term</b>	<b>Definition</b>
<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

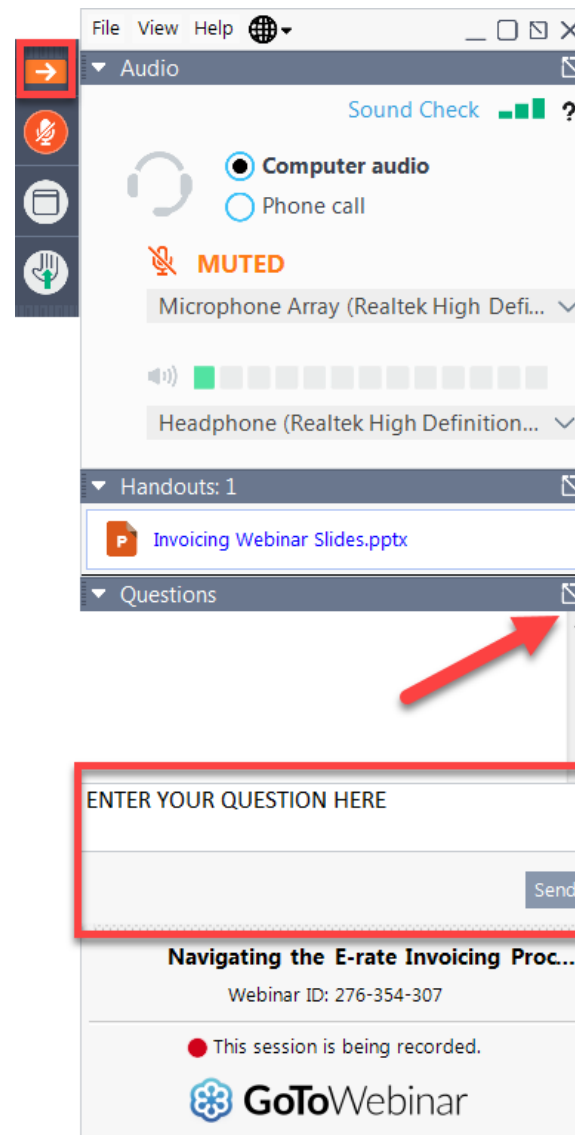
# Key Terms

<b>Term</b>	<b>Definition</b>
<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



## 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 with the arrow above the questions box to expand it and see all the written answers.

**Questions?**

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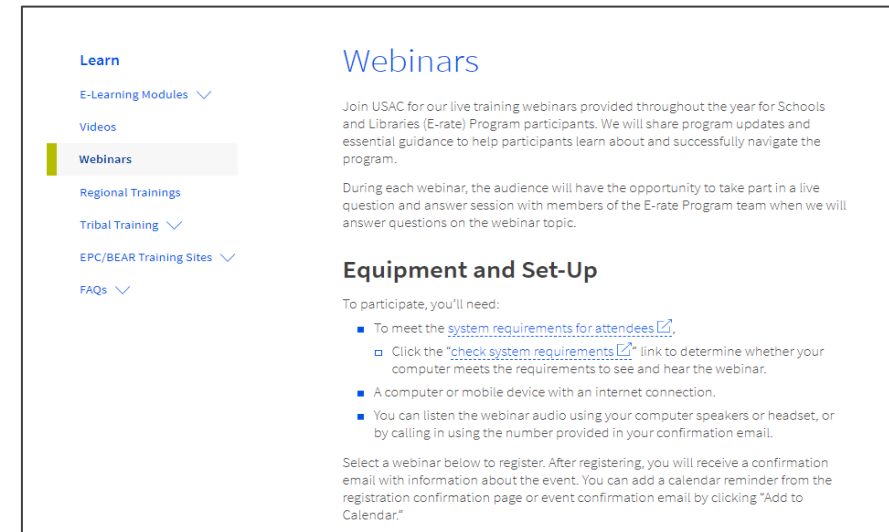


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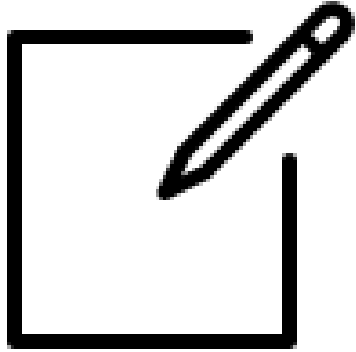
# Upcoming Webinars

- Our next webinar is on **September 5, 2024**
- E-Rate Fall Training: Program Overview
  - Recommended for applicants and service providers
  - Suitable for all E-Rate experience levels
- Please visit the E-Rate [Webinars](#) page for additional information.



The screenshot shows a webpage with a navigation menu on the left and main content on the right. The navigation menu includes: Learn, E-Learning Modules (with a dropdown arrow), Videos, Webinars (highlighted with a yellow bar), Regional Trainings, Tribal Training (with a dropdown arrow), EPC/BEAR Training Sites (with a dropdown arrow), and FAQs (with a dropdown arrow). The main content area has a heading "Webinars" and a paragraph: "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." Below this is another paragraph: "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." The next section is titled "Equipment and Set-Up" and contains the text: "To participate, you'll need:" followed by a list of requirements: "■ 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." At the bottom of the main content area, it says: "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."

# Share Your Thoughts



- 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, a link to it will be emailed to you within two business days.
- We appreciate your feedback!

**Thank You!**





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