

Form 471 Internal Connections Bulk Upload Guide FY 2023



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What is the Internal Connections FRN Line Item Bulk Upload Feature?

- When creating FRNs with multiple FRN Line Items
- USAC created “Offline Templates” to make easily create multiple FRN Line Items
- Templates are available for all service types, but Internal Connections is the most commonly used
- Advantages?
 - Allows you to doublecheck your calculations
 - Copy/paste from another spreadsheet
 - Saves time
- Challenges?
 - Template contains macros
 - Must be sure to “validate” for errors prior to uploading
- Still must create the FRN online and link to Contract Record

What's Different from the FY 2022 Template?

- No changes since FY 2021
 - Correct version = V21.0
 - Available at: <https://www.usac.org/e-rate/applicant-process/applying-for-discounts/fcc-form-471-filing/#bulk-upload-templates>
- If not identifying Recipients of Service, and applying as a single organization (BEN), then ONLY complete Tab 1 and then “Validate” on Tab 2. If no Errors, save and upload to Form 471
 - Super simple!

What Data is Requested in Template?

- All FRN Line Item Data
 - Category
 - Wireless Data Distribution, Data Protection, Cabling, etc.
 - Manufacturer
 - Model #
 - Unit price
 - Eligible and Ineligible
 - Quantity
 - Note: Recipients of Service Tab is entirely optional!

General Process for Using IC Bulk Upload

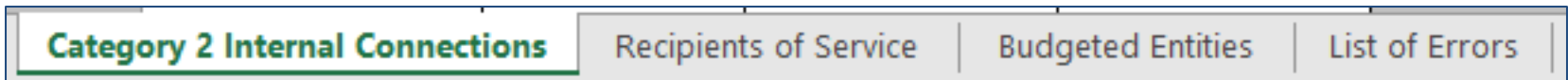
- Create the Template
 - Then 'Validate' for errors, then Save if no errors
- Create the Form 471 and FRN
- At FRN Line Item screen, click “Bulk Upload”
 - Upload the Template, click Submit
 - System will return you to your Actions Page (on the 471)
 - Cannot do any work on this 471 while system is reviewing the data
- EPC will create a Task within 1 minute with the Bulk Upload Results
 - Click on Results and it will tell you if your Upload was successful
- Review all FRN Line Item data to ensure it is accurate
 - Can revise any data
 - Can also delete the FRN Line Item and upload a revised Template



1

Create Your Template

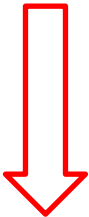
- Internal Connections Template available at:
https://www.usac.org/wp-content/uploads/e-rate/documents/Forms/bulk_upload_templates/Category-Two-Internal-Connections-Version-21.0.xlsm
- Template has 4 tabs, but only first tab is required
 - Internal Connections
 - Recipients of Service (R/S)
 - Budgeted Entities
 - List of Errors



- Macros require you to select from certain options
- Let's review each section of the Template

Reference Number Column

- System will populate Reference Numbers – one per row
- Note: If you change data in the row later, the Reference Number will change
 - Simply highlight the column, right click, then “Clear Contents” and the numbers will return to normal



Category Two - Internal Connections - Version 21.0							
Reference Number	Type of Internal Connection	Installation Included in Price?	Type of Product	Make	Enter the Make (If Other)	Model	Lease or Non-Purchase Agreement?
For Reference only - Not Imported	Required	Required	Required	Required	Required if "Other" is selected as Make	Required	Required
		▼					

Tab 1, Section 1: Equipment Details

- First 7 columns (peach) require equipment details
 - After creating one row, you can copy rows instead of clicking on each cell
 - Example:

Reference Number	Type of Internal Connection	Installation Included in Price?	Type of Product	Make	Enter the Make (If Other)	Model	Lease or Non-Purchase Agreement?
For Reference only - Not Imported	Required	Required	Required	Required	Required if "Other" is selected as Make	Required	Required
1	Wireless Data Distribution	No	Access Point	Aruba		Q9H63A	No
2	License	No	License	Aruba		JW619AAE	No
3	Wireless Data Distribution	No	Wireless Controller	Aruba		JW744A	No
4	Miscellaneous	Yes	Installation, Activation, & Initial Configuration	Other	Installation	Installation of wireless equipment	No

Type of IC & Type of Product

- Choices for Type of Product will change, depending on the Type of Internal connection chosen
- Choices are:

Type of Internal Connection	Type of Product
Required	Required
Cabling/Connectors	Cabling
Cabling/Connectors	Connectors
Caching	Caching Equipment
Data Distribution	Switch
Data Distribution	Router
Data Protection	UPS/Battery Backup
Data Protection	Firewall Services & Components
Racks	Racks & Cabinets
Software	Operating System Software of Eligible Equipment
Wireless Data Distribution	Access Point
Wireless Data Distribution	Antenna
Wireless Data Distribution	LAN Controller
Wireless Data Distribution	Wireless Controller
Miscellaneous	Installation, Activation, & Initial Configuration
Miscellaneous	Training
Miscellaneous	Fees, Taxes, Etc.
License	License
Tranceiver	Tranceiver
Module	Module

Tab 1, Section 2: Monthly Recurring Costs

- Next five columns (dark blue) must be completed, even for Internal Connections Templates
 - Most answers will be \$0.00
 - Doesn't matter which Unit Type is selected
 - System requires at least 1 month to be selected
 - This is meaningless data, so it doesn't matter what is listed

Identify the Monthly Costs							
Monthly Recurring Unit Costs	Monthly Recurring Unit Ineligible Costs	Estimated Monthly Recurring Unit Eligible Costs	Monthly Quantity	Units	Estimated Total Monthly Eligible Recurring Costs	Estimated Months of Service	Estimated Total Eligible Recurring Costs
Required	Required	For Reference only - Not Imported	Required	Required	For Reference only - Not Imported	Required	For Reference only - Not Imported
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00
\$0.00	\$0.00	\$0.00	0	Each	\$0.00	1	\$0.00

Tab 1, Section 3: One-Time Costs

- Next 3 columns (light blue) will identify the:
 - Total Cost of each component
 - Ineligible Cost of each component
 - Quantity of components

Hint: If gray columns don't calculate, type the Unit Costs by hand

Identify the One-time Costs				
One-time Unit Costs	One-time Unit Ineligible Costs	Estimated One-time Unit Eligible Costs	One-time Quantity	Estimated Total Eligible One-time Costs
Required	Required	For Reference only - Not Imported	Required	For Reference only - Not Imported
\$411.00	\$0.00	\$411.00	35	\$14,385.00
\$83.00	\$0.00	\$83.00	35	\$2,905.00
\$6,387.00	\$127.74	\$6,259.26	1	\$6,259.26
\$4,200.00	\$0.00	\$4,200.00	1	\$4,200.00

Tab 1, Section 3: Which Condition Applies

- The final column is asking whether you would like to identify Recipients of Service for each FRN Line Item (each row) and the associated costs/building
- This is optional, so I encourage you to simply select option A and skip the remaining tabs

Do any of these conditions apply?
Required. Options "A" and "B" only applicable if you are an Independent School, Independent Library, Library System, or School District that is not ESA. Options "C" and "D" only applicable if you are a Consortium or ESA School District.
A. Product/Service is for all entities.
A. Product/Service is for all entities.
A. Product/Service is for all entities.
A. Product/Service is for all entities.

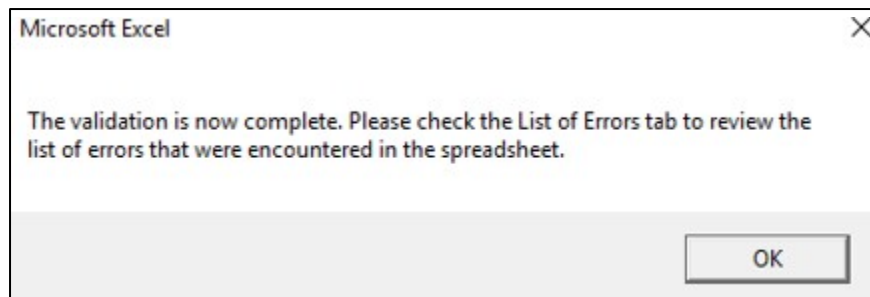
Tab 2: Validating Data (optional)

- After Tab 1 is complete, go to Tab 2 and click the 'Validate' box



Click to Validate

- System will show "Validation is Now Complete" window



- Then click on 4rd Tab: "List of Errors" to see if your data has been perfectly validated

Category 2 Internal Connections

Recipients of Service

Budgeted Entities

List of Errors

Tab 3: Finding Errors (optional)

- If your 3rd Tab looks like this, your data is perfect! Quickly save it to a folder you'll remember!

Tab	Column and Row	Error

- If your 3rd Tab looks like this, review the Error Comments, correct the data, and Validate again



Tab	Column and Row	Error
Recipients of Service	D7	[Reference Number: 2] For this FRN line item, you will not need to allocate costs per BEN because the system will automatically split the cost equally between the recipients listed for this line item.
Recipients of Service	D8	[Reference Number: 2] For this FRN line item, you will not need to allocate costs per BEN because the system will automatically split the cost equally between the recipients listed for this line item.
Recipients of Service	D9	[Reference Number: 2] For this FRN line item, you will not need to allocate costs per BEN because the system will automatically split the cost equally between the recipients listed for this line item.

After Template is Validated

- Now it's time to create your FRN in the Form 471 and Bulk Upload your Template
- Remember, before you can upload your Template, you must create the FRN on the Form 471 and link to your Contract Record

Basic Information Entity Information Funding Requests

This page displays all of the funding requests for this application. From here you can create a new FRN, or edit or delete an existing one.

Funding Requests

To create or update specific FRN Line Item(s), please click on the FRN number hyperlink.

<input type="checkbox"/>	FRN	Nickname	Number of FRN Line Items	FRN Calculation
You haven't created any Funding Requests (FRNs) yet. Click the "Add FRN" button to start creating your first FRN				

Add FRN

2

Creating the Funding Request

Funding Request Key Information

Please enter a Funding Request Nickname here ⓘ*

Wireless - Aruba

Is this Funding Request a continuation of an FRN from a previous funding year?

YES

NO ✓

Service Type

What is the service type of the product and services that you are requesting?

Please delete all line items for this Funding Request if you wish to modify the Service Type

Internal Connections

FRN Contract

How are the services for this FRN being purchased?

Contract information is stored in your Profile; you can add a new Contract at any time.

Contract ✓

Tariff

Month-to-Month

Associate a Contract

Search by Creating Organization BEN

126265

Search by Contract ID

Search by Nickname (All or Partial)

Search by Contract No.

<input type="checkbox"/>	Contract ID	Contract Number	Nickname	Award Date	Creating Organization BEN
<input checked="" type="checkbox"/>	6978		2023 - Switches - Aruba - CDWG	1/22/2023	108
<input type="checkbox"/>	6977		2023 - Wireless - Ruckus - CDWG	1/22/2023	108

Clear Filters

Search

Entering Service Start and Contract Expiration Dates

Contract Information (Additional)

What is the service start date? ?*

07/01/2023



Enter the date when services will start for this Funding Year

What is the date your contract expires for the current term of the contract? ?*

09/30/2024



Service Start Date:

The system will automatically enter 7/1/2023 as SSD.

Note: You are permitted to purchase equipment as early as 4/1/2023, but still must list 7/1/2023 for the SSD.

Contract Expiration Date:

You will need enter the CED for this contract, which is likely 9/30/2024 for Category 2 equipment contracts.

Narrative & Proceeding to Bulk Upload

Narrative

Provide a brief explanation of the products and services that you are requesting, or provide any other relevant information regarding this Funding Request. You should also use this field to describe any updates to your entity data, such as revised student counts, entity relationships, etc, that you were unable to make after the close of the Administrative filing window for profile updates. These changes will be addressed during the application review process. *

This FRN is for wireless equipment.

Enter brief description of FRN.

FCC Form 471 Help

Show Help

Then click ["Save & Manage FRN Line Items"](#) to find Bulk Upload feature

BACK

CANCEL

SAVE & VIEW FRN(S)

SAVE & ADD/MANAGE FRN LINE ITEMS

3

Uploading Template File

Click "Bulk Upload"

<input type="checkbox"/>	FRN Line Item Number	Type of Internal Connection	Type of Product	Quantity	One-time Quantity	Total Eligible FRN Line Item Cost
You haven't created any FRN Line Items yet. Click the 'Add New FRN Line Item' button to start creating your first FRN Line Item.						
ADD NEW FRN LINE ITEM			REMOVE FRN LINE ITEM		BULK UPLOAD	

Bulk Upload

Upload File *

UPLOAD

Bulk Upload

Upload File *

Wireless – Template.xlsm

X

SUBMIT

Upload "validated" template, "Submit", then "Yes".

The system will now process your file. Remember that this may take a few minutes. You will receive an email once the process is complete with next steps. Do you wish to proceed?

4 Obtaining Bulk Upload Results

- After submitting uploaded Template for review, system will return to EPC
 - After 20 seconds, you will receive an e-mail notification with a link to the Bulk Upload Results
 - A “Task” also will appear in your Task Page
 - Task also will be showing on Landing Page under My Tasks

The screenshot shows the Appian user interface. At the top, there is a navigation bar with tabs for 'News', 'Tasks (1)', 'Records', 'Reports', and 'Actions'. The 'Tasks (1)' tab is selected and highlighted with a red box. On the left side, there is a sidebar with the 'Training Universal Service Administrative Co.' logo and filters for 'Assigned to Me >', 'Sent by Me', and 'Starred ☆'. The main content area shows a task list. The first task is 'Create FCC Form 471 - 211000133 - bulk upload test 471 - Review Bulk Upload Results', which is marked as completed with a blue checkmark icon. A red box highlights the task title, and a red arrow points to it from below. The task is attributed to 'Me' and was created 'A moment ago'. There is also a search bar at the top of the task list with the placeholder text 'Click here to send a task...' and a 'NEWEST' dropdown menu.

- Click on task to see if you're bulk upload was successful

Success?

- If your page looks like this, you're Bulk Upload was successful! Click "Submit" to see your FRN Line Items that were uploaded from the Template into the Form 471!

Confirmation

Congratulations! Your file was uploaded successfully. The data is now available for review in the FRN, where you can review and edit it as needed. To view your FRN Line Items, click the Submit button.

SUBMIT

If you need to make changes, the Form 471 can be edited by clicking on the FRN Line Item Numbers (blue)

FRN Line Items for FRN #2199000146 - Wireless - Aruba

<input type="checkbox"/>	FRN Line Item Number ↓	Type of Internal Connection	Type of Product	Quantity	One-time Quantity	Total Eligible FRN Line Item Cost
<input type="checkbox"/>	2199000146.008	Miscellaneous	Installation, Activation, & Initial Configuration	0	1	\$4,200.00
<input type="checkbox"/>	2199000146.007	Wireless Data Distribution	Wireless Controller	0	1	\$6,259.26
<input type="checkbox"/>	2199000146.006	License	License	0	35	\$2,905.00
<input type="checkbox"/>	2199000146.005	Wireless Data Distribution	Access Point	0	35	\$14,385.00

ADD NEW FRN LINE ITEM

REMOVE FRN LINE ITEM

BULK UPLOAD

No Success?

Errors with File Contents

Your file has not been validated or you still have errors. Please click the "Click to Validate" button in the "Recipients of Service" tab and fix all the errors recorded in the "List of Errors" tab. Please ensure after your final, clean validation, you save the file immediately before clicking in or editing cells throughout the spreadsheet, or else you must click the "Validate Button" again before saving.

- If you received this error message, either you made changes after “saving” your validated Template, or you are using an incorrect version of the template
 - Go back to the template and make changes, and “revalidate”, or
 - Use a different version of the template. Then...
 - Start Bulk Upload process over, starting at this screen:

<input type="checkbox"/>	FRN Line Item Number	Type of Internal Connection	Type of Product	Quantity	One-time Quantity	Total Eligible FRN Line Item Cost
You haven't created any FRN Line Items yet. Click the 'Add New FRN Line Item' button to start creating your first FRN Line Item.						
				ADD NEW FRN LINE ITEM	REMOVE FRN LINE ITEM	BULK UPLOAD

5

Be Sure to Review Data

- It's important to ensure all uploaded data is showing and is accurate in the Form 471
 - If data is inaccurate, you can make changes directly on the 471, delete individual FRN Line Items or the entire FRN and start over
- If the data is accurate, you can add additional FRNs or simply continue with the form submission process

Tips for Success

- Make sure that you are using the correct version of the template
- If you run the process multiple times for a single FRN, each upload will create new FRN line items, regardless of data that has previously been uploaded
 - Meaning, it won't "override" the original data
- Once the upload is successful, you will be able to make any additional edits within your FCC Form 471
- Please ensure that after your final, clean validation, you save the file immediately before clicking in or editing cells throughout the spreadsheet, or else you must click the "Validate Button" again before saving
- Please let me know if you have any questions!
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