

Bulk Upload Guide for Internal Connections FY 2018



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February 2018

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

- Creating FRNs with multiple FRN Line Items and/or multiple Recipients of Service can be time consuming
- USAC created “Offline Templates” to assist with this task
- Templates are available for all service types, but Internal Connections is the most commonly used
- Advantages?
 - Allow you to doublecheck your calculations
 - Copy/paste from another spreadsheet
 - Assists with keeping track of school building C2 pre-discount budgets
 - 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 2017 Template?

- Template is identical to last year except they added several vendors to the drop down choices
 - New Template = Version 18.0
 - *Don't worry that 2nd and 3rd tab say 17.0*
- Version 18.0 must be used on FY 2018 Form 471s

What Data is Requested in Template?

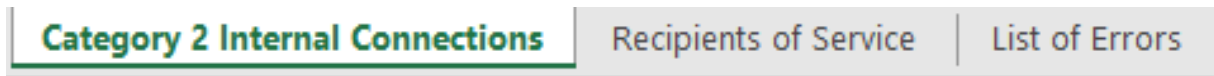
- All FRN Line Item Data
 - Category
 - Wireless Data Distribution, Data Protection, Cabling, etc.
 - Manufacturer
 - Model #
 - Unit price
 - Eligible and Ineligible
 - Quantity
 - Recipients of Service
 - Amount per Model # (component) per Recipient of Service

General Process for Using IC Bulk Upload

- Create the Template
 - 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 (out of 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

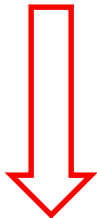
- Template available at:
<https://www.usac.org/res/documents/sl/xls/window-hq/Category-Two-Internal-Connections-v18.0.xlsm>
- Template has 3 tabs
 - Internal Connections
 - Recipients of Service (R/S)
 - List of Errors



- 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
- Used to identify components in Recipients of Service Tab
- 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 18.0							
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 6 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	Data Distribution	No	Switch	Meraki		MS350-24P-HW	No
2	Data Distribution	No	Switch	Meraki		MS225-48LP-HW	No
3	Data Distribution	No	Switch	Meraki		MS425-16-HW	No
4	Data Distribution	No	Switch	Meraki		LIC-MS350-24P-5YR	No
5	Data Distribution	No	Switch	Meraki		LIC-MS225-48LP-5YR	No
6	Data Distribution	No	Switch	Meraki		LIC-MS425-16-5Y	No
7	Data Distribution	No	Switch	Meraki		MA-SFP-1GB-SX	No
8	Data Distribution	No	Switch	Meraki		MA-PWR-640WAC	No
9	Data Distribution	No	Switch	Meraki		MA-PWR-250WAC	No
10	Data Distribution	No	Switch	Meraki		MA-CBL-40G-50CM	No
11	Data Distribution	No	Switch	Meraki		MA-SFP-10GB-LR	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.

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
\$2,937.00	\$0.00	\$2,937.00	7	\$20,559.00
\$2,290.00	\$0.00	\$2,290.00	55	\$125,950.00
\$6,370.00	\$0.00	\$6,370.00	2	\$12,740.00
\$450.00	\$0.00	\$450.00	7	\$3,150.00
\$331.00	\$0.00	\$331.00	55	\$18,205.00
\$975.00	\$0.00	\$975.00	2	\$1,950.00
\$227.00	\$0.00	\$227.00	108	\$24,516.00
\$432.00	\$0.00	\$432.00	7	\$3,024.00
\$204.00	\$0.00	\$204.00	2	\$408.00
\$45.00	\$0.00	\$45.00	57	\$2,565.00
\$1,817.00	\$0.00	\$1,817.00	6	\$10,902.00

Tab 1, Section 3: Which Condition Applies

- The final column is trying to identify how to allocate the costs to the Recipients of Service
 - If A is selected, the system will assume that all entities in your EPC profile will be using the equipment and the costs should be split equally
 - This Reference Number should not be listed on the R/S Tab
 - Be cautious choosing this condition because it will not weight the costs by enrollment
 - If B is selected, the system will require you to list the Reference Number on the R/S Tab, identify who will be using the equipment, but will not require you to identify costs/school
 - Be cautious choosing this condition because it will not weight the costs by enrollment
 - Good choice if all equipment listed in the Template is going to the same school
 - If C is selected, the system will require you to enter all of the data on the Recipients of Service Tab
 - Note: This is the most common choice

Do any of these conditions apply?	
Required. Option "A" only applicable if you are a library system or a school district that is not ESA	
A. Product/Service is for all entities and the cost is split equally	
B. Product/Service is for only some entities, but the cost is split equally among them	
C. Neither A nor B applies	<input type="button" value="v"/>

Tab 2: Recipients of Service

Category 2 Internal Connections	Recipients of Service	List of Errors
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- Cross references each “Reference Number Row” with entities using the equipment
- Identifies the cost/entity for that “row”
- Rows can/should be listed multiple times
- Recipient’s E-rate Entity Number (BEN) must be listed
 - Name of BEN not required or uploaded by you’ll want to include
 - Don’t know a building’s BEN? Look on your EPC Landing Page

Recipients of Service			
Reference Number	BEN	Name	Eligible Cost per BEN
Required- Not Imported	Required	For Reference only - Not Imported	Required
	<input type="text"/>		

Tab 2: Recipients of Service

- Completed Example:

Recipients of Service			
Reference Number	BEN	Name	Eligible Cost per BEN
Required- Not Imported	Required	For Reference only - Not Imported	Required
1	21089	AMANDA E STOUT ELEM (AS)	\$8,811.00
1	21151	MILLMONT ELEM (MM)	\$11,748.00
2	21089	AMANDA E STOUT ELEM (AS)	\$34,350.00
2	21151	MILLMONT ELEM (MM)	\$22,900.00
2	16055732	READING INTERMEDIATE HS (CIT)	\$68,700.00
3	16055732	READING INTERMEDIATE HS (CIT)	\$12,740.00
4	21089	AMANDA E STOUT ELEM (AS)	\$1,350.00
4	21151	MILLMONT ELEM (MM)	\$1,800.00
5	21089	AMANDA E STOUT ELEM (AS)	\$4,965.00
5	21151	MILLMONT ELEM (MM)	\$3,310.00
5	16055732	READING INTERMEDIATE HS (CIT)	\$9,930.00
6	16055732	READING INTERMEDIATE HS (CIT)	\$1,950.00
7	21089	AMANDA E STOUT ELEM (AS)	\$4,540.00
7	21151	MILLMONT ELEM (MM)	\$6,356.00
7	16055732	READING INTERMEDIATE HS (CIT)	\$13,620.00
8	21089	AMANDA E STOUT ELEM (AS)	\$1,296.00
8	21151	MILLMONT ELEM (MM)	\$1,728.00
9	16055732	READING INTERMEDIATE HS (CIT)	\$408.00
10	21089	AMANDA E STOUT ELEM (AS)	\$675.00
10	21151	MILLMONT ELEM (MM)	\$450.00
10	16055732	READING INTERMEDIATE HS (CIT)	\$1,440.00
11	21089	AMANDA E STOUT ELEM (AS)	\$3,634.00
11	21151	MILLMONT ELEM (MM)	\$3,634.00
11	16055732	READING INTERMEDIATE HS (CIT)	\$3,634.00

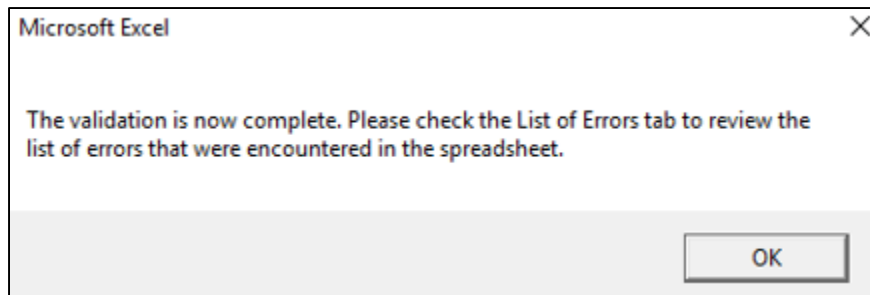
Tab 2: Validating Data

- After Recipients of Service Tab is complete and totals match with totals from Equipment Tab, click the Validate Box



Click to Validate

- System will show “Validation is Now Complete” window



- Then click on 3rd Tab: “List of Errors” to see if your data has been perfectly validated

Category 2 Internal Connections

Recipients of Service

List of Errors

Tab 3: Finding Errors

- 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 umbrella FRN 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 [?](#)*

Switches - Integra1

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?

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 Nickname (All or Partial)

Search by Contract ID

Search by Contract No.

Clear Filters

Search

<input type="checkbox"/>	Contract ID	Contract Number	Nickname
<input type="checkbox"/>	78511		2016 - Meraki - ePlus Contract
<input type="checkbox"/>	78521		2016 - HP Switches 3 - Integra1
<input checked="" type="checkbox"/>	78644		2016 - Switches 2 - HP - Integra1
<input type="checkbox"/>	127887		2017 - Structured Cabling - CRCS
<input type="checkbox"/>	130273		2017 - Switches - HP Aruba - Integra1

Entering Service Start and Contract Expiration Dates

Contract Information (Additional)

What is the service start date? ? *

07/01/2018

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? ? *

09/30/2019

Service Start Date:

The system will automatically enter 7/1/2018 as SSD.

Note: In previous years, you listed this as 4/1/20xx - these should always be listed now as 7/1/20xx.

Contract Expiration Date:

You will need enter the CED for this contract, which is likely 9/30/2019 for Category 2 equipment contracts.

3 Finding Bulk Upload Button

- After FRN is created, the screen will look like this:

Funding Requests

[>> View Category Two Budget Information](#)

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
<input type="checkbox"/>	1899000291	Switches - Aruba - Vendor BBB	0	
<input type="checkbox"/>	1899000290	Wireless Equipment - Ruckus - Vendor AAA	2	\$54,315.00

[ADD FRN](#) [EDIT FRN](#) [REMOVE FRN](#)

- Click on FRN number (not the check box) to move to FRN Line Item page

Select Template File

- Click “Bulk Upload”

FRN Line Items for FRN #1899000293 - Switches - Aruba - Vendor BBB

<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

- Then choose the Template file you saved, then “Submit,” then “Yes, you want to proceed”

Bulk Upload

Upload File *

No file chosen



Bulk Upload

Upload File *

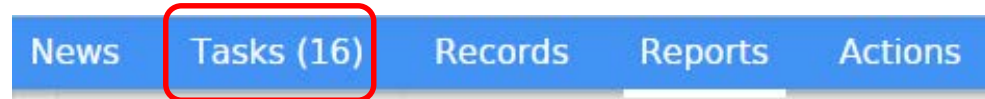
Switches - 470-RFP Template 2017 a.xlsm (104.35 KB) ×



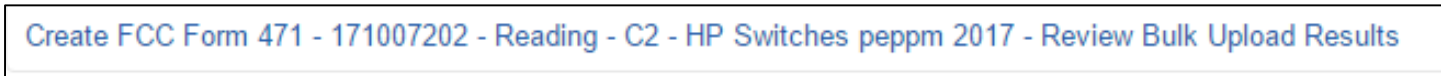
The system will now process your file. Remember that this may take a few minutes. You will receive an email once the process is complete with next steps. Do you wish to proceed?

4 Obtaining Bulk Upload Results

- After submitting uploaded Template for review, system will return to EPC
 - After 30 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



Success?

- If your page looks like this, you're Bulk Upload was successful! Click Submit!

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.

- If the page doesn't look like this, 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, or
 - Use a different version of the template. Then...
 - Start Bulk Upload process over

5 Be Sure to Review Data

- It's important to ensure all uploaded data is showing and is accurate
 - If data is inaccurate, you can make changes directly on the 471, delete individual FRN Line Items or the entire FRN and start over

FRN Line Items for FRN #1799017405 - Switches - HP Aruba - Integra1

<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"/>	1799017405.011	Data Distribution	Switch	0	6	\$10,902.00
<input type="checkbox"/>	1799017405.010	Data Distribution	Switch	0	57	\$2,565.00
<input type="checkbox"/>	1799017405.009	Data Distribution	Switch	0	2	\$408.00
<input type="checkbox"/>	1799017405.008	Data Distribution	Switch	0	7	\$3,024.00
<input type="checkbox"/>	1799017405.007	Data Distribution	Switch	0	108	\$24,516.00
<input type="checkbox"/>	1799017405.006	Data Distribution	Switch	0	2	\$1,950.00
<input type="checkbox"/>	1799017405.005	Data Distribution	Switch	0	55	\$18,205.00
<input type="checkbox"/>	1799017405.004	Data Distribution	Switch	0	7	\$3,150.00
<input type="checkbox"/>	1799017405.003	Data Distribution	Switch	0	2	\$12,740.00
<input type="checkbox"/>	1799017405.002	Data Distribution	Switch	0	55	\$125,950.00

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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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