

STUDENT INFORMATION SYSTEM (SIS) IMPLEMENTATION GUIDE

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Thank you for joining us in Transforming K12 Education®

For more than 30 years, Infinite Campus has implemented solutions for customers of all sizes. We have a unique combination of a focused company, simple yet powerful products, and superior customer service and support, making us the most trusted name in student information and the best choice for districts and states.

Our product and company are stable! We have never acquired another SIS (or any) company. Development decisions and resources are not scattered across multiple (acquired) systems. Our focus is on continually improving the one system used by 3,000+ districts.

Our 600+ employees are also company owners. Our business model is focused on continuous innovation paired with the best service and support, so that you and your teams can continue Transforming K12 Education®.

MORE INFORMATION:
[INFINITECAMPUS.COM](https://www.infinitecampus.com)

THE INFINITE CAMPUS SIS SUPPORTS:

- **10 million** students
- **46** states
- **3,000** districts
- **10** state education agencies

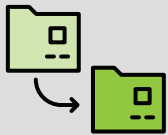
ABOVE PHOTO

Infinite Campus Headquarters in Blaine, Minnesota. More than 560 employees celebrated the company's 30th year in 2023.

Implementation Services

Our expert team takes the guess work out of the implementation process, offering hands-on assistance to guide districts every step of the way. With thousands of successful implementations nationwide, you can trust us to make your transition as smooth and seamless as possible.

The Implementation Team has four goals to accomplish during our time together:



Convert data from the customer's legacy Student Information System (SIS) to the Infinite Campus Student Information System (SIS).



Assist with the initial setup for schools to complete the day-to-day operations in the areas of student attendance, student grading, and schedules for the 'go live' school year.



Provide learning opportunities for SIS Admins and end users through our Infinite Classroom™ training model.



Provide a smooth transition to Client Relations and Technical Support.

In summary, we need to migrate your data, customize features to meet your specific requirements, provide training on using the Infinite Campus SIS, and introduce you to the resources you will use after the implementation. We aim to make this process as smooth as possible, and we understand that change can be challenging. Therefore, we have put together this guide to help implement Infinite Campus SIS.

Our Implementation Process



Implementation Planning

PUTTING THE BEST TEAM TOGETHER

During the SIS implementation process, having the right people in the right roles makes all the difference. While Infinite Campus provides an experienced implementation team, it's equally important to thoughtfully assemble your internal team.

Review the key roles identified by Infinite Campus and assess the strengths each role will require. In some cases, one individual may need to take on multiple roles due to staffing availability. However, the best practice is to assign a dedicated person to each role listed below whenever possible. This ensures focus, accountability, and a smoother implementation experience.

For more information on creating your team, we do have a [Role-Specific Resource guide](#) available in our Knowledge Base.

ROLE	RESPONSIBILITIES
EXECUTIVE SPONSOR	<p>The district/school will provide a staff member for this role to act as an escalation point for the Project Manager, if needed.</p> <p>The person in this role should have the authority to make quick executive-level decisions, allowing the project to stay on track.</p>
PROJECT MANAGER	<p>The district/school will provide a designated staff member to act in the role of Project Manager.</p> <p>This person is responsible for district/school tasks and resources during the implementation and for managing communication with all district/school stakeholders. The Project Manager will be the main point of contact and work closely with the Infinite Campus Project Manager for the duration of the project.</p>
TRAINING COORDINATOR	<p>The district/school will provide a Project Training Coordinator who will be the main point of contact for the Infinite Campus Training Specialist.</p> <p>This person will be responsible for determining applicable training topics that apply to staff members, coordinating dates for live training workshops, and ensuring staff members attend the live workshops. We recommend that this person also attend each training session to address specific practice and procedure policies unique to the district.</p>
DATA CONTACT	<p>This person or persons will work closely with the Infinite Campus Data Conversion Analyst for the duration of the project. They will be responsible for extracting the data from the legacy system and uploading that data to the Infinite Campus Data Conversion Dashboard. They will also work with their designated Business Consultant for data analysis and review.</p> <p>The district/school staff are also responsible for engaging the appropriate district staff to review all data and report those issues to the Infinite Campus SIS Implementation team.</p>
SUBJECT MATTER EXPERTS	<p>For a successful implementation, it is essential to have subject matter experts (SMEs) from the district/school actively involved throughout the project.</p> <p>These SMEs bring critical knowledge of existing processes, workflows, and business requirements, ensuring the solution aligns with operational needs. Working alongside a Business Consultant, they provide insights, validate configurations, and facilitate smooth adoption. Since implementation spans multiple functional areas, the SMEs involved will vary depending on the topic, ensuring the right expertise is available at each stage to drive efficiency and success.</p>

MORE INFORMATION:
[KB.INFINITECAMPUS.COM/HELP/ROLE-SPECIFIC-RESOURCES](https://kb.infinitecampus.com/help/role-specific-resources)

PLANNING FOR CHANGE MANAGEMENT

Navigating Change with Infinite Campus SIS: Key Principles to Keep in Mind

Change can be challenging, but with the right approach, it becomes an opportunity for growth. As you transition to Infinite Campus SIS, here are some important principles to guide you through the process:

- **Understand the “Why”** – Take a moment to identify the key benefits this change will bring to your district. Knowing the value will help you and your team stay motivated.
- **Bring People Along** – While you’ve already been assigned an implementation team, remember that others may need to be involved along the way. Engaging the right stakeholders early on can make a huge difference.
- **Leverage What You Have** – Look at the internal tools and resources available to support staff during this transition. A smooth change starts with having the right support in place.
- **Communicate Clearly and Often** – Develop a solid plan to share updates about the transition. How and when you communicate matters, so be sure to reinforce key messages in different ways. Consistency is key!
- **Support Your Team Every Step of the Way** – Training is essential, but one size doesn’t fit all. Think about how your staff learns best and tailor your approach. Use live training sessions, on-demand resources, and the Infinite Campus Knowledge Base to make the process smoother.
- **Encourage Full Participation** – The more engaged your team is in training, the more successful the transition will be. Keep reinforcing the importance of active involvement.
- **Celebrate Wins Along the Way** – Acknowledge progress and share successes with your team and stakeholders. Every step forward is worth recognizing!
- **Stay Flexible and Keep Improving** – Change is a journey, and adjustments may be needed. Regularly evaluate your communication plan and make sure stakeholders stay informed about updates.

By keeping these principles in mind, you’ll create a positive and successful transition for your district. You’ve got this!

Updating Internal Processes and Procedures

When transitioning to a new SIS, your internal processes and procedures will need to be updated and communicated to your staff. Take inventory of what processes and procedures this will affect and plan accordingly. A good place to start is gathering existing documentation of procedures and updating them as you move through the SIS Implementation process. To support a smooth transition, the following documents should be shared:

- Next Year’s School Calendar with Events
- Bell Schedules (per school)
- Grading Scales
- Sample of a Student Schedule
- Sample of a Report Card
- Sample of a Progress Report

Sharing these documents will give our teams a clear understanding of your current processes, allowing us to optimize and streamline the implementation effectively.



Preparing for Implementation

GETTING TO KNOW INFINITE CAMPUS

RESOURCE	DESCRIPTION	LINK
Infinite Campus at a Glance	Learn about the background of Infinite Campus by visiting the company website.	www.infinitecampus.com
Welcome Toolkit	Learn about the Infinite Campus tools to use in your district's communication efforts, including emails, letters, websites, and other materials.	www.infinitecampus.com/toolkit
Infinite Classroom™ How We Deliver Training and Resources	Infinite Campus transforms training into an ongoing journey, unlocking infinite opportunities for learning and growth!	www.infinitecampus.com/training
Infinite Campus Premium Products and Suites	Learn more about Infinite Campus Premium Products and Suites.	www.infinitecampus.com/premium-products
Logo	Access the Infinite Campus logo and letter templates. Feel free to use this logo and templates with any communication materials or on your district's website.	www.infinitecampus.com/toolkit

IMPLEMENTATION RESOURCES

RESOURCE	DESCRIPTION	LINK
Introduction to Implementation Video	This video provides a brief overview of what to expect during the implementation process.	www.infinitecampus.com/about/video/implementation-overview
Campus Community	The Campus Community is an interconnected group of customers sharing knowledge, providing product tips and tricks, and promoting peer-to-peer networking among the entire user base, be it teachers, staff, or administrators. This user-friendly site provides single sign-on access from the Infinite Campus system to the Knowledge Base, forum discussions, learning tools, customer events calendar, and news stories.	community.infinitecampus.com
Hosting Information	Infinite Campus provides three hosting options, each suited to meet different customer needs and demands: Campus Cloud, Campus Cloud Choice, and In-District (Virtualized).	kb.infinitecampus.com/help/hosting-information
Managed Services	Managed Services provides hosting options that meet the needs of districts of all sizes by configuring, maintaining, and troubleshooting hosted servers and environments.	www.infinitecampus.com/managed-services
Reporting Server	The reporting server is an SIS instance that uses its own database connection string to dynamically render reports on the database connection.	Not part of core SIS implementation and would require extra funding if needed.
Salesforce Cases	Cases in Portal allow the Infinite Campus team to share information, gather and respond to questions, aid in managing communications, and help to resolve issues or questions effectively.	Cases are used by the district's authorized contacts for communication with Infinite Campus.
Technical Services	For an additional fee, we can help you make the most of your Infinite Campus investment by providing you with certified technical experts to help you get the data you want, where and when you want it.	www.infinitecampus.com/technical-services
Training Terms and Conditions	Stated terms and conditions of training delivery.	www.infinitecampus.com/terms/training-and-consulting-services-terms
Campus Passport Login Page	Website for on-demand training content and access to live workshops	university.infinitecampus.com/learn

SYSTEM CONSIDERATIONS

IT Items

Ensure IT items are planned for, for example:

- Whitelisting Domains on the Network
- Checking Network Capability for a Cloud Based Program
- Certificate Transfers
- [Single Sign On \(SSO\)](#) Setup
- Multi-Factor Authentication

Data Conversion

- During discovery and project status meetings, the project team will work with you to identify the data fields that are in Infinite Campus SIS.
- The Infinite Campus project team will make sure that the data fields are mapped between systems. Once identified/confirmed, the DCA can import the data.
- Consider what items are out of the scope of the data conversion, and create a plan on how to ensure a smooth transition of those items.

DATA CLEANUP

We work in partnership with you to ensure your data is as clean as possible, but it does require you to review and clean your data before transitioning to Infinite Campus.

During implementation the Data Conversion Analyst will:

- Provide the appropriate process/tool for district to submit their data
- Convert the data as agreed upon with the district
- Address data conversion logic issues
- Help with reformatting data file from a usable format (**PDF and images are not acceptable)
- Provide a discovery site that will be used to gather district setup information
- Provide a working trial/production site to the district

A great metaphor we use is moving houses. Moving your stuff to a new house offers the BEST opportunity to go through stuff that is no longer relevant and should be discarded by cleaning up and organizing what you will be moving. We want to bring your best data set into Infinite Campus SIS so you can fully optimize the use of the user interface, and the robust tools offered through Infinite Campus SIS. To prepare for data conversion, consider reviewing and cleaning up the following items before the Infinite Campus Data Conversion Analyst begins migrating your data from your legacy SIS to Infinite Campus.

CLEANUP / COMMON ISSUES TO LOOK OUT FOR	DESCRIPTION
ADDRESS	Ensure addresses are consistent in address 1 and address 2. For example: If apartments were in address 2, ensure they are consistent. If abbreviations were used for Street, Place, Boulevard, all should be abbreviated in a consistent way, or spelled out consistently. Infinite Campus does have an address cleanup script to help with this, but the best practice is to be consistent in abbreviations.
ADDRESS	Delete duplicated addresses.
GUARDIANS	Ensure each student has a listed guardian identified or a way to later identify who the student's guardian is.
STUDENT CONTACTS	Ensure each student has a contact identified and assigned.
SIBLINGS	Ensure siblings are connected in an identifiable way in the legacy SIS, along with ensuring sibling addresses match exactly.
STUDENT/CONTACT/EMPLOYEE	Ensure that there is only one record per unique instance of a person in legacy system. This is usually done by determining or creating unique identifiable information for everyone. This will prevent any duplicate people in Campus.

INVENTORY OF REPORTS

Come prepared to your implementation with an understanding of what reports you will require in Infinite Campus SIS. Take inventory of your current reports you use in your legacy SIS and compare them against what reports are available in Infinite Campus SIS. You can reach out to your Infinite Campus Implementation team for additional information or questions regarding available reports.

In addition, training opportunities include learning how to use existing core reports and customize reports within Infinite Campus SIS. Ad hoc reporting is a tool you can use to build your own custom reports. If additional reporting needs arise, our Technical Services team can assess the requirements and, if feasible, provide a fee-for-service quote for report development. To initiate this process, please inform your Implementation Project Manager so a case can be opened for further discussion.

EXPLORE AVAILABLE REPORTS IN INFINITE CAMPUS:
[KB.INFINITECAMPUS.COM/HELP/AVAILABLE-REPORTS](https://kb.infinitecampus.com/help/available-reports)

Third-Party Vendors

Infinite Campus understands that working with other educational applications is a reality. Infinite Campus's SIS has built-in tools to offer API setup. Tools include Ad Hoc Reporting options to filter specific data sets, and a Data Extract Utility for automated data extraction to assist you in third-party connections.

In addition, take inventory of each third-party application you currently use or plan to use for the future school year. Review the third-party application integration information to determine the best setup for moving forward.

We encourage you to start a conversation with your third-party application vendor at the beginning of the implementation of Infinite Campus's SIS to identify which tool or type of integration would be best.

Tools and integration options to exchange information between third-party application and Infinite Campus

The [OneRoster API](#) is a set of specifications established by the IMS Global Learning Consortium. The OneRoster API allows third-party systems (such as an LMS) to retrieve data from Campus if the system has been given the correct credentials. The data that can be gathered through this API includes roster and section data, as well as assignments, grades, and scores, if enabled. This API allows districts to integrate their third-party program more simply with Campus. Campus does not own the OneRoster specifications; we created the OneRoster API based on those specifications to allow third-party systems to communicate with Campus. Fields in Campus are mapped to fields in OneRoster.

[LTI \(Learning Tool Interoperability\)](#) connections allow districts to establish connections with other learning tool providers and integrate those tools with assignments. LTI connections differ from OneRoster con-

nections. OneRoster connections allow applications to request section and roster data from Campus and send assignments, score, and grade data to Campus. LTI connections allow teachers to integrate learning tools with assignments. Students access these tools through Campus Student and scores are received into the Grade Book where available.

[Ad Hoc Reporting](#), provide users with the ability to filter, display, and report specific database information based on defined criteria. Ad hoc filters can also be used in conjunction with many reports throughout Campus to further filter results to a specific set of data or students.

The [Data Extract Utility](#) provides an automated data extract tool for the purpose of transferring data via a flat file from Infinite Campus servers. This can be used to upload Campus data into third party software.

Beyond the Tools

If additional needs have been identified for setting up an integration between a third-party application and Infinite Campus SIS, our Technical Services team can scope out the requirements needed for the integration and offer a fee-for-service quote to set up a desired integration, if possible. Please let your Implementation Project Manager know there is a need and a case can be opened to start the conversation.

USER SECURITY

User security in SIS platforms is not apples to apples, therefore user security and permissions need to be set up specifically in Infinite Campus SIS. This setup can occur in your trial site and then be brought over to your production site. Training opportunities include learning about Infinite Campus User Security but come prepared for your implementation with an idea of how to set up your users in the system.

Items to get started on:

1. Inventory all of your staff that will need access to Infinite Campus SIS.
2. Determine within the inventory of staff if there are any themes or grouping you can put your staff into, such as:
 - a. All Staff
 - b. Instructional Staff
 - c. Front Office & School Staff
 - d. Building Administration & Leadership
 - e. District Leadership & Operations
 - f. Technology Staff
 - g. State Education Agency
3. These groupings will become the user groups you can assign 'tool rights' to based on what tools they will need to access.
4. Additional consideration can be placed on what types of tools each of the groups should have.
5. Further control can be placed on allowing these groups access to past, present, and future school years via school calendars in Infinite Campus SIS.

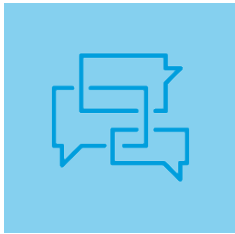
Organizing your staff into groups gets you halfway there with user security!



Implementation

IMPLEMENTATION EXPERIENCE





PHASE 1: INITIATION

An implementation team will be assigned to you. This team will work with you during the entirety of the implementation project. The Infinite Campus Implementation team consists of:

- **Project Manager:** The Project Manager acts as the main point of contact during the implementation process and ensures assigned tasks are completed on time and the implementation stays on track. The Project Manager also facilitates status meetings, tracks action items, and identifies any risks, issues, or barriers during the implementation.
- **Data Conversion Analyst:** The Data Conversion Analyst delivers a Data Conversion Plan, converts data from the legacy SIS to Infinite Campus SIS, assists with data cleanup efforts, and offers guidance on data-related questions.
- **Business Consultant:** The Business Consultant provides guidance on change management and process-related questions and supports the implementation of new or revised workflows that align with the intended use of Infinite Campus SIS. They also configure key settings within the system to ensure it is optimized for your district's needs.
- **SIS Training Specialist:** The SIS Training Specialist delivers a Training Plan, facilitates training workshops to support the on-demand content, and offers guidance on product-related questions throughout the implementation process.
- **Premium Products Training Specialist (if Applicable):** The Premium Products Training Specialist delivers a Training Plan, facilitates training workshops to support the on-demand content, and offers guidance on product-related questions for products that include training.

Campus Community

Credentialed access to Campus Community is offered to staff. Campus Community provides:

- **News** for current and upcoming events
- **Forums** for topic-related discussions
- **Knowledge Base** for a variety of articles, videos, and information
- **Campus Passport** for a training library

Statement of Work

A Statement of Work is provided for you to review and acknowledge prior to starting the implementation project. A statement of work may include:

- Implementation Goals
- Requirements and Scope
- Major Deliverables from Infinite Campus
- Deliverables from Customer
- Key Milestones
- Assumptions and Requirements
- Exclusions (Out of Scope)
- Acceptance Criteria

Implementation Plan Schedule

An Implementation Plan Schedule will be created, proposed and confirmed to your team. The schedule details each meeting date and time, along with key milestones such as trial data conversion, production data conversion and when edits are due prior to each conversion. Once confirmed, the Implementation Plan Schedule is the guiding schedule used throughout the implementation.



PHASE 2: DISCOVERY & PLANNING

Discovery Documents

Several documents will be provided to your implementation team. The example documents allow the team to understand how items will be set up in Infinite Campus SIS. A defined list of what documents to include will be provided as part of the implementation project.

Data Conversion / Migration

The Data Conversion Analyst will provide a data migration video and a data migration guide that will provide the scope of data elements included in data conversion, out of scope items, data conversion process details, schedule, and additional provisions.

Training Plan

A Training Plan will be provided which details what on-demand courses are available and the scheduled dates and times of live virtual instructor-led workshops. The composition of this plan will be what topics are focused on during the implementation process that work towards the goal of providing guidance on setup and training end users on using Infinite Campus SIS to function in the first month of the school year. Additional training opportunities are provided to focus on topics that will be needed to utilize Infinite Campus SIS beyond the first month of school.

Training Site

A Training Site will be provided that contains fictitious data to work with alongside the consumption of the on-demand training content in Campus Passport.



PHASE 3: IMPLEMENTATION

Trial Data Conversion

A trial site is created. The trial site is a preproduction site designed to provide a preview of data that has been migrated into the Infinite Campus SIS and helps the customer implementation team identify items that may require cleansing in the legacy system. The trial site will be active until a production site is created and supplied.

Review and Validation of Data in Trial Site

You know your data best. After your data is converted into your trial site, it is your team's responsibility to review and validate that the data converted from your legacy SIS into Infinite Campus SIS is accurate. Since this is a trial, this is a good opportunity to identify the items that need to be adjusted in your legacy SIS to prepare for the final conversion into your production site. Validation reports will be provided to you to assist with these efforts. We recommend also spot-checking data to ensure accuracy.

Setup and Configuration of Infinite Campus SIS

Your assigned Business Consultant will work with you to set up the following on your behalf in Infinite Campus SIS:

- Schools
- Calendars
- Grade Levels
- Term Schedules
- Period Schedules
- Lunch Minutes
- Grading Tasks
- Credit Groups
- Score Groups/Rubrics
- Grading Scales
- Standard Bank
- Missing Assignment Preferences
- Course Masters
- Course Masters Grading Tasks
- Course Masters Grade Calculation Options
- Course Masters Categories

Production Data Conversion

The production environment (also known as the "live" environment) is the web application and database where users do their day-to-day work. This includes all the reports generated by Infinite Campus SIS.

Review and Validation of Data in Production Site

This is your final opportunity to review and validate the data converted from your legacy SIS into Infinite Campus SIS. While this process is similar to the trial data conversion, it is critical to ensure accuracy, as this is the last conversion before going live and transitioning to support. All new changes or adjustments to the data should be made in Infinite Campus SIS, as this was your last data conversion.

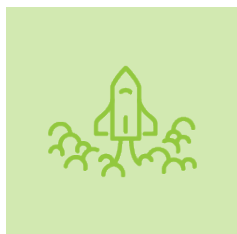
It is the district's responsibility to thoroughly review the data and involve the appropriate stakeholders in the production site validation process. Designate key team members—such as registrars, counselors, and data managers—to review specific areas of data for accuracy. Any necessary adjustments should now be made directly in Infinite Campus SIS, as no further conversions will occur.

Validation reports will be provided to assist with this process, but we also recommend spot-checking records to confirm accuracy. Ensuring all stakeholders are engaged in this review will help prevent data issues once the system is fully in use.

Set Up Training and Workshops

Your review and validation of the data will continue as areas are set up on your production site. The set-up training and workshops have prepared you to finish the desired setup of items in Infinite Campus SIS. Setup items include:

- Finalizing User Security Setup
- Grading Setup
- Attendance & Behavior Setup
- Portal Account Creation
- Grading Administration
- Health Setup
- Messenger Setup
- Premium Products Setup



PHASE 4: GO LIVE

Go Live Checklist

To prepare for the first day of school (and beyond) a checklist is provided to the district PM who will own updates. Infinite Campus supports the district PM in validating what is and isn't completed. This includes areas to complete for production, to prepare for the first day of school, and three months into the school year.

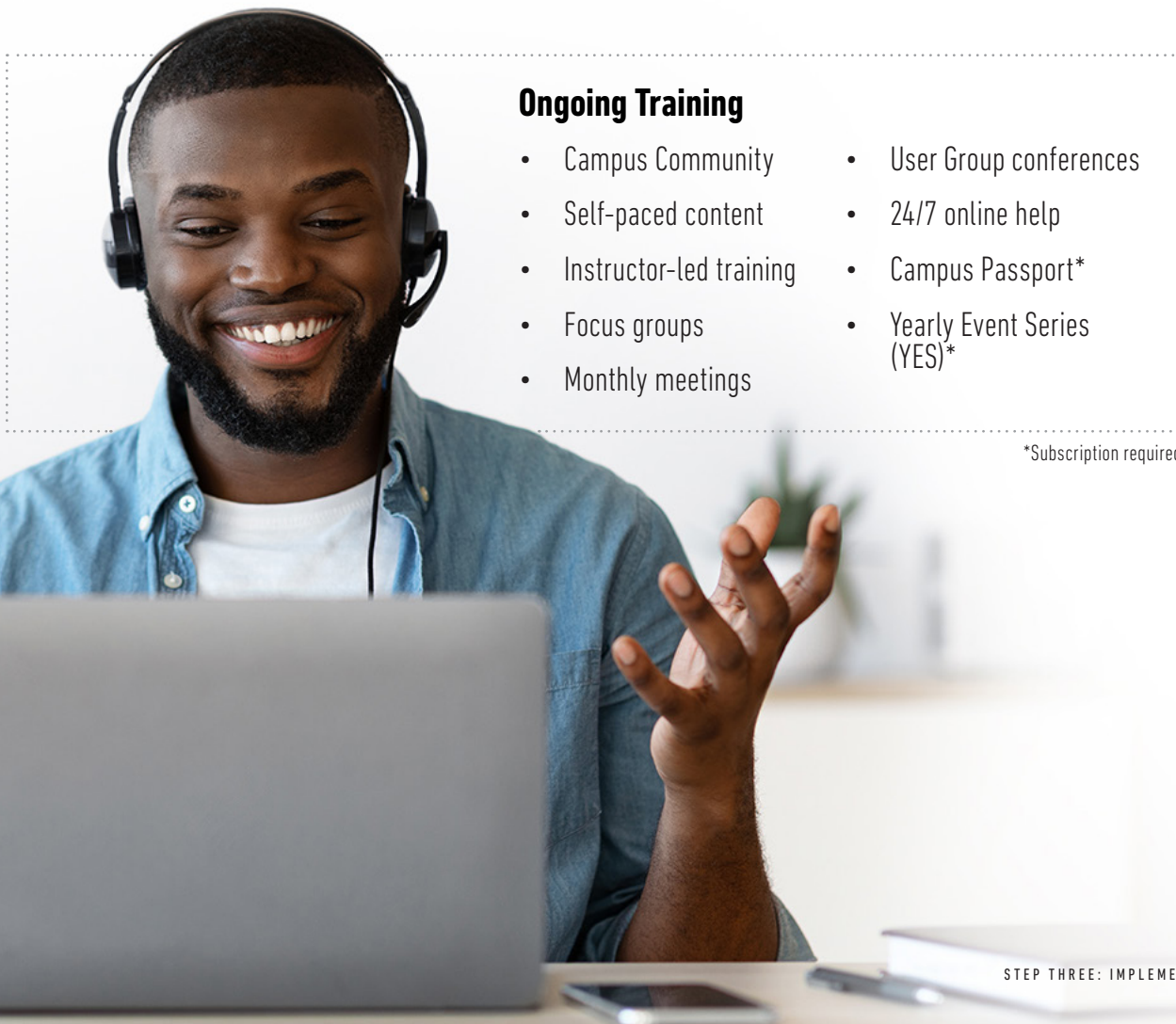
Operational Infinite Campus SIS URL Delivered as Production Site

Your operational production site is now a completed deliverable.

End User Training

End user training will now focus on preparing all staff for utilizing Infinite Campus SIS based on their role within the school. On-demand content coupled with virtual live workshops support each user to understand the robust functionality of Infinite Campus SIS.

With Infinite Classroom™, you're empowered to take charge of your learning through self-paced video content, which is complemented by dynamic workshop sessions led by an Infinite Campus Training Specialist. It doesn't end there, ongoing training is also available.



Ongoing Training

- Campus Community
- Self-paced content
- Instructor-led training
- Focus groups
- Monthly meetings
- User Group conferences
- 24/7 online help
- Campus Passport*
- Yearly Event Series (YES)*

*Subscription required

Completion of Implementation and Post Implementation Support

PLANNING FOR AFTER THE SIS IMPLEMENTATION

Once the implementation is finished, you will still need to complete the setup of certain tasks that align with your internal processes and procedures. The Infinite Campus team will share the Go-live Checklist with you to help you prepare for the first day of school, and into the school year. In addition, you will have Client Relationship Manager (CRM) and our Support team to answer any questions you have after the SIS Implementation.

INTRODUCTION OF CLIENT RELATIONSHIP MANAGER

After implementation districts are assigned their very own CRM at no additional cost. They are your voice within the company and will provide answers to all your questions and concerns.

Your CRM will:

- Communicate product enhancements and important notices
- Schedule User Group meetings
- Provide answers to district questions and concerns
- Deliver information regarding Campus Premium Products/Suites and services
- Help explore additional training opportunities
- Offer helpful suggestions to maximize the value of the Infinite Campus SIS

INTRODUCTION OF SUPPORT TEAM

The Infinite Campus Support team is dedicated to providing our valued customers with a centralized point of contact for responsive, personalized solutions, and expert advice. We are committed to “Doing the Right Thing” through teamwork and use a proactive approach to identify and solve problems. We are located at Infinite Campus national headquarters in Blaine, Minnesota. To help protect your student data, Support is available for Authorized Contacts in each district. Authorized Contacts are provided with a free Introduction to Support training course (located in Campus Passport) to help them in their roles.

FREE INTRODUCTION TO SUPPORT TRAINING COURSE:
UNIVERSITY.INFINITECAMPUS.COM/LEARN/COURSE/20392/INTRODUCTION-TO-SUPPORT

SUPPORT RESOURCES DOCUMENTATION:
KB.INFINITECAMPUS.COM/HELP/SUPPORT-RESOURCES





LET THE JOURNEY BEGIN

WE ARE EXCITED TO WORK WITH YOU ON IMPLEMENTING THE INFINITE CAMPUS STUDENT INFORMATION SYSTEM (SIS)!



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