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Got questions or need a hand navigating your new resources? Our team is just a click away and always ready to help.

| Schedule your meeting with Infobase Today! | | |
| --- | --- | --- |
| Onboarding | <https://calendly.com/infobasecustomersuccess> | |
| Training | [training@infobase.com](mailto:training@infobase.com) | |
| Technical Support | [support@infobase.com](mailto:support@infobase.com) | |
| Product Trials and Pricing | [trial@infobase.com](mailto:trial@infobase.com) | |

**Infobase Implementation Checklist (7 steps)**

1. Account Set Up
   * Credentials
     + Primary contacts will receive credentials from email [noreply@infobase.com](mailto:noreply@infobase.com) and they are attached to this email. Need credentials? Please email [support@infobase.com](mailto:support@infobase.com).
     + Log in to your products and explore! <https://infobase.com/subscriber-page/>
2. Managing your Subscription
   * **Admin Portal Access:** [https://admin.infobase.com](https://admin.infobase.com/)
     + [Administrative Portal Training](https://infobaseadmin.zendesk.com/hc/en-us/articles/24548871223579-Infobase-Admin-Portal-Training)
     + Request a renewal quote
     + Request information on additional products
     + Run usage report
     + Run a title list
     + Request an invoice
     + Access training resources
     + Access support guides
     + Please ask your IT team / contacts to do any or all of the following to help our newsletters and customer communications land in inboxes:

whitelist our domains: [email.infobase.com](http://email.infobase.com/) and [infobase.com](http://infobase.com) add our send emails to their contact list: email@email.infobase.comand noreply@infobase.com and please whitelist our IP addresses

* + 205.159.93.67
  + 205.159.93.71
  + Ensuring Optimal Access
    - Choose the product(s) in our Onboarding Section in our Admin portal and identify options for remote Authentication, LMS Integration and Library Systems Integration. Download the guide and share with your technical partners for optimal access. [Click here for quick access.](https://infobaseadmin.zendesk.com/hc/en-us/articles/29453208681627-Integration-Authentication)
    - [Download Marc Records to increase discoverability in your catalog](https://infobaseadmin.zendesk.com/hc/en-us/articles/360006828354-MARC-Records-Overview)
  + Contacts & Notifications
    - Make sure all staff is added to contacts in the admin portal. This will ensure all new title notifications, training and announcements are sent directly to the faculty/staff end users. [Click here to follow the instructions](https://infobaseadmin.zendesk.com/hc/en-us/articles/29792316192795-How-to-Create-a-New-Contact) to add contacts or send excel file to [support@infobase.com](mailto:support@infobase.com) to add users to admin portal)
    - Sign up and ask faculty/ staff to sign up for subscriber access to quarterly newsletters here: <https://infobase.com/subscriber-page/>

**Dive Deeper into Implementation**

1. Marketing
   * + A-Z List. Add Infobase icons and descriptions to your existing A-Z Guide. Logos and Descriptions are found in our Onboarding Section in our admin portal. [Click here for quick access.](https://infobaseadmin.zendesk.com/hc/en-us/articles/29466664893979-A-Z-Guides)
     + [Getting the Word Out to our staff, faculty and teachers](https://infobaseadmin.zendesk.com/hc/en-us/sections/28261057618971-Getting-the-Word-Out)
2. Explore Our Resources (going to enter link to article)
   * [Tips for Searching by currency vs relevance](https://infobaseadmin.zendesk.com/hc/en-us/articles/29971711488795-Quick-Search-Tips-Find-What-You-Need-Fast)
     + Relevance
     + Newest to Oldest
     + Oldest to Newest
     + A-Z
     + Z-A
     + Most Viewed
3. Customize Your Experience
   * Tips to personalize your experience
     + [Customize Sliders to personalize your institutions learning experience](https://infobaseadmin.zendesk.com/hc/en-us/articles/360016458813-eBooks-Homepage-Sliders)
     + Create Playlists
     + [Suppress Content](https://infobaseadmin.zendesk.com/hc/en-us/sections/360001295514-Suppressing-Content)
     + [Add Custom Content to Infobase Streaming Video](https://infobaseadmin.zendesk.com/hc/en-us/articles/360036166013-Infobase-Hosted-Custom-Content)
     + Add searches to lib guides
4. Connect with Support
   * Email [support@infobase.com](mailto:support@infobase.com). We are eager to help!
   * Find support by product: <https://support.infobaselearning.com/>
     + Identify product| click in to tile to training, markets, what's new and product support!
   * [Accessibility](https://support.infobaselearning.com/) 
     + Choose your product| Accessibility| VPAT ready to download
     + Questions? Contact support@infobase.com
5. Provide Feedback
   * Submit request in the administrative portal: https://infobaseadmin.zendesk.com/hc/en-us/requests/new