NAU Affiliate Agreements
Standards and Non-Standard

Contents

NAU Affiliate Agreements
Standards and Non-Standard

Overview

Official agreements with outside affiliates can now use OnBase to track the entire process. Depending on the type of form, the required fields and specific steps may vary.

The individual who submits the form is responsible for obtaining approval from both the affiliate and the NAU approver, for example their Dean or designee. The submitter records that information in OnBase and then delivers a copy of the final agreement to the affiliate.

OnBase forms, workflows, and documents can be initiated and managed using the Unity Client and the Web Client. Both provide access to many features, but the Unity Client streamlines many processes and is required to complete some tasks.
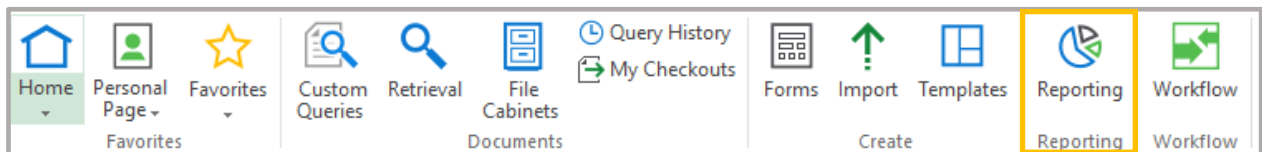
Helpful Tip
The Wildcard feature (*) searches for any word that begins or ends with the root or stem of the word truncated by the asterisk.

The Unity Client must be downloaded to a Windows machine using the steps provided in the OnBase Unity Client Knowledge Base article.

NAU Affiliate Agreements
## Standards and Non-Standard

Unity Client

Search existing agreements

Before initiating a new agreement, always check the system to see if one already exists. All forms in every status can be searched from the Unity Client Dashboard Gallery.

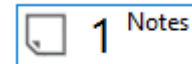1. Open the **Unity Client**.

2. Click **Reporting**.

3. Expand the **Shared With Me** list in the **Dashboard Gallery**.

4. Select the desired dashboard from which to search from (i.e., **Affiliate Agreement – ALL**)
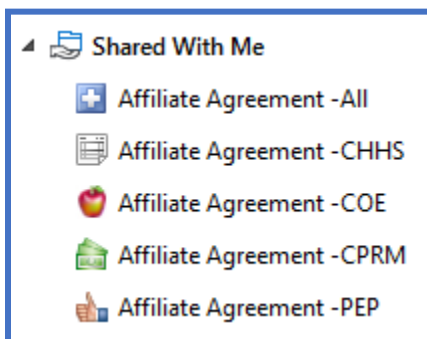
Helpful Tip
If you are searching for a PDF agreement, check the agreement Notes within the PDF (upper right corner) for important information.

5. Adjust the filters by clicking on the filter icon in the column name to locate potential existing agreements for your area. You can also sort columns ascending to descending or vice versa. Helpful parameters to search by include:

- Affiliate Legal Name
- Agreement Number
- Start/End Date
- State
- NAU Submitter Name
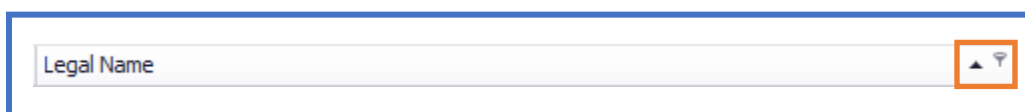
NAU Affiliate Agreements
## Standards and Non-Standard

Initiate Standard Affiliate Agreement form

The NAU Affiliate Agreement form is a dynamic form, which means that the options and fields that appear change based on what is selected at various steps. A sample form and "Show Help" has been included to provide additional guidance, as needed.
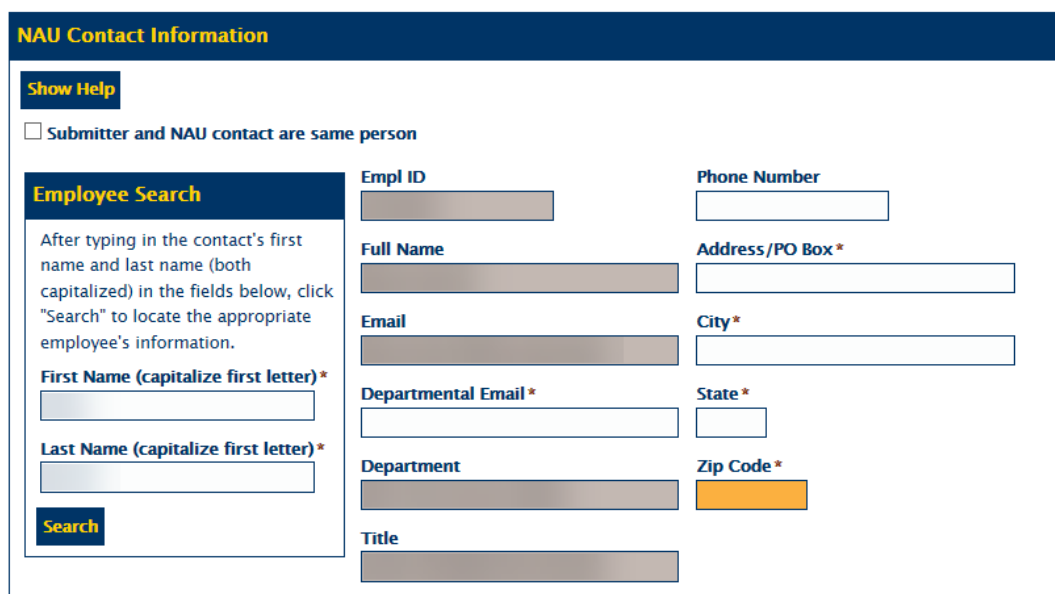
To initiate a Standard form:

1. From the Unity Client, start by clicking on the Forms button:
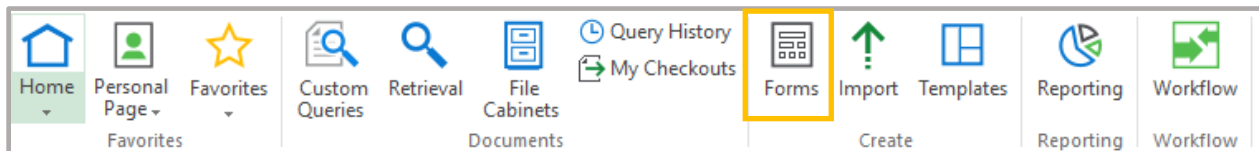
   If you are using the OnBase web client, navigate to https://onbase.nau.edu, click on the three-line menu button (☰ Document Retrieval), and select "New Form"

2. Select **Standard** from the **Agreement Type** dropdown list.

3. Confirm the appropriate information for the submitter.

4. Select the **Submitter and NAU contact are same person** checkbox if that is the situation. Otherwise, use the **Employee Search** to locate the appropriate contact.

   - *Note:* Capitalize the first letter of the first and last name when searching.

5. Add any missing information to the required fields.

6. Complete the required information in the **Affiliate Information** section.

   - You must select the **Primary Affiliate** checkbox for the first contact.
   - Click **Add** if you need to include additional affiliates.

Affiliate Legal Name. To add additional entities associated with the affiliate, click the "Add" button again for each additional entity. | Add |

Show Help

Affiliate Information

☑ **Primary Affiliate**   ☐ **International Affiliate**

Affiliate Legal Name*   **City***
Affiliate name   Flagstaff

Address*   **State***
1234 Elm St.   AZ

Address 2   **Zip Code***
                                       86000

7. Complete the required information in the **Affiliate Contact** section. Additional contacts can be added by selecting the **Affiliate Has Additional Contracts** checkbox.

Affiliate Contact

Contact Name*   **Phone Number***
Ms. Affiliate Name   928-555-5555

Contact Description
(title or description of role in this process i.e.   **Phone Extension (if applicable)**
internship supervisor)*
Chief Financial Officer   **Contact Fax (if known)**

Contact Email*
affiliate@company.com

☐ **Affiliate Has Additional Contacts**

8. If you do not know the effective dates for the agreement, uncheck the **Effective date and end dates are known at this time** checkbox.

9. Enter any **Additional Information**.

10. Select **only** the "**This agreement should not be released…**" checkbox if you are ready to submit the form.

11. Select **only** the "**Save this form and come back to it later…**" checkbox if you need to come back to this form later. You will receive an email with a link to the un-submitted form.

12. Click **Submit**.

Agreement Information

Show Help

Universal Standard Agreements by default covers all students

☑ **Agreement covers all students within selected agreement type**

☑ **Effective date and end dates are known at this time**

Effective Date

End Date

Student Start Date (if known)

Additional Information (can include information regarding affiliate, contacts, etc.)

Select **only** the first checkbox and agree to the terms it describes if you want to submit the form. Select **only** the second checkbox below if you want to save the form and come back to it later.

☐ **This agreement should not be released outside of the University, except to the Affiliate, without a public records request. ***

☐ **Save this form and come back to it later (click submit after selecting this option)**

Submit

Obtain affiliate approval

The steps for obtaining the affiliate approval are provided in the email confirmation you will receive from OnBase. *Note*: Emails can take up to five minutes to send.

1. Review the PDF attached to the OnBase email for accuracy.

   - If changes need to be made, click the link in the email to update the OnBase routing form and generate a new PDF agreement.
   - See Regenerate PDF Agreement section below for additional information.

2. Generate a new email to the affiliate with the attached agreement for their review and approval.

3. Update the fields in the **Approval Processing** section by returning to the form:

   - Check the **Affiliate has reviewed agreement** box.
   - Select **Approve** from the **Affiliate Decision** dropdown list.
   - Enter the affiliate's name in the **Affiliate Approver Name** field.
   - Enter the approval date in the **Decision Date** field.

Approval Processing

If any signatures have been provided at this point, please check the corresponding box below and provide the approval information.

☑ **Affiliate has reviewed agreement**

☐ **Dean has reviewed agreement**

Affiliate Decision *	**Affiliate Approver Name** *	**Decision Date** *
APPROVE ▼	Thomas Jefferson	9/4/2018

Agreement Status

Agreement Status

PENDING NAU ▼

Select **only** the first checkbox and agree to the terms it describes if you want to submit the form. Select **only** the second checkbox below if you want to save the form and come back to it later.

☐ This agreement should not be released outside of the University, except to the Affiliate, without a public records request. *

Submit

4. If the affiliate signs the agreement with no changes, the **Agreement Status** field automatically changes to **Pending NAU**.

- *Note:* If the affiliate requests a change to the agreement, depending on the type of change, you may need to change the agreement type to **Non-Standard**, which involves a separate set of steps.
- See [Changing a Standard agreement to Non-Standard](#) section below for additional information.

5. Select the acknowledgement checkbox and click **Submit**.

NAU Affiliate Agreements
Standards and Non-Standard

Obtain NAU approval

After OnBase is updated with the approval information and the **Agreement Status** changes to **Pending NAU**, the submitter receives another OnBase email with a new set of instructions for obtaining NAU approval.

1. Update the new fields in the **Approval Processing** section

   - Select the **Dean has reviewed agreement** checkbox.
   - Select **Approve** from the **NAU Decision** dropdown list.
   - Enter the approver's name in the **NAU Approver Name** field.
   - Enter the approval date in the **Decision Date** field.

2. Upload the final agreement PDF in the **Final Agreement Attachment** section.

3. Select the acknowledgement checkbox and click **Submit**.

4. The **Agreement Status** automatically changes to **Fully Executed**.

5. Deliver a copy of the final agreement to the affiliate.

Approval Processing

If any signatures have been provided at this point, please check the corresponding box below and provide the approval information.

☑ **Affiliate has reviewed agreement**

☑ **Dean has reviewed agreement**

Affiliate Decision *	**Affiliate Approver Name** *	**Decision Date** *
APPROVE	Thomas Jefferson	9/4/2018

NAU Decision *	**NAU Approver Name** *	**Decision Date** *
APPROVE	Francis Bacon	9/4/2018

☑ **Affiliation agreement has completed processing** *

Final Agreement Attachment

*

C:\Users\jil3\Desktop\Final Agreement.pdf Remove

Attach Final Affiliation Agreement

Agreement Status

Agreement Status

FULLY EXECUTED

Select **only** the first checkbox and agree to the terms it describes if you want to submit the form. Select **only** the second checkbox below if you want to save the form and come back to it later.

☑ **This agreement should not be released outside of the University, except to the Affiliate, without a public records request.** *
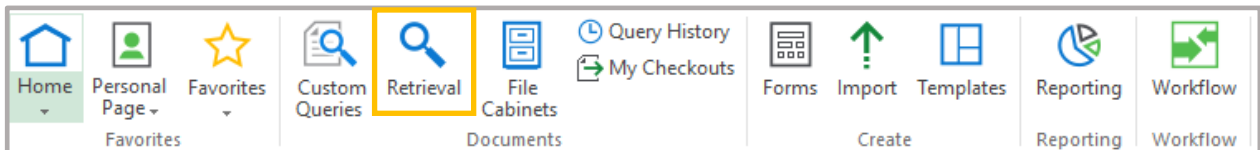
Submit

Changing a Standard agreement to Non-Standard

If the affiliate requests changes to the language in the agreement, this now becomes a non-standard agreement. Follow these steps to convert an already submitted Standard Agreement to Non-Standard. This process starts on the **Tasks** tab in the Unity Client.

1. Open the **Home** tab and click **Retrieval**.

2. Select **NAU – Affiliation Agreement Routing Form** from the **Document Types and Groups** dropdown list.

3. Enter search criteria to locate the form using any of the provided fields and click **Find.**

   When searching for documents and forms, take advantage of the Wildcard feature.

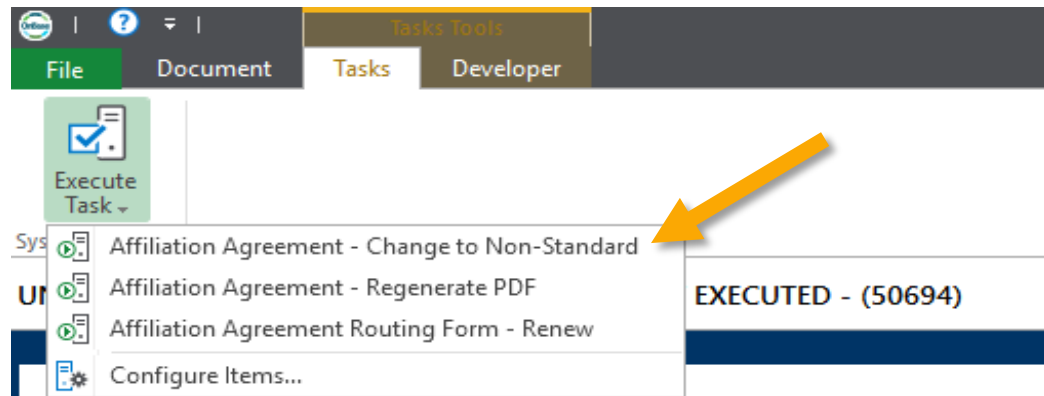   *Enter an asterisk (*) in a field to find all possible matches.*

4. Double-click the form to open it.

5. Make the modifications to the form as necessary and click **Submit**.

6. Open the **Tasks** tab.
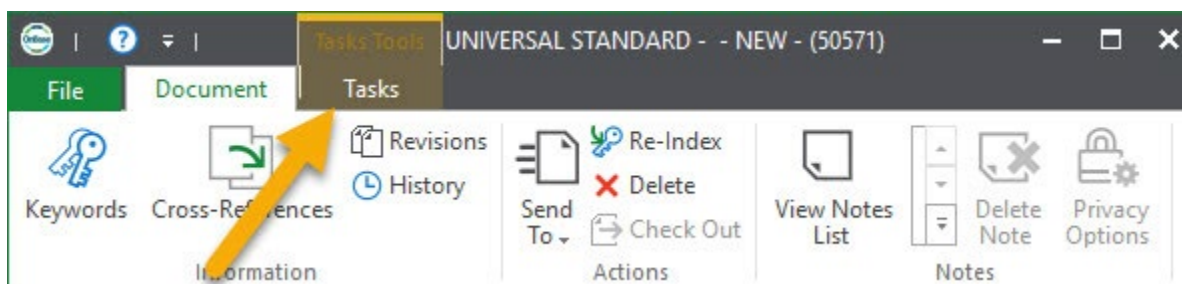
7. Open the **Execute Task** menu and select **Affiliation Agreement – Change to Non-Standard**

8. Follow the directions provided in the OnBase email to add additional required information into the form. Once this new information is entered and submitted, the form will route to Contracting, Purchasing and Risk Management (CPRM) for processing.

Initiate a Non-Standard Affiliate Agreement form

All users have the ability to create a Non-Standard agreement submission or change a Standard agreement to Non-Standard.

When a non-standard agreement is initiated in OnBase, the initial submitter and approver receive separate email notifications with instructions. The approver's email provides a link to OnBase, where the approver must review the attached agreement and provide their approval.

To initiate a Non-Standard form:

1. Select **Non-Standard** from the **Agreement Type** dropdown list.

2. Confirm the appropriate information for the submitter.

3. Select the **Submitter and NAU contact are same person** checkbox if that is the situation. Otherwise, use the **Employee Search** to locate the appropriate contact.

4. Add any missing information to the required fields.

5. Complete the required information in the **Affiliate Information** section.

- You must select the **Primary Affiliate** checkbox for the first contact.
- Click **Add** if you need to include additional affiliates.

Affiliate Legal Name. To add additional entities associated with the affiliate, click the "Add" button again for each additional entity. | Add

Show Help

Affiliate Information

☑ **Primary Affiliate**   ☐ **International Affiliate**

Affiliate Legal Name *   **City ***
Affiliate name   Flagstaff

Address *   **State ***
1234 Elm St.   AZ

Address 2   **Zip Code ***
                                      86000

6. Complete the required information in the **Affiliate Contact** section.

Affiliate Contact

Contact Name *   **Phone Number ***
Ms. Affiliate Name   928-555-5555

Contact Description
(title or description of role in this process i.e.   **Phone Extension (if applicable)**
internship supervisor) *
Chief Financial Officer   **Contact Fax (if known)**

Contact Email *
affiliate@company.com

☐ **Affiliate Has Additional Contacts**

7. Complete the **Agreement Information** section

Agreement Information

Show Help

☑ Agreement covers all students within selected agreement type

☑ Effective date and end dates are known at this time

Effective Date

End Date

Student Start Date (if known)

Is the affiliate an NAU Employee or is the affiliate owned by an NAU employee?
○ Yes ◉ No

I would like to:
◉ Have Contracting, Purchasing and Risk Management send agreement to affiliate
○ Have Contracting, Purchasing and Risk Management email agreement to me so I can send to the affiliate
○ Pick up agreement from Contracting, Purchasing and Risk Management and return to affiliate myself

Additional Information (can include information regarding affiliate, contacts, etc.)

8. If the agreement covers specific Colleges/Programs, uncheck the **Agreement Covers all Students** checkbox and select the appropriate College and Program dropdown boxes.

9. If you do not know the effective dates for the agreement, uncheck the **Effective date and end dates are known at this time** checkbox.

10. Select the appropriate response to the **Is the affiliate an NAU employee….** radio button.

11. Indicate how you would like the agreement delivered to the affiliate.

12. Enter any **Additional Information**.

13. Complete the **Responsible Departmental Signature Authority** section

Responsible Departmental Signature Authority (Typically chair or director)

Show Help

Employee Search

First Name (capitalize first letter) *

Last Name (capitalize first letter) *

Search

Empl ID

Full Name

Email

Department

14. Enter the NAU Approver by typing in the First and Last Name and selecting **Search**.

- *Note: C*apitalize the first letter of the first and last name when searching.

15. Complete the **Attachments** section

Attachments

Show Help

· Use the Attach button below to attach any relevant documents.

· Attachments can be, but are not limited to, original agreements, relevant email conversations, and previously signed agreements.

· You can add multiple attachments by clicking the Attach button even if a document is already attached.

NOTE: Since this is a non-standard agreement, you are required to attach a document using the "Attach Non-Standard Attachment" button below. These attachments will be reviewed by Contracting, Purchasing and Risk Management.

Non-Standard Required Attachment

*

Attach Non-Standard Attachment

Please provide any notes regarding your attachments below:

16. Upload the **Non-Standard Agreement** or email communication regarding any changes as an attachment.

17. Enter any **Additional Information**.

18. Select **only** the **This agreement should not be released…** checkbox if you are ready to submit the form.

19. Select **only** the **Save this form and come back to it later…** checkbox if you need to come back to this form later. You will receive an email with a link to the un-submitted form.

20. Click **Submit**.

Non-standard NAU approval

These steps are to be completed by the NAU approver of the non-standard affiliate agreement.

1. Access the routing form from the link in the automated email from OnBase.

2. Review the attached agreement in the **Attachments** section.

Attachments

Show Help

I have read the agreement and have completed all of the required information. The description of the goods and services to be provided to the University is accurate and complete. I understand all provisions of the agreement, including the University's obligations, and am able to and will administer per the terms and conditions of the agreement and any applicable university policies. I have obtained all approvals necessary to enter into this agreement.

NOTE: Since this is a non-standard agreement, you are required to attach a document using the "Attach Non-Standard Attachment" button below. These attachments will be reviewed by Contracting, Purchasing and Risk Management.

Non-Standard Required Attachment (1)

*

NAU – Affiliation Agreement Attachment – 9/6/2018

Attach Non-Standard Attachment

Please provide any notes regarding your attachments below:

Select **only** the first checkbox and agree to the terms it describes if you want to submit the form.
Select **only** the second checkbox below if you want to save the form and come back to it later.

☐ This agreement should not be released outside of the University, except to the Affiliate, without a public records request. *

Submit

3. Select **Approve, Cancel, Deny or Need More Information** from the **Approver Decision** dropdown list in the section above **Attachments**. The **Decision Date** and **Approver User ID** automatically populate.

4. Select the "**This agreement should not be released…**" checkbox and then click **Submit**.

NAU Affiliate Agreements

Standards and Non-Standard

NAU
NORTHERN
ARIZONA
UNIVERSITY

Renew existing agreements

If a Fully Executed agreement needs to be renewed, you can complete that task from the actual agreement in the Unity Client. When an agreement is renewed, new emails are sent to the identified recipients with further instructions.

1. Search for and open the agreement.

2. Click on the **Tasks** tab.
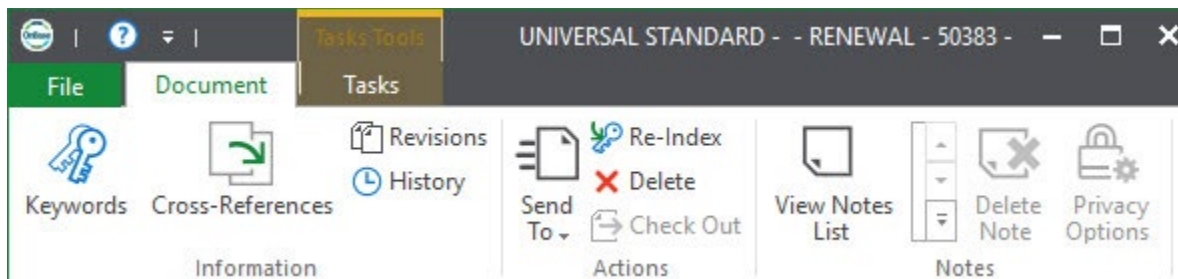
3. Open the **Execute Task** dropdown menu and select **Affiliation Agreement Routing Form – Renew**.
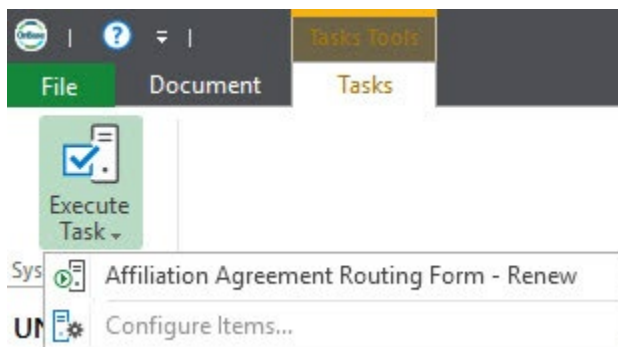
Helpful Tip
The Wildcard feature (*) searches for any word that begins or ends with the root or stem of the word truncated by the asterisk.
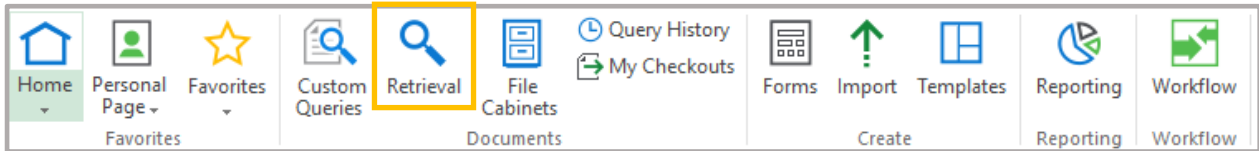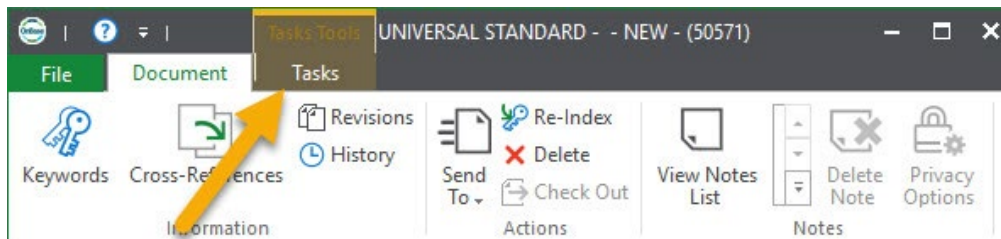

Regenerate PDF Agreement

If changes need to be made to the information in the form, you must regenerate the PDF. This process starts on the **Tasks** tab in the Unity Client.
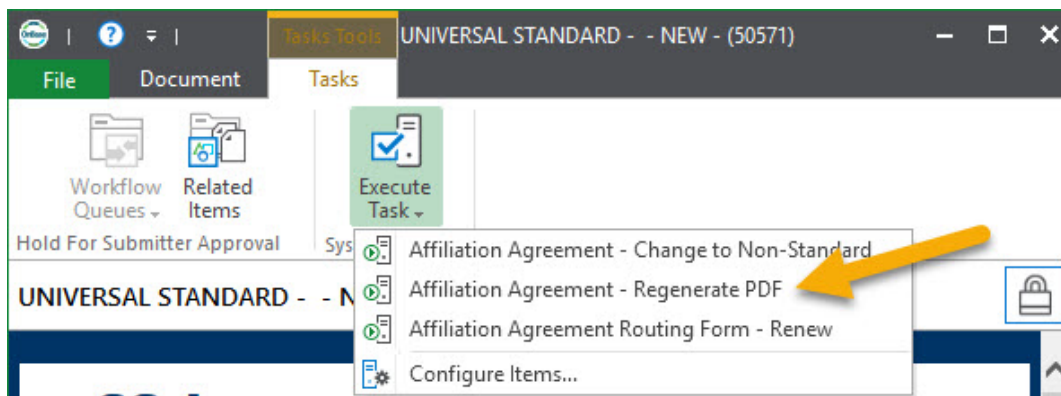
1. Open the **Home** tab and click **Retrieval**.

3. Enter search criteria to locate the form using any of the provided fields and click **Find.**

4. Double-click the form to open it.

5. Make the modifications to the form as necessary and click **Submit**.

6. Open the **Tasks** tab.

7. Open the **Execute Task** menu and select **Affiliation Agreement – Regenerate PDF**.
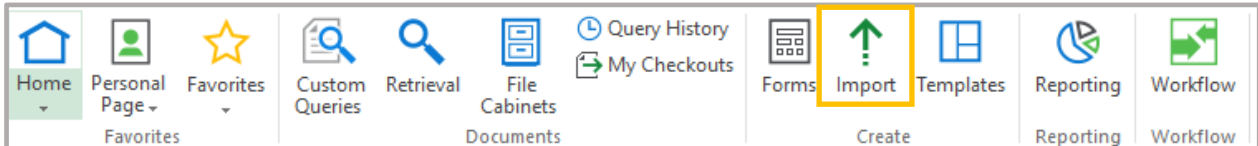
NAU Affiliate Agreements
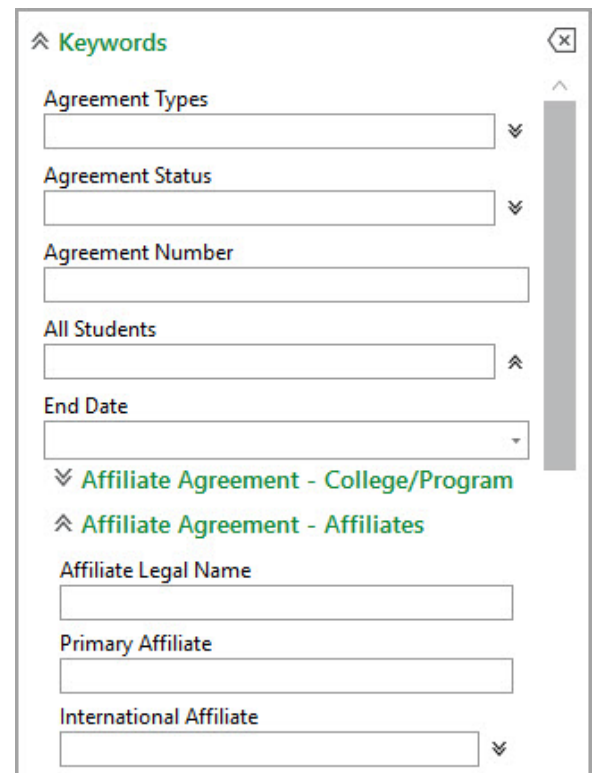## Standards and Non-Standard

Importing agreements into OnBase

Agreements that were initiated outside of OnBase can be imported into the system for better tracking and reporting. Importing is done through the Unity Client.

1. Open the **Unity Client**.

2. Click **Import**.

3. Add the agreement to the **Preview** window. There are two methods:

   - Click **Browse**, navigate to the agreement in your files and click **Open**.
   - Drag and drop the agreement into the **Preview** area.

4. Adjust the fields on the left to finish importing the agreement. Fill out as many fields in the **Keywords** section as possible to make the agreement searchable in the future.

   - **Document Type Group:** NAU
   - **Document Type:** NAU – Final Affiliate Agreement
   - If you select **Yes** from the All Students dropdown list, do not add anything in the **College/Program** section

5. Click **Import**.

Web Client

Search existing agreements

Before initiating a new agreement, always check the system to see if one already exists. All forms in every status can be searched from the Web Client Dashboard Gallery.

1. Open the **Web Client** by navigating to https://Onbase.nau.edu.

2. Select the upper left-hand **Three Line** menu button.

   ≡ Document Retrieval

3. From the side drop-down menu, select **Gallery** from Reporting Dashboards

   REPORTING DASHBOARDS
   Gallery
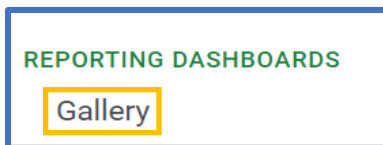
4. Expand the **Shared With Me** list in the **Dashboard Gallery**.

5. Select the desired dashboard from which to search from (i.e., **Affiliate Agreement – ALL**)

   ▲ Shared With Me
   　Affiliate Agreement -All
   　Affiliate Agreement -CHHS
   　Affiliate Agreement -COE
   　Affiliate Agreement -CPRM
   　Affiliate Agreement -PEP
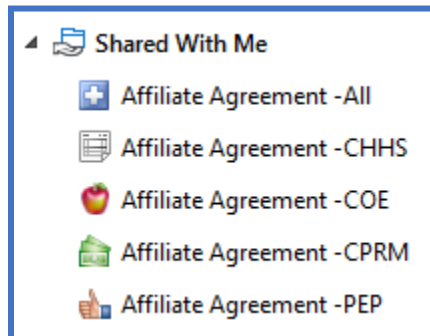
6. You can sort columns ascending to descending or vice versa by clicking on the column header or sort arrow. Helpful parameters to search by include:

   a. Affiliate Legal Name
   b. Agreement Number
   c. Start/End Date
   d. State
   e. NAU Submitter Name

Initiate Standard Affiliate Agreement form

The NAU Affiliate Agreement form is a dynamic form, which means that the options and fields that appear change based on what is selected at various steps. A sample form and "Show Help" has been included to provide additional guidance, as needed.

To initiate a Standard form:

1. From OnBase web client, navigate to https://onbase.nau.edu, click on the **Three Line** menu button and select "**New Form**"

2. Scroll down the list of available forms from the left-hand menu and select "**NAU – Affiliation Agreement**".
3. Select **Standard** from the **Agreement Type** dropdown list.

4. Confirm the appropriate information for the submitter.

5. Select the **Submitter and NAU contact are same person** checkbox if that is the situation. Otherwise, use the **Employee Search** to locate the appropriate contact.

    a. *Note:* Capitalize the first letter of the first and last name when searching.

6. Add any missing information to the required fields.

NAU Contact Information

Show Help

☐ Submitter and NAU contact are same person

Employee Search

After typing in the contact's first name and last name (both capitalized) in the fields below, click "Search" to locate the appropriate employee's information.

First Name (capitalize first letter) *

Last Name (capitalize first letter) *

Search

Empl ID

Full Name

Email

Departmental Email *

Department

Title

Phone Number

Address/PO Box *

City *

State *

Zip Code *

7. Complete the required information in the **Affiliate Information** section.

    a. You must select the **Primary Affiliate** checkbox for the first contact.

    b. Click **Add** if you need to include additional affiliates.

Affiliate Legal Name. To add additional entities associated with the affiliate, click the "Add" button again for each additional entity.   **Add**

Show Help

Affiliate Information

☑ Primary Affiliate   ☐ International Affiliate

Affiliate Legal Name *
Affiliate name

Address *
1234 Elm St.

Address 2

City *
Flagstaff

State *
AZ

Zip Code *
86000

8. Complete the required information in the **Affiliate Contact** section. Additional contacts can be added by selecting the **Affiliate Has Additional Contracts** checkbox.

Affiliate Contact

Contact Name *
Ms. Affiliate Name

Phone Number *
928-555-5555

Contact Description
(title or description of role in this process i.e. internship supervisor) *
Chief Financial Officer

Phone Extension (if applicable)

Contact Fax (if known)

Contact Email *
affiliate@company.com

☐ **Affiliate Has Additional Contacts**

9. If you do not know the effective dates for the agreement, uncheck the **Effective date and end dates are known at this time** checkbox.

10. Enter any **Additional Information**.

11. Select **only** the "**This agreement should not be released…**" checkbox if you are ready to submit the form.

12. Select **only** the "**Save this form and come back to it later…**" checkbox if you need to come back to this form later. You will receive an email with a link to the un-submitted form.

13. Click **Submit**.

NAU Affiliate Agreements
Standards and Non-Standard

Agreement Information

Show Help

Universal Standard Agreements by default covers all students

☑ **Agreement covers all students within selected agreement type**

☑ **Effective date and end dates are known at this time**

Effective Date

End Date

Student Start Date (if known)

Additional Information (can include information regarding affiliate, contacts, etc.)

Select **only** the first checkbox and agree to the terms it describes if you want to submit the form. Select **only** the second checkbox below if you want to save the form and come back to it later.

☐ **This agreement should not be released outside of the University, except to the Affiliate, without a public records request.** *

☐ **Save this form and come back to it later (click submit after selecting this option)**

Submit

Obtain affiliate approval

The steps for obtaining the affiliate approval are provided in the email confirmation you will receive from OnBase. *Note*: Emails can take up to five minutes to send.

1. Review the PDF attached to the OnBase email for accuracy.

   - If changes need to be made, click the link in the email to update the OnBase routing form and generate a new PDF agreement.
   - See Regenerate PDF Agreement section below for additional information.

2. Generate a new email to the affiliate with the attached agreement for their review and approval.
3. Update the fields in the **Approval Processing** section by returning to the form:

   a. Check the **Affiliate has reviewed agreement** box.
   b. Select **Approve** from the **Affiliate Decision** dropdown list.
   c. Enter the affiliate's name in the **Affiliate Approver Name** field.
   d. Enter the approval date in the **Decision Date** field.

Approval Processing

If any signatures have been provided at this point, please check the corresponding box below and provide the approval information.

☑ Affiliate has reviewed agreement

☐ Dean has reviewed agreement

Affiliate Decision*	Affiliate Approver Name*	Decision Date*
APPROVE	Thomas Jefferson	9/4/2018

Agreement Status

Agreement Status
PENDING NAU

Select **only** the first checkbox and agree to the terms it describes if you want to submit the form. Select **only** the second checkbox below if you want to save the form and come back to it later.

☐ This agreement should not be released outside of the University, except to the Affiliate, without a public records request. *

Submit

4. If the affiliate signs the agreement with no changes, the **Agreement Status** field automatically changes to **Pending NAU**.

     a. *Note:* If the affiliate requests a change to the agreement, depending on the type of change, you may need to change the agreement type to **Non-Standard**, which involves a separate set of steps.

     b. See Changing a Standard agreement to Non-Standard section below for additional information.

5. Select the acknowledgement checkbox and click **Submit**.

Obtain NAU approval

After OnBase is updated with the approval information and the **Agreement Status** changes to **Pending NAU**, the submitter receives another OnBase email with a new set of instructions for obtaining NAU approval.

1. Update the new fields in the **Approval Processing** section

   - Select the **Dean has reviewed agreement** checkbox.
   - Select **Approve** from the **NAU Decision** dropdown list.
   - Enter the approver's name in the **NAU Approver Name** field.
   - Enter the approval date in the **Decision Date** field.

2. Upload the final agreement PDF in the **Final Agreement Attachment** section.

3. Select the acknowledgement checkbox and click **Submit**.

4. The **Agreement Status** automatically changes to **Fully Executed**.

5. Deliver a copy of the final agreement to the affiliate.

NAU NORTHERN ARIZONA UNIVERSITY

Changing a Standard agreement to Non-Standard

If the affiliate requests changes to the language in the agreement, this now becomes a non-standard agreement. Follow these steps to convert an already submitted Standard Agreement to Non-Standard.

6. Click the three line menu button and select **Document Retrieval.**

☰ Document Retrieval

7. Select **NAU – Affiliation Agreement Routing Form** from the **Document Types** dropdown list.

8. Enter search criteria to locate the form using any of the provided fields and click **Search.**
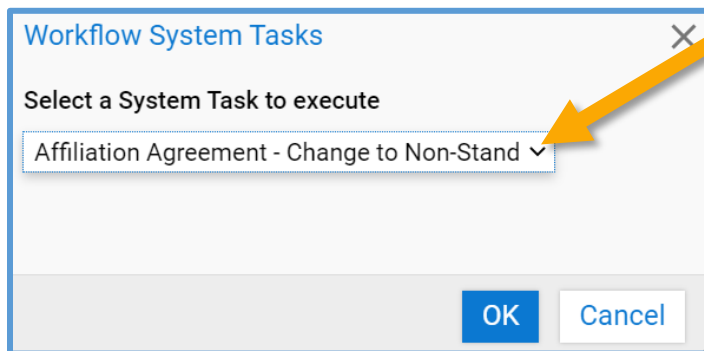
When searching for documents and forms, take advantage of the Wildcard feature.

Enter an asterisk (*) in a field to find all possible matches.

9. Double-click the form to open it.

10. Make the modifications to the form as necessary and click **Submit**.

11. Right click the agreement from the **Document Search Results** pane and select **Workflow** and the **System Tasks**.
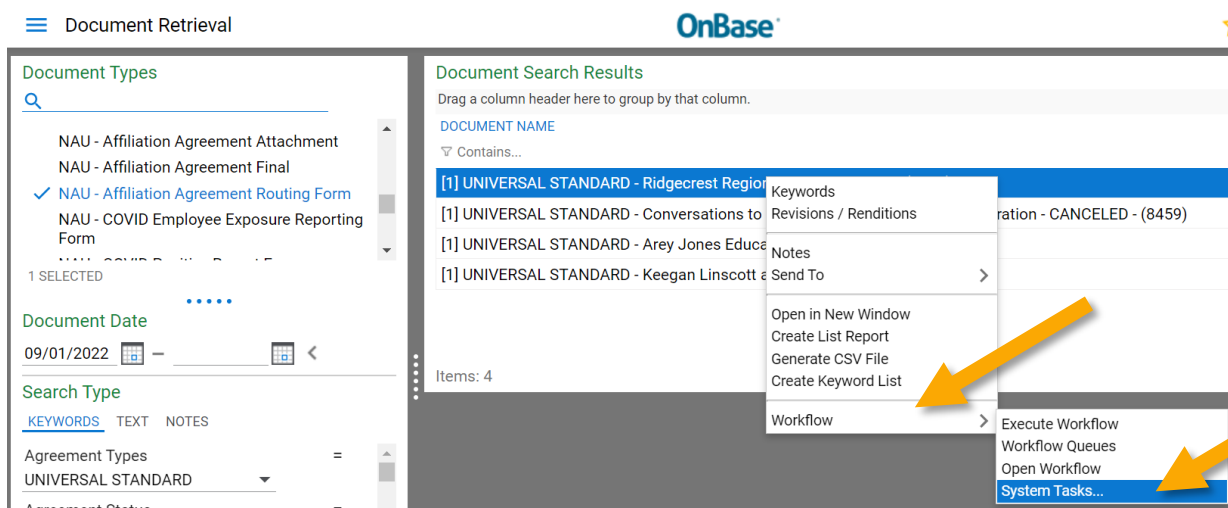
12. Open the **Execute Task** menu and select **Affiliation Agreement – Change to Non-Standard**

13. Follow the directions provided in the OnBase email to add additional required information into the form. Once this new information is entered and submitted, the form will route to Contracting, Purchasing and Risk Management (CPRM) for processing.

Initiate a Non-Standard Affiliate Agreement form

All users have the ability to create a Non-Standard agreement submission or change a Standard agreement to Non-Standard.

When a non-standard agreement is initiated in OnBase, the initial submitter and approver receive separate email notifications with instructions. The approver's email provides a link to OnBase, where the approver must review the attached agreement and provide their approval.

To initiate a Non-Standard form:

1. Select **Non-Standard** from the **Agreement Type** dropdown list.

2. Confirm the appropriate information for the submitter.

3. Select the **Submitter and NAU contact are same person** checkbox if that is the situation. Otherwise, use the **Employee Search** to locate the appropriate contact.

4. Add any missing information to the required fields.

NAU Contact Information

Show Help

☐ Submitter and NAU contact are same person

Employee Search

After typing in the contact's first name and last name (both capitalized) in the fields below, click "Search" to locate the appropriate employee's information.

First Name (capitalize first letter) *

Last Name (capitalize first letter) *

Search

Empl ID

Full Name

Email

Departmental Email *

Department

Title

Phone Number

Address/PO Box *

City *

State *

Zip Code *

5. Complete the required information in the **Affiliate Information** section.

- You must select the **Primary Affiliate** checkbox for the first contact.
- Click **Add** if you need to include additional affiliates.

Affiliate Legal Name. To add additional entities associated with the affiliate, click the "Add" button again for each additional entity. [Add]

[Show Help]

Affiliate Information

☑ **Primary Affiliate**   ☐ **International Affiliate**

Affiliate Legal Name*   **City***
[Affiliate name]   [Flagstaff]

Address*   **State***
[1234 Elm St.]   [AZ]

Address 2   **Zip Code***
[ ]   [86000]

6. Complete the required information in the **Affiliate Contact** section.

Affiliate Contact

Contact Name*   **Phone Number***
[Ms. Affiliate Name]   [928-555-5555]

Contact Description   **Phone Extension (if applicable)**
(title or description of role in this process i.e.
internship supervisor)*   [ ]
[Chief Financial Officer]
                                     Contact Fax (if known)
                                     [ ]
Contact Email*
[affiliate@company.com]

☐ **Affiliate Has Additional Contacts**

7. Complete the **Agreement Information** section

Agreement Information

Show Help

☑ Agreement covers all students within selected agreement type

☑ Effective date and end dates are known at this time

Effective Date
[   ]

End Date
[   ]

Student Start Date (if known)
[   ]

Is the affiliate an NAU Employee or is the affiliate owned by an NAU employee?
○ Yes ● No

I would like to:
● Have Contracting, Purchasing and Risk Management send agreement to affiliate
○ Have Contracting, Purchasing and Risk Management email agreement to me so I can send to the affiliate
○ Pick up agreement from Contracting, Purchasing and Risk Management and return to affiliate myself

Additional Information (can include information regarding affiliate, contacts, etc.)
[   ]

8. If the agreement covers specific Colleges/Programs, uncheck the **Agreement Covers all Students** checkbox and select the appropriate College and Program dropdown boxes.

9. If you do not know the effective dates for the agreement, uncheck the **Effective date and end dates are known at this time** checkbox.

10. Select the appropriate response to the **Is the affiliate an NAU employee….** radio button.

11. Indicate how you would like the agreement delivered to the affiliate.

12. Enter any **Additional Information**.

13. Complete the **Responsible Departmental Signature Authority** section

Responsible Departmental Signature Authority (Typically chair or director)

Show Help

Employee Search

First Name (capitalize first letter) *
[   ]

Last Name (capitalize first letter) *
[   ]

Search

Empl ID
[   ]

Full Name
[   ]

Email
[   ]

Department
[   ]

14. Enter the NAU Approver by typing in the First and Last Name and selecting **Search**.

- *Note: C*apitalize the first letter of the first and last name when searching.

15. Complete the **Attachments** section

Attachments

Show Help

• Use the Attach button below to attach any relevant documents.

• Attachments can be, but are not limited to, original agreements, relevant email conversations, and previously signed agreements.

• You can add multiple attachments by clicking the Attach button even if a document is already attached.

NOTE: Since this is a non-standard agreement, you are required to attach a document using the "Attach Non-Standard Attachment" button below. These attachments will be reviewed by Contracting, Purchasing and Risk Management.

Non-Standard Required Attachment

*

Attach Non-Standard Attachment

Please provide any notes regarding your attachments below:

16. Upload the **Non-Standard Agreement** or email communication regarding any changes as an attachment.

17. Enter any **Additional Information**.

18. Select **only** the **This agreement should not be released…** checkbox if you are ready to submit the form.

19. Select **only** the **Save this form and come back to it later…** checkbox if you need to come back to this form later. You will receive an email with a link to the un-submitted form.

20. Click **Submit**.

Non-standard NAU approval

These steps are to be completed by the NAU approver of the non-standard affiliate agreement.

1. Access the routing form from the link in the automated email from OnBase.

2. Review the attached agreement in the **Attachments** section.

3. Select **Approve, Cancel, Deny or Need More Information** from the **Approver Decision** dropdown list in the section above **Attachments**. The **Decision Date** and **Approver User ID** automatically populate.

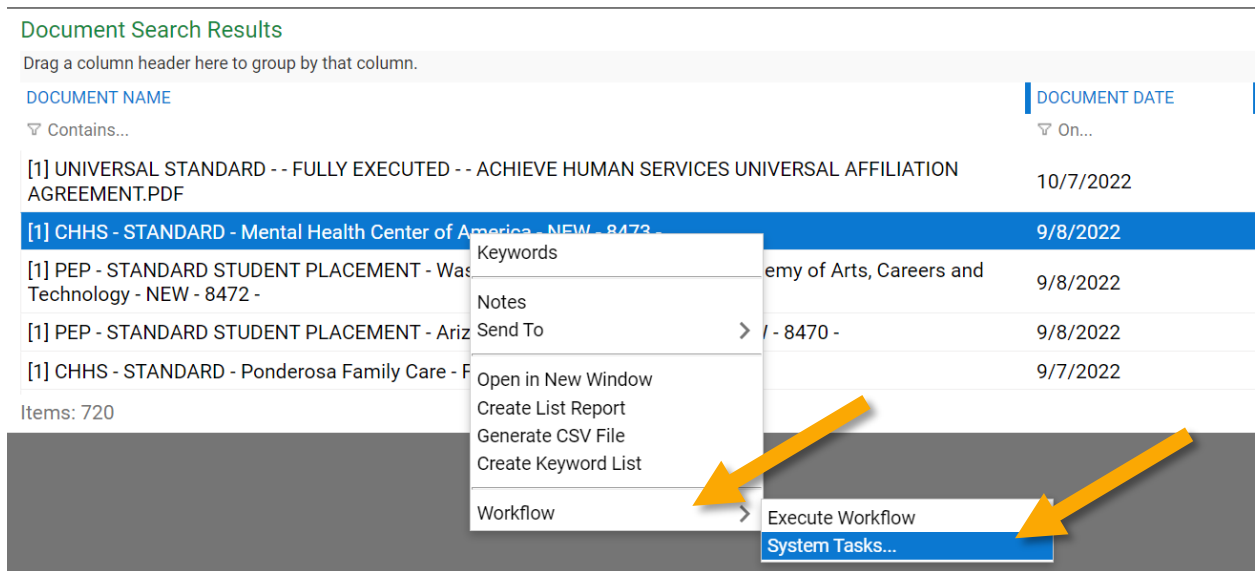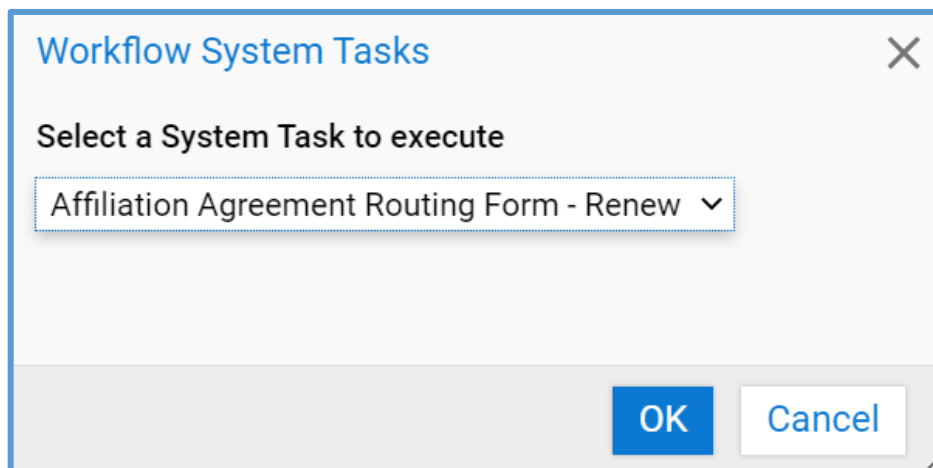4. Select the "**This agreement should not be released…**" checkbox and then click **Submit**.

Renew existing agreements

If a Fully Executed agreement needs to be renewed, you can complete that task from the actual agreement in the Web Client. When an agreement is renewed, new emails are sent to the identified recipients with further instructions.

1. Search for and right-click the agreement.

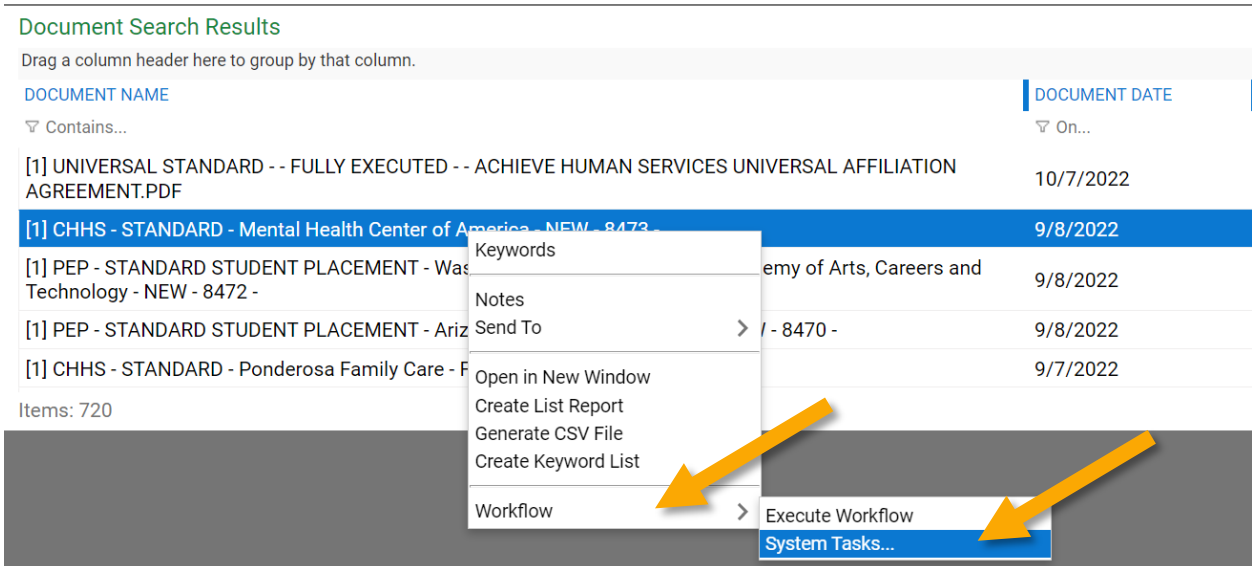2. Click on **Workflow** and then **System Tasks**.

3. Open the **Execute Task** dropdown menu and select **Affiliation Agreement Routing Form – Renew**.

Regenerate PDF Agreement

If changes need to be made to the information in the form, you must regenerate the PDF.

1. Search for and right-click the agreement.

2. Click on **Workflow** and then **System Tasks**

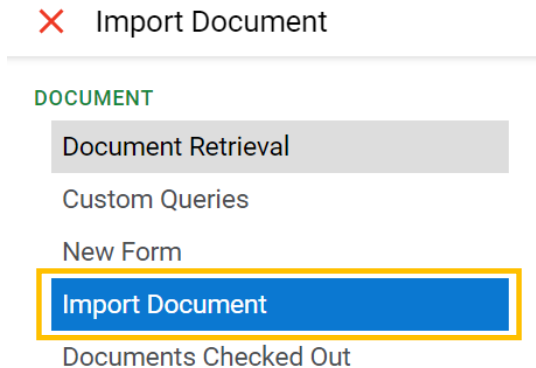3. Open the **Execute Task** menu and select **Affiliation Agreement – Regenerate PDF**.
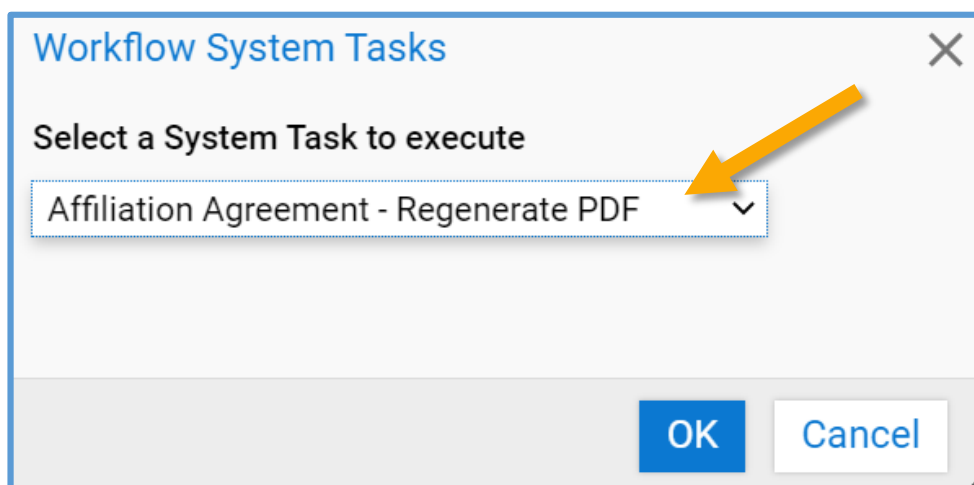
Importing agreements into OnBase

Agreements that were initiated outside of OnBase can be imported into the system for better tracking and reporting.

1. Open the **Web Client**.

2. Click the **Three Line menu** and select **Import Document**.

   ✕ Import Document

   DOCUMENT

   Document Retrieval

   Custom Queries

   New Form

   Import Document

   Documents Checked Out

3. Select the file you with to upload and make sure to select the **Document Type Group** of <All> and then select the **Document Type** you wish to import in.

   Select File

   Choose File   No file chosen

   Import Settings

   Document Type Groups

   <All>

   Document Types

   NAU - Affiliation Agreement Final

   File Type

   Image File Format (.???)

   Document Date

   09/09/2022

4. Adjust the fields on the left to finish importing the agreement. Fill out as many fields in the **Keywords** section as possible to make the agreement searchable in the future.

    a. **Document Type Group:** NAU
    b. **Document Type:** NAU – Final Affiliate Agreement
    c. If you select **Yes** from the All Students dropdown list, do not add anything in the **College/Program** section

5. Click **Import**.

Troubleshooting

If you experience any issues using either the Onbase Unity Client or Web Client, submit a ticket to the ITS Solution Center or call 928-523-1511. You can also try the following workaround solutions and fixes:

Apps.NAU.EDU

Apps.NAU.EDU is a web-based virtual environment that hosts many NAU applications including the OnBase Unity Client. Follow these steps to use this OnBase option:

1. Open your browser and navigate to https://apps.nau.edu
2. When prompted, log in using you NAU credentials
3. Once the selection of available applications are listed, scroll down and select **OnBase Unity Client.**

Resolving form display issues

If you are experiencing form display issues when using the Web Client (i.e., the form does not contain the NAU theme/coloring scheme), then follow the instructions in these Knowledgebase Articles in order to resolve the issue:

- Form display issue KB article: https://nau.service-now.com/sp?id=kb_article&article=KB0017479
- Clear cache and cookies instructions: https://nau.service-now.com/sp?id=kb_article&article=KB0013129