



Master Service Agreement

Basic Level of Support for Journals

This document represents a Master Service Agreement ("MSA") between the Center for Digital Research and Scholarship ("CDRS") and **JOURNAL** ("Partner") for the provision of services required to support and sustain a **Basic** online journal. This MSA remains valid until superseded by a revised agreement mutually endorsed by the stakeholders. Incremental changes will be recorded in an Amendments section of this Agreement and are effective upon mutual endorsement by the primary stakeholders.

Section 1: Definitions of terms

- 1.1 "Open Journal Systems," or "OJS," shall mean an application that is installed by CDRS and utilized by the Partner to distribute academic content via the Internet. It is a software and web interface bundle that was authored and is maintained by the Public Knowledge Project, offered as an open source application.
- 1.2 "Journal" shall mean the content placed into OJS by the Partner.
- 1.3 "Configuration" shall mean any method by which the Open Journal Systems application is changed from its default installation state.
- 1.4 "Workflow" shall mean the manner in which all the pieces of the Open Journal Systems application work. This encompasses authoring, submission management, article review, acceptance, and publication.
- 1.5 "Server" shall mean the hardware, the Apache/Tomcat package, and the file system on which the OJS install has occurred.
- 1.6 "Instance" shall mean one unique, isolated, unshared install of the Open Journal Systems. "Permission(s)" shall mean any type of view, read, write, or execute ability to folders and files within the server on which the system is hosted.
- 1.7 "Patches" shall mean any incremental software fixes released by the Public Knowledge Project.
- 1.8 "Upgrades" shall mean the install of any new version of the OJS application as released and verified by the Public Knowledge Project, or the install of any new version of a requested plug-in or operant extension (see Section 3.4).
- 1.9 "User" shall mean any person who is given access to the web development space in which OJS resides.

- 1.10 "Admin" shall mean a person designated by the Partner to have full and comprehensive permissions to all areas of the site, and who is authorized to add or remove other users.
- 1.11 "Service" shall mean the offering CDRS provides as a whole, not restricted to OJS install and maintenance. Please see Section 2 for full definition.
- 1.12 "Commencement Date" shall mean the date that CDRS will start development work on the Service.
- 1.13 "Launch Date" shall mean the date that the Service will be available to the Partner, as set forth in the proposal or such other written notice from CDRS to Partner. Notwithstanding anything in this Agreement or any Partner Order to the contrary, no Partner-requested date for delivery of Service will be effective unless and until confirmed in writing by CDRS.
- 1.14 "Reporting" shall mean text status updates from CDRS to the Partner concerning actions that have been performed on the Service.
- 1.15 "Migration" shall mean a transfer of content by CDRS or Partner from a specified location, whether digital or analog, to the new application, but content will only be moved as defined by an Amendment.

Section 2: Definition of Service

For the Basic level of Journals service, CDRS defines its offering as

- 2.1 INSTALL of OJS.
- 2.2 Provision of server and web development ACCESS to OJS.
- 2.3 CONFIGURATION of OJS WORKFLOW.
- 2.4 Implementation of COLORING on OJS per Partner-provided palette and logo.
- 2.5 Creation and implementation of a single LAYOUT CUSTOMIZATION for the public-facing pages of the OJS application.
- 2.6 MAINTENANCE of the application and underlying systems.
- 2.7 REPORTING concerning status of the system as a whole and actions taken upon said system.

Section 3: Description of Service

The following details describe the responsibility of CDRS in the ongoing support of this Agreement:

- 3.1 Install of OJS – CDRS will perform a full install of the Open Journal Systems software. Any default Service setting decisions will be changed as required to fulfill the workflow needs of the Partner. Any application setting decisions that require Partner feedback will be done in tandem with the Partner and be defined prior to launch, via discussion meetings.
- 3.2 Provision of access to OJS – CDRS will deliver appropriate server access permissions, as well as access documentation, to any requested users within the Partner’s organization.
 - 3.2.1 Post-Launch Date, Partner may ask via email notification for additional users to be given access permissions. CDRS will provide access to Columbia-based users within 5 business days of email receipt. Users external to Columbia will take more time. Partner will be notified when external users have been added.
 - 3.2.2 Post-Launch Date, the designated admin will also have the ability to add Columbia-based users. The designated admin will have the ability to delete any users.
- 3.3 Hosting of OJS – CDRS will install OJS at a server location with 10 GB of storage space with an expectation of maximum of 10,000 visits per month. If Partner exceeds this capacity, an Amendment is required.
 - 3.3.1 The server on which the installation resides will have a cap of 60 MB per file for upload via the OJS web tool. Users with appropriate server access (described in 2.2) may place larger files directly onto the server via FTP.
- 3.4 Maintenance of OJS – CDRS will keep the OJS installation up to date with patches, installing required patches within 30 business days of distribution. CDRS will also ensure any upgrades required to OJS are performed in a timely fashion, and will initiate any patches or upgrades to the server platform on which the Service lives. CDRS will also ensure that valid backups are performed on a regular basis. CDRS will also ensure that the layout configuration continues to adhere to any new iterations of W3C best practices.
- 3.5 Reporting on maintenance of OJS – On a quarterly basis CDRS will deliver status reports describing what has been done for maintenance.

Section 4: Partner Requirements

The following detailed responsibilities and/or requirements in support of this are the responsibility of the Partner in the ongoing support of this Agreement:

- 4.1 Partner is responsible for having an authoritative representative attend discussion meetings to define requirements of workflow prior to Commencement Date.
- 4.2 Partner is responsible for delivery to CDRS of a list of names and Columbia UNIs of those who will need access to the server on which their OJS instance is hosted, including any specific levels of access required. As part of this list, a designated admin user must be selected and indicated to CDRS prior to install. This designated admin user should be the technical lead for the Partner's organization.
- 4.3 Partner is responsible for delivery to CDRS of all details concerning people outside of Columbia University who might need access to the server on which their OJS instance is hosted.
- 4.4 Partner holds complete responsibility for assignation of OJS registration IDs to appropriate participants within and without Partner's organization. These are specifically used to associate participants with Journal roles (Authors, Editors, etc.).
- 4.5 Partner holds responsibility to provide CDRS with a color palette and logo within one week of Commencement Date.
- 4.6 Partner and CDRS share responsibility for setting up any web statistics or metrics system they so choose. If the Partner has no preferred metrics system, Partner will be provided access to Google Analytics.
- 4.7 Partner holds complete responsibility for repairing any errors that come about as a result of expanding or customizing the OJS install beyond what has been delivered by CDRS at Launch Date.
- 4.8 Partner holds complete responsibility for migration of content from existing site to new site unless migration service is requested and quote for this service approved.

Section 5: Supplemental Services

Should the Partner desire to add a blog or wiki to their Journal service, the following Service expansions apply:

- 5.1 Blog – CDRS uses WordPress as its blog software. If Partner chooses to add a blog, CDRS will:

- 5.1.1 install the system and create a full-access account for the designated admin. No user roles or workflow shall be implemented by CDRS.
- 5.1.2 create a layout consistent with that of the custom OJS layout.
- 5.1.3 implement coloring consistent with that of the custom coloring used on OJS, as per the Partner's palette.
- 5.1.4 place logo and search for the blog to mimic their location on the OJS application. Partner can alter placement at any time.

No shared user registration system between the blog and OJS will be implemented. WordPress training will be provided.

- 5.2 Wiki – CDRS has several options for wiki-style content. For independent hosting use with more options for layout, CDRS uses MediaWiki; for more simple content with a more intuitive collaborative system, CDRS can offer a Wikischolars site. If Partner chooses to add a wiki, CDRS will:

- 5.2.1 install or configure the system and create a full-access account for the designated admin. No user roles or workflow shall be implemented by CDRS.
- 5.2.2 place logo and search for the Wiki.

SAMPLE

No shared user registration system between the Wiki and OJS will be implemented. No layout changes will be implemented on the Wiki.

- 5.3 Migration Service – CDRS has several options by which it can migrate Partner's content from its original location into the journal site designated by the service level. Each option carries an associated overhead cost, and each also has a different cost per item, depending on the complexity of the content to be migrated. Should this service be requested, these costs will be detailed and documented in an Amendment to this agreement. Specific options include, but are not limited, to the following:

- 5.3.1 migration of text content from HTML pages on an existing site
- 5.3.2 migration of text content from HTML or Word documents provided to CDRS by Partner
- 5.3.3 migration of text and PDF content from PDFs provided to CDRS by Partner or on an existing site
- 5.3.4 migration of text and TIFF/EPS images provided to CDRS by Partner or on an existing site
- 5.3.5 migration of text and JPG/GIF images provided to CDRS by Partner or on an existing site
- 5.3.6 migration of text and multimedia content, including video, provided to CDRS by Partner or on an existing site
- 5.3.7 migration of other content (e.g., XML, datasets) other than text, images, and multimedia, as provided to CDRS by Partner or on an existing site

Each numbered option above carries a different cost per item. No conversion of video can be performed by CDRS unless DAT or other masters are available, in which case a separate quote and schedule for video conversion will be delivered by the CDRS Video team.

Section 6: General Terms of Service

- 6.1 Communications – In order to speed service, communications from Partner to CDRS via email should have [Name of Journal] in brackets in the subject line. CDRS will utilize any communication format the Partner desires for reporting and notification purposes.
- 6.2 Bug fixes – CDRS is responsible for any bugs that arise or are discovered from the standard use of the Service or any CDRS-managed patches, standards changes, or upgrades. Partner is responsible for any bugs that occur during their own efforts at customization.
- 6.3 Unrecoverable configuration – Should the Partner be unable to correct bugs created by their own efforts at customization, CDRS will roll back the site to its original configuration settings.
- 6.4 Expansion or reduction of service – Partner can request a service expansion at any time with the understanding that a service expansion will render the original agreed-upon Launch Date invalid. If a service expansion is desired, CDRS will respond with proposed timelines for Commencement Date and Launch Date, and if this is agreeable to all parties, an Amendment will be created or, if necessary, a new MSA will be drawn up.
- 6.5 Transfer of Stakeholding – Either the Partner or CDRS may change their designated stakeholders at any time. Notification should be given 10 business days prior to stakeholder transfer, and an Amendment attached to the MSA.
- 6.6 Force Majeure – Both parties acknowledge the possibility of failure of performance or equipment due to causes beyond such party's reasonable control ("force majeure event"). In the event CDRS is unable to deliver Service as a result of a force majeure event, Partner shall be notified within 24 hours of discovery, and all effort will be expended to repair the issue.
- 6.7 Columbia Terms of Use – CDRS offers its Service under the auspices of Columbia University's Acceptable Use policy (found at http://www.columbia.edu/cu/policy/network_use.html). CDRS does not bear responsibility for any action that is taken as required by the Acceptable Use policy.

Section 7: Duration of Service

The initial phase of the Service (Install and Access) will take no longer than 25 business days from delivery of Partner requirements 4.2, 4.4, and 4.5. If all requirements are fulfilled prior to Commencement Date, timeframe between Commencement Date and Launch Date is shorter.

The latter phase of the Service (Hosting, Maintenance, and Reporting) will continue until mutually agreed otherwise. If a Service expansion changes a free service into a chargeable service, Maintenance at the higher Service level will be included for a year. After a year, Maintenance will change to the highest free level, until otherwise negotiated.

Section 8: Terms of Termination

Should Partner wish to terminate the Service, CDRS requests a minimum 30 business days' notice via email. CDRS will transfer all content and access rights to whomever the Partner designates.

Should CDRS need to terminate its support of the Service, they will provide no less than 120 business days' notice via email. Staff will be on hand for the duration of that time period to facilitate handoff and deliver training to any members of the Partner's organization.

Section 9: Stakeholders

Stakeholders will be considered primary point of contact between CDRS and Partner. While direct communication will go on between other participants in the project, Service-level conversations must include and be signed off by stakeholders as designated.

When either CDRS or Partner changes stakeholders, notification is required. Please refer to 6.5 for process.

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Section 10: Endorsement



Rebecca Kennison, CDRS Director

Date

[JOURNAL EIC, JOURNAL] Editor-in-Chief

Date