



Master Service Agreement

Extended Level of Support for Journals

This document represents a Master Service Agreement ("MSA") between the Center for Digital Research and Scholarship ("CDRS") and **[JOURNAL NAME (JOURNAL ABBREV)]** ("Partner") for the provision of services required to support and sustain an **Extended** 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 This MSA remains valid until superseded by a revised agreement mutually endorsed by the stakeholders.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 "WordPress" shall mean a blog application installed and hosted by CDRS that can be used in conjunction with the OJS system or as a standalone application, depending on Partner preference.
- 1.3 "Journal" shall mean the content placed into OJS and/or WordPress by the Partner.
- 1.3 "Configuration" shall mean any method by which the Open Journal Systems and/or WordPress 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. Workflow is not applicable to WordPress.
- 1.5 "Server" shall mean the hardware, the Apache/Tomcat package, and the file system on which the install(s) occurred
- 1.6 "Setup" shall mean one unique, customizable instance of one or both applications.
- 1.7 "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.

- 1.8 "Patches" shall mean any incremental software fixes released by the Public Knowledge Project or by WordPress.org.
- 1.9 "Upgrades" shall mean the install of any new version of the OJS application or WordPress and associated plugins as released and verified by the relevant product owners), or the install of any new version of a requested plug-in or operant extension (see Section [#})
- 1.10 "User" shall mean any person who is given access to the web development space in which OJS resides – not a participant in the Journal.
- 1.11 "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.
- 1.12 "Service" shall mean the offering CDRS provides as a whole, not restricted to application install and maintenance. Please see Section 2 for full definition.

1.13 "Commencement Date" shall mean the date that CDRS will start development work on the Service.

1.14 "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.

- 1.15 "Reporting" shall mean text status updates from CDRS to the Partner concerning actions that have been performed on the Service.
- 1.16 "Migration" shall mean a transfer of content by CDRS or Partner from a specified location, whether digital or analog, into the new application, but content will only be moved as defined by an Amendment.

Section 2: Definition of Service

For the Extended level of Journals service, CDRS defines their offering as

- 2.1 SETUP of OJS or WordPress.
- 2.2 Provision of server and web development ACCESS to OJS or WordPress.

- 2.3 HOSTING of OJS or WordPress.
- 2.4 CONFIGURATION of OJS WORKFLOW.
- 2.5 Creation and implementation of COLORING on applications per CDRS-provided and approved palette and Partner-provided logo.
- 2.6 Creation and implementation of an agreed-upon number of LAYOUT CUSTOMIZATIONS for the public-facing pages of the relevant applications.
- 2.7 MAINTENANCE of the application and underlying systems.
- 2.8 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 Setup of OJS or WordPress – CDRS will provide partner with a unique instance within the Open Journal System. Any Service settings that 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 applications – CDRS will deliver appropriate access permissions, as well as access documentation, to any requested users within the Partner’s organization.
 - 3.2.1 CDRS will not provide a unified registration between applications.
 - 3.2.2 Pre-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.
 - 3.2.3 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 – CDRS will create the Partner’s setup at a server location with 10 gigabytes of storage space, with an expectation of a 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 any web tool. Users with appropriate server access (described in 2.2) may place larger files directly onto the server via FTP.
- 3.4 Configuration of OJS workflow – CDRS will set up the pattern of the application workflow for the Partner. This will require in-depth discussion with Partner’s editorial staff ahead of Commencement Date.
- 3.5 Coloring – CDRS will come up with a palette of colors to use on the public-facing pages of the relevant applications. CDRS will also ensure that the colors adhere to accessibility guidelines. There will be only two iterations of feedback on the palette.
- 3.6 Layout Customizations – CDRS will design 2-3 custom layouts for the Partner, designing components from navigation to fonts to column sizes. There will be only two iterations of feedback on each layout.
- 3.7 Maintenance of system – CDRS will keep the application installations up to date with patches, installing required patches within 30 business days of distribution. CDRS will ensure any Service upgrades required are performed in a timely manner, and will be responsible for initiating the addition of 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 configurations continue to adhere to all new iterations of WCAG best practices and accessibility rules.
- 3.8 Reporting on maintenance of system – 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 be users and who will need access to the server on which their Service 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 admin is not required to perform any administrative role, but will have the access and permissions to perform tasks as desired.

- 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 Service is hosted.
- 4.4 Partner holds complete responsibility for assignment of OJS and/or WordPress 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 logo within one week of Commencement Date.
- 4.6 Partner holds responsibility for rapid and comprehensive feedback on layouts as they are delivered from and described by CDRS.
- 4.7 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.
- 4.8 Partner should not attempt to customize their setup. Partner holds complete responsibility for informing CDRS of any desire to expand or customize the setup beyond what has been delivered by CDRS at Launch Date.

9 Partner holds complete responsibility for migration of content from existing site to new site, unless migration service is requested and quoted for this service approved.

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Section 5: Supplemental Services

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

- 5.1 Blog –If Partner chooses to add a blog beyond the existing use of WordPress, CDRS will:
 - 5.1.1 configure the system and create a full-access account for the designated admin. No additional user roles or workflow shall be implemented by CDRS.
 - 5.1.2 create two layouts consistent with that of the customized layouts used on the relevant applications.
 - 5.1.3 implement coloring consistent with that of the custom coloring used on the relevant applications, as per the approved palette.
 - 5.1.4 place logo and search for the blog to mimic their location on the relevant application. Partner can alter placement at any time.

As before, no shared user registration system between the blog and OJS will be implemented. Shared registration between blogs is possible at additional time cost.

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 area. If Partner chooses to add an independently hosted 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 create one layout consistent with that of the customized layouts used on the relevant applications.
- 5.2.3 implement coloring consistent with that of the custom coloring used on the relevant applications, as per the approved palette.
- 5.2.4 place logo and search for the Wiki.

No shared user registration system between the Wiki and OJS or the Wiki and WordPress will be implemented.

5.3 Migration service – CDRS has several options by which our staff would 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 as a result of any efforts at self-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 agreement null and void. If a service expansion is desired, CDRS will respond with new projected 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 offered and signed.
- 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 their 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 mitigation action that they are required to take due to the Acceptable Use policy.

Section 7: Duration of Service

The initial phase of the Service (Setup, Access, and Hosting) will take no longer than 10 business days from delivery of Partner requirements 4.2 and 4.3.

The second phase of the Service (Configuration, Coloring, Customization) is a flexible timeframe. Delivery of first palette and sample custom layout will take 15 business days from delivery of logo (Partner requirement 4.5). Feedback iterations will be negotiated per the Partner's schedules. If desired, CDRS can provide a full project plan with requested iteration milestones and requirements if Partner wishes to hit a desired date. CDRS will not guarantee date if Partner-dependent milestones are missed. Delivery of customized setup will be delivered 35-40 business days after final approval of palette and all sample layouts.

If content loading is required to complete the project, a separate time assessment will be made based on amount of content and application in which it is stored. An amendment will be created and attached to the MSA.

Launch date will be based on the assembly of the above conditions.

The final phase of the Service (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 one year, Maintenance will change to the highest free level, until otherwise negotiated.

Section 8: 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 their 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 points 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.

Name, Dept.

Email

Rebecca Kennison, CDRS

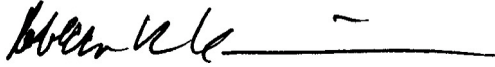
rkennison@columbia.edu

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

Section 10: Endorsement



Rebecca Kennison, CDRS Director

JOURNAL EIC, _____ Date
JOURNAL NAME Editor-in-Chief

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