Symplectic Elements

SOW Catalogue

Prepared by:

Digital Science

SYMPLECTIC
Part of DIGITAL science

This document is a catalogue of Statement of Work (SOW) templates for your review only. The templates are provided for informational purposes, to help you understand the types of services we offer. Once the review is complete, we'll create a customer-specific SOW and issue it to you via DocuSign for your signature.

Note that

- Text in blue is help text for the drafting process
- Text in yellow is to be replaced
- Text with a blue border are variables that will be set when drafting

Statement of Work templates

SOW #001 Symplectic Elements Installation Services
SOW #00n Symplectic Elements Discovery Implementation
SOW #00n Symplectic Elements User Profile Data Feed OR Migration
SOW #00n Symplectic Elements Category Data Feed OR Migration
SOW #00n Symplectic Elements Repository Integration for DSpace/Eprints/Figshare

SOW #001 Symplectic Elements Installation Services

[If this SOW was in-scope of the original Order Form] This SOW is made pursuant to the Symplectic Elements Order Form with Start Date Order Form Start Date between Digital Science and Research Solutions Inc and Customer Name (the "Agreement").

[If this SOW was not in-scope of the original Order Form but the customer has agreed the DS General Terms as part of the contract with us] Digital Science and Research Solutions Inc and Customer Name entered into a Symplectic Elements Order Form with Start Date Order Form Start Date, and now wish to agree Additional Services in connection therewith pursuant to the 'Digital Science General Terms and Conditions' (the "Agreement").

*[If this SOW was not in-scope of the original agreement and we contracted on the basis of a customer contract template (if this is the case, please make sure this SOW is sent for legal review before being shared with the customer)]*This SOW is made pursuant to the '[Agreement]' dated [Agreement date] between Digital Science and Research Solutions Inc and Customer Name (the "Agreement").

This SOW shall form part, and be subject to the terms and conditions of the Agreement. In the event of a conflict between the terms and conditions of this SOW and the terms and conditions of the Agreement, the former shall prevail.

Terms defined in the Agreement shall bear the same meanings in this SOW, save where expressed to the contrary.

This SOW sets out agreed Additional Services, as described below.

Project Overview

In providing the Symplectic Elements Installation Services, we will work with you to carry out the following:

1. Installation of Symplectic Elements
2. Integration of Symplectic Elements and the Customer SSO
3. Establishing a User Feed to Symplectic Elements
4. Configuration of data harvest in Symplectic Elements
5. Knowledge Transfer Sessions for Symplectic Elements

Description of Additional Services

1. **Installation of Symplectic Elements**

   Digital Science will install the agreed number of instances of Symplectic Elements on your Digital Science-hosted server(s).

2. **Integration of Symplectic Elements and the Customer SSO**

   Digital Science will work with you to integrate your SSO authentication scheme with Symplectic Elements.

3. **Establishing a User Feed to Symplectic Elements**

   Digital Science will work with you to produce a User Feed file, and give you access to our SFTP/FTP server for uploading this, before it is imported into your instances of Symplectic Elements, using our Standard HR Importer, on a mutually agreed schedule.

4. **Configuration of data harvest in Symplectic Elements**

   Digital Science will work with you to ensure that your Symplectic Elements instances are correctly configured to harvest publication and grants data, from third party data sources, that correspond to your current subscriptions and your current Symplectic Elements licence.

5. **Knowledge Transfer Sessions for Symplectic Elements**

Digital Science will deliver up to five (5) training sessions to your project team, targeting these to support the project's progress, by giving the Symplectic Elements administrators the necessary capability to maintain the Symplectic Elements configuration.

Assumptions / Dependencies

#	Assumption area	Assumptions / Dependencies
1	Installation of Symplectic Elements	None
2	Establishing a User Feed to Symplectic Elements	a. The Standard HR Importer will only be used to import user object information required for the functioning of Symplectic Elements. The User Feed file: b. will be deposited on a regular basis (preferably nightly) to an SFTP/FTP server provided by Digital Science c. will be deduplicated before it is provided to Digital Science. This is particularly important if it generated from multiple source systems d. will be structured according to the schema provided by Digital Science, and must contain data for mandatory fields e. will contain unique and non-recycled identifiers for each user f. will be provided to Digital Science in either CSV or XML format g. will include details of all members of staff required to be active users of Symplectic Elements at any given import h. will include details of any and all members of staff (present or past) to whom links to other data categories in Symplectic Elements (publications, grants, etc.) are required, in conjunction with any data migration or feed.
3	Integration of	a. Support accounts will be provided to Digital Science to access Symplectic

	Symplectic Elements and the Customer SSO	Elements via Customer SSO b. Symplectic Elements can communicate with the relevant authentication server(s) c. Symplectic Elements supports integration with the following authentication methods, given the following assumptions: • **AD Federation Services (ADFS)** - ADFS Metadata URL will be available • **Microsoft Entra ID** - Microsoft Entra ID is configured and Symplectic Elements instances registered as services • **Central Authentication Service (CAS)** - The CAS 2.0 Service Base URL will be provided • **LDAP -** Information on how the LDAP server is to be accessed, and how the user will be authenticated against it will be provided • **Shibboleth 2 -** The Shibboleth SP will have been installed on the application server and configured to allow the SP to communicate with the institution's authentication IdP Integration with any other authentication systems will require a separate scoping and pricing exercise.
4	Configuration of data harvest in Symplectic Elements	a. The Customer will confirm to which of the available Symplectic Elements data sources they have an active subscription (e.g. MLA, Web of Science Premium). b. The Customer will obtain access credentials for third-party data sources, not hosted by Digital Science (e.g. Scopus, Web of Science), and share these with the Digital Science project team. c. The Customer will select an academic/faculty user for testing connectivity to the configured Symplectic Elements data sources.
5	Knowledge Transfer Sessions for Symplectic Elements	a. Sessions will be agreed and scheduled collaboratively during the delivery of Symplectic Elements Installation Services b. Sessions will be scheduled to be delivered on separate days. c. Sessions will be delivered remotely

Acceptance Criteria

#	Acceptance area	Acceptance criteria
1	Installation of Symplectic Elements	Verify that Symplectic Elements instances can be accessed using provided System Administrator credentials
2	Establishing a User Feed to Symplectic	a. Verify that a user that is added to the User Feed file is created successfully in Symplectic Elements; and that the user is associated with correct User Group(s).

	Elements	b. Verify that a user that is removed from the User Feed file is rendered inactive in Symplectic Elements. c. Verify that the *Global user feed cutoff* threshold works as expected.
3	Integration of Symplectic Elements and the Customer SSO	Verify that a user can log in via the Customer SSO and is taken straight to the Symplectic Elements homepage.
4	Configuration of data harvest in Symplectic Elements	Verify that data is being retrieved from the third party data sources that have been configured in Symplectic Elements, for the academic/faculty user that has been selected for testing.
5	Knowledge Transfer Sessions for Symplectic Elements	All agreed sessions have been held.

You will be deemed to have accepted a Deliverable if: (a) you fail to notify us in writing of your assessment of a Deliverable within five (5) Working Days of a written reminder notice from us (which may be by email) requesting such acceptance, having already failed to provide such assessment within the Acceptance Period; or (b) where a Deliverable is software, by using that Deliverable in a production environment.

Communication Plan

Digital Science makes use of the Asana project management platform for running our project in a collaborative manner with you. An Asana project will be made available for the management and delivery of the services described in this SOW. All normal communication relating to this project should take place on this platform.

The following roles should be made available for project governance, where required.

Role (Digital Science)			**Role (Customer)**	
Project Manager			**Project Manager**	
Name:			Name:	
Email:			Email:	
Head of Project Services			**Business Owner**	
Name:	Kay Lino		Name:	
Email:	k.lino@digital-science.com		Email:	
SVP Client Services			**Executive Sponsor**	
Name:	Geirmund Knutsen		Name:	
Email:	g.knutsen@digital-science.com		Email:	

Draft Delivery Plan

For planning purposes, the following is a draft high-level delivery plan based on projects of similar scope. Development of a final project schedule and the setting of an official project start date will occur within 30 days of us receiving the signed SOW.

Symplectic Elements Installation Services			
#	**Task**	**Duration**	**Resource**
1	Installation of Symplectic Elements	1	Digital Science
2	Integration of Symplectic Elements and the Customer SSO	2	Both
3	Establishing a User Feed to Symplectic Elements	3	Both
4	Configuration of data harvest in Symplectic Elements	3	Both
5	Knowledge Transfer Sessions for Symplectic Elements	6	Digital Science
Minimum duration for this service		**6 weeks**	

Note, the time periods described and the successful completion of each task are dependent on the timely performance of the duties and other obligations assigned to the Customer, as well as availability and quality of any data and other inputs to be provided by the Customer.

If the Customer wishes to delay, or put it on hold, any stage of the project, a written request must be submitted for approval by the Digital Science Project Manager.

Fees for the Additional Services

[If this SOW was in-scope of the original Order Form] Fees payable in respect of the work described in this SOW are as set out in the Symplectic Order Form, and will be invoiced as follows:

- 50% upon signing of the SOW
- 50% upon acceptance

*[If this SOW was not in-scope of the original Order Form]*Fees payable under this SOW shall be [CCY Amount] (excl. taxes) and will be invoiced as follows:

- 50% upon signing of the SOW
- 50% upon acceptance

Email for POs: operations@digital-science.com

Email for invoices: invoices@digital-science.com

Signature

SIGNED for and on behalf of	SIGNED for and on behalf of
Digital Science & Research Solutions, Inc.	**Customer Name**
Name:	Name:
Position:	Position:
Date:	Date:

SOW #00n Symplectic Elements Discovery Implementation

[If this SOW was in-scope of the original Order Form] This SOW is made pursuant to the Symplectic Elements Order Form with Start Date Order Form Start Date between Digital Science and Research Solutions Inc and Customer Name (the "Agreement").

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Terms defined in the Agreement shall bear the same meanings in this SOW, save where expressed to the contrary.

This SOW sets out agreed Additional Services, as described below.

Project Overview

In providing the Symplectic Elements Discovery Implementation, we will work with you to carry out the following:

1. Provision and prepare for Discovery
2. Configuration of Discovery Non-Production
3. Move to Discovery Production
4. FoR Code analysis (Optional)

Description of Additional Services

Provision and prepare for Discovery

1. We will deploy and maintain up to two instances (non-production and production) of the Symplectic Elements Discovery Module on the Digital Science-hosted server(s) that each source data from your corresponding Symplectic Elements system(s).

2. We will configure an ongoing data synchronisation process between your Symplectic Elements instance and its target Symplectic Elements Discovery Module instance.

3. Prior to public release, we will implement either IP access restrictions (preferred) or username and password based security for the Symplectic Elements Discovery Module site so as to restrict the Discovery Module to authorised access only.

Configuration of Discovery Non-Production

1. We will provide you with instructions as to how you can configure your system to push metadata to the Symplectic Elements Discovery Module. We will also explain how data can be excluded from the push to the Symplectic Elements Discovery Module.
2. To support testing, you will confirm the names of a small group of Symplectic Elements users within your system that have well populated profiles (i.e. contain data suitable for display in the Discovery Module, including: person/profile data, publication data, grant data, professional activity data, teaching data).
3. We will provide you with a 'Discovery Module Branding' document that describes the size/types of images, blocks of text, logos and Hex codes required to reflect your institutional branding within the Discovery Module.
4. We will apply the institutional branding supplied by you, as covered by our branding guidelines (which describe the entirety of the supported interface customisations to the module).

Moving to Discovery Production

1. We will deploy an agreed release of the Symplectic Elements Discovery Module on a server procured and owned by Digital Science.

2. The non-production instance of Symplectic Elements and the Discovery Module will be used to confirm all configurations for the production instance which will then be applied to production. The completion of these configurations will require staff effort on both sides.

Note: If IP access restrictions were implemented, these may remain in place if the Discovery Module is to be used for Internal purposes only - thereby preventing it from becoming available to a public audience.

(Optional) FoR Code Analysis

If you opt to undertake this work:

1. We will:
    a. Request a copy of the Symplectic Elements Production Reporting database, or
    b. Ask you to run a script against your Symplectic Elements Production Reporting database, or
    c. With your permission, run that script remotely against your Symplectic Elements Production Reporting database.

2. We will run an analysis of the 2020 Fields of Research (FoR) classifications stored against “claimed” journal publications for users in your Symplectic Elements Production system.
3. We will provide you with the outcome of the analysis, up to the top 10 most frequently occurring FoR codes, for you to decide how many FoR codes you would like to apply to each user’s Symplectic Elements profile.
4. We will
    a. Supply the materials and documentation necessary for you to use the Symplectic Elements API to populate the agreed number of FoR codes for each user, or
    b. With your permission, do this on your behalf remotely. This will take place on a mutually agreed date.

Note: It is possible to use other data for Tag Search and Filter for example: a custom data set can be used. Please speak to your Discovery Module Project Manager for further information.

Assumptions / Dependencies

- All Symplectic Elements instances to be used as a source for the Discovery Module have been upgraded to the latest available version.
- The allocation of FoRs to individuals relies on those individuals having claimed journal publications in Symplectic Elements, where the journal ISSN has been associated with particular FoR codes.
- Where the FoR Code work is being undertaken, the stock version of the Fields of Research label scheme is applied.
- If you only have specific groups of users that you want FoR codes applied to, you will tell us this before we start the analysis.
- FoR codes will only be applied to your production instance of Symplectic Elements following a successful test of the process on a non-production instance.
    - If you require the FoR codes to be populated to any further non-production instances, you may re-run the process on that instance, or you may request or complete a “Data Refresh” from your production to your non-production instance.
- You will work collaboratively with Digital Science staff in the support of the above delivery items and services.
- All Digital Science services detailed in this document are provided under the terms and conditions of the Symplectic Elements Service Level Agreement.

Acceptance Criteria

- Symplectic Elements and Discovery Module have a working connection that can

successfully send data from Symplectic Elements to the Discovery Module so that changes to profile data in Symplectic Elements results in accurately crosswalked metadata in the Discovery Module following synchronisation.

- Agreed branding has been applied to the Discovery Module.

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Communication Plan

Digital Science makes use of the Asana project management platform for running our project in a collaborative manner with you. An Asana project will be made available for the management and delivery of the services described in this SOW. All normal communication relating to this project should take place on this platform.

The following roles should be made available for project governance, where required.

Role (Digital Science)			Role (Customer)	
Project Manager			**Project Manager**	
Name:			Name:	
Email:			Email:	
Head of Project Services			**Business Owner**	
Name:	Kay Lino		Name:	
Email:	k.lino@digital-science.com		Email:	
SVP Client Services			**Executive Sponsor**	
Name:	Geirmund Knutsen		Name:	
Email:	g.knutsen@digital-science.com		Email:	

Draft Delivery Plan

For planning purposes, the following is a draft high-level delivery plan based on projects of similar scope. Development of a final project schedule and the setting of an official project start date will occur within 30 days of us receiving the signed SOW.

Symplectic Elements Discovery Implementation			
#	**Task**	**Duration**	**Resource**

1	Provision Discovery	2	Digital Science
2	Prepare for Discovery	2	Both
2	Configuration of Discovery Non-Production	4	Both
3	Move to Discovery Production	4	Both
4	(Optional) FoR Code analysis	2	Both
Minimum duration for this service		**12 weeks**	

Note, the time periods described and the successful completion of each task are dependent on the timely performance of the duties and other obligations assigned to the Customer, as well as availability and quality of any data and other inputs to be provided by the Customer.

If the Customer wishes to delay, or put it on hold, any stage of the project, a written request must be submitted for approval by the Digital Science Project Manager.

Fees for the Additional Services

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Email for POs: operations@digital-science.com

Email for invoices: invoices@digital-science.com

Signature

SIGNED for and on behalf of

Digital Science & Research Solutions, Inc.

Name:

Position:

SIGNED for and on behalf of

Customer Name

Name:

Position:

Date:

Date:

SOW #00n Symplectic Elements User Profile Data Feed OR Migration

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This SOW sets out agreed Additional Services, as described below.

Project Overview

In providing the Symplectic Elements User Profile Data Feed OR Migration, we will work with you to carry out the following:

1. **Mapping.** We will advise you on good practices concerning the creation of a mapping between the source system's data structure and the data structure of the User Profile in Symplectic Elements.
2. **Configuration of Symplectic Elements User Profile**. We will assist you with configuring the Symplectic Elements User Profile.
3. **First iteration import (on non-Production)**. We will run the data import process into your non-production instance, before we ask you to review the import results and provide us with feedback on changes required for the next iteration import.
4. **Second iteration import (on non-Production)**. We will run the data import process into your non-production instance, before we ask you to review the import results and provide us with feedback on changes required for the next iteration import.

5. **Final iteration import (on Production)**. We will run the data import process into your production instance.
6. **(For Data Feed) Schedule**. In case of an ongoing feed, we will schedule it.
7. **(For Data Feed) Notification.** In case of an ongoing feed, we will provide email notifications (success and failure).

Description of Additional Services

1. Mapping.

We will advise you on good practices concerning the creation of a mapping between the source system's data structure and the data structure of the User Profile in Symplectic Elements.

We will provide you with input file templates that must be used in conjunction with the data import. These are in CSV format and use UTF-8 encoding.

We will provide you with access to our secure FTP server as the location to which you will upload the files.

After the mapping process is done, you will generate the necessary files from the source system into the Digital Science-specified schema, transferring them to the specified location on Digital Science's FTP server.

2. Configuration of Symplectic Elements User Profile.

We will assist you with configuring the Symplectic Elements User Profile.

3. First iteration import (on non-Production). We will run the data import process into your non-production instance, before we ask you to review the import results and provide us with feedback on changes required for the next iteration import.

4. Second iteration import (on non-Production). We will run the data import process into your non-production instance, before we ask you to review the import results and provide us with feedback on changes required for the next iteration import.

5. Final iteration import (on Production). Once the dataset and mapping are ready for production, we will deploy a separate data import process targeting the production instance, and run the data import process into your production instance.

6. (For Data Feed) Schedule. In case of an ongoing feed, we will configure the relevant scheduled task(s) to run the importer on a pre-agreed schedule.

7. (For Data Feed) Notification. In case of an ongoing feed, we will configure the importer to send email notifications in case of both success and failure and share relevant logs via the same FTP location where the files are to be uploaded.

Assumptions / Dependencies

1. Data

Data must be delivered by the Customer in UTF-8 encoding and conforming precisely to the schema set out in the template files provided in a timely manner.

Data must be of reasonable quality, deduplicated, and in CSV format (including the correct escaping of characters that could be interpreted as delimiters). Data values will be in a readily machine-parseable form.

Data must contain a unique identifier for each referenced user. This identifier must match the unique identifier for that user in your Symplectic Elements User Feed in order that a relationship between the imported records and Symplectic Elements users may be established.

2. Data Categories

Only User Profile data is relevant for this SOW.

- **User Profile data** is understood to be all cv-related editable fields on a user's User Profile page in Symplectic Elements. This includes but is not limited to, data elements such as academic appointments, education and addresses. This does not include publications, professional activities, grants and teaching activities. Note: the structure of the fields on the User Profile page are fixed in Symplectic Elements and cannot be modified.

3. On-going Operation

Symplectic Elements User Profile Data Feed OR Migration, is a service that uses automation tools to import the provided data via the most recent Symplectic Elements API endpoint.

In case of an ongoing feed, as part of the Customer's subscription to Symplectic Elements, Digital Science will maintain its automation tools where doing so is required to preserve compatibility with the latest Symplectic Elements API as Symplectic Elements is upgraded in the future. However, the data feed and provided data files together form a custom integration with Symplectic Elements, as defined in Ongoing Maintenance of Elements Customisations & Custom Integrations. Please see that document for the Customer's responsibilities relating to the maintenance of custom integrations.

Support for the data feed is available under the *Client Customisation & Environment Support* area of support in the Symplectic Elements Service Level Agreement.

In the event that new Symplectic Elements functionality is released, it is the Customer's

responsibility to request changes to the data feed where there is a desire to leverage such functionality. This usually entails changing the way the data files are generated. Any associated assistance is chargeable.

The Customer should inspect the log output of the data feed regularly in order to detect any issues with incorrect functioning, whether caused by unexpected data file content or by other factors.

Acceptance Criteria

- Data is loaded in Symplectic Elements
- Relationships between users and data in Symplectic Elements are established.

You will be deemed to have accepted a Deliverable if: (a) you fail to notify us in writing of your assessment of a Deliverable within five (5) Working Days of a written reminder notice from us (which may be by email) requesting such acceptance, having already failed to provide such assessment within the Acceptance Period; or (b) where a Deliverable is software, by using that Deliverable in a production environment.

Communication Plan

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The following roles should be made available for project governance, where required.

Role (Digital Science)			Role (Customer)	
Project Manager			**Project Manager**	
Name:			Name:	
Email:			Email:	
Head of Project Services			**Business Owner**	
Name:	Kay Lino		Name:	
Email:	k.lino@digital-science.com		Email:	
SVP Client Services			**Executive Sponsor**	
Name:	Geirmund Knutsen		Name:	
Email:	g.knutsen@digital-science.com		Email:	

Draft Delivery Plan

For planning purposes, the following is a draft high-level delivery plan based on projects of similar scope. Development of a final project schedule and the setting of an official project start date will occur within 30 days of us receiving the signed SOW.

Symplectic Elements Category Data Feed OR Migration			
#	**Task**	**Duration**	**Resource**
1	Mapping	3	Both
2	Configuration of Symplectic Elements	1	Digital Science
3	First Iteration (on Non-Production)	2	Both
4	Second Iteration (on Non-Production)	2	Both
5	Final Iteration (on Production)	1	Both
Minimum duration for this service		**8 weeks**	

Note, the time periods described and the successful completion of each task are dependent on the timely performance of the duties and other obligations assigned to the Customer, as well as availability and quality of any data and other inputs to be provided by the Customer.

If the Customer wishes to delay, or put it on hold, any stage of the project, a written request must be submitted for approval by the Digital Science Project Manager.

Fees for the Additional Services

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Email for POs: operations@digital-science.com

Email for invoices: invoices@digital-science.com

Signature

SIGNED for and on behalf of	SIGNED for and on behalf of
Digital Science & Research Solutions, Inc.	**Customer Name**
Name:	Name:
Position:	Position:
Date:	Date:

SOW #00n Symplectic Elements Category Data Feed OR Migration

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Terms defined in the Agreement shall bear the same meanings in this SOW, save where expressed to the contrary.

This SOW sets out agreed Additional Services, as described below.

Project Overview

In providing the Symplectic Elements Category Data Feed OR Migration, we will work with you to carry out the following:

1. **Mapping.** We will advise you on good practices concerning the creation of a mapping between the source system's data structure and the data structure of the Category Module in Symplectic Elements.
2. **Configuration of Symplectic Elements**. We will assist you with configuring Symplectic Elements to correspond to your required data structure, where this is possible.
3. **First iteration import (on non-Production)**. We will run the data import process into your non-production instance, before we ask you to review the import results and provide us with feedback on changes required for the next iteration import.
4. **Second iteration import (on non-Production)**. We will run the data import process into your non-production instance, before we ask you to review the import results and provide us with feedback on changes required for the next iteration import.

5. **Final iteration import (on Production)**. We will run the data import process into your production instance.
6. **(For data feed) Schedule**. In case of an ongoing feed, we will schedule it.
7. **(For data feed) Notification.** In case of an ongoing feed, we will provide email notifications (success and failure).

Description of Additional Services

1. Mapping.

We will advise you on good practices concerning the creation of a mapping between the source system's data structure and the data structure of the Category Module in Symplectic Elements.

We will provide you with input file templates that must be used in conjunction with the data import. These are in CSV format and use UTF-8 encoding.

We will provide you with access to our secure FTP server as the location to which you will upload the files.

After the mapping process is done, you will generate the necessary files from the source system into the Digital Science-specified schema, transferring them to the specified location on Digital Science's FTP server.

2. Configuration of Symplectic Elements.

We will assist you with configuring Symplectic Elements to correspond to your required data structure, where this is possible.

3. First iteration import (on non-Production). We will run the data import process into your non-production instance, before we ask you to review the import results and provide us with feedback on changes required for the next iteration import.

4. Second iteration import (on non-Production). We will run the data import process into your non-production instance, before we ask you to review the import results and provide us with feedback on changes required for the next iteration import.

5. Final iteration import (on Production). Once the dataset and mapping are ready for production, we will deploy a separate data import process targeting the production instance, and run the data import process into your production instance.

6. (For data feed) Schedule. In case of an ongoing feed, we will configure the relevant scheduled task(s) to run the importer on a pre-agreed schedule.

7. (For data feed) Notification. In case of an ongoing feed, we will configure the importer to send email notifications in case of both success and failure and share relevant logs via the same FTP location where the files are to be uploaded.

Assumptions / Dependencies

1. Data

Data must be delivered by the Customer in UTF-8 encoding and conforming precisely to the schema set out in the template files provided in a timely manner.

Data must be of reasonable quality, deduplicated, and in CSV format (including the correct escaping of characters that could be interpreted as delimiters). Data values will be in a readily machine-parseable form.

Data must contain a unique identifier for each referenced user. This identifier must match the unique identifier for that user in your Symplectic Elements User Feed in order that a relationship between the imported records and Symplectic Elements users may be established.

Data from source system can be imported into Symplectic Elements under different sources:

1. “Institutional source” - read-only records, that are not editable by the user
2. “Manual records” - editable records, that are editable by the user, but where administrators are able to lock the entire record, ad-hoc.

Customer will need to advise Digital Science of its preference prior to the first iteration of the data feed.

2. Data Categories

Only Category data is relevant for this SOW.

- **Grants data**, to be housed within the Grants Module of Symplectic Elements, is understood to be all standard grant-related information available at award level and used for the identification and retrieval of a grant. This includes but is not limited to, data elements such as title, funder name and award date.
- **Professional activities data**, to be housed within the Professional Activities Module of Symplectic Elements, is understood to contain information related to the activities associated with an individual’s professional life. This includes but is not limited to, information related to activities such as professional honours or awards, membership of professional bodies, and committee memberships.
- **Publications data**, to be housed within the Symplectic Elements Publications Module may comprise all standard publication-related data used for the identification and retrieval of a bibliographic record. This includes but is not limited to, attributes such as

title, author and unique standard international identifiers. Publications will be imported as an “Claimed” article in the relevant users’ publication list(s).

- **Teaching Activities data**, to be housed within the Teaching Activities Module of Symplectic Elements, is understood to be all standard teaching-related information used for the identification and retrieval of an individual’s teaching responsibilities. This includes but is not limited to, data elements such as courses taught and students supervised.

3. On-going Operation

Symplectic Elements Category Data Feed OR Migration, is a service that uses automation tools to import the provided data via the most recent Elements API endpoint.

In case of an ongoing feed, as part of the Customer’s subscription to Symplectic Elements, Digital Science will maintain its automation tools where doing so is required to preserve compatibility with the latest Elements API as Symplectic Elements is upgraded in the future. However, the data feed and provided data files together form a custom integration with Symplectic Elements, as defined in Ongoing Maintenance of Elements Customisations & Custom Integrations. Please see that document for the Customer’s responsibilities relating to the maintenance of custom integrations.

Support for the data feed is available under the *Client Customisation & Environment Support* area of support in the Symplectic Elements Service Level Agreement.

In the event that new Symplectic Elements functionality is released, it is the Customer’s responsibility to request changes to the data feed where there is a desire to leverage such functionality. This usually entails changing the way the data files are generated. Any associated assistance is chargeable.

The Customer should inspect the log output of the data feed regularly in order to detect any issues with incorrect functioning, whether caused by unexpected data file content or by other factors.

Acceptance Criteria

- Data is loaded in Symplectic Elements
- Relationships between users and data in Symplectic Elements are established.

You will be deemed to have accepted a Deliverable if: (a) you fail to notify us in writing of your assessment of a Deliverable within five (5) Working Days of a written reminder notice from us (which may be by email) requesting such acceptance, having already failed to provide such assessment within the Acceptance Period; or (b) where a Deliverable is software, by using that Deliverable in a production environment.

Communication Plan

Digital Science makes use of the Asana project management platform for running our project in a collaborative manner with you. An Asana project will be made available for the

management and delivery of the services described in this SOW. All normal communication relating to this project should take place on this platform.

The following roles should be made available for project governance, where required.

Role (Digital Science)			Role (Customer)	
Project Manager			**Project Manager**	
Name:			Name:	
Email:			Email:	
Head of Project Services			**Business Owner**	
Name:	Kay Lino		Name:	
Email:	k.lino@digital-science.com		Email:	
SVP Client Services			**Executive Sponsor**	
Name:	Geirmund Knutsen		Name:	
Email:	g.knutsen@digital-science.com		Email:	

Draft Delivery Plan

For planning purposes, the following is a draft high-level delivery plan based on projects of similar scope. Development of a final project schedule and the setting of an official project start date will occur within 30 days of us receiving the signed SOW.

Symplectic Elements Category Data Feed OR Migration			
#	**Task**	**Duration**	**Resource**
1	Mapping	3	Both
2	Configuration of Symplectic Elements	1	Digital Science
3	First Iteration (on Non-Production)	2	Both
4	Second Iteration (on Non-Production)	2	Both
5	Final Iteration (on Production)	1	Both
Minimum duration for this service		**8 weeks**	

Note, the time periods described and the successful completion of each task are dependent on the timely performance of the duties and other obligations assigned to the Customer, as well as availability and quality of any data and other inputs to be provided by the Customer.

If the Customer wishes to delay, or put it on hold, any stage of the project, a written request must be submitted for approval by the Digital Science Project Manager.

Fees for the Additional Services

[If this SOW was in-scope of the original Order Form] Fees payable in respect of the work described in this SOW are as set out in the Symplectic Order Form, and will be invoiced as follows:

- 50% upon signing of the SOW
- 50% upon acceptance

*[If this SOW was not in-scope of the original Order Form]*Fees payable under this SOW shall be [CCY Amount] (excl. taxes) and will be invoiced as follows:

- 50% upon signing of the SOW
- 50% upon acceptance

Email for POs: operations@digital-science.com

Email for invoices: invoices@digital-science.com

Signature

SIGNED for and on behalf of

Digital Science & Research Solutions, Inc.

Name:

Position:

Date:

SIGNED for and on behalf of

Customer Name

Name:

Position:

Date:

SOW #00n Symplectic Elements Repository Integration for DSpace/Eprints/Figshare

[If this SOW was in-scope of the original Order Form] This SOW is made pursuant to the Symplectic Elements Order Form with Start Date Order Form Start Date between Digital Science and Research Solutions Inc and Customer Name (the "Agreement").

[If this SOW was not in-scope of the original Order Form but the customer has agreed the DS General Terms as part of the contract with us] Digital Science and Research Solutions Inc and Customer Name entered into a Symplectic Elements Order Form with Start Date Order Form Start Date, and now wish to agree Additional Services in connection therewith pursuant to the 'Digital Science General Terms and Conditions' (the "Agreement").

*[If this SOW was not in-scope of the original agreement and we contracted on the basis of a customer contract template (if this is the case, please make sure this SOW is sent for legal review before being shared with the customer)]*This SOW is made pursuant to the '[Agreement]' dated [Agreement date] between Digital Science and Research Solutions Inc and Customer Name (the "Agreement").

This SOW shall form part, and be subject to the terms and conditions of the Agreement. In the event of a conflict between the terms and conditions of this SOW and the terms and conditions of the Agreement, the former shall prevail.

Terms defined in the Agreement shall bear the same meanings in this SOW, save where expressed to the contrary.

This SOW sets out agreed Additional Services, as described below.

Project Overview

In providing Symplectic Elements Repository Integration for DSpace/Eprints/Figshare, we will work with you to carry out the following:

1. *[If Figshare, keep]*Aligning user accounts and user IDs across Figshare and Symplectic Elements
2. Configuring your Repository Tools connector
3. Developing a crosswalk map file for harvesting metadata from the repository to Symplectic Elements
4. Developing a crosswalk map file for depositing metadata and files from Symplectic Elements to the repository
5. (If required) Create a relevance scheme to define the behaviour of automated metadata updates

Description of Additional Services

Symplectic Elements offers a DSpace/Eprints/Figshare repository integration that supports

harvest, deposit and monitoring functionality. A Repository Tools 2 DSpace/Eprints/Figshare integration provides detailed oversight of actions occurring within an integrated repository and makes a wide range of repository information available within Symplectic Elements for data reuse and reporting.

[If Figshare, keep this paragraph] Digital Science will work with you to ensure user accounts and user IDs are aligned between Figshare and Symplectic Elements. This supports key functionality within the integration and ensures the systems stay synchronised.

A repository integration will connect Symplectic Elements with your DSpace/Eprints/Figshare Repository using the repository's own API. Records harvested from the repository into Symplectic Elements will be matched to outputs already in Symplectic Elements, including records deposited in the repository by sources other than Symplectic Elements.

By the same harvesting process, your Symplectic Elements system will receive metadata updates from the repository. This ensures the data from DSpace/Eprints/Figshare is represented in both systems and also provides metadata to Symplectic Elements for reporting, monitoring and reuse.

In order to ensure the accurate transfer of bibliographic and other metadata from the repository into Symplectic Elements we use mapping configurations called Crosswalks which translate between the two systems. For Repository Tools 2 there are two different types:

- **Harvest Crosswalks** - to enable metadata records to be pulled from the repository into Symplectic Elements, and
- **Deposit Crosswalks** - to enable metadata records to be pushed from Symplectic Elements into the repository.

For each crosswalk, Digital Science will provide a default crosswalk map and will assist in configuring this crosswalk map to match your local metadata structures. At the beginning of preparing each crosswalk, Digital Science will work with you to review the metadata structures in both the repository and in Symplectic Elements, and discuss your priorities.

If our initial evaluation of the metadata structures indicates that the standard number of days for configuration of the default mapping is likely to be significantly exceeded (because, for instance, of complex mapping requirements or very large numbers of metadata fields or output types), we will inform you and agree a revised estimate of the number of days likely to be required. This may result in an additional charge which we will agree with you before commencing the work.

As a guide the standard number of days for the configuration outlined in this statement of work will typically cover:

- Creating the default mapping including simple one-to-one mappings for all fields and more complex mappings for 5-10 fields.
- Adding 30-40 field mappings (marked as "custom fields") to vary from the default mapping for specific publication types (eg. 5 per type for 8 different publication types).

Once the crosswalk frameworks are in place responsibility for crosswalk maintenance becomes yours.

Assumptions / Dependencies

You will:

- *[If Figshare, keep]* Work with Digital Science to align user accounts between the two systems.
- Identify metadata mappings required for crosswalks.
- Be familiar with the administration and configuration procedures for your repository.
- Provide details of current and desired repository configurations and workflows.
- *[If DSpace/Eprints, keep]*Configure the repository API.
- *[If DSpace/Eprints, keep]*Configure appropriate ports and firewalls.
- *[If DSpace/Eprints, keep]*Provide the username and password for a repository user account with admin privileges (the 'RT2 service user account'). This account should be a generic (i.e. non-personal) admin account accessible to repository admins.
- *[If Figshare, keep]*Work with the Digital Science team as necessary to ensure that Symplectic Elements has admin-level access to the Figshare API.

Acceptance Criteria

Symplectic Elements and the repository have a working repository connection that can successfully send data to and receive data from the repository. This includes:

1. *[If Figshare, keep]*User accounts and user IDs have been aligned between Figshare and Symplectic Elements.
2. Symplectic Elements is able to successfully harvest metadata records of publications from the repository with accurately crosswalked metadata.
    a. Verify that the defined repository collections have been harvested into Symplectic Elements.
    b. Verify that repository metadata has been correctly mapped for the crosswalk (as per the agreed mappings) and included in the harvest.
    c. Manually add/remove/edit data within the repository. Re-run the harvest and verify that the changes have been applied.
    d. Verify that the harvest refreshes data regularly as per supplied Digital Science documentation.
3. Users are able to deposit new publications with fulltext into the repository via Symplectic Elements with accurately crosswalked metadata.
    a. Deposit publications via Symplectic Elements and verify that the items have been deposited to the repository as per agreed configurations.

b. Verify that when a publication is deposited, the record is harvested back into Symplectic Elements as per supplied Digital Science documentation.

c. Verify that Symplectic Elements metadata has been correctly mapped for the crosswalk (as per the agreed mappings) and included in the deposit.

4. (If required) Verify that metadata changes in Symplectic Elements result in the appropriate metadata changes in your repository, as defined by the relevance scheme.

5. Repository metadata is available for reporting and monitoring via Symplectic Elements.

    a. Verify that harvested repository records are available for reporting via the Symplectic Elements basic reports and Reporting Database.

    b. Verify the OA monitor is displaying data as per agreed configurations.

    c. Verify OA Monitor functionality is performing as per supplied Digital Science documentation.

You will be deemed to have accepted a Deliverable if: (a) you fail to notify us in writing of your assessment of a Deliverable within five (5) Working Days of a written reminder notice from us (which may be by email) requesting such acceptance, having already failed to provide such assessment within the Acceptance Period; or (b) where a Deliverable is software, by using that Deliverable in a production environment.

Communication Plan

Digital Science makes use of the Asana project management platform for running our project in a collaborative manner with you. An Asana project will be made available for the management and delivery of the services described in this SOW. All normal communication relating to this project should take place on this platform.

The following roles should be made available for project governance, where required.

Role (Digital Science)			Role (Customer)	
Project Manager			**Project Manager**	
Name:			Name:	
Email:			Email:	
Head of Project Services			**Business Owner**	
Name:	Kay Lino		Name:	
Email:	k.lino@digital-science.com		Email:	
SVP Client Services			**Executive Sponsor**	
Name:	Geirmund Knutsen		Name:	

Email:	g.knutsen@digital-science.com		Email:	

Draft Delivery Plan

For planning purposes, the following is a draft high-level delivery plan based on projects of similar scope. Development of a final project schedule and the setting of an official project start date will occur within 30 days of us receiving the signed SOW.

Symplectic Elements Repository Integration			
#	**Task**	**Duration**	**Resource**
1	Preparation	5	Both
2	Develop and test the crosswalk map files (non-PROD)	30	Both
3	(If required) Configure OA Monitor (non-PROD)	5	Both
4	(If required) Configure automated metadata updates (non-PROD)	5	Both
5	Full harvest & final testing (non-PROD)	15	Both
6	Deployment on Production	1	Both
Minimum duration for this service		**12 weeks**	

Note, the time periods described and the successful completion of each task are dependent on the timely performance of the duties and other obligations assigned to the Customer, as well as availability and quality of any data and other inputs to be provided by the Customer.

If the Customer wishes to delay, or put it on hold, any stage of the project, a written request must be submitted for approval by the Digital Science Project Manager.

Fees for the Additional Services

[If this SOW was in-scope of the original Order Form] Fees payable in respect of the work described in this SOW are as set out in the Symplectic Order Form, and will be invoiced as follows:

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- 50% upon acceptance

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- 50% upon signing of the SOW
- 50% upon acceptance

Email for POs: operations@digital-science.com

Email for invoices: invoices@digital-science.com

Signature

SIGNED for and on behalf of	SIGNED for and on behalf of
Digital Science & Research Solutions, Inc.	**Customer Name**
Name:	Name:
Position:	Position:
Date:	Date: