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CHORUS Helps Drive Public Access

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Public access to published research is growing quickly. Initiatives like CHORUS—which went into production in July 2014—and the US Department of Energy’s Public Access plan—announced in August 2014—are just two examples of the accelerating projects in the public access space. The continuing move to online publication of research, exponential increase in data collection, and expansion of public access mandates globally are just some of the factors that make scholarly communications so much more complex today than they were 20 years ago.

As a result, publishers have invested significantly in tools and services to help make the research process more efficient and effective—from manuscript submission systems to CrossRef DOIs to ORCID unique identifiers for researchers. CHORUS—the Clearinghouse for the Open Research of the United States—is a new, not-for-profit, publisher-led initiative designed to help implement public access to the articles resulting from US federally-funded research, as required by the Office of Science and Technology Policy’s February 2013 memo.

The CHORUS pilot project launched in Fall 2013. On July 31, 2014, CHORUS went into production and a few days later, on August 4, the US Department of Energy (DOE), announced that it would “collaborate with CHORUS on our implementation of public access to scholarly publications resulting from DOE-funded research.”

CHORUS supports public access to federally funded research by acting as an information bridge, linking the public to freely accessible journal articles directly on publisher platforms, where the articles can be read and preserved in their scholarly context. Its open technology platform leverages publishers' existing infrastructure, avoids duplication of effort, minimizes cost to the government, taxpayer, and grantee institutions, and ensures the continued availability of the research literature.

CHORUS Provides Five Core Functions:

- **Identification** - One of the major challenges for funders is simply identifying which published articles have resulted from their funded research. Most agencies don't have good systems for tracking this information themselves and, until recently, researchers have not had an easy way to provide this information. Now though, thanks to the introduction of CrossRef's FundRef service, solutions exist for both of these problems. As of the time of writing, FundRef includes information on well over 7,000 funders globally. CHORUS incorporates the relevant data on US funders. All the researchers need to do is to name their funding source during the submission process. This adds the relevant metadata, which can trigger public access to the article.
- **Discovery** - CHORUS has been designed to facilitate discovery of the latest research articles via agency portals and common search engines, as well as through its own Search application. To date, CHORUS has taken advantage of existing open application programming interfaces (APIs) from organizations like CrossRef and ORCID. Plans are underway to issue CHORUS-specific APIs to help innovators create new tools and functionality that further support public access. CHORUS is leveraging existing tools, like CrossRef's new Text and Data Mining services, to eliminate much of the time and effort that has been spent in the past to set up machine access to scholarly content. CHORUS directly commented on the draft of the NISO Open Access and Metadata Indicators Working Group (recently renamed to Access License and Indicators; see separate article on page 35) and is eager to make best use of the forthcoming Recommended Practice within CHORUS.

CHORUS

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- **Access** - Even when readers have found the article(s) they need, it's not always easy to find the best available version. Multiple versions may exist online, some of which may be pre-publication prints and could contain errors or misinformation that were corrected in the published or later version. CHORUS points users to the best available version (accepted author manuscript or Version of Record) of articles on their publisher publication sites, where essential context, tools, and information, either immediately at publication or after an embargo period, are openly accessible.
- **Preservation** - Everyone involved in scholarly communications recognizes the importance of preserving access to research. CHORUS ensures the integrity and sustainability of the scholarly record through partnerships with CLOCKSS, Portico, and other services that archive and preserve research articles in perpetuity. These agreements have been set up to ensure that, irrespective of journal transfers, evolving publisher policies, or other future changes, readers will continue to have access to the articles arising from publicly funded research.
- **Compliance** - Tracking compliance with funder requirements for authors to identify funded articles when published is another critical issue for funders and institutions alike. By integrating FundRef data from CrossRef, CHORUS makes it easy for authors to comply with these requirements, while the CHORUS Dashboard service facilitates monitoring and reporting by funders and institutions, without adding unnecessary costs and administrative overhead.

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Next Steps

Even though CHORUS is now officially in production, there is still much work to be done. For example, the CHORUS Search tool is currently in beta. Results returned identify articles that report on agency funded research from our growing database, but these articles may or may not be publicly accessible at this time as the implementation of various agency policies is still underway. In the near future, CHORUS will introduce a method to clearly identify publicly accessible articles in search results. Other areas of focus for development include work on a standard way to surface publishers' article reuse terms, improved dashboards for monitoring the status of articles in the CHORUS system, integration with the SHARE notification system (see separate article on SHARE on page 29), and better integration with our dark archive partners.

The new CHORUS website will feature improved navigation, more information, and seamless integration with the dashboard and search services—all branded with the new visual identity. Very importantly, it will support CHORUS' membership marketing and activities. As a new organization, CHORUS has benefited—and continues to benefit—from the generous support of a number of publishers and publishing organizations. We are now introducing a range of membership options to help ensure the future sustainability of CHORUS

and its parent organization, CHOR, Inc. These include sliding-scale, fee-based Publisher Membership and Affiliate Membership (for non-publisher organizations and businesses involved in scholarly publishing), as well as gratis Funder Partner and Academic Supporter options.

Continuing to collaborate over the coming months with funders and with other organizations such as SHARE—with whom we are already working on common standards and technologies for persistent identifiers and metrics—will also be critical to CHORUS's future success. Looking further ahead, while CHORUS is focused on providing a neutral, stable, and effective platform to help increase public access to peer-reviewed publications arising out of US Government-funded research, addressing connections to publicly accessible data and international concerns are also being investigated.

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CHORUS

<http://chorusaccess.org/>

CrossRef

<http://www.crossref.org/>

FundRef

<http://www.crossref.org/fundref/index.html>

NISO Access License and Indicators Working Group

<http://www.niso.org/workrooms/oami/>

ORCID

<http://orcid.org/>

Office of Science and Technology Policy's February 2013 memo

http://www.whitehouse.gov/sites/default/files/microsites/ostp/ostp_public_access_memo_2013.pdf

US Department of Energy Public Access plan

<http://www.energy.gov/downloads/doe-public-access-plan>

US DOE and CHORUS collaboration announcement

<http://chorusaccess.org/july-2014-chorus-to-work-with-DOE/>

CLOCKSS

<http://www.clockss.org/clockss/Home>

Portico

<http://www.portico.org/digital-preservation/>

SHARE

<http://www.arl.org/focus-areas/shared-access-research-ecosystem-share>



RELEVANT
LINKS