



*Advancing Public Access to Research*

# Consuming Identifiers: A Tale of Knitting

STM US Conference, 27 April 2016

Howard Ratner, Executive Director

[hratner@chorusaccess.org](mailto:hratner@chorusaccess.org)

[@chorusaccess](#) | [www.chorusaccess.org](http://www.chorusaccess.org)

Access • Discovery • Compliance • Identification • Preservation

# CHORUS

CHORUS advances sustainable, cost-effective public access to articles reporting on funded research in ways that benefit all in the scholarly communications community.

- 501(c)(3) not-for-profit membership organization
- Maximizes interoperability by employing widely used standards and infrastructure
- Policy agnostic – works across a spectrum of funder policies, gold and green OA business models, publishing platforms
- Broadens the dialogue among publishers, societies, funders, service providers, researchers, and other stakeholders

**OXFORD**  
UNIVERSITY PRESS



American Chemical Society

**Science**  
AAAS



**OSA**  
The Optical Society

**AIP**  
Publishing

THE ROCKEFELLER  
UNIVERSITY  
PRESS



Association for  
Computing Machinery

**PNAS**

**American  
Diabetes  
Association**

**APS**  
physics

**AMS**  
AMERICAN MATHEMATICAL SOCIETY  
www.ams.org



Taylor & Francis Group  
an informa business

**ASCO**



**AGU**

*The Company of  
Biologists*



Society of Exploration Geophysicists  
*The international society of applied geophysicists*



PLUS OVER 118  
SIGNATORIES

**ACA**

**AAPT**  
PHYSICS EDUCATION

**GSA**  
Genetics Society of America

**IOP Publishing**



Hindawi

**ASME**



THE  
ROYAL  
SOCIETY  
**WILEY**



AMERICAN  
PSYCHOLOGICAL  
ASSOCIATION



**ELSEVIER**

**IEEE**

**Atypon**



**CAMBRIDGE**  
UNIVERSITY PRESS



**AIAA**  
Shaping the Future of Aerospace

**SPRINGER NATURE**

**Aries**  
systems  
Publish Faster. Publish Smarter.

**semantic**

**siam**

**STM**  
The global voice of scholarly publishing

**AAP}** PROFESSIONAL  
AND SCHOLARLY  
PUBLISHING



The Association of  
Learned & Professional  
Society Publishers

**SILVERCHAIR**  
INFORMATION/SYSTEMS



HighWire

**Cenveo**  
publisher services

# US Agencies & CHORUS



**Department of Defense**  
Announced Partnership  
on 3 February 2016  
Signed Agreement on  
18 December 2015



**Smithsonian  
Institution**

**Smithsonian**  
Announced Partnership  
on 18 August 2015  
Signed Agreement on  
24 June 2015



**National Science  
Foundation**  
Announced Partnership  
on 30 November 2015  
Signed Agreement on  
1 October 2015

**NIST**

**NIST**  
Signed Pilot Agreement  
on 9 July 2015



**US Geological Survey**  
Announced Partnership  
on 16 November 2015  
Signed Agreement on  
23 October 2015



**US Department of  
Energy**  
Announced Partnership  
on 4 August 2014  
Signed Agreement on  
15 April 2015

*Active discussions with 5-10 other US federal agencies*

# How Does CHORUS Help?

**Identification**

**Discovery**

**Compliance**

**Preservation**

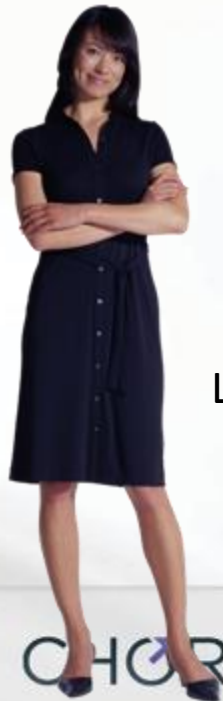
**Access**



Agency



Researcher



Librarian

Office of  
Research



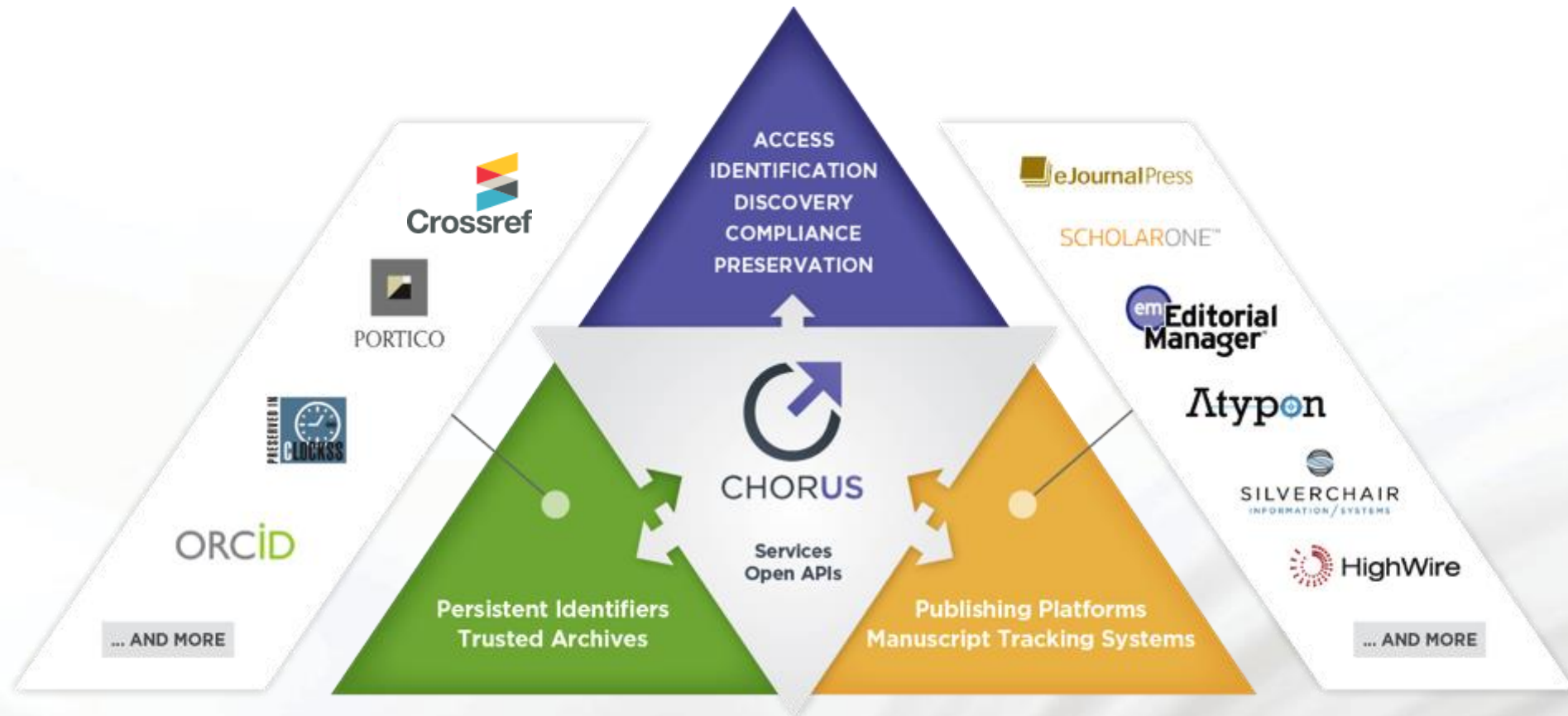
Publisher



Public

# Cost-effective Public Access Solution

*Builds on Existing Infrastructure*





# How CHORUS Works: Access



Embargo Period Expires  
or Author/Funder Pays for Public Access

Accepted Author Manuscript  
becomes publicly accessible



Version of Record  
becomes publicly accessible



# Identification

**Funding Information**

Please enter the funder name, grant number and the grant recipient. Authors listed in the dropdown menu were added during the Add/Edit/Remove Authors submission step. Click the "+" icon to add another funder. When you are finished, click the "Next" button.

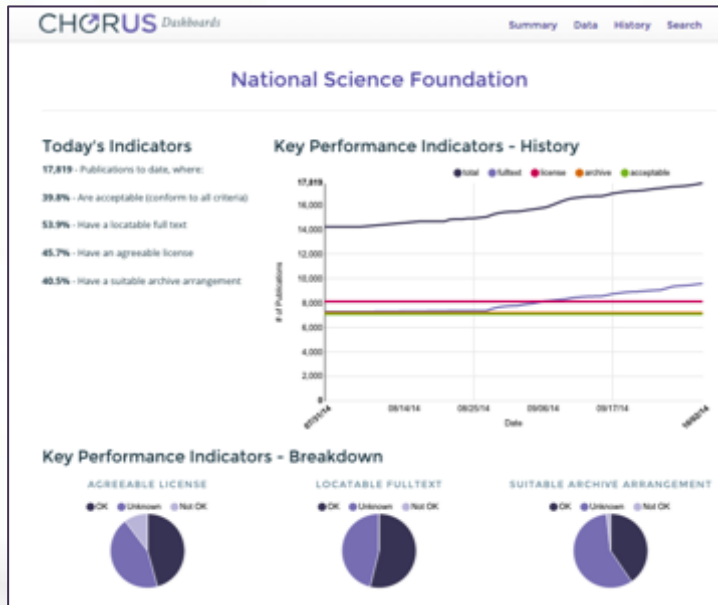
Funder Name	Grant Number	Grant Recipient	Action
Howard Hughes Medical Institute	HH 2055681	Dr. Mary François Smith	🗑️
National Science Foundation	KK9898-5476	Robert Jones	🗑️
National Institutes of Health (US)	897-42-98	Sarah Wilkes	🗑️

Previous Next



# Discovery

# Compliance

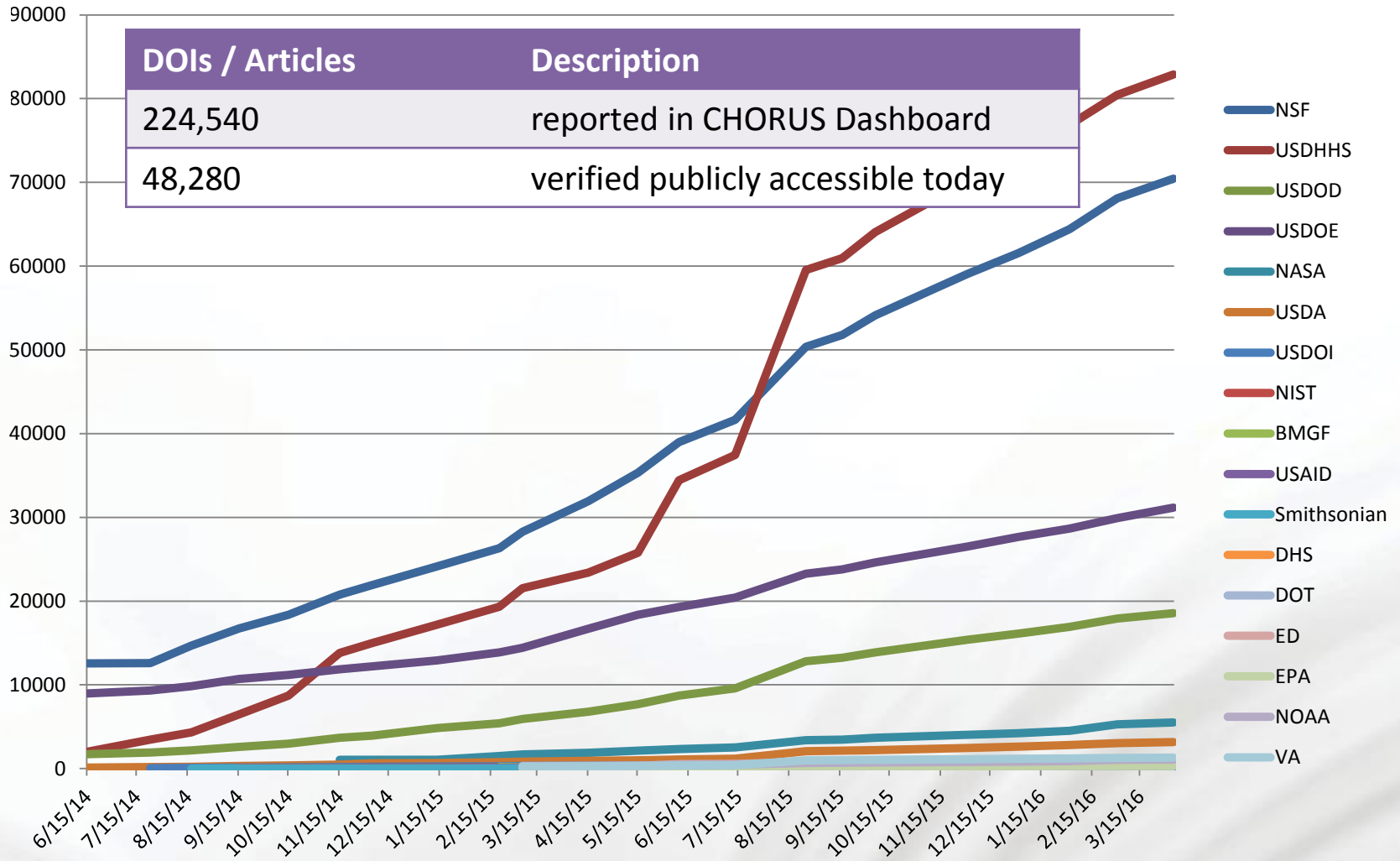


# Preservation



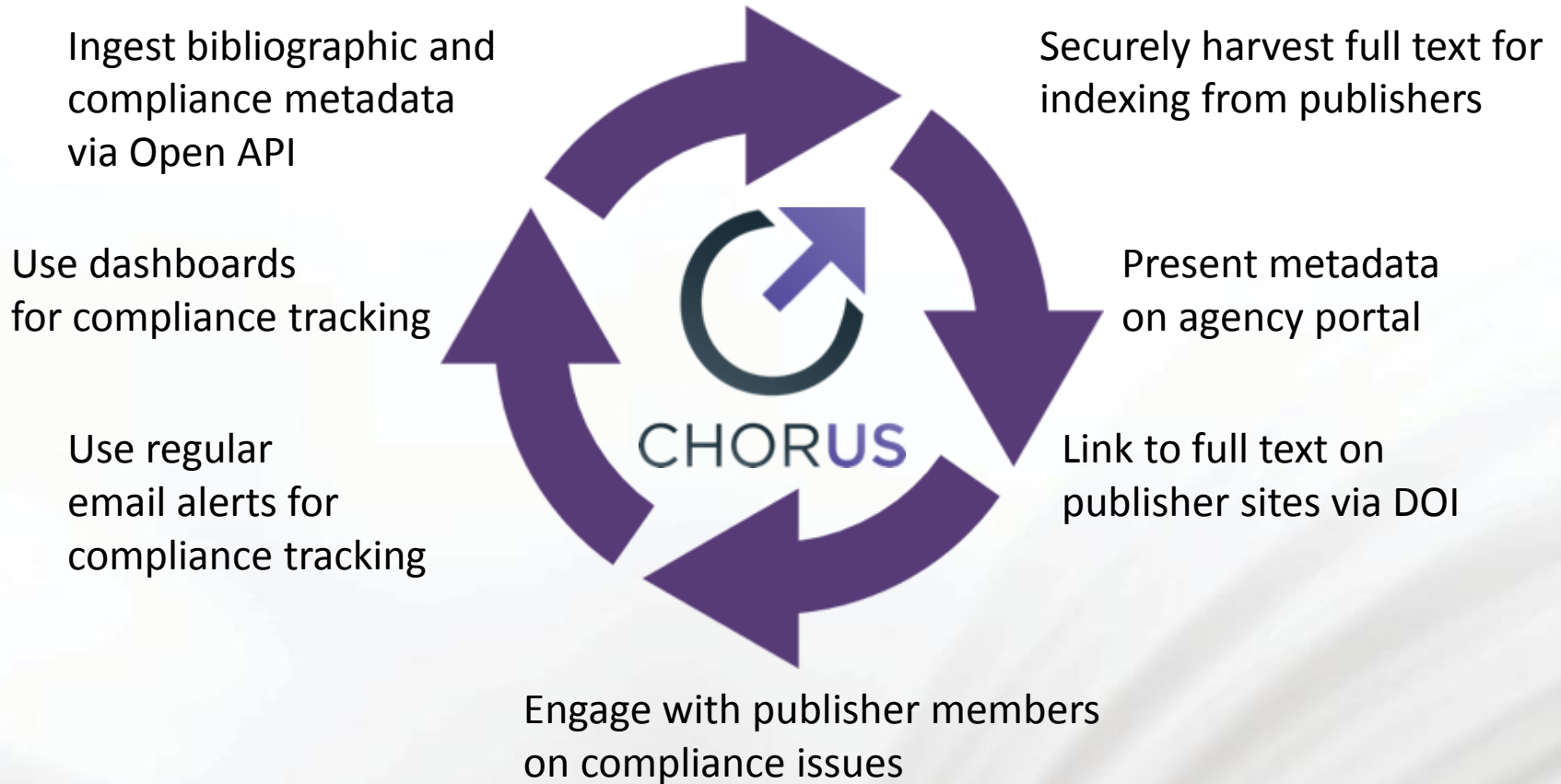


# Monitored Articles by US Agency



as of 4/25/16

# US Agency Interactions



# Using IDs

## ORCID



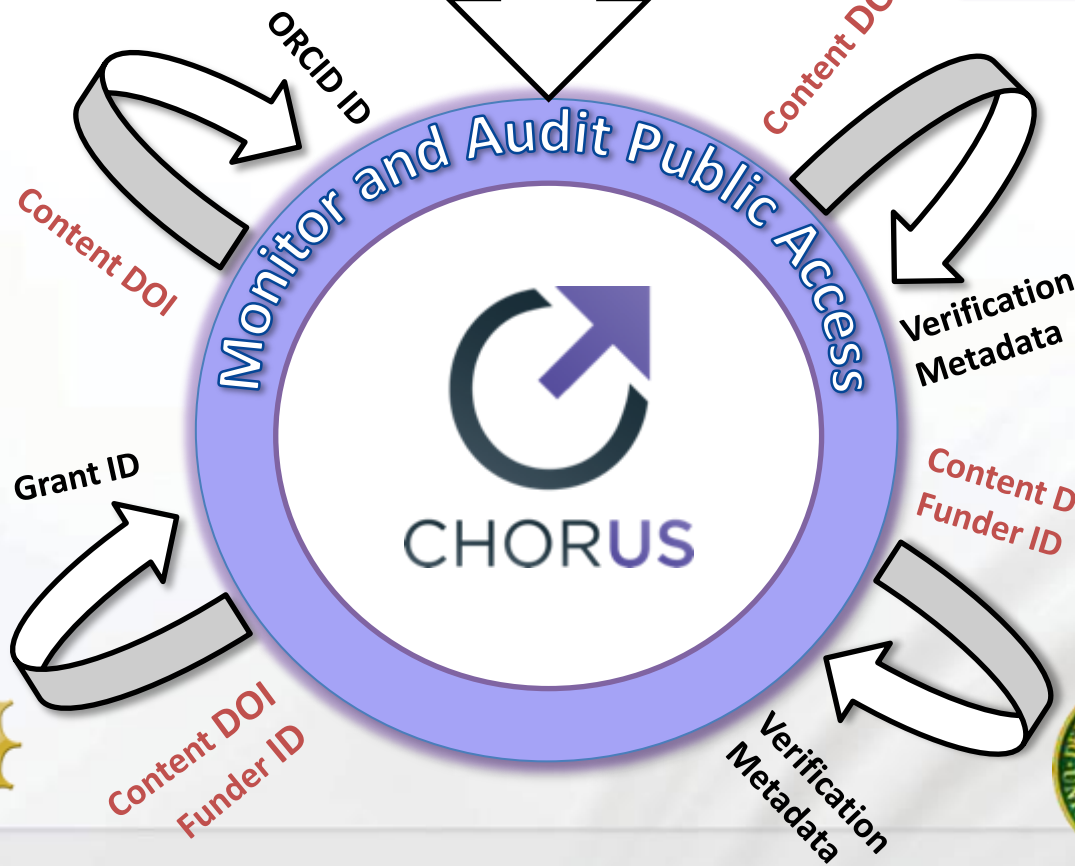
**Publishers**  
Content DOI  
Funder ID



**Crossref**  
Content DOI  
Funder ID



**Monitor and Audit Public Access**



Grant ID

Content DOI  
Funder ID

Verification  
Metadata

Content DOI  
Funder ID

Verification  
Metadata



# Other IDs on the Horizon



# How CHORUS Works: Identification

...built into the author's submission process



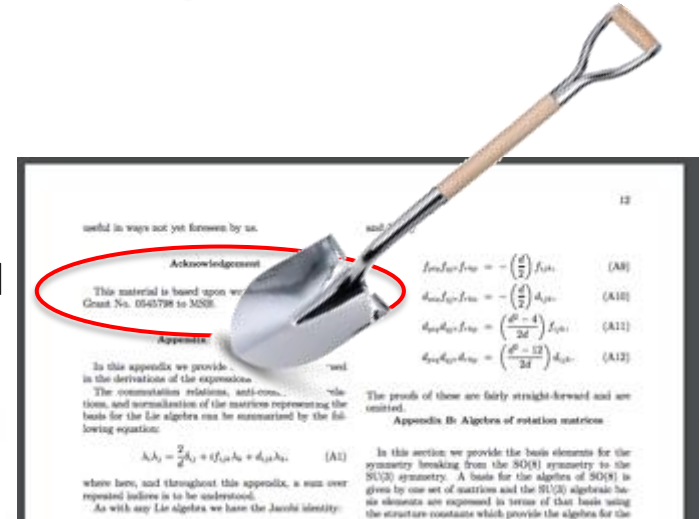
**Funding Information**

Please enter the funder name, grant number and the grant recipient. Authors listed in the dropdown menu were added during the Add/Edit/Remove Authors submission step. Click the '+' icon to add another funder. When you are finished, click the 'Next' button.

Funder Name	Grant Number	Grant Recipient	Action
Howard Hughes Medical Institute	HH 2055681	Dr. Mary François Smith	
National Science Foundation	KK9898-5476	Robert Jones	
National Institutes of Health (US)	897-42-98	Sarah Wilkes	

Previous Next

and  
/  
or



Publisher Host

Atypion  
HighWire  
SILVERCHAIR  
INFORMATION/SYSTEMS



# How CHORUS Works: Identification

*...built into the author's submission process*



**Funding Information**

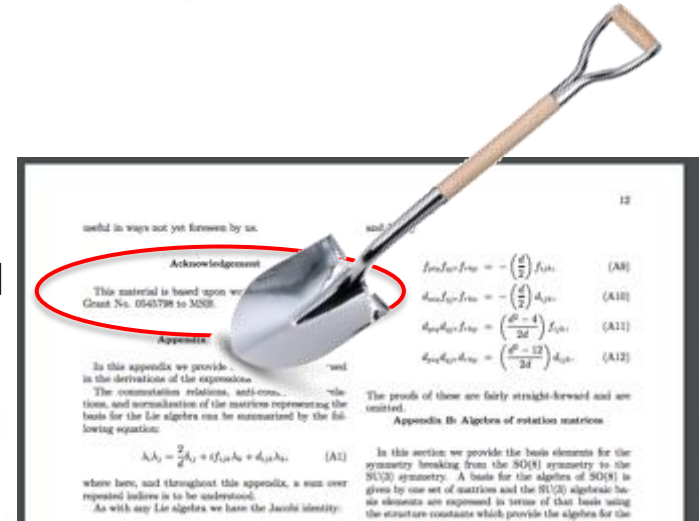
Please enter the funder name, grant number and the grant recipient. Authors listed in the dropdown menu were added during the Add/Edit/Remove Authors submission step. Click the '+' icon to add another funder. When you are finished, click the 'Next' button.

Funder Name	Grant Number	Grant Recipient	Action
Howard Hughes Medical Institute	HH 2055681	Dr. Mary François Smith	
National Science Foundation	KK9898-5476	Robert Jones	
National Institutes of Health (US)	897-42-98	Sarah Wilkes	

+

Previous    Next

and  
/  
or



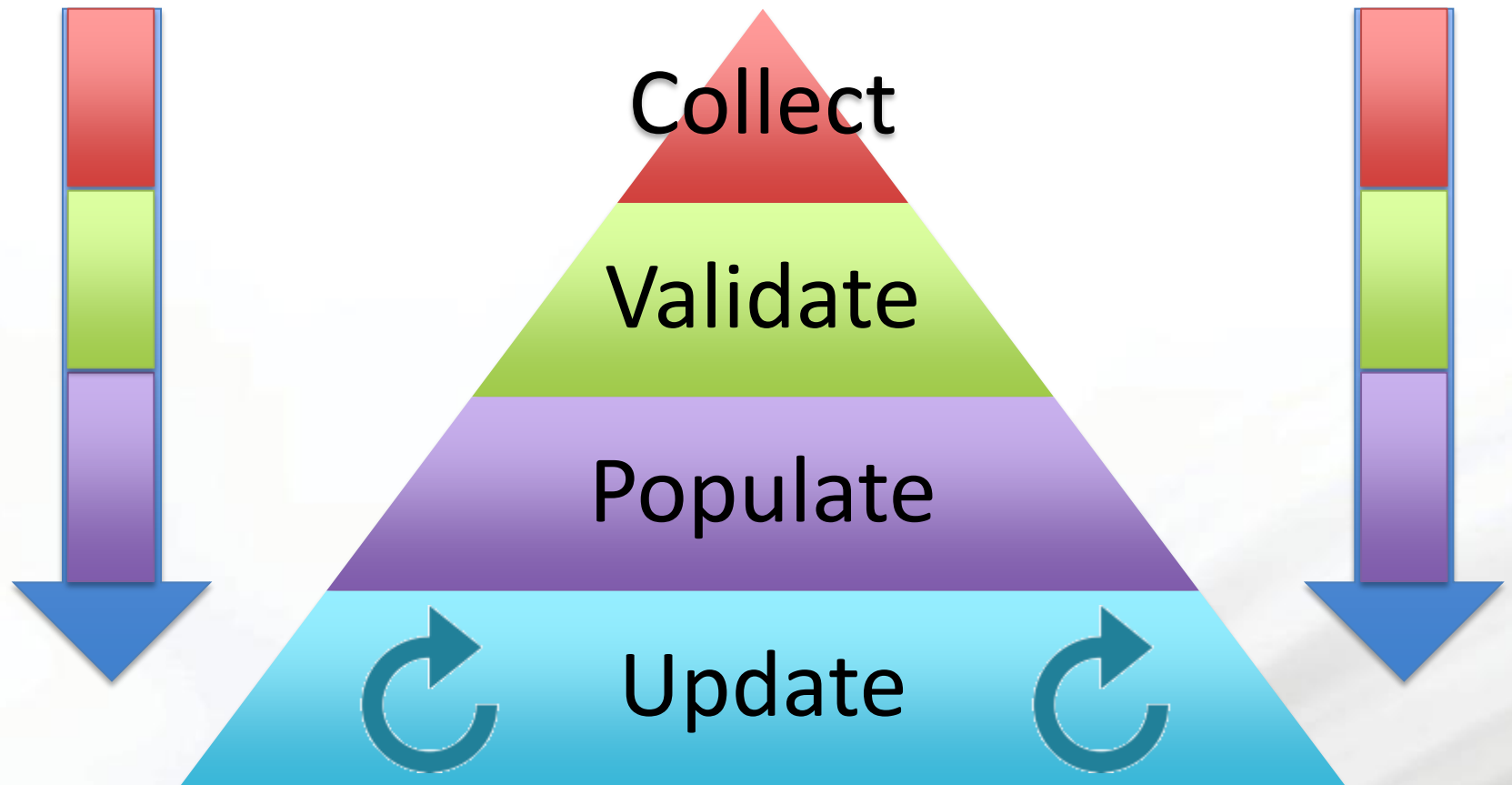
Public Host

Atyp...  
High...  
VERCHAIR  
MATION/SYSTEMS  
...



Create PDF

# Identifier & Metadata Best Practices



# Conclusion

- **Maximize use of existing identifiers:**  
Crossref's Content DOIs | Funder IDs  
ORCID IDs
- **Adopt a few new necessary ones:**  
Data set DOIs | Organization IDs
- **Use best practices:**  
Collect | Validate | Populate | Update



# CHORUS

*Advancing Public Access to Research*

## Thank you!

Contact: Howard Ratner  
[hratner@chorusaccess.org](mailto:hratner@chorusaccess.org)  
[www.chorusaccess.org](http://www.chorusaccess.org)

Follow us on Twitter: [@chorusaccess](https://twitter.com/chorusaccess)

**Access • Discovery • Compliance • Identification • Preservation**