

RDA Annotator Guidelines

Instructions for installing and using the
RDA Annotator

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1. Introduction: why use the RDA Annotator?

RDA members typically consult and reference a large number of web-based resources (websites, publications, and so on) in order to create and formulate their outputs, supplementary materials, and other outputs. In doing so, a large amount of effort is lost in respect of future reuse since the finer context of the resources and references being consulted is often not recorded in the final outputs.

The RDA Annotator allows users to make detailed annotations to web-based resources using textual descriptions, as well as RDA vocabularies and tags that contextualises and categorises the content. Annotations made using the Annotator are then passed to the RDA Knowledge Base, a suite of resources where other RDA community members can access them.

This document describes the installation and use of the RDA Annotator, a browser extension mainly intended for RDA community members, which lets you annotate materials through a simple menu that captures and annotates any material you select on your browser.

2. The RDA Knowledge Base

The RDA Knowledge Base is a mechanism for the publication and cataloguing of the RDA's body of work, e.g. outputs, supplementary materials, and other useful publications. In addition, it provides prior art, specifications, applications and services, recommendations and good practice, or any other resource that were identified by group participants in RDA as being useful in an RDA-related context. To contextualise such resources for RDA use and re-use, annotation of the resources with RDA-related vocabulary would be a starting point, in addition to the usual free-text annotation.

The RDA Knowledge Base provides a set of interrelated resources:

1. **RDA Publisher:** A mechanism for RDA members or their collaborators to publish resources formally to Zenodo by default,¹ and to supplement the metadata typically required by Zenodo with additional, RDA-specific context, using a newly-developed RDA metadata schema.
2. **RDA Graph:** A comprehensive metadata catalogue containing e.g. RDA outputs, members, groups, as well as external, RDA-Relevant, resources such as vocabularies. The RDA Graph is linked to the Zenodo catalogue, allowing but not requiring resources to be published there.
3. **RDA Annotator:** In addition to containing a catalogue of RDA resources, the RDA Graph can be extended to include any other resource on the web that was annotated by an RDA member, using the RDA Annotator. To the extent that these annotations are linked to RDA vocabulary, groups, and members, they can be found and reused by anyone, including the general public. The annotations added via the RDA Annotator are also mirrored to hypothesis.is as free-text annotations, which assists the wider research community with content generated by and on behalf of RDA.
4. **RDA Discovery:**² this includes search and discovery tools, and a dashboard interface, allowing users to find and explore resources from the RDA Graph.

¹ In principle, the system can be configured to publish to other repositories that offer an API service for the purpose.

² <https://rda.dansdemo.nl/>



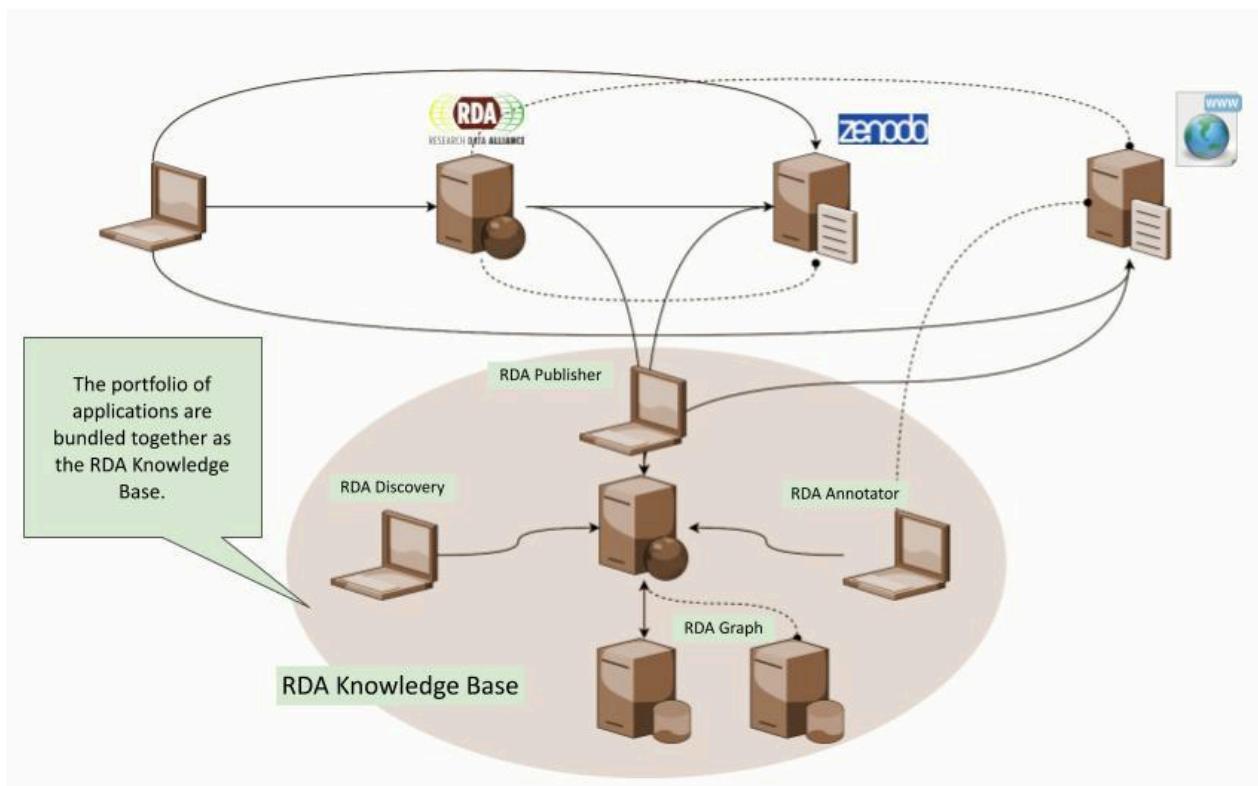


Figure 1: The RDA Knowledge Base, its components, and links to the RDA Website, Zenodo, and other web-based resources



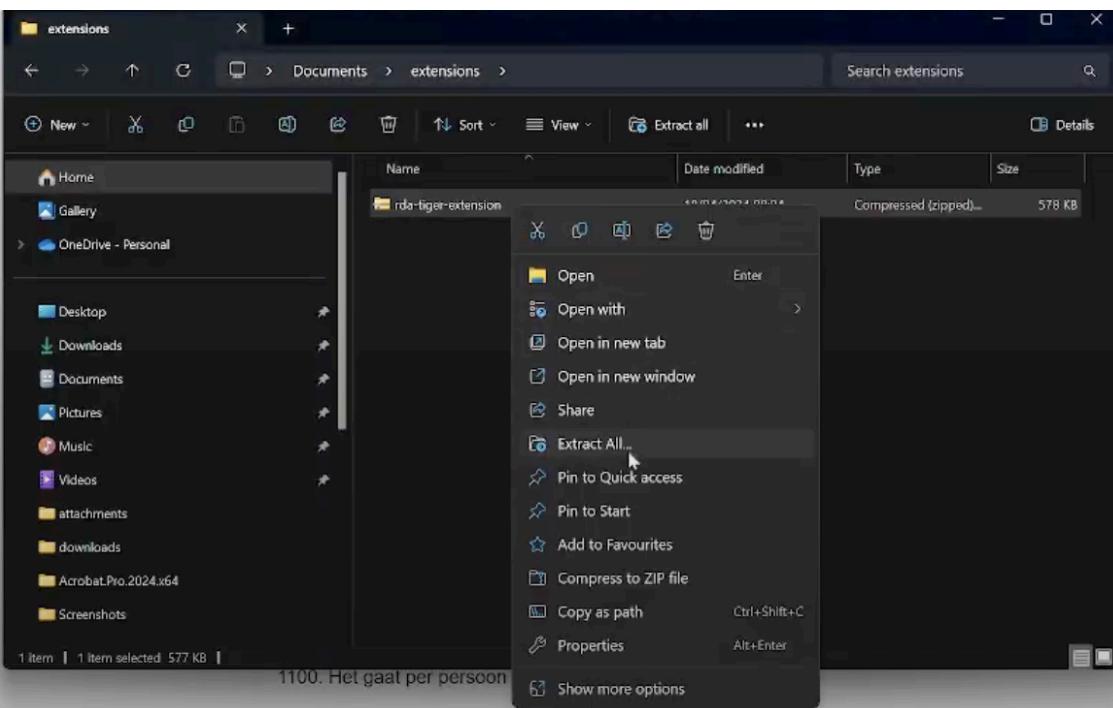
3. Using the RDA RDA Annotator

The 4 sub-sections describe how to install the RDA Annotator; create and save annotations; where annotations are stored; and browse annotations.

3.1. Installation

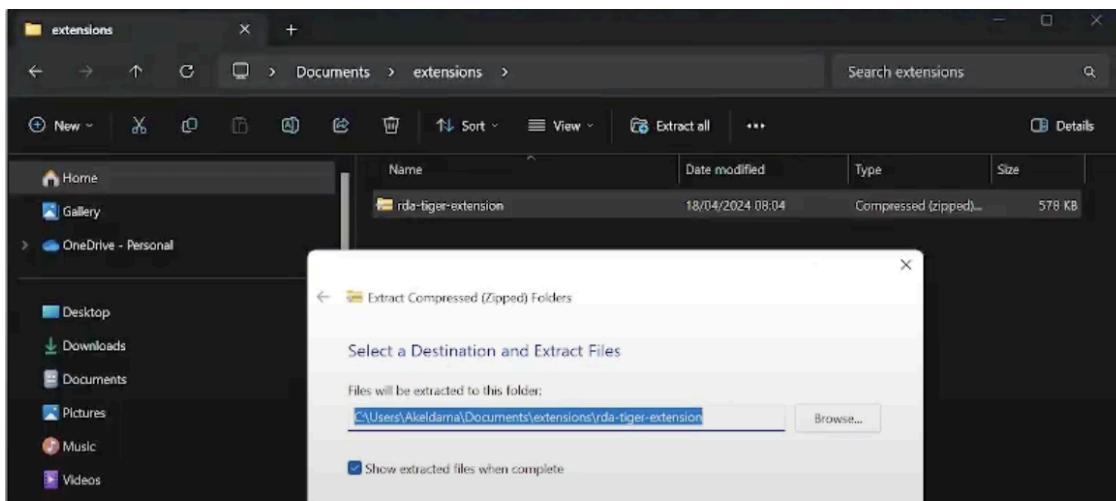
The application consists of a browser extension (also known as a plug-in application) that must be downloaded and activated in your web browser. The latest version can be downloaded at the [RDA Annotator Github Repository](#). The installation process is [illustrated in this video](#). The table below walks you through the same process as well.

To manage the extension, web browsers generally have a settings page to manage plug-ins (as pictured in step 4) that lets you see whether the extension is activated, and what version it is.

Step	Description
1	The steps below demonstrate how to download, install, and activate the RDA Annotator browser extension.
2	First download and expand the zip file containing the browser extension, as shown below, and then extract the files to any suitable location on your local hard drive. 

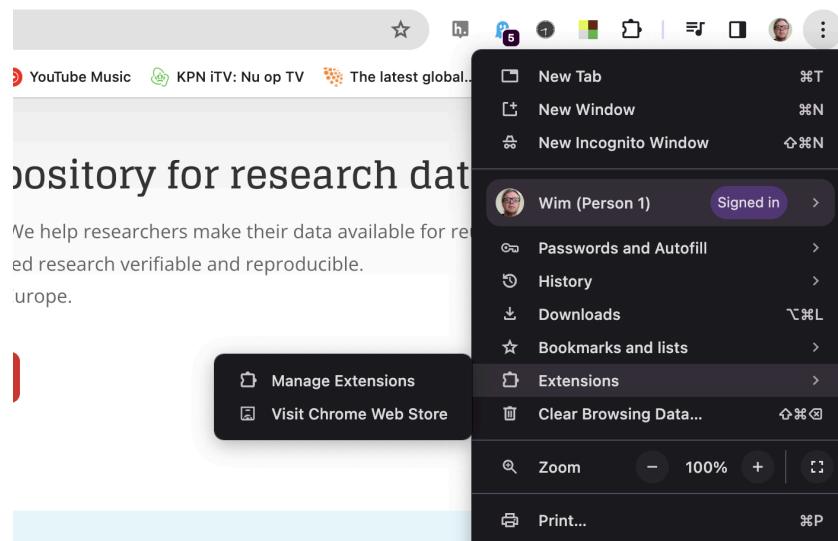


- 3 After expanding the zip file, the application can also be moved to a convenient permanent location on your local hard drive (it's not recommended to leave it in the download folder). Depending on the operating system, one can also specify a target for expansion of the zip file.

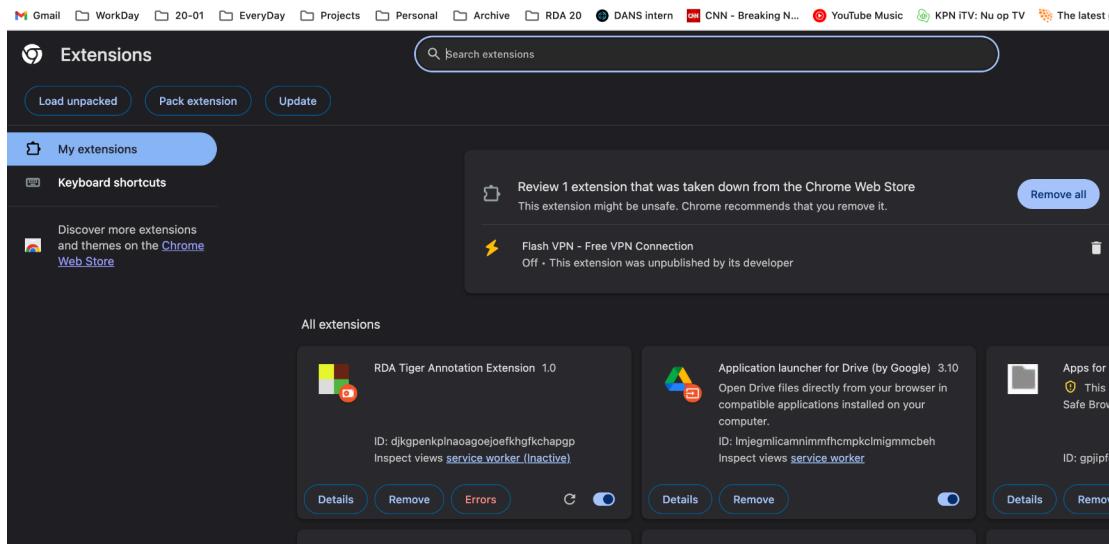


- 4 In the next step, we install the extension in our browser. For the moment, the instructions are meant for Chrome browsers, and depending on the need, more browsers types will be supported in future. The plug-in should also work in Brave.

To add an extension, click the settings icon at the very top right of the browser window. The settings menu will open, and in there an entry for 'Extensions' can be found.



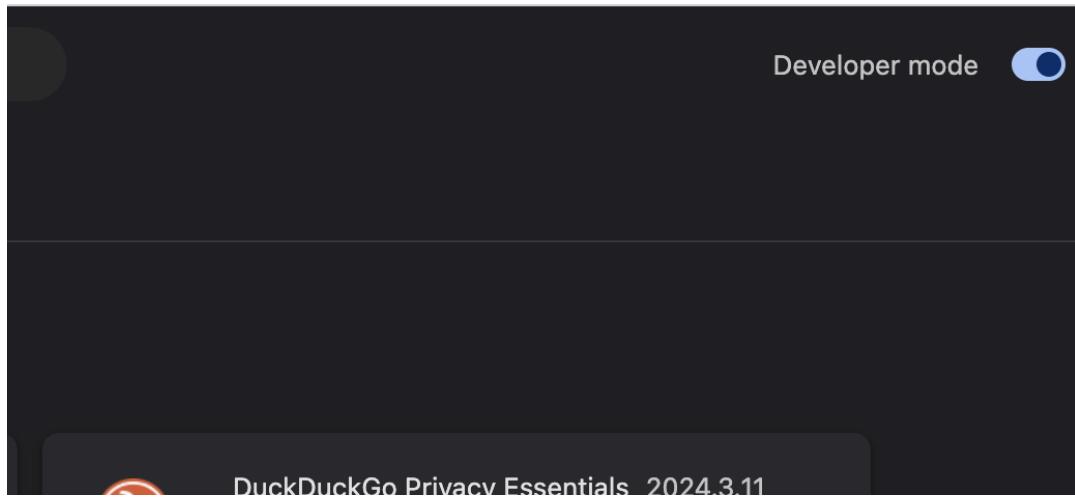
- 5 Click on ‘Manage Extensions’. A page with currently available extensions is shown, and one can add extensions here as well.



- 6 For the RDA Annotator application, one will select an application from disk, and not search for it in Google Play.³

IMPORTANT: To load extensions from disk, the ‘Developer Mode’ has to be enabled. Once the extension is deployed in Google Play, this step will not be needed.

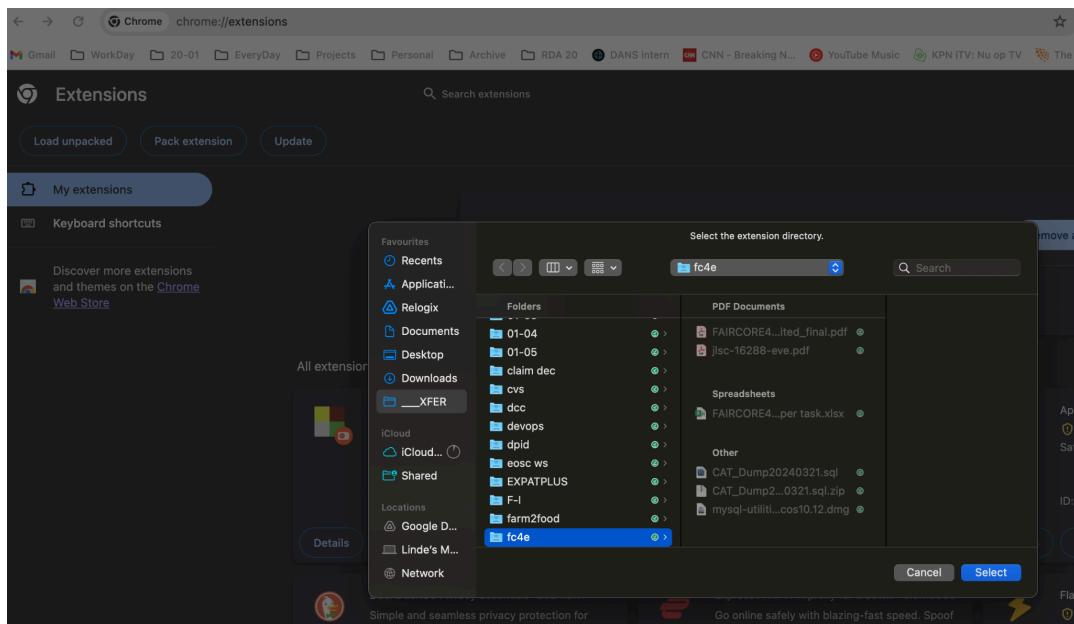
To enable, click the switch at the top right of the ‘Manage Extensions’ page:



³ Once the Plug-In is ready for production use, we will deploy it to Google Play.



- 7 To load the extension, click on the ‘Load Unpacked’ button at the top left, and select the location (folder) where the application has been extracted to (steps 2, 3).



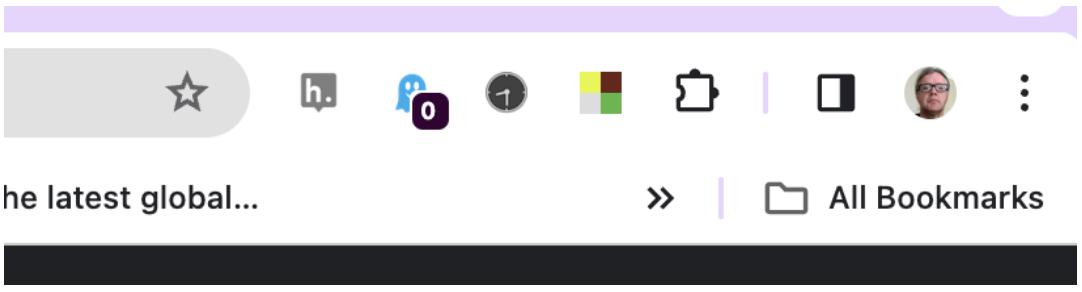
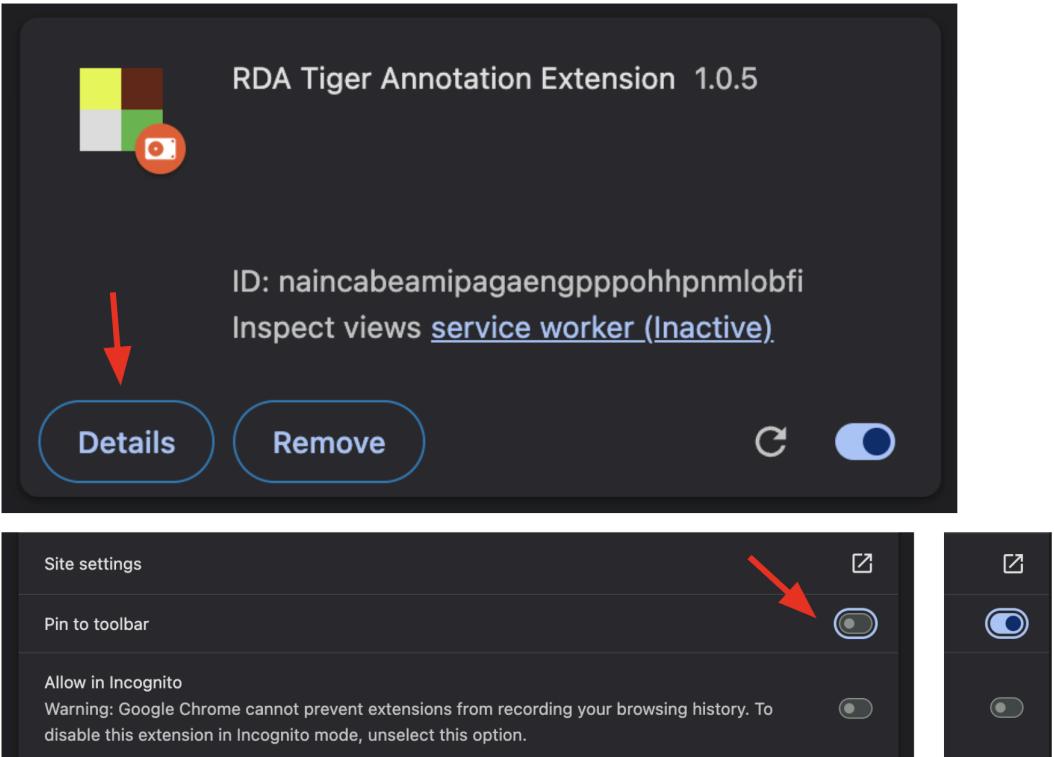
- 7 Once the Plug-In extension has been registered, it will show up in the list of extensions for the browser (note: depending on the browser, it may be found under a “From other sources” category, as below). Clicking the button at the bottom right of the ‘card’ will enable it in the browser.

From other sources



RAWR 0.13.0
 RAWR - RDA Annotator for Web Resources
 ID jkbeiadfhchcdenakoiifcmnfjnmclek
Inspect views No active views
[Details](#) [Remove](#)

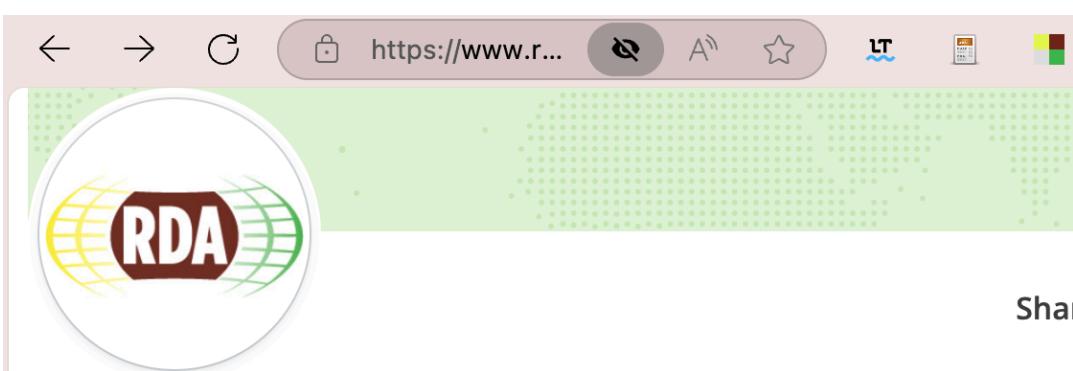
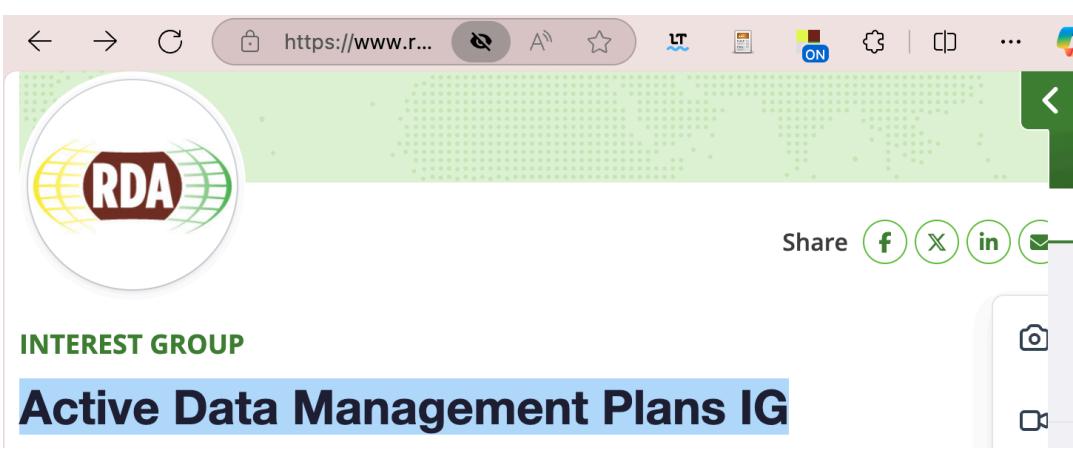
- 8 Once this is done, the extension can be used, but is is far simpler to pin it to the Browser Toolbar so that it is instantly available (top right of your Browser) - it will show as a small RDA icon: 

	
9	To pin the extension to the Toolbar, click the 'Details' button in the 'Manage Extensions Page': 



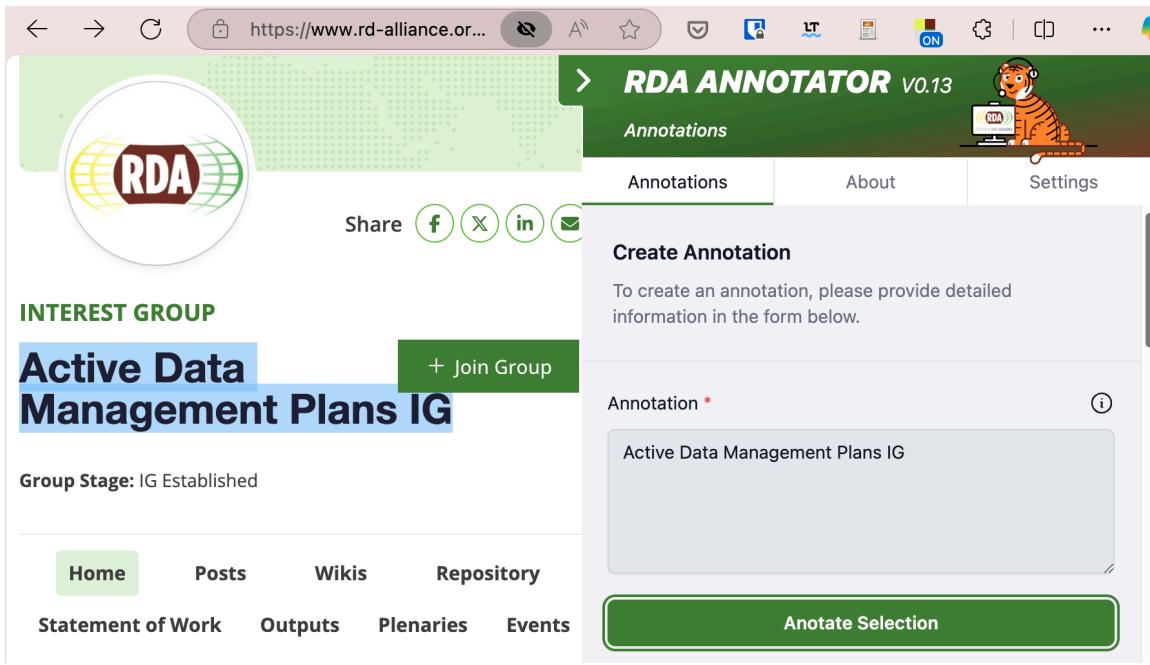
3.2. Creating and Saving Annotations

The following steps describe the use of the RDA Annotator.

Step	Description
1	<p>When you want to create an annotation, first turn on the extension by going to the toolbar (usually right of the browser address bar), and clicking the RDA Icon:</p>  <p>INTEREST GROUP</p> <p>Active Data Management Plans IG</p>
2	<p>Open the side menu by clicking the white arrow to the right side of the browser:</p>  <p>INTEREST GROUP</p> <p>Active Data Management Plans IG</p>



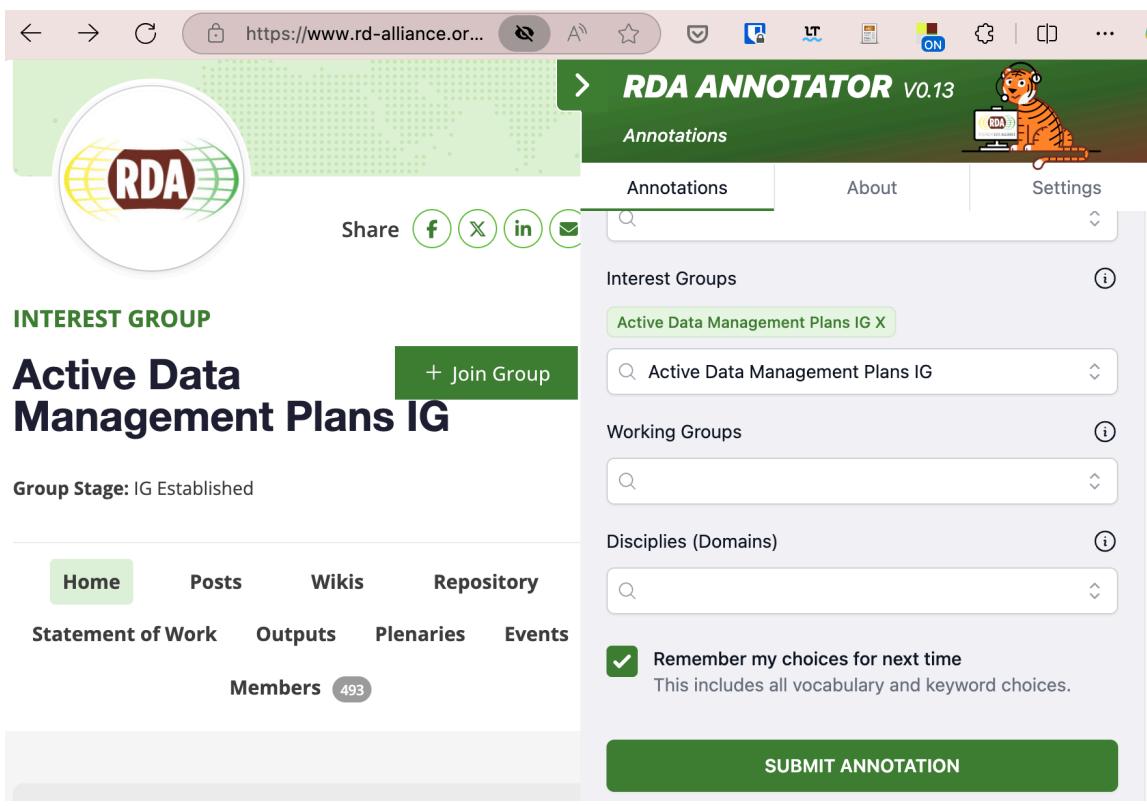
- 3 Select the text you want to annotate, and click “Annotate Selection” in the side panel. The selected text will now appear in the Annotation window:



The screenshot shows a web browser window with the URL [https://www.rd-alliance.org...](https://www.rd-alliance.org/). The page displays the "RDA ANNOTATOR V0.13" interface. On the left, there's a sidebar for "Annotations" with tabs for "Annotations", "About", and "Settings". A cartoon tiger is visible in the sidebar. Below the sidebar, a "Create Annotation" form is open, asking for detailed information. The main content area shows an "INTEREST GROUP" titled "Active Data Management Plans IG". Below the title, it says "Group Stage: IG Established". Underneath the title, there are navigation links: "Home" (highlighted in green), "Posts", "Wikis", "Repository", "Statement of Work", "Outputs", "Plenaries", and "Events". At the bottom right of the main content area is a large green button labeled "Annotate Selection".



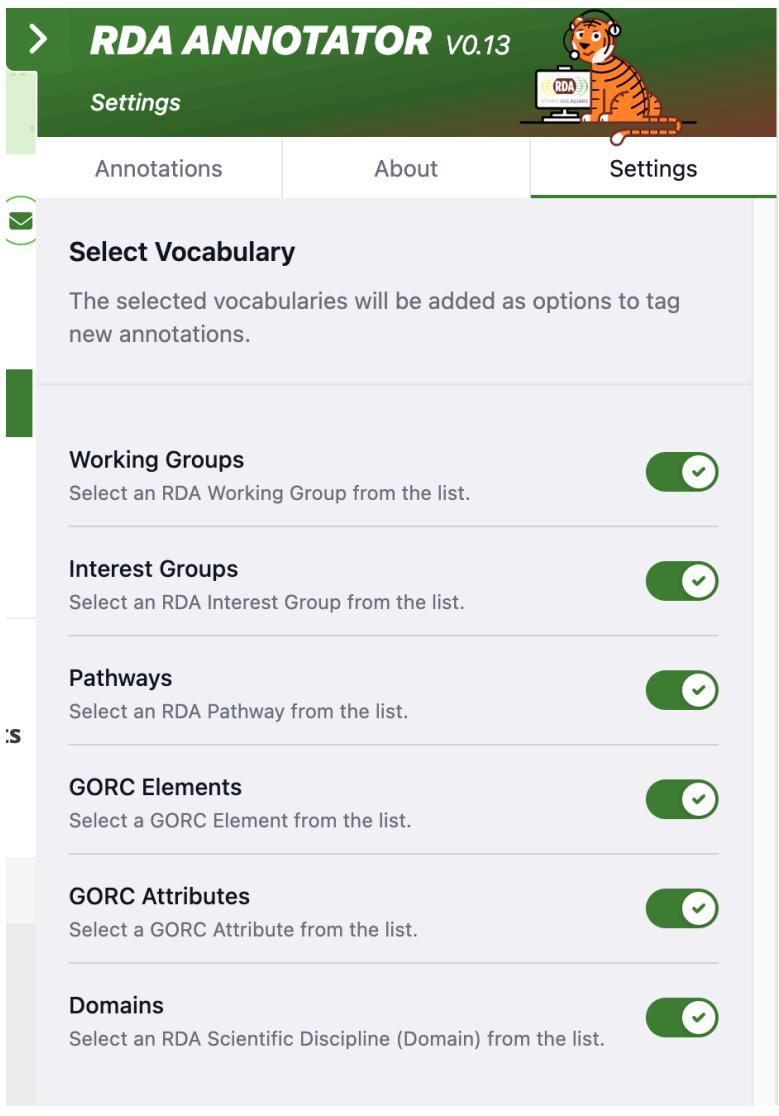
- 4 Fill out the (required) information, and click “Submit Annotation” at the bottom of the menu. Note that some vocabulary menus allow multiple selections.
You can optionally choose to remember the choices made for the next time, which can be useful if you make several annotations on the same page.



The screenshot shows a web browser window with the URL https://www.rd-alliance.org/interest-groups/active-data-management-plans-ig. The page title is "Active Data Management Plans IG". The top navigation bar includes "Annotations" (selected), "About", and "Settings". A sidebar on the right contains sections for "Interest Groups" (with "Active Data Management Plans IG X" highlighted), "Working Groups", "Disciplines (Domains)", and a checkbox for "Remember my choices for next time" (which is checked). At the bottom is a large green "SUBMIT ANNOTATION" button.



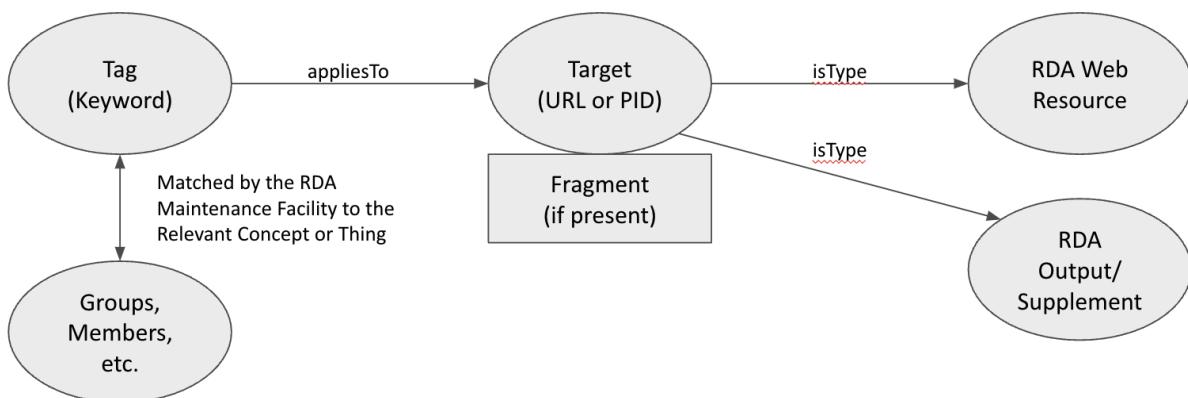
- 5 The Settings tab allows you to select which vocabularies you are able to choose from each time you make annotations.



3.3 What Happens to the RDA Annotator Data?

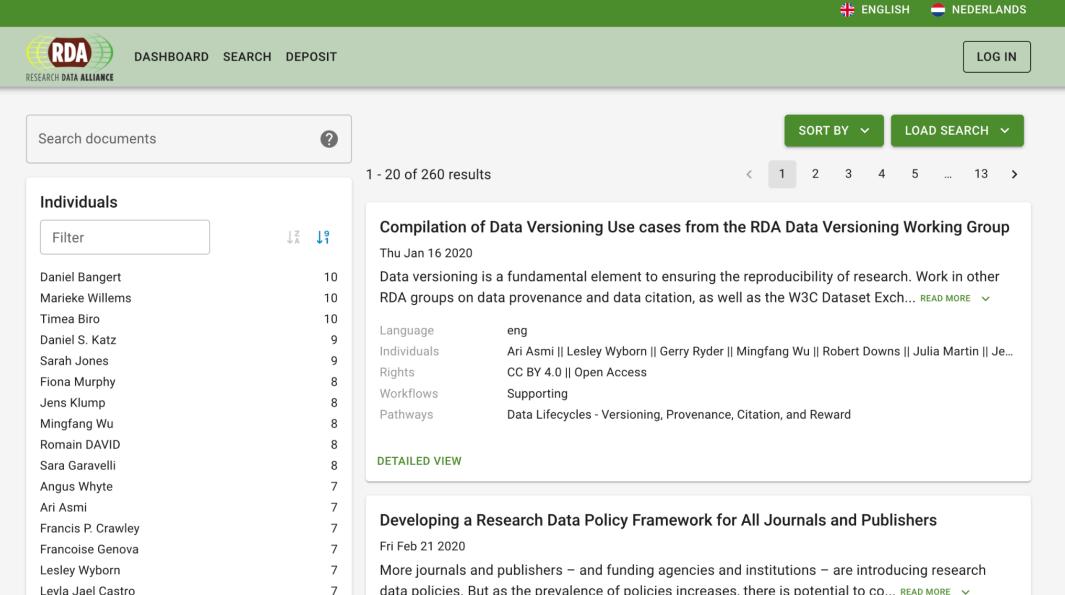
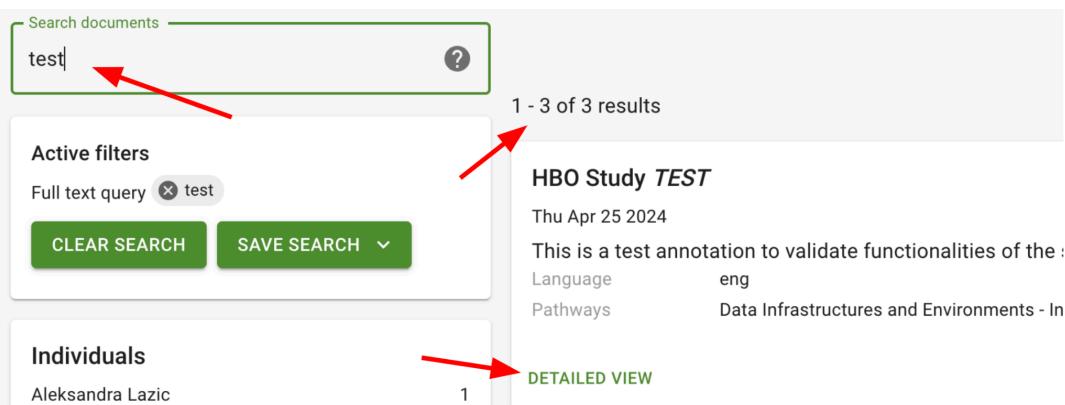
When using the RDA Annotator, the data is stored in the RDA Knowledge Base but also in [hypothes.is](#) - see below (A.3.3)⁴. In the Knowledge Base, the data is stored in a richer context, as follows:

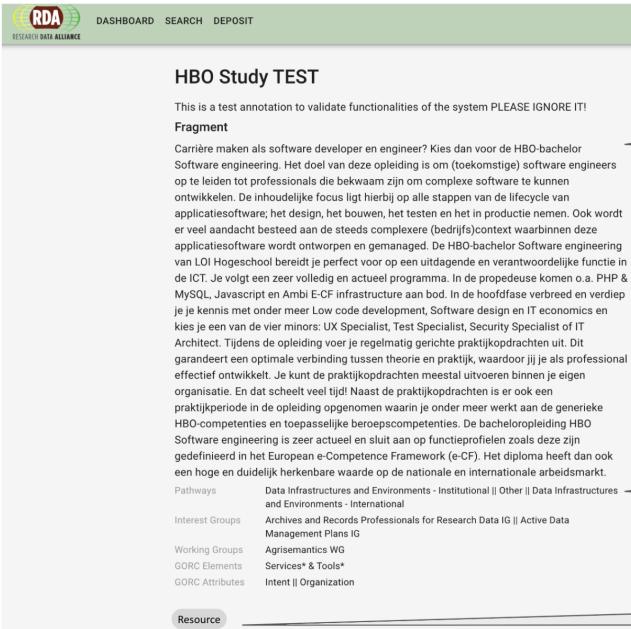
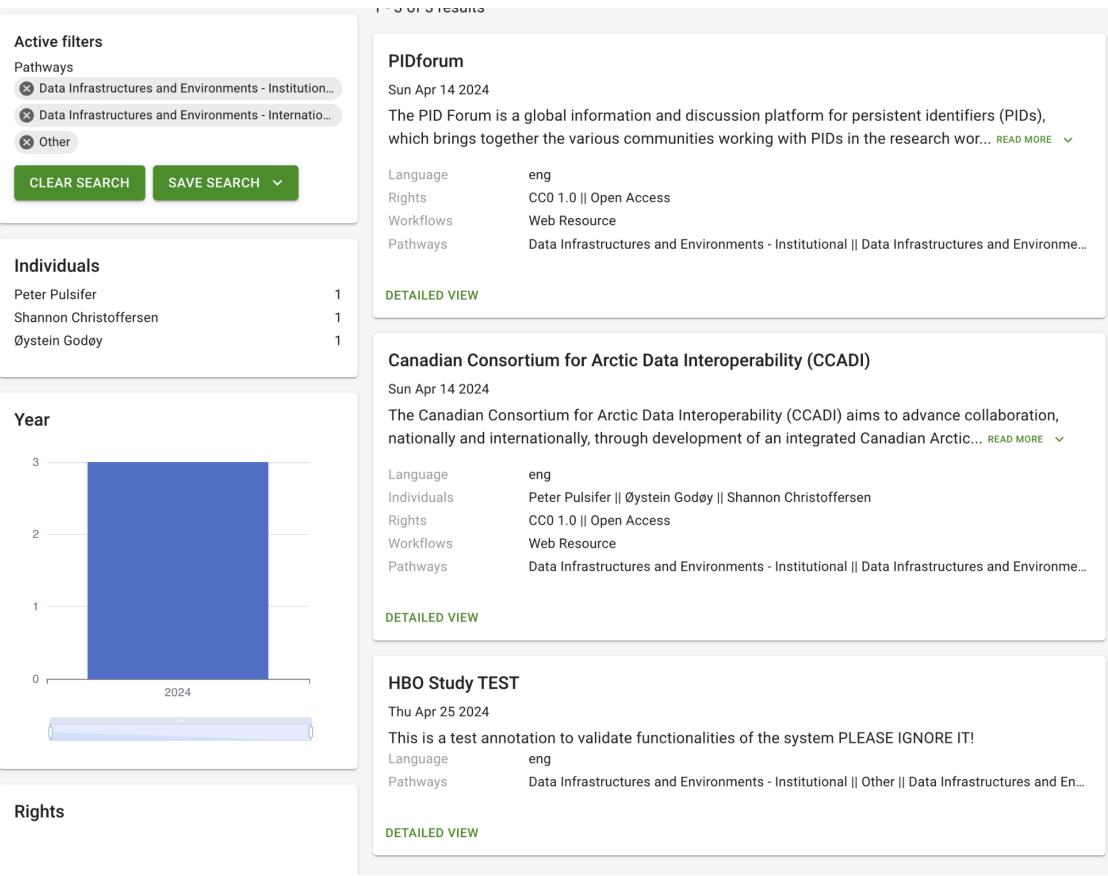
1. The tag provided by the annotation will match one of the corresponding concepts or things that was selected by the annotator - see Annexure B. These include other nodes in the RDA Graph, such as Groups, Members, Pathways, and so on. We will use this, rather than a general node such as 'Tag', as the object of a graph relation.
2. The object has a standard relationship with the annotation target (subject). In a graph, this relationship (or relation) is called the predicate, and in cases of annotation, it will always be 'appliesTo'.
3. The Target is the PID or URI of the web resource that is being annotated. For HTML pages, images, SVG pages, and similar, it is mostly possible to also identify a [fragment](#) unambiguously (such as a region in an image or highlighted text in a web page) [2]. For PDFs, a specification exists for identifying fragments, but this is [not consistently implemented](#) by viewer technology that displays PDFs in web pages - in such cases, a fragment cannot be specified.
4. The annotations contributed to the RDA Graph via this channel will always reference an 'RDA Web Resource' (a general category of resources in the web).
5. In some cases, one might annotate existing RDA resources, and if the RDA Maintenance Facility can match it to an existing RDA Output or Supplement via the document URI and Title, the annotation can be linked to that resource.



⁴ This allows the owner to view annotations made for RDA together with others made in a different context, and contributes to the larger body of knowledge available to the general research community in the [hypothes.is](#) graph.

3.3 Browsing Annotations

Step	Description
1	<p>The annotations are added to the RDA Knowledge Base, these are catalogued and indexed, and made available through in the RDA Discovery UI of the Knowledge Base.</p>  <p>The screenshot shows the RDA Discovery interface. At the top, there are links for ENGLISH and NEDERLANDS, and a LOG IN button. Below the header is a search bar with placeholder text 'Search documents'. To the right of the search bar are 'SORT BY' and 'LOAD SEARCH' dropdowns. The main area displays a list of 'Individuals' with their names and counts. A detailed view of an entry for Daniel Bangert is shown on the right, including metadata like Language (eng), Rights (CC BY 4.0 Open Access), and Pathways (Data Lifecycles - Versioning, Provenance, Citation, and Reward). Another entry for 'Developing a Research Data Policy Framework for All Journals and Publishers' is partially visible below it.</p>
2	<p>To find an annotation, one can start by using a free-text search - in our example, we will search for a 'Test' entry:</p>  <p>The screenshot shows the RDA Discovery interface with a search bar containing 'test'. An arrow points to the search bar. Below the search bar, there are 'Active filters' and buttons for 'CLEAR SEARCH' and 'SAVE SEARCH'. The search results are displayed as '1 - 3 of 3 results'. The first result is titled 'HBO Study TEST' with a date of 'Thu Apr 25 2024'. A detailed view of this entry is shown on the right, including its description: 'This is a test annotation to validate functionalities of the :'. The detailed view button is highlighted with a red arrow. Below the search results, there is a section for 'Individuals' with a single entry for Aleksandra Lazic.</p> <p>The right-hand listing of matching resources is updated automatically, and the detailed entry can be seen by clicking 'Detailed View'.</p>

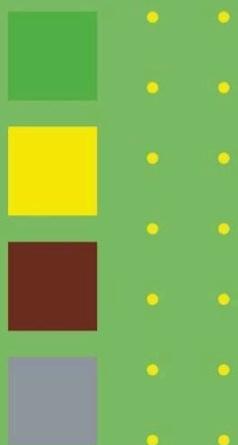
<p>3</p>	 <div style="position: absolute; left: 65%; top: 20%; width: 30%; padding: 10px; background-color: white; border: 1px solid #ccc;"> <p>The annotated fragment is available for users to read.</p> </div> <div style="position: absolute; left: 65%; top: 34%; width: 30%; padding: 10px; background-color: white; border: 1px solid #ccc;"> <p>These are the RDA tags associated with the annotation</p> </div> <div style="position: absolute; left: 65%; top: 40%; width: 30%; padding: 10px; background-color: white; border: 1px solid #ccc;"> <p>The original resource can be accessed here</p> </div>
<p>4</p>	<p>The resource will also show up using one or more of the tags associated with the annotation in a filter:</p> 



References

- [0] Developed in this document
- [1] Hugo, Wim, & Saldner, Simon. (2023). RDA TIGER D4.1 – Description of Output Support Services and Maintenance Platform (Version 1). Zenodo. <https://doi.org/10.5281/zenodo.8096631>
- [2] W3C (2012), Media Fragments URI 1.0 (basic), W3C Recommendation 25 September 2012, <https://www.w3.org/TR/media-frags/>





research data sharing without barriers

rd-alliance.org