

FINAL REPORT for Grant Award Number: LG-05-05-0197-05
“SmartFox: the Scholar’s Browser for Digital Collections”
October 31, 2008

Executive Summary

In our grant proposal to IMLS, we offered a new vision for a digital tool that would greatly benefit museums and libraries: “We would like to offer an alternate paradigm for the sophisticated digital museum/library experience. Rather than adjusting to the idiosyncratic options offered by individual institutions (if such tools are offered at all), we believe that users need at their disposal a set of common tools that work across all museum and library websites, and the best way to offer such tools is to build them into the one common denominator of every online museum and library experience: the web browser itself.”

We strongly believe we have fulfilled this vision over the last two years in what has become the expansive Zotero Project, and are enormously grateful to IMLS for the opportunity to pursue this vision. As of this writing, over a million people, from every state of the union and over 100 countries are using Zotero. Although we targeted Virginia’s library and museum community in the proposal, the strength of the software and the idea of a intra-browser tool has led to exponential growth in the user base and functionality, with dozens of additional (often user-requested) features. As a result, the project is now poised to become one of the leading research tools in the world.

As envisioned in the proposal, we introduced two major innovations in the use of library and museum objects. First, we produced a completely new way to **capture** items from within the browser. Using a series of methods ranging from sophisticated Semantic Web techniques to API queries to screen scraping, the project has made thousands of scholarly sites “Zotero-compatible.” With a single click, users can save individual objects or sets of objects into the Zotero environment. Second, we provided a new way to **organize** saved items in a commonsensical yet powerful way. The iTunes-like interface has enabled new users to quickly get started while permitting more advanced users to take advantage of potent functionality such as smart collections (saved searches) and tagging.

The project looks forward to many years of improvement, expansion, and innovation, and is currently looking at various models of sustainability. The tremendous support—right from the start—of the library and museum community has been instrumental in the success of the project and we hope that they will continue to be a source of support and advice.

Use and Coverage

Zotero has surpassed the milestone of an active installed base of over a million users (measured by unique IP addresses per month, the solid metric we decided on at the IMLS seminar at the beginning of the project), triple the number of users we had a year ago and a hundred times the number from two years ago. Moreover, Zotero now enjoys

substantial formal promotion, with over a hundred colleges and universities now actively recommending Zotero to their students, faculty, and staff.

The project has received numerous awards. *PC Magazine* declared Zotero one of the "Best Free Software" applications in both 2007 and 2008. The American Political Science Association gave Zotero its "Best Software" award at its annual meeting in August 2007. In the summer of 2007, the Mozilla Corporation—the makers of the Firefox web browser—recognized the importance of Zotero as a research tool by creating a special version of Firefox. Educause noted Zotero as one of the "tech trends to watch" as part of its annual *Horizons* report on the state of academia and technology.

Zotero has received coverage multiple times in the *Chronicle of Higher Education* and *Inside Higher Ed*, as well as many newspapers ranging from *The Examiner* to *The Guardian*. Zotero has also been the subject of over 10,000 blog posts (according to Google Blog Search), and well over six million web pages now mention it.

Users and developers have been vocal in their appreciation of Zotero and their commitment to the project. Usage of the Zotero community forums on our website is extremely active—to date there have been nearly 20,000 posts and we regularly get over 50 new posts a day. Community users have also worked diligently to make Zotero accessible in other languages: 35 user-translated language localizations of the interface ship with Zotero, and another 5 are in production; our user documentation and tutorials are now available in nine languages, ranging from Arabic to Vietnamese, thanks to our users.

New Features and Compatibility

Zotero currently includes hundreds of translators that provide compatibility for thousands of sites, including over 90 percent of online library catalogs and all of the sites mentioned in our proposal. We continue to add new translators every week, and developers from outside of the Center for History and New Media make such contributions as well. In addition, over the last year we have added over a thousand bibliographic styles (available at <http://www.zotero.org/styles>) for all kinds of journals from the humanities to the natural sciences.

Over the last year we have also added major new functionality:

- Free and automatic backup and synchronization of your library data on Zotero's servers: for example, you can sync your PC at work with your Mac laptop and your Linux desktop at home
- Automatic synchronization of your attachment files: store your PDFs, Word documents, and data sets on any WebDAV server (e.g. iDisk, Jungle Disk, Sakai, or other commercial or university-provided web storage)

- Rich-text notes editor: create and edit notes that retain all of the formatting detail of your original sources
- A new style manager: add and delete CSLs and legacy style formats, with over 1100 styles now available for download
- Automatic association of PDF metadata: simply drag and drop all of those PDFs cluttering your harddrive into Zotero, and it will do the work of assigning proper metadata
- Automatic detection and support for proxy servers: greatly improves off-campus usage of libraries' gated resources
- Updated cross-platform plugins for OpenOffice and Microsoft Word, plus drag-and-drop functionality for Google Docs and other online word processing programs
- New, simple ways to export bibliographic information, including drag-and-drop into web pages
- Over a dozen new plugins to Zotero by outside developers, adding functionality such as video and audio annotation (<http://www.zotero.org/extend>)
- Ability to view Zotero collections from any web browser, as well as iPhones and other web-enabled mobile devices
- Compatibility with One Laptop Per Child

Finally, the Zotero project is serving as the foundation for other projects at libraries, museums, and universities. For instance, a team at the University of Michigan's School of Information will build Bibliobouts, a game which uses Zotero data to create a game targeted at engendering information literacy. That project was funded by IMLS in 2008. The Bibliobouts project is another powerful example of how Zotero has become a powerful platform for major grant-funded research projects and innovation. Like Vertov, Bibliobouts demonstrates the way in which Zotero is becoming a foundational element in academic cyberinfrastructure.

Again, we are extraordinarily grateful for IMLS's support of the Zotero project, and would be happy to discuss the contents of this final report in greater depth with IMLS staff.

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