

INTERIM PERFORMANCE REPORT for Grant Award Number: LG-05-05-0197-05
“SmartFox: the Scholar’s Browser for Digital Collections”
May 1, 2007

Overview

The last six months of this project—begun as SmartFox and now (as our last report noted) called Zotero—have continued the success that the fall release of our software began. Zotero has generated extensive media coverage, including a front-page story in the *Washington Examiner*. Most indicative of our success, just four months after its initial public release, Zotero was named one of the “Best Free Software Applications” by *PC Magazine* in February 2007.

Adoption by researchers has been rapid. As we mentioned in our October 2006 interim performance report, in response to the helpful IMLS assessment seminar, we designed the software to “phone home” once a day, and we have been tracking these figures to provide a good sense of how many people are actually using our software (as opposed to mere downloads). In April 2007 we registered over 133,000 unique IP addresses of Zotero users.

George Mason University and other campuses in Virginia and the United States (and abroad) are considering making Zotero their officially supported research tool, and the American Council of Learned Societies plans to distribute information about Zotero to its constituent societies for widespread promotion among scholars. We have received uniformly positive reviews and write-ups across the higher ed and technology press, including the *Chronicle of Higher Education* and *Linux.com* (“If you spend most of your time doing research on the Web, you need Zotero”), and in over 3,000 blog posts by academics and librarians. Since our last report we have received many inquiries asking for further extensions to the software, including support for mapping, text mining, and other tools for scholarly analysis in an age when many research collections (though not all) are digitized.

Continued Improvement to the Software

In January 2007 we had our Beta 3 release, which added Zotero support (i.e., the ability to save references with a single click) to many more sites. It also added integration with Microsoft Word, the ability to publish research reports in XHTML, support for abstracts, a more advanced tagging system, full-text phrase searching and other advanced searching (including regular expressions). January also saw the release of an

API for outside developers to build utilities on top of Zotero, and 11 foreign language skins.

March 2007 saw release of Beta 4, another major upgrade. We added a sophisticated mode for annotating and highlighting documents saved within Zotero, accessibility enhancements including text resizing, more foreign language skins, improved methods for finding objects within one's local library, and major optimization improvements for smoother use of large personal collections.

Beta 4 is our last beta. We had planned to go to a 1.0 final by this point but the feature set for 1.0 expanded greatly from our original plan because of significant input from our rapidly growing user community. But that feature set is now essentially frozen. We will be out of beta shortly.

Next we will add the ability to backup and synchronize to a remote server at an institution, e.g., so that universities, beginning with those in our target area of Virginia, can store the research of their faculty and students in local repositories and allow access to that research from the library, office and home computers, or anywhere else. Throughout 2007, we will continue to expand the set of methods for importing from, and exporting to, a wide range of scholarly tools and collections.

Beyond the core team of developers at the Center for History and New Media at George Mason University, about 30 people have contributed code, including 14 foreign language localizations, bug fixes, citation styles (CSLs), and "translators" for research websites (to allow them to seamlessly transfer information to Zotero).

Dissemination

Beyond the large user base mentioned in the introduction to this report, on our site's forums we have had over 2,000 comments from over 600 users. Zotero, a name we adopted in part because it had no namespace competition (there was only one hit in Google for it), now appears on over 500,000 web pages and in almost 4,000 blog posts (according to Bloglines). In April 2007 we had 110,000 unique visitors to the Zotero website, more than a six-fold increase since December 2006.

We continue to attend meetings of scholarly associations, make presentations at universities, and evangelize Zotero through germane online communities. We have already given on-campus demos at George Washington University, Georgetown University, Catholic University, the Graduate Center of the City University of New York, University of Maryland, the University of Chicago, Northwestern, Harvard, Brandeis, MIT, Tufts, Boston University, Brown, and to the SCHEV (State Council of Higher Education for Virginia) board; we have upcoming presentations at Stanford and the annual meeting of the American Council of Learned Societies in Montreal in May. We also presented at a well-attended session on Zotero at the Coalition for Networked Information meeting in December. We are also presenting at the American Historical

Association, Modern Language Association, and other scholarly conferences over the next year.

Next Steps

We are moving ahead with completing our original work plan, albeit using the one-year no-cost extension already granted by IMLS. Among other things, that will allow us to better coordinate the work funded by IMLS with additional development that is being funded by the Mellon Foundation and that will result in the 2.0 version of Zotero. As previously noted, we have been relying more on outside contractors and hourly programmers for work on Zotero because of the difficulty of locating a full-time programmer with sufficient skills for the project. Finally, we have two key personnel changes since our previous report. First, we hired Trevor John Owens to serve as our “evangelist” and “outreach coordinator.” Second, Josh Greenberg has just taken a new job as Director of Digital Strategy and Scholarship at the New York Public Library—a position that gives Zotero further close links to the digital library community. Sean Takats, who was already working on Zotero, has assumed most of Greenberg’s responsibilities.

We look forward to the next steps on the project, and we would be delighted to discuss them in more detail with IMLS staff.

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