

Eudora 5.0 Address Book

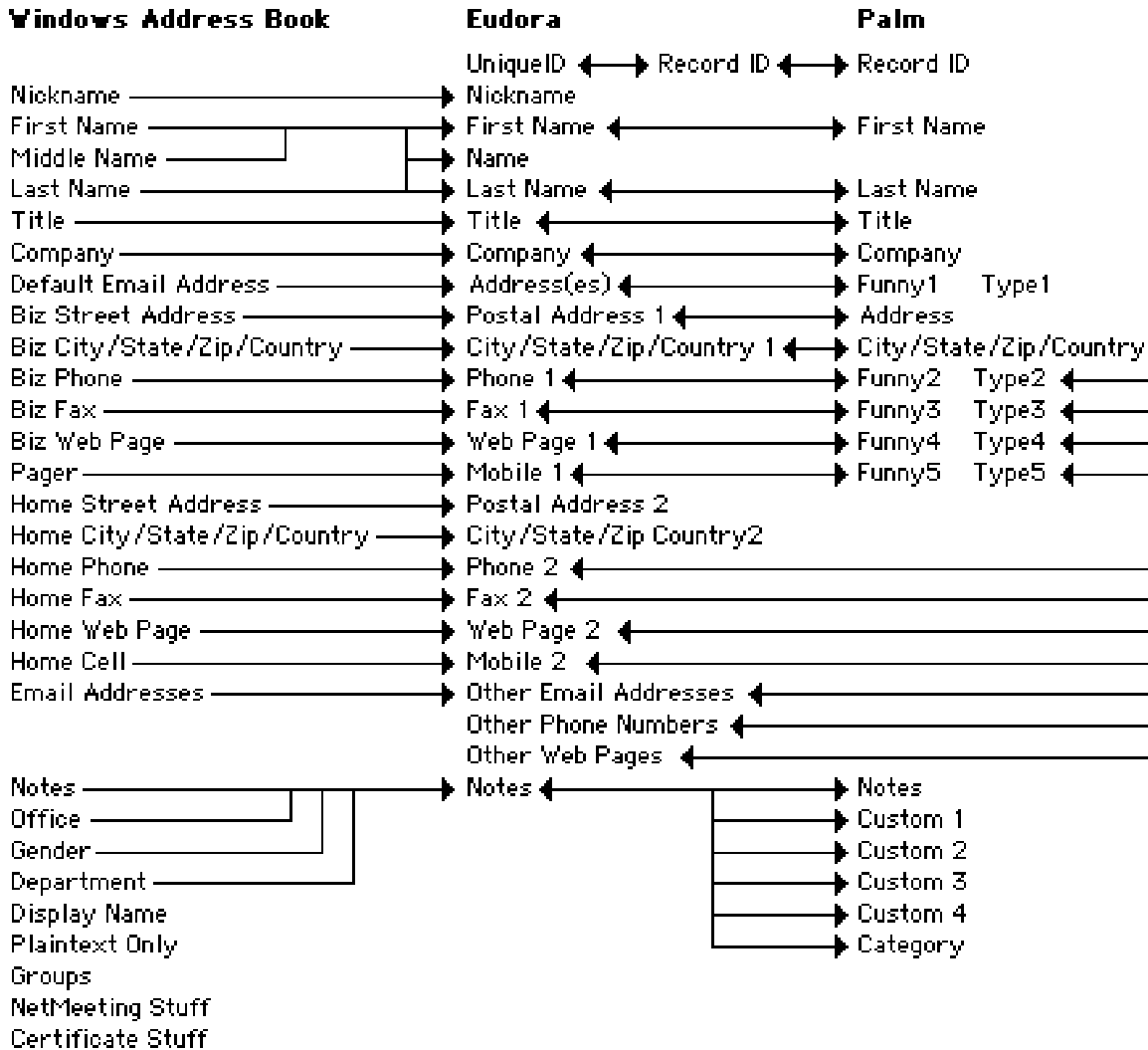
Basic Goals

Full Import. We want to be able to represent everything important from the Outlook Express and Netscape Messenger address books.

Palm Sync. We need to be able to sync efficiently with PalmOS.

Field Mappings

The following diagram shows how fields will be mapped from Outlook Express (also called “The Windows Address Book”) to Eudora, and how Eudora will sync with the Palm:



- PalmOS assigns a record id to every address book entry; this id is one of the keys to doing fast syncs of data with the Palm. However, the id is assigned by the individual Palm device, which means that no Eudora-generated id will suffice for the Palm. The conduit is expected to keep a Palm RecordID ↔ Eudora Uniqueid mapping. This will keep Eudora’s address book from having to store data that’s specific to a given device.

2. The WAB nickname may actually not be an appropriate thing to map into Eudora’s nickname field, since Eudora’s nickname field is really meant for email address abbreviation. However, we

will attempt this and see what the reaction is. If the nickname is absent, we will manufacture one from the user's name.

3. We will have to split our name field up as best we can; more on that later.
4. The WAB has a list of email addresses, with one labelled "default". We will put the "default" one in our Address(es) field, and the rest on Other Email Addresses.
5. The "Funny" fields on the palm are five fields that can be any one of a bunch of things; fax/home/work/mobile/pager phone numbers, email address, url. We will map these according to what type the user applies to them. If the user applies the same type to more than one field, the 2nd and subsequent fields of that type will go into "Other {Email Addresses/Phone Numbers/Web Pages}" as needed. We will put them on lines by themselves and label them tersely, ala:
 [Work] 555-5555
 [Home] 666-6666
6. These other fields will be lumped into notes. I think we should allow a more free-form display than we do now, but still retain tagging for info.
7. We'll do the same trick for the custom fields as #6.
8. Items from the WAB displayed with grey background will be terminated with extreme prejudice. We do not plan to use them or sync them anywhere, so there's no point keeping them around.

Address Book File Format

The format for Eudora nickname files remains unchanged. Each nickname will still be represented in the address book file by a pair of lines: an 'alias' line and a 'note' line. All of our new or extra data will be stored on the 'note' line as bracketed attribute value pairs. Tags are *not* localized! Instead, it will be preferred to include a localizable string along with each tag to associate the correct translation to be used in the Address Book window when labeling each field.

<u>Field</u>	<u>Localizable Name</u>	<u>Tag</u>
Unique ID	<i>none</i> ¹	id
Nickname	Nickname	<i>none</i> ²
Name	Full Name	name
First Name	First Name	first
Last Name	Last Name	last
Title	Title	title
Company	Company	company
Address(es)	Address(es)	<i>none</i> ³
Postal Address 1	Street Address	address
City 1	City	city
State 1	State	state
Zip 1	Zip	zip
Country 1	Country	country
Phone 1	Phone	phone
Fax 1	Fax	fax
Web Page 1	Web	web
Mobile 1	Mobile	mobile

¹ The unique ID used to identify a nickname does not appear in the address book UI, however it will be tagged in the nickname file.

² Nickname values appear on each command line of the nickname file, so no separate tag is needed to identify the field data.

³ Address expansions appear on the 'alias' command line of the nickname file, so no separate tag is needed.

<u>Field</u>	<u>Localizable Name</u>	<u>Tag</u>
Postal Address 2	Street Address	address2
City 2	City	city2
State 2	State	state2
Zip 2	Zip	zip2
Country 2	Country	country2
Phone 2	Phone	phone2
Fax 2	Fax	fax2
Web Page 2	Web	web2
Mobile 2	Mobile	mobile2
Other Email Addresses	Other Email Addresses	otheremail
Other Phone Numbers	Other Phone Numbers	otherphone
Other Web Pages	Other Web Pages	otherweb
Notes	<i>none</i> ⁴	<i>none</i> ⁵
Primary	Primary Information	primary ⁶

Groups

Though our more experienced users understand the subtleties of group syntax when making an address book entry, most users see Eudora nicknames as shorthand for either a single email address, or a group of multiple addresses. We have not, in the past, done anything in the UI to distinguish nicknames for single addresses from those representing multiple addresses. We can change this in a subtle manner with the new 5.0 address book window.

- ☐ Nicknames containing multiple email addresses will be represented in the user interface by a special icon, distinguishable from any icon used to represent a single email address. For the sake of tossing something into a document, single addresses will be represented by a single user icon ,like so:



While nicknames containing multiple email addresses will be represented by a double user icon,



which looks like you'd imagine:

It is important to note here that no attempt is being made to denote group syntax, which will function as it has before. The icons are merely a visual clue to the user that a nickname contains one or more than one email address. The idea being conveyed through the icons is one of context rather than symantics.

Address Book Changes

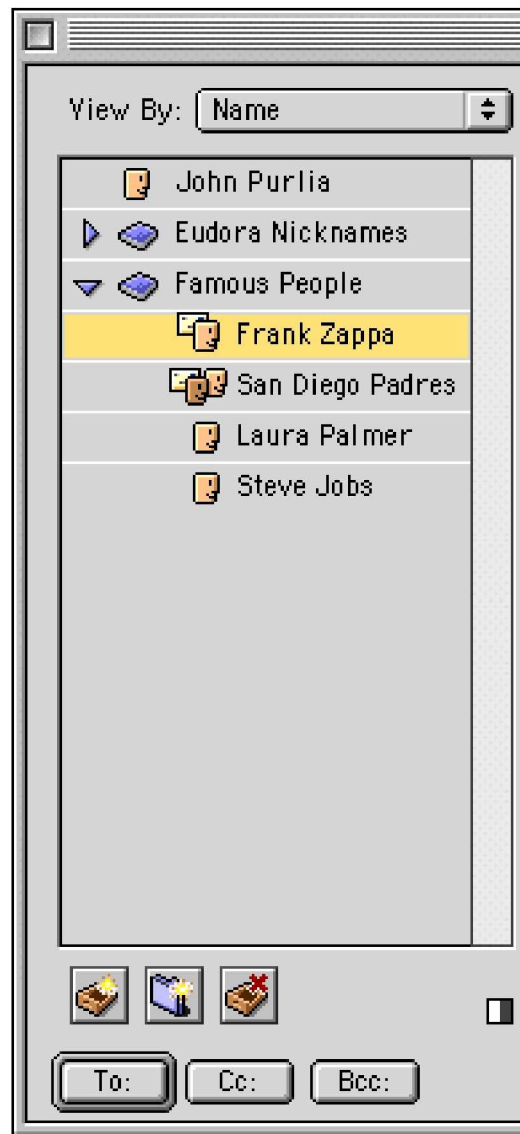
The Address Book window will be changing to accommodate all of our new fields and will also be updated to behave in a manner more consistent with other elements of the UI which include lists of items (such as the Mailboxes, Signature and Stationery windows). We'll retain the familiar two-pane interface with the list of all nicknames and address books on the left hand side of the window, however the right hand side of the window will now collect all of our new fields in a series of tabs to better organize the information.

⁴ The notes field does not have a label in the UI since it appears as the only field on the Notes tab.

⁵ Neither does the notes field have a tag since 'note' is an existing command name within the existing Eudora nickname file.

⁶ The primary information field designates from which tab the user should pull its primary information.

- ☐ The left hand side of the Address Book window will now look something like this:



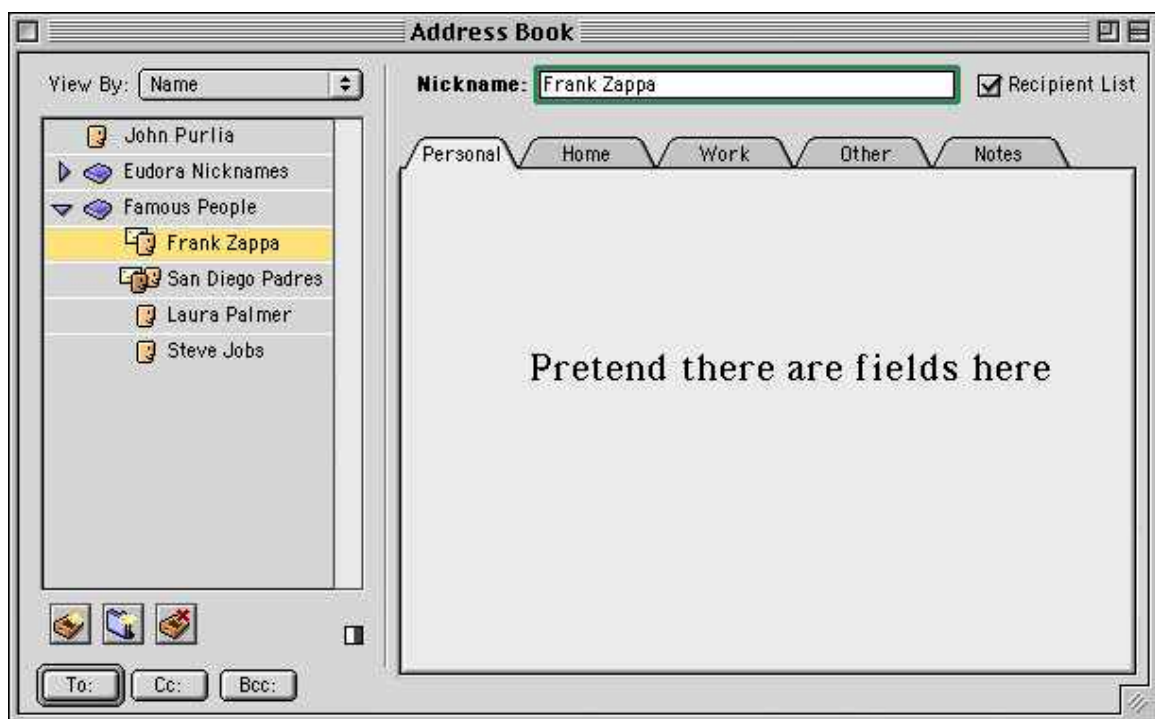
This portion of the window is actually very similar to the current address book design with a few notable changes:

- ☐ Each entry in the Address Book list will be accompanied by an icon to represent either an address book, a nickname containing a single email address, or a nickname containing a group of email addresses.
- ☐ A single nickname will appear at the root level of the Address Book window which represents the user's own personal information. This is the information that will be used to generate vCards for the user. At the moment, there will be only one such root level address book entry, but we could in the future support many entries for personal information (presumably for separate vCards for each personality).

- ☐ The New and Remove pushbuttons will be replaced by three beveled icon buttons (pretend these icons have pictures of faces and address books). These buttons will be used to remove a selected item, or to create a new address book or nickname. In the past we've overloaded the Make Address Book Entry dialog as a way to create nicknames from a given context (the current selection, message, etc) or as a way to assign a nickname from the Address Book window itself. This intermediate modal step in the Address Book window should be retired in favor of a mechanism more consistent with the rest of the Eudora UI. The Address Book should handle the creation and deletion of list items in the same way we create list items for the Mailboxes, Stationery and Signature windows. Further, we need separate buttons for creating a new Nickname or a new Address Book. Clicking on New Nickname creates a new untitled nickname in the selected address book. The right hand side of the window will display an empty address book entry and the user can edit the name of the nickname in place within the list itself. Clicking on New Address Book will similarly create a new untitled address book in the list.

Note: I'm not sure what should happen if the user is viewing the list by a field besides Nickname... Maybe we switch automatically to nickname view?

- ☐ The right hand side of the Address Book window will be changing more dramatically, as illustrated below



- ☐ The Nickname and Recipient List fields are always present on the right hand side of the window with the content tabs immediately below. These fields provide some much needed vertical spacing when the window is wazooed and lends some quick context to the content of whichever tab is currently displayed (i.e. the nickname itself is always present immediately above whatever content we're viewing). The user also is not pressed to search for the Recipient List checkbox when desiring to change this simple setting.

Tabs & Fields

We will divide our fields into five tabs. The fields will be allocated as follows:

Personal

First Name
Last Name
Address(es)
Name

Home

Postal Address 1
City/State/Zip/Country 1
Phone 1
Fax 1
Mobile 1
Web Page 1

Work

Postal Address 1
City/State/Zip/Country 2
Phone 2
Fax 2
Mobile 2
Web Page 2
Title
Company

Other

Other Email Addresses
Other Phone Numbers
Other Web Pages

Notes

Notes

Hidden Fields

UniqueID

- ☐ The Home and Work tabs should each have a checkbox labeled “Primary”. Though these are checkboxes on separate tabs, they’ll act like a cross-tab radio button. Whichever tab is selected as “Primary” will be synced to the Palm.
- ☐ The Home and Work tabs should also have a “Swap with Work[Home]” button. This will allow the user to easily get undifferentiated address information (from Palm or old Eudora) into the “correct” tab.

Tab layouts appear as follows:

Home

Street
Address:

City:

State/Province:

Country:

Zip/Postal Code:

Phone:

Fax:

Mobile:

Web:

Swap with Work

☐ Primary Information

Work

Title:

Organization:

Street
Address:

City:

State/Province:

Country:

Zip/Postal Code:

Phone:

Fax:

Mobile:

Web:

Swap with Home

☐ Primary Information

Other

Other Email Addresses:

Other Phone Numbers:

Other Web Pages:

The 'Other' tab is a light gray rectangular panel with a tabbed top edge. It contains three sections, each with a label and a text input field. The first section, 'Other Email Addresses:', has a wide text box. The second, 'Other Phone Numbers:', has a narrower text box. The third, 'Other Web Pages:', has a text box similar in width to the email addresses. Each text box has a vertical scrollbar on its right side, consisting of a small upward arrow, a central track, and a small downward arrow.

Notes

The 'Notes' tab is a light gray rectangular panel with a tabbed top edge. It features a large, empty rectangular text area. A vertical scrollbar is located on the right side of this area, with an upward arrow at the top, a central track, and a downward arrow at the bottom.

Handling of the Name Field

The other day when I was waltzing through a meadow full of dairy cows, I heard a loud, squishy plop. At that point, I began to think about how we are to handle this lovely name problem.

In general, we are given a single name; either from a person's stored address book or from an email message. However, the anal-retentive types insist on decomposing such names into their component parts; first and last name (or given and family name, god help us all).

We cannot do this perfectly. I doubt we can do it very well. I am going to strive for moderately badly.

Cast of Characters The basic actors that come to mind in this game are:

First Names

Last Names

Middle Names (possibly multiple)

Qualifiers (Jr, Sr, I, II, III, IV, Esq, PhD, etc, possibly multiple)

Honorifics (Dr, Mr, Mrs, Ms, Miss, Mme, M)

Parentheticals; either double-quoted or with parentheses

No doubt I've missed some, and we will have to add to this list.

Common Name Forms Here are the forms I think we'll see a lot of:

[Honorific] First [Middle] Last, [Qualifier]

First [Middle] Last [Qualifier]

Last, First [Middle] [Qualifier]

Last First⁷

Note that I've left parentheticals out altogether in the above forms. I think we should strip any parentheticals in names.

Splitting Algorithm

- ☐ We need to split names algorithmically into first and last names. This should be done when "importing" old address books, or in "Make Address Book Entry".

Discard parentheticals

If the name contains one comma

 If the only thing appearing after the comma is a qualifier

 Note and remove any Qualifiers

 Call FirstLastExtractor on the stuff before the comma

 Else

 Note and remove any Qualifiers

 Note the LastName as all words before the comma

 Note the FirstName as all words after the comma

 End If

Else If the name contains no commas

 Note and remove any qualifiers

 Call FirstLastExtractor on the name

Else if the name contains more than one comma

 Curse God and Die

End If

Append Qualifiers to FirstName

Done.

Subroutine FirstLastExtractor

 If we have reason to believe we re in Asia

⁷ The Asian way, which will be problematic.

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        Note the LastName as the first word
        Note the FirstName as all subsequent words
    Else
        Note and remove any (leading) Honorifics
        Note the LastName as the last word
        Note the FirstName as all prior words
    End If
End Subroutine FirstLastExtractor

```

Joining Algorithm

- ☐ We need to join the first and last names algorithmically into a display name. This will need to be done when we generate mail or nicknames from address book entries that lack name fields. To combine the names, note and remove all qualifiers, then combine the names according to a template that allows the user to specify where First, Last, and Qualifiers go. Honorifics are not distinguished in the joining algorithm.

Preferences

It would hardly be Eudora if it didn't have preferences, would it? I believe we need the following preferences:

- ☐ A list of Qualifiers for use in splitting names.
- ☐ A list of Qualifiers for use in joining names.
- ☐ A list of Honorifics for use in splitting names.
- ☐ A template for use in joining names for suggesting nicknames.
- ☐ A template for use in joining names for generating mail messages.
- ☐ A preference for defaulting whether or not we think we're in Asia.

Make Address Book Entry

It's time to do a facelift on this dialog. The user needs to see what address book entry will be made, and be allowed to tweak it. In place of our current dialog, we propose a pair of dialogs for creating "regular" nicknames or group nicknames. The two dialogs look like so:

Make Address Book Entry

Personal Information

Nickname: John_Purlia


Full Name: John Purlia

First Name: John Last Name: Purlia

This nickname will expand to the following address:

jpurlia

In the Address Book: Eudora Nicknames ☐ Quick Recipient

 Cancel Add Details Create Nickname

Here, in the dialog displayed for single address selections, the button between the first and last names would swap the names, just in case we have guessed wrong. It may be appropriate to show this button only as a preference; I'd suspect it to be used most often by folks who deal with a lot of Asians.

Make Address Book Entry

Group Information

Nickname:

Group Name:

This nickname will expand to the following addresses:

- Sam Rogers <samr>
- Jim Riley <jimr>
- Matt Neuburg <matt@tidbits.com>
- Jo Rufing <jrufing>
- David Hom <dhom>
- Janice Miller <jmiller>

In the Address Book: ☐ Quick Recipient

Cancel **Add Details** **Create Nickname**

Handling Other Information

It's possible that we can recognize other information during the process, especially if the ABE is being made from a vCard or directory entry. We have several choices here:

1. Throw away the other information. (Bad)
2. Forget the modal dialog in favor of simply opening the AB with entries prefilled. (Seems too disruptive, since the user would have to "get rid" of the AB before continuing with their work.)
3. Replicate all the AB tabs in the modal dialog. (This is probably the best choice, but may be more work than we are willing to undertake.)
4. Carry the extra information into the ABE, even though we do not show it in the dialog. (Somewhat like we do now for all fields except Nickname.)

There is another alternative. While more and more software seems to be single-paned and "browse-like", many address books other than Eudora's are very highly modal. The WAB makes you use a modal dialog to change any information. Claris Organizer goes another step further, and you have to go two modal dialogs deep to change anything. I personally find this clumsy and distasteful, but it certainly makes for a conceptually clean (if operationally clumsy) UI.

VCards

Received vCards

- ☐ Make Address Book Entry should work from a selected vCard.

- ☐ VCards attached to messages should also be consulted. That is, if a message has a vCard attached, and the user does a MABE from that message, the info from the vCard should be included.
- ☐ VCards, when recognized, should be sent to the parts folder rather than the attachments folder. This is intended to cut down on attachment folder clutter.
- ☐ VCards should get special icons.

Sending vCards

- ☐ The “me” nickname will be the contents of the user’s personal vCard. If the user wants to specify vCards for specific personalities, they’ll have to append a dash and the personality name (no, we don’t expect any but the geekiest of the geeky to do this).
- ☐ We will add another checkbox to the icon bar, for “include vCard”. This should be done IFF the user has defined a “me” nickname.

Miscellany

- ☐ We need to recognize and support tel: URL’s, explicit and “slack”, and dial the phone. This is relatively simple on Windows via TAPI, harder on the Mac.
- ☐ Intersects Nickname should pay attention to the Other Address(es) field.
- ☐ The Palm conduits should allow the user to specify which AB’s to sync with.

Other Macintosh UI Modifications

Some changes are needed to the Macintosh Address Book UI:

- ☐ The Mac address book needs to switch to a tabbed format for field display.
- ☐ Remove the Dial menu in favor of URL-ish behavior.

Other Windows UI Modifications

These tweaks are needed to the Windows Address Book UI:

- ☐ The left-hand pane needs a minimum size. The size should be wide enough to show all the action buttons.
- ☐ The right-hand pane needs a minimum size. The size should be wide enough to display a reasonable number of characters in the editing fields.
- ☐ We should remember two states for the window; expanded and collapsed. The window size and position of the splitter bar should be remembered for each state, and hitting the expand/collapse button should restore the window to its prior state.
- ☐ We may need to resize the wazoo when opening/switching into it. If the currently open pane(s) cannot be shown at minimum size, the window should be resized to the saved size, be it expanded or collapsed. If there is room for minimal sized pane(s), the pane(s) should be resized rather than growing the window (lesser of the evils).
- ☐ Remove the “Expand Nicknames” checkbox. This will give more vertical room in the list box, and users will live with having expansion as a permanent setting (or modifier action) rather than an obvious on-the-fly thing.
- ☐ Print the goddam thing already.

Appendix A - To-Do List

Address Book Window

- ☐ The nickname list will be displayed with icons
- ☐ A personal address book entry will appear at the root level of the address book list.
- ☐ The New and Remove pushbuttons will be replaced by three beveled buttons for: New Address Book, New Nickname, Remove which will function in a similar fashion to those found in the Mailboxes, Signature and Stationery windows.
- ☐ The Nickname and Recipient List fields will always be present on the right hand side of the Address Book window.

Tabs & Fields

- ☐ We will divide our fields into five tabs.
- ☐ Home and Work tabs should have a checkbox labelled "Primary".
- ☐ The Home and Work tabs should also have a "Swap with Work[Home]" button.

Handling of the Name Field

- ☐ We need to split names algorithmically into first and last names.
- ☐ We need to join the first and last names algorithmically into a display name.
- ☐ A list of Qualifiers for use in splitting names.
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- ☐ VCards should get special icons.
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- ☐ Intersects Nickname should pay attention to the Other Address(es) field.
- ☐ The Palm conduits should allow the user to specify which AB's to sync with.

Other Macintosh UI Modifications

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Other Windows UI Modifications

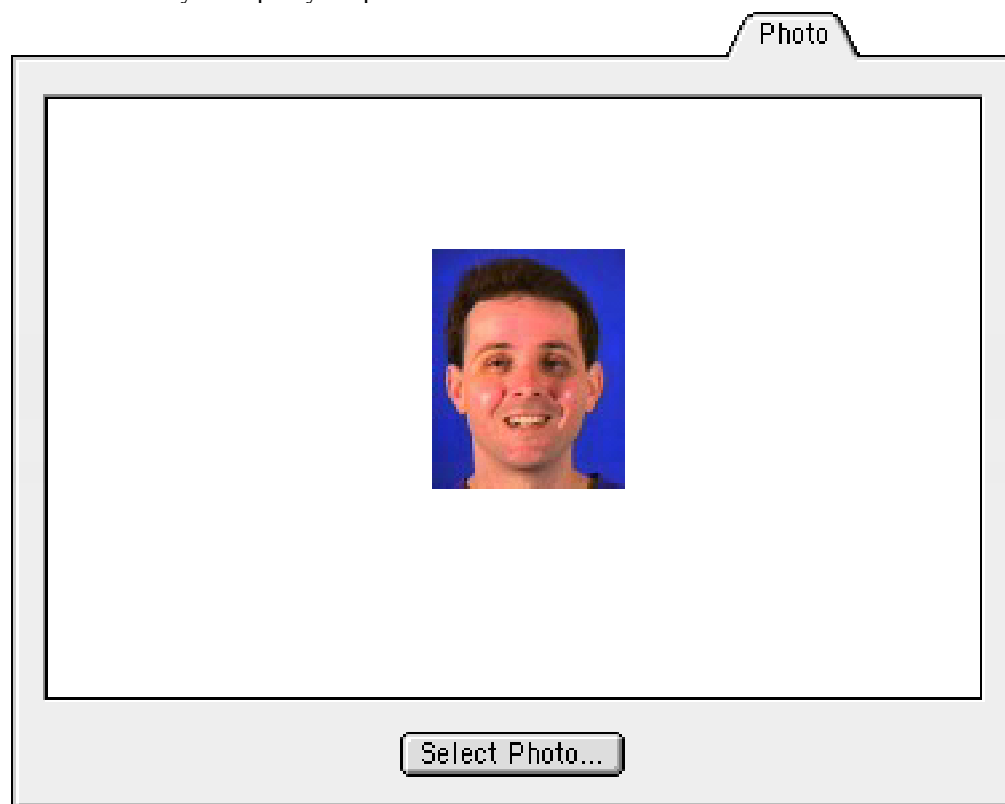
- ☐ The left-hand pane needs a minimum size.
- ☐ The right-hand pane needs a minimum size.
- ☐ We should remember two states for the window; expanded and collapsed.
- ☐ We may need to resize the wazoo when opening/switching into it.
- ☐ Remove the "Expand Nicknames" checkbox.
- ☐ Print the goddam thing already.

Appendix B - 5.1 Improvements

The address book will continue to improve with 5.1 and beyond in ways that begin to integrate address book functions and various types of contact information into other parts of the interface. One such evolutionary step will be the introduction of pictures into a new, optional, address book tab. Pictures are nice friendly things people can relate to, and the address book seems like a natural place to keep photos of your family and friends.

- ☐ The Address Book will grow a new (optional) tab, “Photo”, into which the user will be able to place a graphic image associated with a given nickname. The tab is optional, in the sense that it should be implemented as a resource plug-in — as should all address book tabs. If the user doesn’t want to clutter their address book with more and more tabs, there should be a way to disable or remove those tabs that the user doesn’t care to support in his or her address book.

The “Photo” tab layout is pretty simple:



The tab provides an “image well” containing a graphic image. We should be able to support all kinds of image types; whatever is most appropriate for each of our client platforms. The tab also contains a single button, “Select Photo...” which, when clicked, displays a file browser from which the user can select a picture to be displayed in the image well.

- ☐ In addition to the “Select Photo...” button, the user should be able to place pictures into the tab by any of the following means:
 - Cut’n’paste of graphic images from either Eudora or other apps
 - Drag’n’drop of graphic images or files containing graphics
 - We should also support ‘Delete’ and the usual editing commands to remove a graphic.

Storage

So where are we going to store all these colorful images and how are we going to represent binary data in the Eudora address book?

- ☐ Eudora will store a copy of each nickname photo into a new subdirectory of the Nicknames Folder, which we will call "Photo Album". Within the Photo Album directory we will create subdirectories, one per nickname file and named the same as each nickname file. Individual graphic files are stored into these subdirectories and should be named to match their corresponding nickname. So, a directory structure may look like this:

```

Nickname Folder
  Photo Album
    Eudora Nicknames
      Jeff Belk
      Steve Dorner
      Jim Riley
    Friends
      Kathy
      Kirsten

```

- ☐ We'll store references to a nickname's photo in the address as a URL assigned to a new tag, "picture". At the moment, it probably makes sense to store the URL as a 'file' reference, but there's really nothing stopping us from in the future storing 'http' URL's here to grab'n'display a nickname's photo from a server. A typical "picture" attribute in the nickname file might look like this:

```

<picture:file:///Dogbert:Documents:Eudora Folder:Nicknames Folder:Photo
Album:Eudora Nicknames:Kathy_Couch>

```

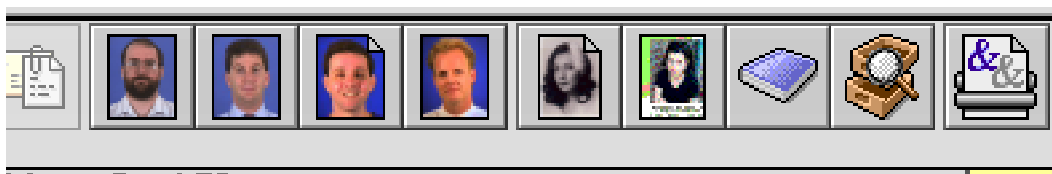
Big deal, I have photos in my address book

Hey, I'm unimpressed... what next? Well, now that we have photos in the address nook associated with a nickname, why not start using these pictures in fun and interesting ways as a replacement of the nickname they represent?

There are a bunch of ways we'll eventually be using photos... Maybe in the progress window, as proxy icons in message windows, as icons in the address book's nickname list, inside mailbox windows to show the sender of a message, etc, etc, etc...

For now, though, let's start by placing nickname icons in our toolbar.

- ☐ The user will be able to drag nicknames from the address book, to the toolbar to automatically create a toolbar shortcut to this nickname that we can use in a number of interesting ways. The operation is simple, just open the address book and drag a nickname entry from the list into the tool bar. When this happens, Eudora will automatically add this nickname to the Quick Recipient list and create a toolbar button linked to the "New Message to..." menu command for this nickname. Bingo!



Clicking on a nickname button will open a new composition message addressed to this nickname. Eventually, we'll likely want to apply modifiers to the click to support redirect and forward, and we may even want to support message drags onto the nickname buttons to forward or redirect a message to that nickname.

Additional Wacky Ideas

More potential uses for photos and icon nicknames in our UI:

- As proxy icons in window titlebars. For example, Steve's "Jennifer Lopez" mailbox might have a interesting icon appearing in the mailbox titlebar — or in the mailboxes window itself.
- Message windows might have the picture of the sender appearing in some place within the UI
- Icon thumbnails of a message sender might appear in a TOC column
- Icons of a person might also appear in the Address Book as replacement for our little beige and brown bald (or on windows, lightly coiffed) guys.
- We might want to flash pictures in task progress as messages are received from certain people, maybe as a filter action
- Might also be cool to detect photos in Make Address Book Entry and ask the user if they want to add the picture to the nickname

More to come...