Updates

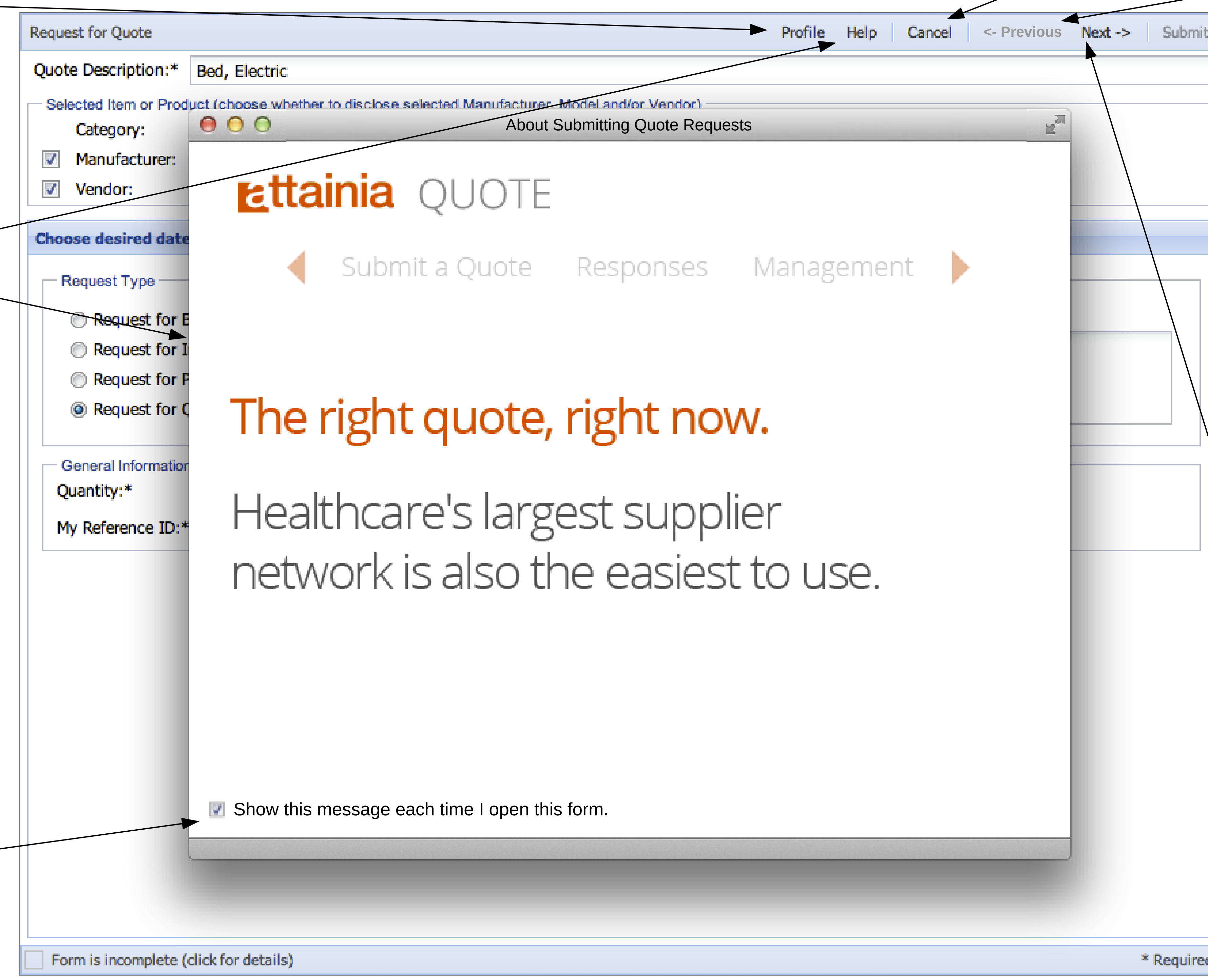
101912 WDM	Separated from common item groups spec.
010713 WDM	Completed preliminary spec for Quote – Basic.
032613 SV	Completed final spec for Quote – Basic.
032913 SV	Added the “About Quote” splash screens, and revised the notes for About popup window. (S0340)
042213 SV	Made layout changes in Select Item or Product section. Made layout changes in “Choose one or more suppliers” wizard step. (S0341 through S0346)
042213 SV	Updated the criteria for which suppliers should display in Member and Other Suppliers lists, and the criteria for which contracts should display. (S0342)
042213 SV	Updated the workflow to go through a review process when a quote request is submitted by a user who does not have access to apps other than Supplier PREDICT. (S0347, S0340)
042313 SV	Updated the Supplier Acknowledged page to enable suppliers to attach documents to a quote request, and to display previously attached documents, when quote request originates from a PLAN item or a BUDGET request. (S0352A, S0352B)
042313 SV	Updated Quote Sign in wizard step, to allow only users with Can Submit Quote Requests permission to sign in. (S0343)
042813 SV	In Attach Documents section in “Enter notes …” Quote popup wizard step, added Attachment Type control, and added Clear button to clear the selected file. (S0345)
042813 SV	In Documents section in Supplier Acknowledged page, added Clear button to clear the selected file. (S0352B)
050713 SV	Updated the design for Attach Documents section in “Enter notes …” Quote popup wizard step. (S0345, S0354)
050913 SV	Clarified that Description should display in Edit mode when a file is browsed and attached . Also, clarified that URL should be editable in an attachment bar, when it is not an item or a project document. (S0345, S0354)

The Quote Request modal popup window can be initiated from the Product, Request or Item detail, or from marketing pages. If submitted via an item or request, the Manufacturer, Model and/or Vendor may not be specified.

The Profile button should:
- Display only after user signs in (Quotes: S0343), when the quote request is initiated from a marketing page. After a user signs in, the Profile button should display in all steps in the Quote popup.
- Always display, when the quote request is initiated from Product, Request or Item Detail panel.
- Have a mouseover: “Edit My Profile”.
- When selected, open the Profile popup, and display only the “Profile” tab. Refer to Admin: S0171A for details.

The About popup window should:
- Display when the Help button is selected.
- When initiated from a marketing page, display whenever the quote request window is opened.
- When initiated from a product, request or item detail, display whenever the quote request window is opened, unless the “Show this message…” checkbox is deselected.
- By default rotate through this screen and the “Submit a Quote”, “Responses” and “Management” screens shown below, in that order, and then stop on this screen at the end of one cycle. The pause time should be adjusted so that the user has sufficient time to read the message, but, not much more.
- When user selects “Submit a Quote”, “Responses” or “Management” link, switch to that screen. If user selects a link before the auto-rotation is completed, then the auto-rotation should stop.
- When user selects the right arrow, display the next screen in the cycle mentioned above. If user selects the arrow before the auto-rotation is completed, then the auto-rotation should stop.
- When user selects the left arrow, display the previous screen in the cycle mentioned above. If user selects the arrow before the auto-rotation is completed, then the auto-rotation should stop.
- When closed, display the first step in Quote wizard, if opened automatically upon first load, or the current step if opened via the Help button.

The “Show this message…” checkbox should:
- Display if the quote request is initiated from a product, request or item detail.
- Not display if the quote request is initiated from a marketing page.
- Control whether or not this window opens when the quote request window is opened, when initiated from a product, request or item detail.
- Default to selected for all current and new users.
- Have its value automatically saved to the user’s profile upon closing of the form whenever the value differs from its opening state.



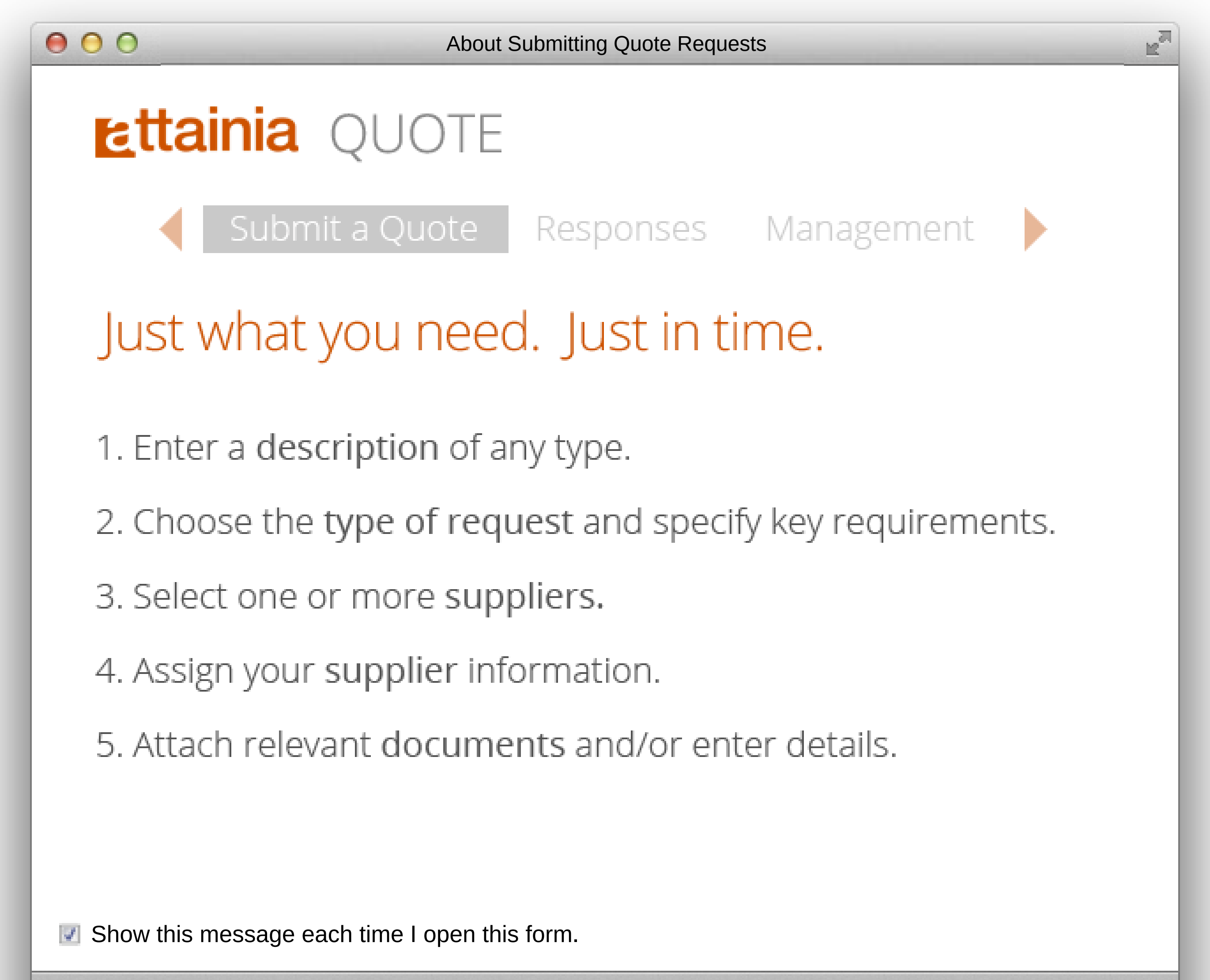
Quote – Popup – About
S0340

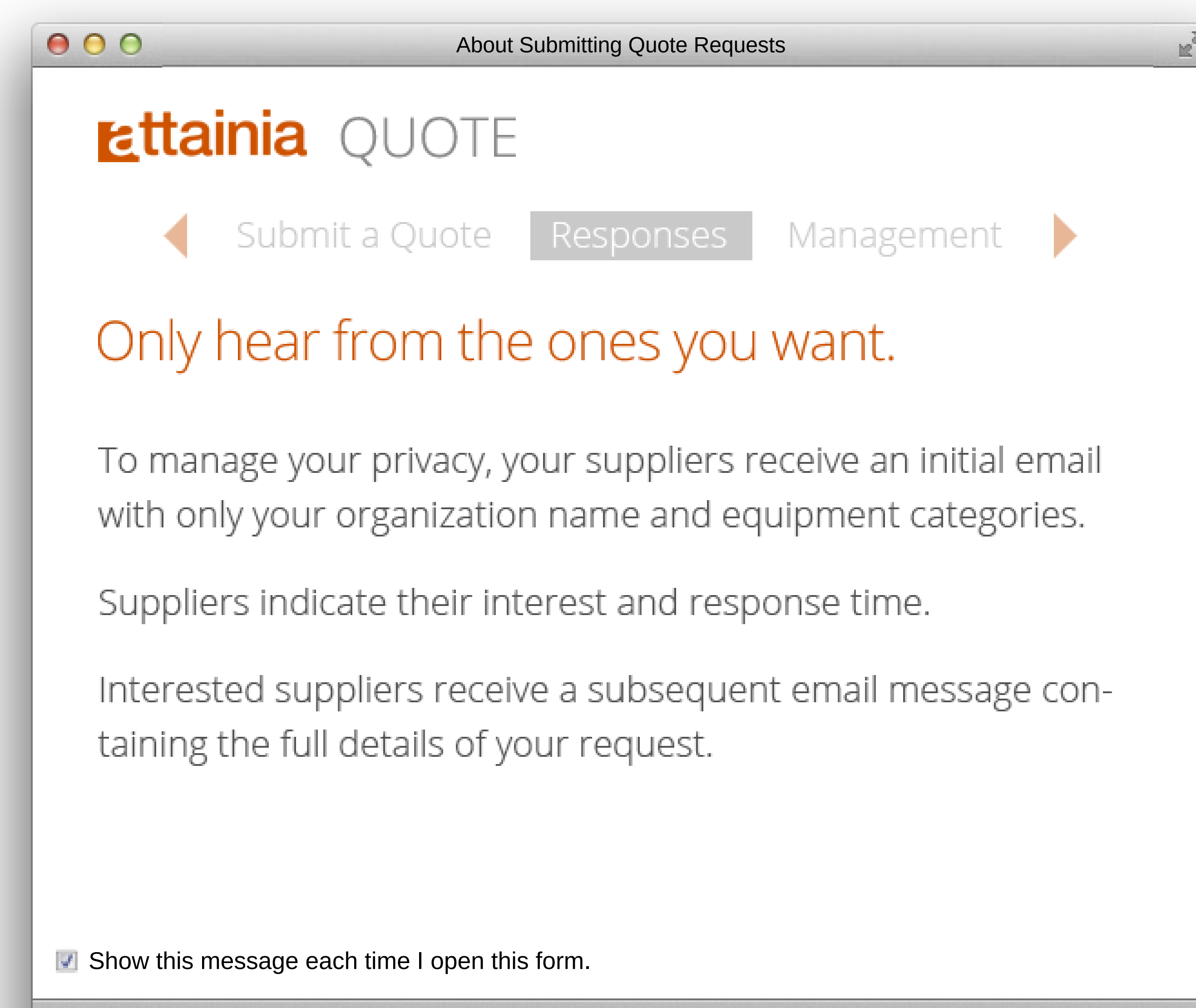
The Cancel button should:
- Have mouseover: “Cancel quote request and close window.”
- When selected, close the window without user prompt.

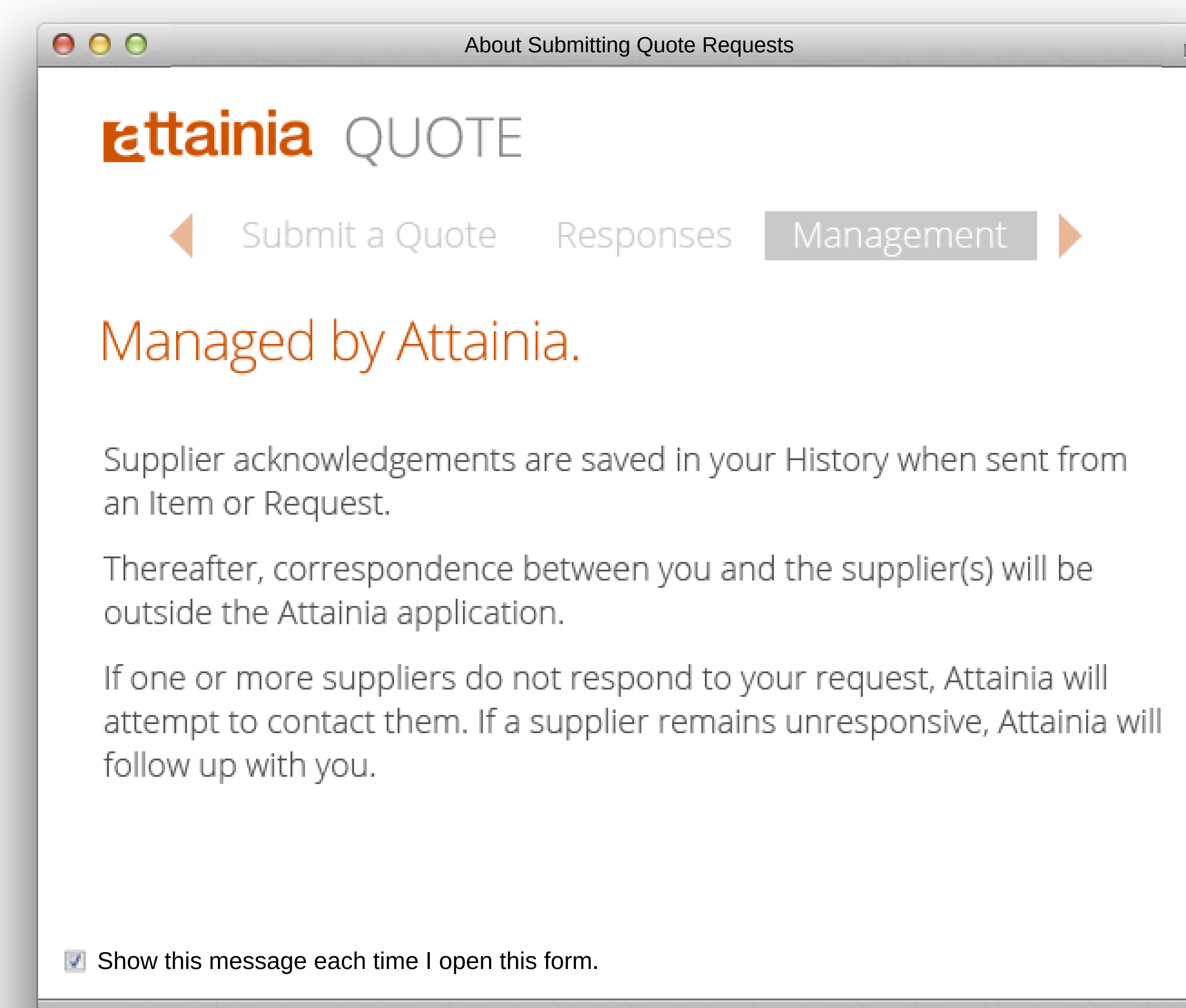
The Previous button should:
- Be disabled when the first step is active.
- When selected, go to the previous wizard step. Changes and actions made on later steps should be preserved.

The Submit button should:
- Have mouseover: “Send this quote request to the selected supplier(s).”
- Be disabled until the last step is active.
- Be enabled in the last step only if quote Description field contains at least 3 characters.
- When selected:
  - Close the quote request window.
  - Post a fading confirmation message in the originating app: “Your <QuoteType> has been submitted to the selected <“supplier.” or # “suppliers.”>
  - Initiate the quote request workflow (Quotes: S0347).
    - Log all quote fields to DB, including the date/time when the quote request is submitted.
    - If the requester has access to one or more apps (as a My Org or Guest user), other than Supplier PREDICT:
      - If quote request is originating from a PLAN item or a BUDGET request:
        - Attach any documents other than Item and Project documents (Quotes: S0345) to the item/request, only if the requester has edit permission for PLAN item’s room’s department or BUDGET request’s cost center.
        - For each document that is attached to the originating item or request, add a “Document - Attached” history action to the item/request.
      - If quote request is originating from a PLAN item or a BUDGET request, add one of the following history actions: “Quote – RFB – Submitted”, “Quote – RFI – Submitted”, “Quote – RFP – Submitted” and “Quote – RFQ – Submitted” (Items: S0215A), whichever is appropriate, for each supplier to whom quote request is submitted.
      - Send email (Email: E0048) with full details to the requester. If there are others to be notified (Quotes: S0344), add their email addresses in CC section. And add quotes@attainia.com in BCC section.
      - Send blinded email (Email: E0049) to selected supplier contacts at selected suppliers (Quotes: S0342).
    - Otherwise, send email (Email: E0057) with full details to Attainia, for review and validation.

The Next button should:
- Be disabled when the last step is active.
- Be enabled only when all criteria, as specified in each step, required to move forward to next step are met.
- When selected, go to the next wizard step.







The Description control should:
- Default to the Category name.
- Accept up to 100 alphanumeric characters.
- Be required to contain at least three characters.

The Selected Item or Product checkboxes should:
- Determine whether or not the selected values will be disclosed to supplier(s).
- Display only for Manufacturer, Model and Vendor. The checkbox adjacent to Model control determines whether or not Model and Mfr # are disclosed to supplier(s).
- Not display when the adjacent value is not specified in the originating item, request or template item.

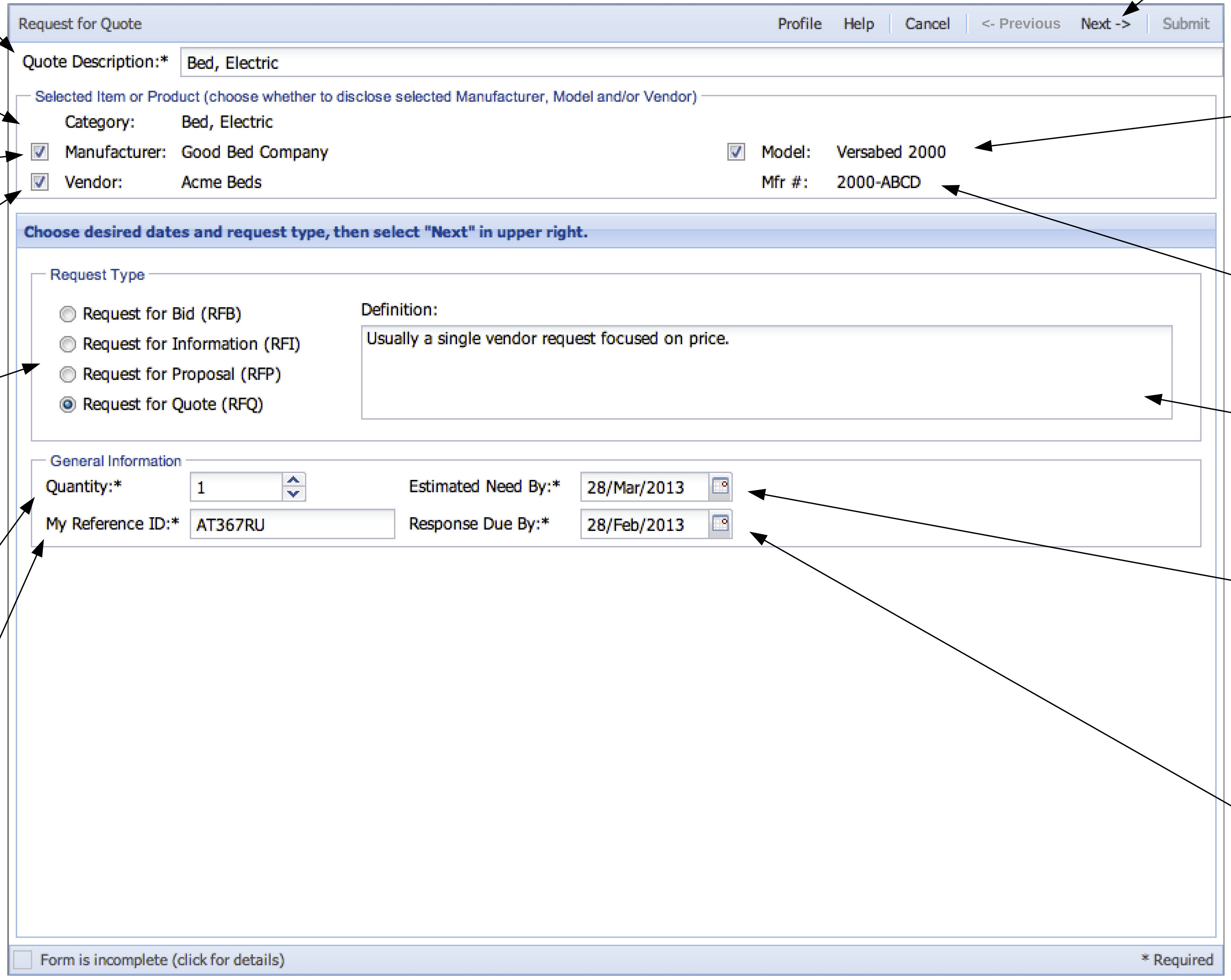
The Manufacturer control should:
- Display the manufacturer of the originating item, request, product or template item.
- If the quote request is originating from an item or request, display as "Unspecified" when no manufacturer is specified in the originating item or request.

The Vendor control should:
- Display the vendor for the originating item, request, product or template item.
- If the quote request is originating from an item, request or template item, display as "Unspecified" when no vendor was specified in the originating item, request or template item.

The Request Type radio buttons should:
- Default to Request for Quote
- When changed:
  - Update the Definition as follows:
    - RFB: "Usually a multi-vendor request focused on price."
    - RFI: "Usually a preliminary request for information."
    - RFP: "Usually a preliminary request for configuration suggestions and pricing."
    - RFQ: "Usually a single vendor request focused on price."
  - Update the popup window title.

The Quantity control should:
- If the quote request is originating from an item or request, default to that of the originating item or request. Otherwise default to 1.
- Be a number stepper, accepting only integers greater than 1.

The My Reference ID control should:
- Default to the AutoID of the originating item in PLAN, or the Request # of the originating request in BUDGET, or the Atta ID of the originating product or template item.
- Accept up to 25 alphanumeric characters.
- Be required to contain at least one character.



Quote – Popup – Type
S0341

The Next button should:
- Be enabled only if the following criteria are met:
  - The Quote Description field contains at least 3 characters.
  - The Reference ID field is non-null.
  - The Estimated Need By and Response Due By dates are greater than or equal to the current date.
- When selected, display "Choose suppliers" step.

The Model control should:
- Display the model of the originating item, request, product or template item.
- If the quote request is originating from an item, request or template item, display as "Unspecified" when no model was specified in the originating item, request or template item.

The Mfr # control should display the Mfr Catalog # of the originating item, request, product or template item.

The Definition note box should:
- Display the definition of the currently selected quote request type.
- Be read-only.

The Estimated Need By date control should:
- Default to the underlying request's or item's Need By date, otherwise default to empty.
- Be a required field and be validated as a date equal to or later than the current date.
- Be in the format d/M/Y

The Response Due By date control should:
- Default to empty.
- Be a required field and be validated as a date equal to or later than the current date.
- Be in the format d/M/Y

The Other Suppliers tab should:
- Contain a list of non-archived non-PREDICT suppliers and custom suppliers that distribute at least one non-archived vendor product (including custom products) in the quote category, sorted ascending. The criteria for including products flagged as UK-only is same as the criteria defined under Member Suppliers list.
- Display only if there is at least one supplier in the list.
- If Member Suppliers tab is hidden, display label as “Suppliers” instead of “Other Suppliers”.
- Display number of other suppliers, within parenthesis.
- Display number of selected suppliers, if one or more suppliers are selected in the tab.
- Display custom suppliers in underline.

The Member Suppliers tab should:
- Contain a list of current PREDICT suppliers that distribute at least one non-archived vendor product (including custom products) in the quote category, sorted ascending. Products flagged as UK-only should be included only when:
  - If the quote request originated in PLAN, the project is located in a country other than the US
  - If the quote request originated in BUDGET or WATCH, the client-org has a license that includes a region other than the “US or Canada”.
- If there is a combination of new and aftermarket products for any supplier on the list, only one row should display, with the aftermarket icon.
- Display only if there is at least one supplier in the list.
- Display number of other suppliers, within parenthesis.
- Display number of selected suppliers, if one or more suppliers are selected in the tab

The checkbox column, in Member Suppliers list and in Other Suppliers list, should:
- When selected, select all checkboxes in the list.
- When deselected, deselect all checkboxes in the list.
- When selected or deselected, not change the currently selected supplier row.
- Be automatically deselected, when any checkbox in that list is deselected.
- Be automatically selected, when all checkboxes in that list are selected.

A supplier row checkbox, should:
- When selected, automatically select the corresponding supplier row.
- When deselected, automatically deselect the corresponding supplier row, if the row is currently selected.
- Default to selected, in the Member Suppliers list, only if the supplier is the originating Vendor (if any). When selected by default, the corresponding supplier row should also be selected by default.
- Default to selected, in the Other Suppliers list, only if the supplier is the originating Vendor (if any) and there are no suppliers in the Member Suppliers list. When selected by default, the corresponding supplier row should also be selected by default.

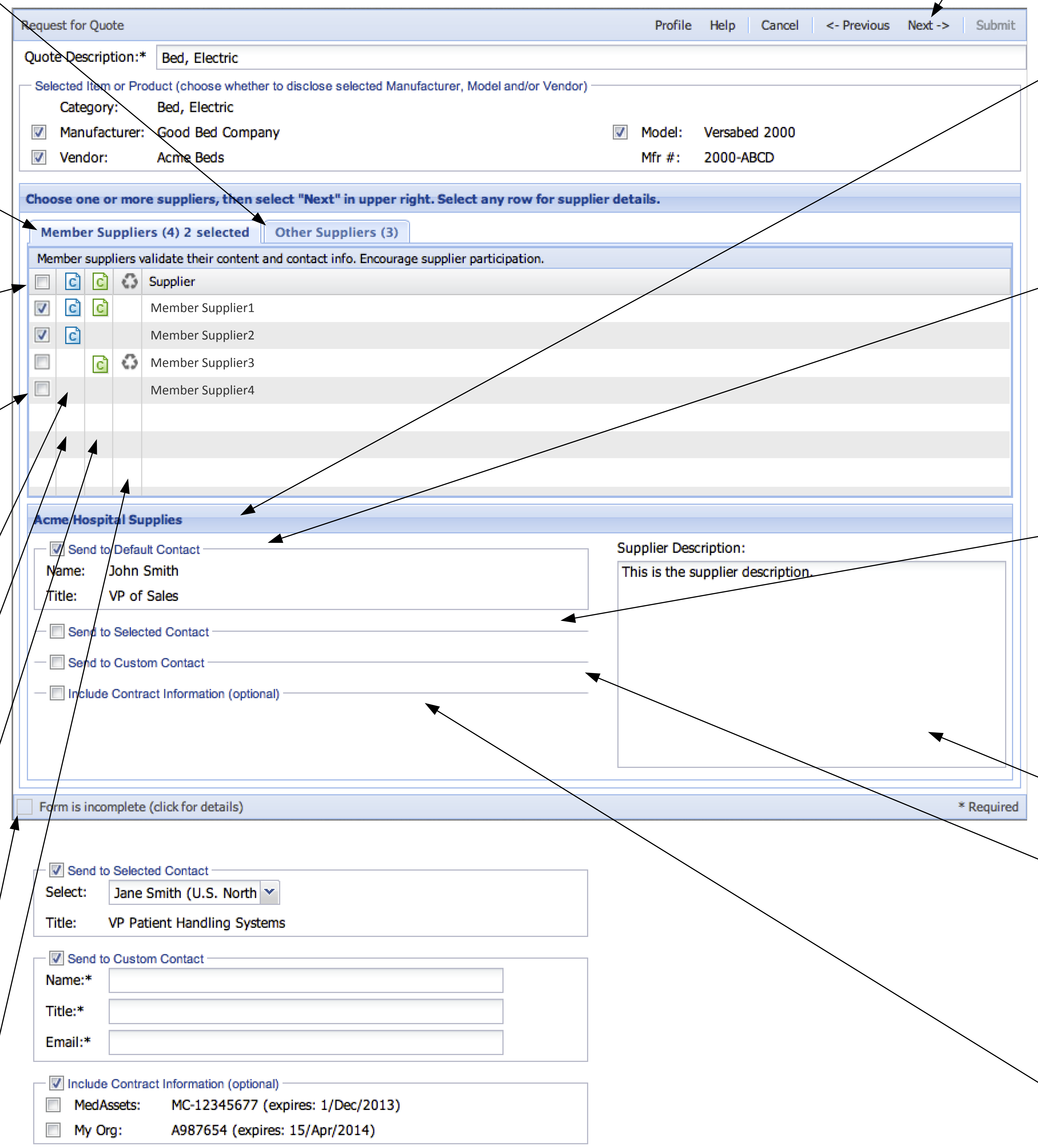
A supplier row, when selected, should select the row, but, not select the corresponding checkbox. Only one row may be selected at a time.

The GPO contract column, in Member Suppliers list and in Other Suppliers list, should:
- Display only if this column is visible in the originating application (i.e. GPO and Can View Contracts criteria is met).
- Display contract icons in cases where there is at least one non-expired
  - Contract/Vendor scope GCM contract available for the quote category and current supplier, or
  - Vendor scope GCM contract available for current supplier, or
  - Product/Vendor scope GCM or GPPC contract available for at least one product, that meets the criteria defined under Member Suppliers and Other Suppliers list notes, and is distributed by the current supplier.
- Row icon mouseovers are not required.

The Client contract column, in Member Suppliers list and in Other Suppliers list, should:
- Display only if this column is visible in the originating application (i.e. Can View Contracts criteria is met).
- Display contract icons in cases where there is at least one non-expired
  - Contract/Vendor scope MOC contract available for the quote category and current supplier, or
  - Vendor scope MOC contract available for current supplier, or
  - Product/Vendor scope MOC contract available for at least one product, that meets the criteria defined under Member Suppliers and Other Suppliers list notes, and is distributed by the current supplier.
- Row icon mouseovers are not required.

Validation of fields and the entire form should be implemented as demonstrated in the sample: http://cdn.sencha.com/ext-4.1.1a-gpl/examples/statusbar/statusbar-advanced.html

The Market column should:
- Display aftermarket icons in cases where there is at least one aftermarket product, that meets the criteria defined under Member Suppliers and Other Suppliers list notes, and is distributed by the current supplier.



Quote – Popup – Suppliers
S0342

The Next button should:
- Be enabled only if the following criteria are met:
  - At least one supplier checkbox is selected on either the Member Suppliers list or Other Suppliers list.
  - At least one contact is selected for each supplier with a selected checkbox.
  - Custom supplier contact, if selected, is validated, for each supplier with a selected checkbox.
  - The Quote Description field still contains at least 3 characters.
- When selected, if the quote request is initiated from Product, Request or Item Detail panel, display “Choose request details” step.
- When selected, if the quote request is initiated from a marketing page, display:
  - “Sign In” step, if user is not signed in.
  - “Choose request details” step, if user has already signed in.

The supplier detail should:
- Display only when a supplier row is selected.
- Display as enabled when checkbox is selected in the selected supplier row.
- Display as disabled when checkbox is not selected in the selected supplier row.
- When enabled, allow one or more contacts to be selected/entered for the selected supplier, and allow one or more contracts to be selected, if available.
- Retain contact(s) selected by user, custom contact details entered by user, and contracts selected by user, for the selected supplier, when another supplier row is selected or when the supplier checkbox is deselected.

The Send to Default Contact section should:
- Display the Default Sales contact for the selected supplier.
- Display only if Name and Sales email address are not null.
- Display Name and Title as read-only text.
- When it displays, have checkbox selected by default.
- Display as expanded when checkbox is selected.
- Display as collapsed when checkbox is not selected.
- Determine whether the quote request is sent to default contact.
- Have checkbox disabled, if it is selected, and the Selected Contact section and Custom Contact section checkboxes are not selected.

The Select Contact section should:
- Display in the Select combo box, a list of all contacts, with non-null Name and Email fields, in the form: "<FirstName> <LastName> (<LocationName>)", for the selected supplier, other than the Default sales contact, sorted ascending.
- Display only if there is at least one contact meeting the above mentioned criteria.
- When it displays, have checkbox selected by default, only if the Default section does not display.
- Display as expanded when checkbox is selected, as shown under the form.
- Display as collapsed when checkbox is not selected.
- Display Title, corresponding to selected contact, as read-only text.
- Determine whether the quote request should be sent to a selected contact.
- Have checkbox disabled, if it is selected, and the Default Contact section and Custom Contact section checkboxes are not selected.

The Supplier Description should:
- Display only when a Member Supplier is selected.
- Display the member supplier’s org description as read-only text.

The Custom Contact section should:
- Display as expanded when checkbox is selected, as shown under the form.
- Display as collapsed when checkbox is not selected.
- Have checkbox selected by default, only if the Default and Select sections do not display.
- Allow entry of a custom Name, Title and Email address.
- Utilize an email validator for the email address.
- Utilize a required field validator for Name and Title.
- Determine whether the quote request should be sent to a custom contact.
- Have checkbox disabled, if it is selected, and the Default Contact section and Selected Contact section checkboxes are not selected.

The Contract section should:
- Display only when at least one GPO or My Org contract is available for the selected supplier.
- Display as expanded when checkbox is selected, as shown under the form.
- Display as collapsed when checkbox is not selected. When section checkbox is deselected, any selected contract checkboxes should also be deselected.
- Have checkbox deselected by default.
- Default to having none of the contract checkboxes selected, when the section checkbox is selected.
- Determine whether contract information should be disclosed to the supplier.
- Contain a list of GPO contracts available for the selected supplier (if any), as defined in GPO contract column note on the left, in the format: “<GPOName>: <Contract#> (expires: <ContractExpireDate>)”, in descending order by creation date.
- Contain a list of My Org contracts available for the selected supplier (if any), as defined in Client contract column note on the left, in the format: “My Org: <Contract#> (expires: <ContractExpireDate>)”, in descending order by creation date.

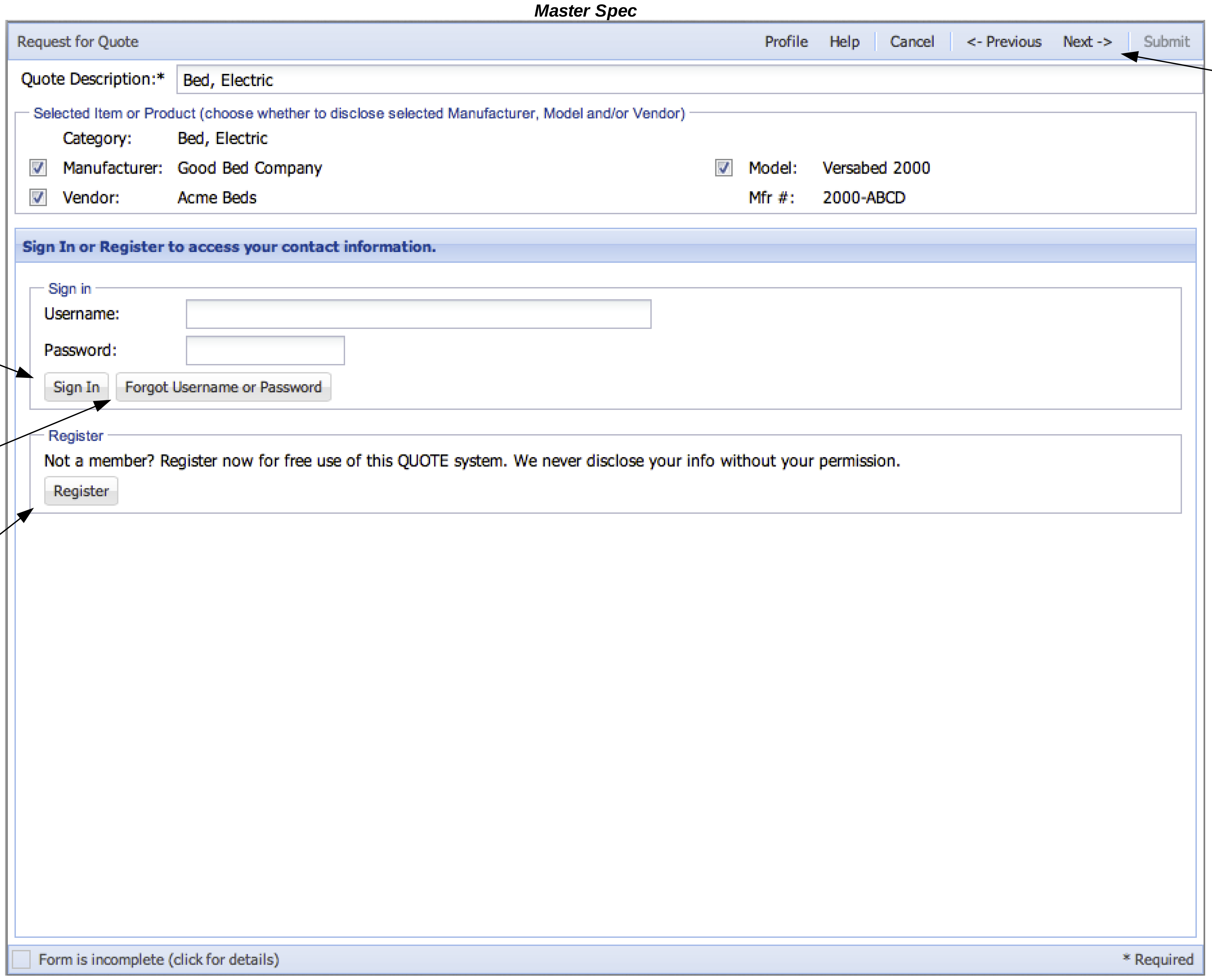
The Sign In button, when selected, should:
- If username and password are valid, and user has Can Submit Quote Requests permission, display “Choose details” step.
- If username and/or password is not valid, prompt the user:
  “The username and/or password you have entered is invalid. Please try again.

  Note: Passwords are case sensitive.

  Need Help? Click on Forgot Username or Password button to reset your password. <OK>.”.
- If username and password are valid, and user does NOT have Can Submit Quote Requests permission, prompt the user:
  “You do not have permission to submit quote requests.<OK>”

The “Forgot Username or Password” button should function same as “Forgot username or password?” link on Attainia home page.

The Register button, when selected, should open the Profile popup, in Register mode. Refer to Admin: S0171C for details. When “Register” button is selected in Profile popup, that popup should close and the Quote popup should display “Choose details” step, without requiring the user to sign in.



Quote – Popup – Sign In
S0343

The Next button should be disabled until user signs in.

The Organization, Facility, Name, Title, Email, City, State, Country, Phone, and Alt Phone should be derived from the requester’s user profile.

The Facility control should display only when there is a facility mapped to the requester.

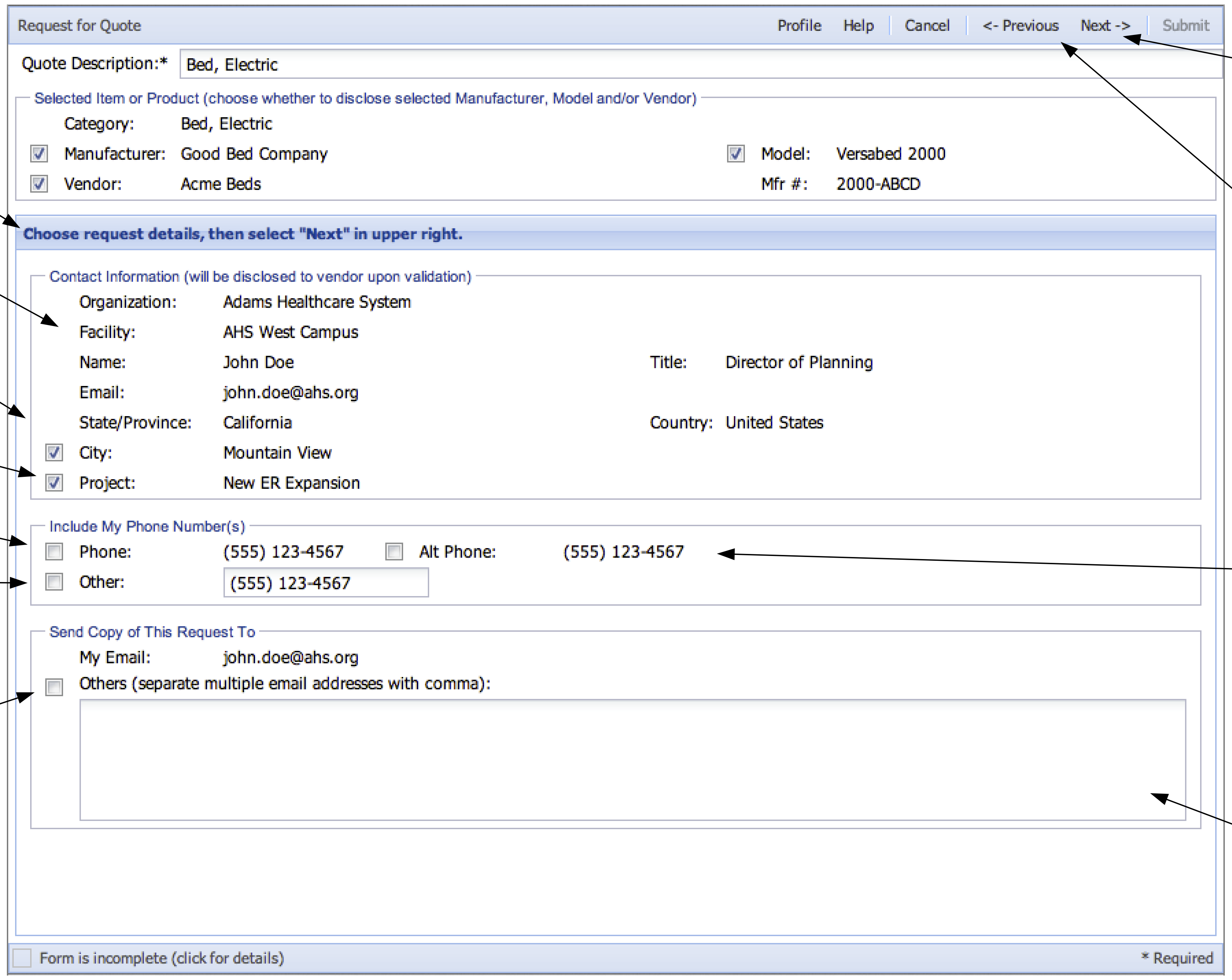
All contact information in this section, except the City and Project will automatically be disclosed to the supplier(s). City and Project should default to selected, but will not be disclosed if not selected.

The Project control should:
- Display the name of the project of the originating item.
- Display only when the quote request originates from an item in PLAN.

The Phone Number checkboxes should default to not-selected.

The Other phone checkbox should:
- Be enabled only when a valid other phone number is entered. It should be possible to enter international phone numbers.
- Be automatically selected when a valid other phone number is entered.
- Be automatically deselected when the other phone number is cleared or is not valid any more.
- When deselected, automatically clear the other phone number.

The Others email checkbox should:
- Be enabled only when one or more valid email addresses are entered.
- Be automatically selected when one or more valid email addresses are entered.
- Be automatically deselected when the other email addresses are cleared.
- When deselected, automatically clear the other email addresses.



Quote – Popup – Details
S0344

The Next button should:
- Be enabled only if the following criteria are met:
  - The Quote Description field still contains at least 3 characters.
  - The Other phone, if entered, is valid.
  - The Others email, if entered, is valid.
- When selected, display “Enter notes” step.

The Previous button, when selected, should display “Choose suppliers” step, irrespective of whether the user came to this step from “Choose suppliers” step or “Sign In” step.

The Alt Phone control should display only if the requester has a non-null Alt Phone number.

When selected, the Others email address section designates other addresses that will be copied on the full request email. This section should be validated to contain only legitimate, comma separated email addresses.

The Type combo box should:

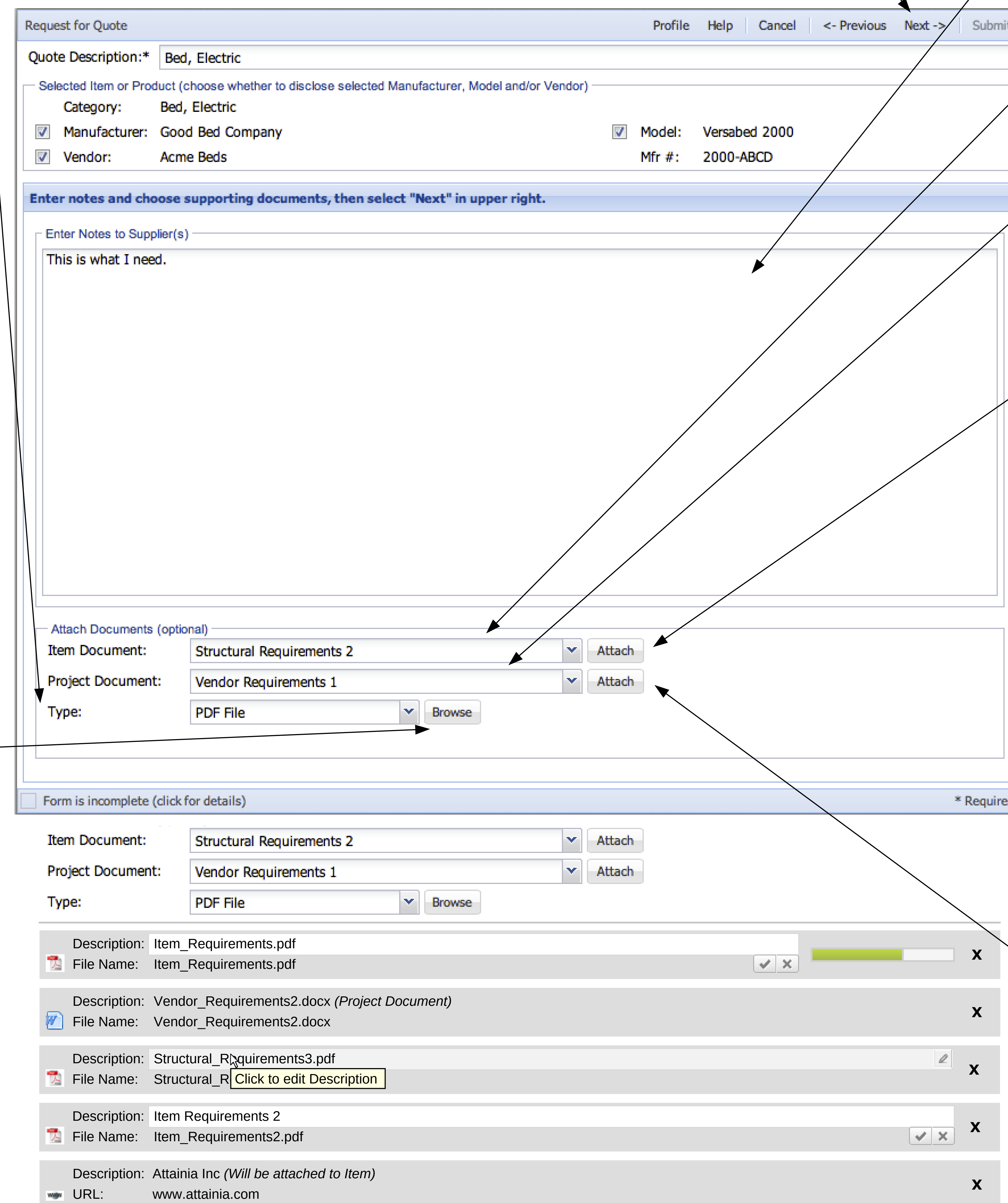
- Display all document types defined in “Quote” column in Documents: D0015, except for “Quote – From Supplier” document type.

The Browse / Attach button adjacent to Type control should:

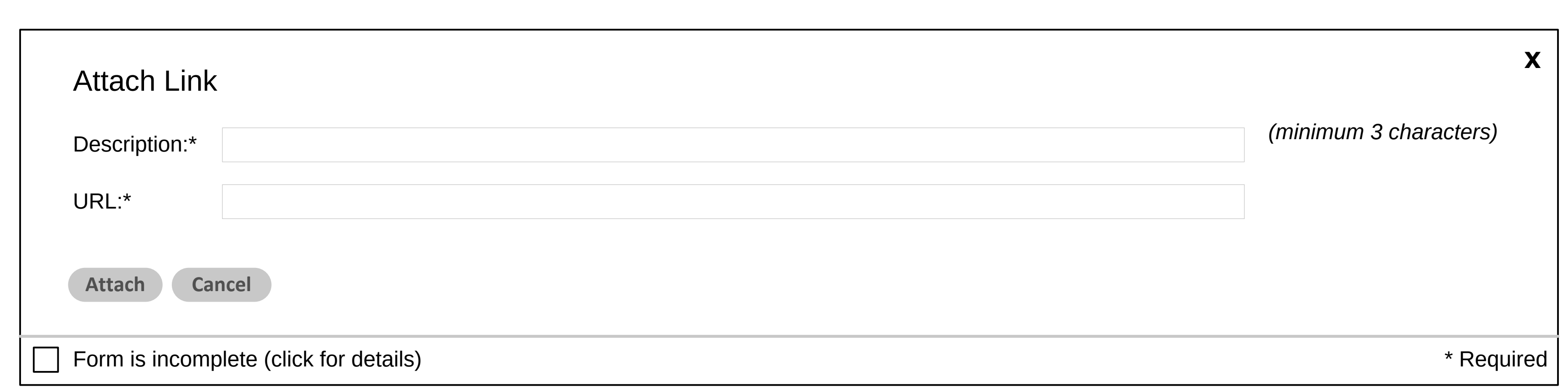
- If a document type other than “Web Link” is selected in the Type combo box,
  - Display as “Browse” button.
  - When selected, open the file dialog box and enable users to select a file and upload it. When the selected file is uploaded,
    - Its name, icon corresponding to document type selected in Type combo box, and description, should display in an attachment bar as shown in the sketch below the screen. The attachment bar should display above any other existing attachment bars.
    - Upload progress bar should display until the file is uploaded.
    - Document type icon should display after the file is completely uploaded. The icon should have a mouseover: “Click to download document.”, and when selected should download the document.
    - Description should default to file name, and should display in in-line edit mode as shown in the sketch below the screen.
    - When Description is in in-line edit mode,
      - If “√” icon is selected or if clicked outside the Description edit box, the edits should be saved and Description should display as read-only text. The “√” icon should be enabled only when 3 or more characters are entered. The Description control when it is editable should have a field and form validation that it is at least 3 characters long.
      - If the “x” icon below the edit box is selected, then any changes made to Description after previous save of Description field, should be canceled, and Description should display as read-only text.
    - When Description displays as read-only text, it should have a mouseover: “Click to edit Description”, and should display in a different background when cursor hovers over it. When clicked upon, it should display in in-line edit mode.
    - If the quote request originated from a PLAN item or a BUDGET request, and the requester has edit permission for PLAN item’s room’s department or BUDGET request’s cost center, the text “*(Will be attached to Item)*” or “*(Will be attached to Request)*” should display adjacent to description, only when description is in view mode.
    - Document name should display as read-only text.
    - A “X” button should display with a mouseover: “Click to detach document.”, and when selected should detach the file.
- If “Web Link” is selected in Type combo box,
  - Display as “Attach” button.
  - When selected, open the Attach Web Link popup, as shown in Quotes: S0354. In the Attach Web Link popup,
    - The Attach button should be disabled when Description and/or URL are invalid. A minimum of 3 characters should be entered in Description.
    - The Cancel button, when selected, should close the popup and not attach the web link to the quote request.
    - The “X” button should function same as the Cancel button.
    - If Description is blank when URL is entered, then Description should be auto-populated with what is entered in URL.
    - The Attach button, when selected, should display an attachment bar in Attach Documents section in the quote request popup, above any other existing attachment bars. In the attachment bar,
      - The URL, web link icon, and Description should display as shown in the sketch below the screen.
      - URL and Description should display as read-only text.
      - Description should display in a different background when cursor hovers over it, and have a mouseover: “Click to edit Description”.
      - Description, when clicked upon, should be editable in-line, and
        - If “√” icon is selected or if clicked outside the Description edit box, the edits should be saved and Description should display as read-only text. The “√” icon should be enabled only when 3 or more characters are entered. The Description control when it is editable should have a field and form validation that it is at least 3 characters long.
        - If the “x” icon below the edit box is selected, then any changes made to Description after previous save of Description field, should be canceled, and Description should display as read-only text.
      - URL should display in a different background when cursor hovers over it, and have a mouseover: “Click to edit URL”.
      - URL, when clicked upon, should be editable in-line, and
        - If “√” icon is selected or if clicked outside the URL edit box, the edits should be saved and URL should display as read-only text. The “√” icon should be enabled only when a valid URL is entered. The URL control when it is editable should have a field and form validation that it is a valid URL.
        - If the “x” icon below the edit box is selected, then any changes made to URL after previous save of URL field, should be canceled, and URL should display as read-only text.
      - If the quote request originated from a PLAN item or a BUDGET request, and the requester has edit permission for PLAN item’s room’s department or BUDGET request’s cost center, the text “*(Will be attached to Item)*” or “*(Will be attached to Request)*” should display adjacent to description, only when description is in view mode.
      - A “X” button should display with a mouseover: “Click to detach document.”, and when selected should detach the web link.

The Next button should:

- Be enabled only if the following criteria are met:
  - The Quote Description field still contains at least 3 characters.
  - The Description fields are not blank if a document is attached in the corresponding Attachment controls.
- When selected, display “Review choices” step.



Quote – Popup – Notes
S0345



Attach Web Link – Popup
S0354

The Notes section should:

- Allow user to enter up to 1000 characters.
- Not be a required field.

The Item (or Request) Document combo box should:

- Display only if the quote request originated from a BUDGET request or PLAN item.
- Display a label of “Item Document” if originating from PLAN or “Request Document” if originating from BUDGET.
- Display descriptions of documents tied to the BUDGET request or PLAN item, sorted ascending. Note that the documents may be of any type, including web links.
- If the quote request originated from a PLAN item and the user is a guest of that project, exclude documents flagged as not “Visible to Guests”.
- Documents that are already attached to this quote request should be excluded.
- Not display if there are no documents to display in the combo box.

The Project Document combo box should:

- Display only if the quote request originated from a PLAN item.
- Display descriptions of project-scope documents in the PLAN item’s parent project, sorted ascending. Note that the documents may be of any type, including web links.
- If the quote request originated from a PLAN item and the user is a guest of that project, exclude documents flagged as not “Visible to Guests”.
- Documents that are already attached to this quote request should be excluded.
- Not display if there are no documents to display in the combo box.

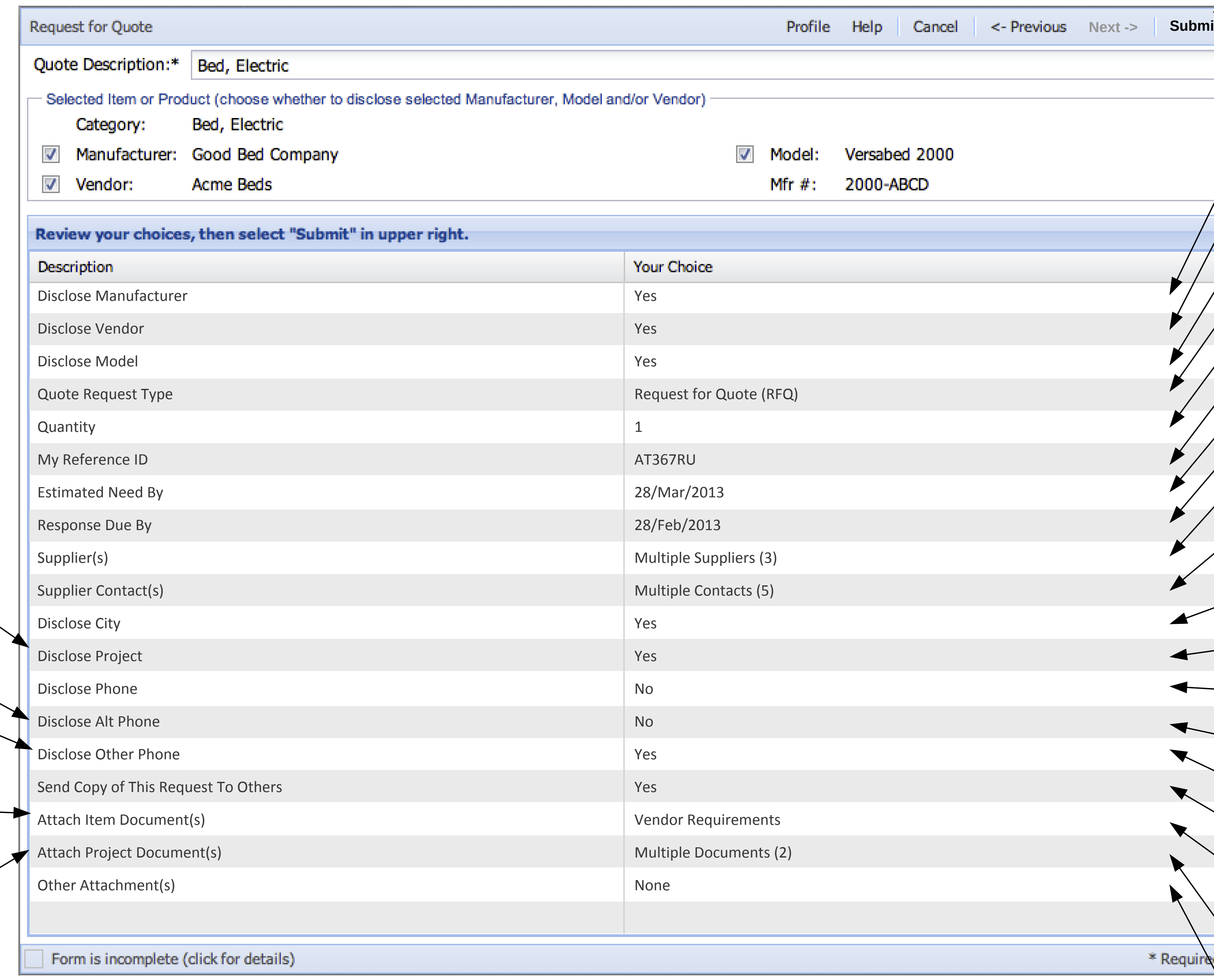
The Attach button adjacent to Item (or Request) Document control, when selected, should:

- Display only when Item (or Request) Document control displays.
- If the document selected in Item (or Request) Document combo box is a file,
  - Upload the selected document and display document name, document type icon, and document description, in an attachment bar as shown in the sketch below the screen. The attachment bar should display above any other existing attachment bars.
  - Display upload progress bar during file upload.
  - Display document type icon after the file is completely uploaded. The icon should have a mouseover: “Click to download document.”, and when selected should download the document.
  - Display document name and description as read-only text, and not allow editing them. The text “*(Item Document)*” or “*(Request Document)*” should display adjacent to the description.
  - Display a “X” button with a mouseover: “Click to detach document.”, and when selected should detach the file.
- If the document selected in Item (or Request) Document combo box is a web link,
  - Display URL, web link icon, and description, in an attachment bar as shown in the sketch below the screen. The attachment bar should display above any other existing attachment bars.
  - Display web link icon with a mouseover: “Click to open the web page in a browser.”, and when selected should open the web page.
  - Display URL and description as read-only text, and not allow editing them. The text “*(Item Document)*” or “*(Request Document)*”should display adjacent to the description.
  - Display a “X” button with a mouseover: “Click to detach document.”, and when selected should detach the web link.
- Refresh the Item (or Request) Document combo box, so that the attached document does not display in the combo box. If there are no more item (or request) documents that can be attached, then the Item (or Request) Document combo box and the Attach button should be hidden, and the other controls below them should move up.

The Attach button adjacent to Project Document control, when selected, should:

- Display only when Project Document control displays.
- If the document selected in Project Document combo box is a file,
  - Upload the selected document and display document name, document type icon, and document description, in an attachment bar as shown in the sketch below the screen. The attachment bar should display above any other existing attachment bars.
  - Display upload progress bar during file upload.
  - Display document type icon after the file is completely uploaded. The icon should have a mouseover: “Click to download document.”, and when selected should download the document.
  - Display description as read-only text, and do not allow editing it. The text “*(Project Document)*” should display adjacent to the description.
  - Display a “X” button with a mouseover: “Click to detach document.”, and when selected should detach the file.
- If the document selected in Project Document combo box is a web link,
  - Display URL, web link icon, and description, in an attachment bar as shown in the sketch below the screen. The attachment bar should display above any other existing attachment bars.
  - Display web link icon with a mouseover: “Click to open the web page in a browser.”, and when selected should open the web page.
  - Display URL and description as read-only text, and not allow editing them. The text “*(Project Document)*” should display adjacent to the description.
  - Display a “X” button with a mouseover: “Click to detach document.”, and when selected should detach the web link.
- Refresh the Project Document combo box, so that the attached document does not display in the combo box. If there are no more project documents that can be attached, then the Project Document combo box and the Attach button should be hidden, and the other controls below them should move up.

Refer to Quotes: S0340 spec page.


Request for Quote   Profile | Help | Cancel | <- Previous | Next -> | Submit

Quote Description:* Bed, Electric

Selected Item or Product (choose whether to disclose selected Manufacturer, Model and/or Vendor)

Category: Bed, Electric

☑ Manufacturer: Good Bed Company   ☑ Model: Versabed 2000

☑ Vendor: Acme Beds   Mfr #: 2000-ABCD

Review your choices, then select "Submit" in upper right.

Description	Your Choice
Disclose Manufacturer	Yes
Disclose Vendor	Yes
Disclose Model	Yes
Quote Request Type	Request for Quote (RFQ)
Quantity	1
My Reference ID	AT367RU
Estimated Need By	28/Mar/2013
Response Due By	28/Feb/2013
Supplier(s)	Multiple Suppliers (3)
Supplier Contact(s)	Multiple Contacts (5)
Disclose City	Yes
Disclose Project	Yes
Disclose Phone	No
Disclose Alt Phone	No
Disclose Other Phone	Yes
Send Copy of This Request To Others	Yes
Attach Item Document(s)	Vendor Requirements
Attach Project Document(s)	Multiple Documents (2)
Other Attachment(s)	None

Form is incomplete (click for details)   * Required

Quote – Popup – Review
S0346

The “Disclose Project” row should display only when the quote request originates from an item in PLAN.

The “Disclose Alt Phone” row should display only if the user has a non-null Alt Phone number.

The “Disclose Other Phone” row should display only if the user has entered an other phone number in “Choose request details” step.

The “Attach Item Document(s)” row should display only if the quote request is initiated from a PLAN item and there is at least one item-scope document tied to the item. If the quote request is initiated from a BUDGET request and there is at least one request-scope document tied to the request, then a “Attach Request Document(s)” row should display instead of “Attach Item Document(s)” row.

The “Attach Project Document(s)” row should display only if the quote request is initiated from a PLAN item and there is at least one project-scope document tied to the item’s parent project.

Displays “Yes” if Manufacturer checkbox is selected in “Choose request details” step, and otherwise displays “No”.

Displays “Yes” if Vendor checkbox is selected in “Choose request details” step, and otherwise displays “No”.

Displays “Yes” if Model checkbox is selected in “Choose request details” step, and otherwise displays “No”.

Displays Quote Type selected in “Choose request details” step.

Displays Quantity entered in “Choose request details” step.

Displays My Reference ID entered in “Choose request details” step.

Displays Estimated Need By entered in “Choose request details” step.

Displays Response Due By entered in “Choose request details” step.

Displays supplier name, if a single supplier is selected in “Choose suppliers” step. If multiple suppliers are selected in “Choose suppliers” step, displays “Multiple Suppliers (<Number of selected suppliers>)”.

Displays contact name, if a single supplier is selected in “Choose suppliers” step and a single contact is selected for the selected supplier. In “Choose suppliers” step, if multiple contacts are selected from among the selected supplier(s), displays “Multiple Contacts (<Number of selected contacts from among the selected suppliers>)”.

Displays “Yes” if City checkbox is selected in “Choose request details” step, and otherwise displays “No”.

Displays “Yes” if Project checkbox is selected in “Choose request details” step, and otherwise displays “No”.

Displays “Yes” if Phone checkbox is selected in “Choose request details” step, and otherwise displays “No”.

Displays “Yes” if Alt Phone checkbox is selected in “Choose request details” step, and otherwise displays “No”.

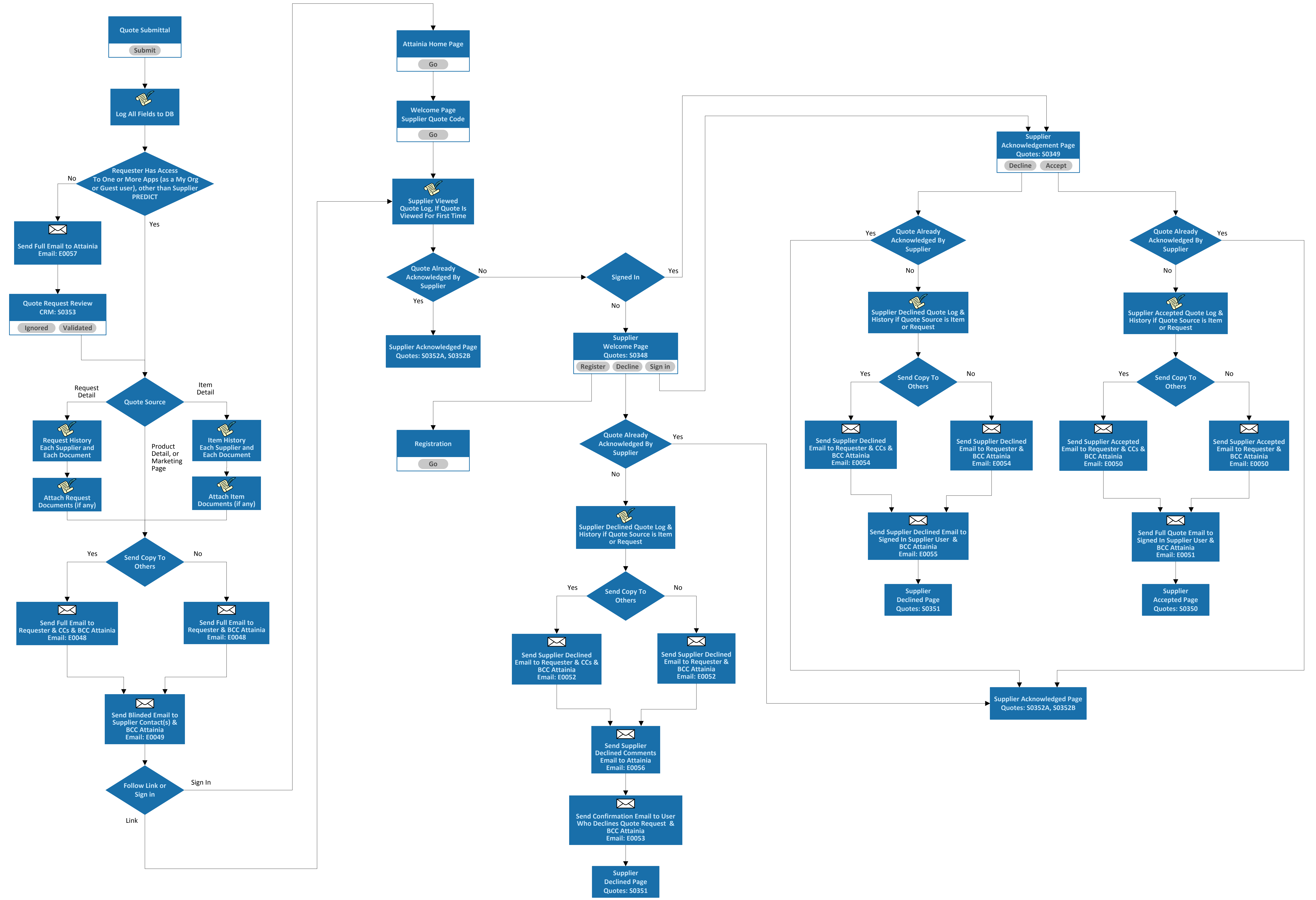
Displays “Yes” if the row displays.

Displays “Yes” if Others checkbox is selected in “Send Copy of This Request To” section in “Choose request details” step, and otherwise displays “No”.

Displays description of item (or request) document, if only one item (or request) document is attached in “Choose notes” step. If multiple item (or request) documents are attached in “Choose notes” step, displays “Multiple Documents (<Number of attached item (or request) documents>)”. If none of the item (or request) documents is attached in “Choose notes” step, displays “None”.

Displays description of project document, if only one project document is attached in “Choose notes” step. If multiple project documents are attached in “Choose notes” step, displays “Multiple Documents (<Number of attached project documents>)”. If none of the project documents is attached in “Choose notes” step, displays “None”.

Displays description of attached document if only one document other than item (or request) and project documents is attached in “Choose notes” step. If multiple documents, other than item (or request) and project documents, are attached in “Choose notes” step, displays “Multiple Documents (<Number of documents attached, other than item (or request) and project documents>)”. If no document other than item (or request) and project documents is attached in “Choose notes” step, displays “None”.



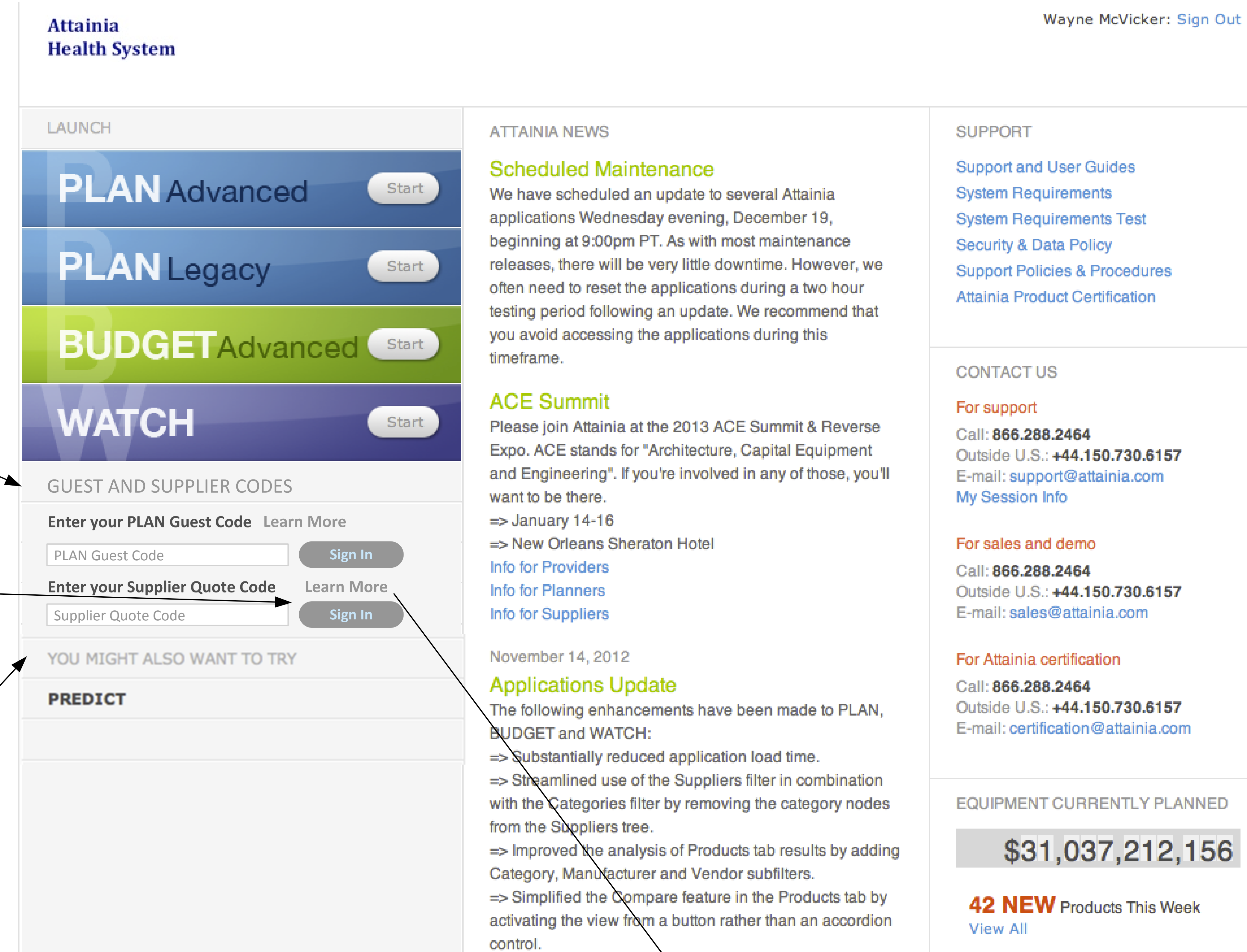
Quote – Basic – Flow Diagram
S0347

Revise the Guest Account section and add a Supplier Quote Code section.

The Sign In button, when selected, should:

- If the entered supplier quote code is valid,
  - And used for the first time (irrespective of which user), a log should be entered in the DB that "Supplier has viewed quote request", noting the username and date/time. Note that a quote request can also be viewed by a supplier by clicking on a link to the Supplier Welcome page in the email sent to a supplier contact (Email: E0049).
  - And the quote tied to the supplier quote code is NOT already acknowledged, using this supplier quote code, display Supplier Acknowledgement page (Quotes: S0349).
  - And the quote tied to the supplier quote code is already acknowledged, using this supplier quote code, display Supplier Acknowledged page (Quotes: S0352B).
- If the entered supplier quote code is NOT valid, prompt the user: "The supplier quote code you have entered is invalid. Please try again."
- If supplier quote code control is blank, prompt the user: "Please enter a valid supplier quote code and try again."

Move the "YOU MIGHT..." section to below the Guest section.

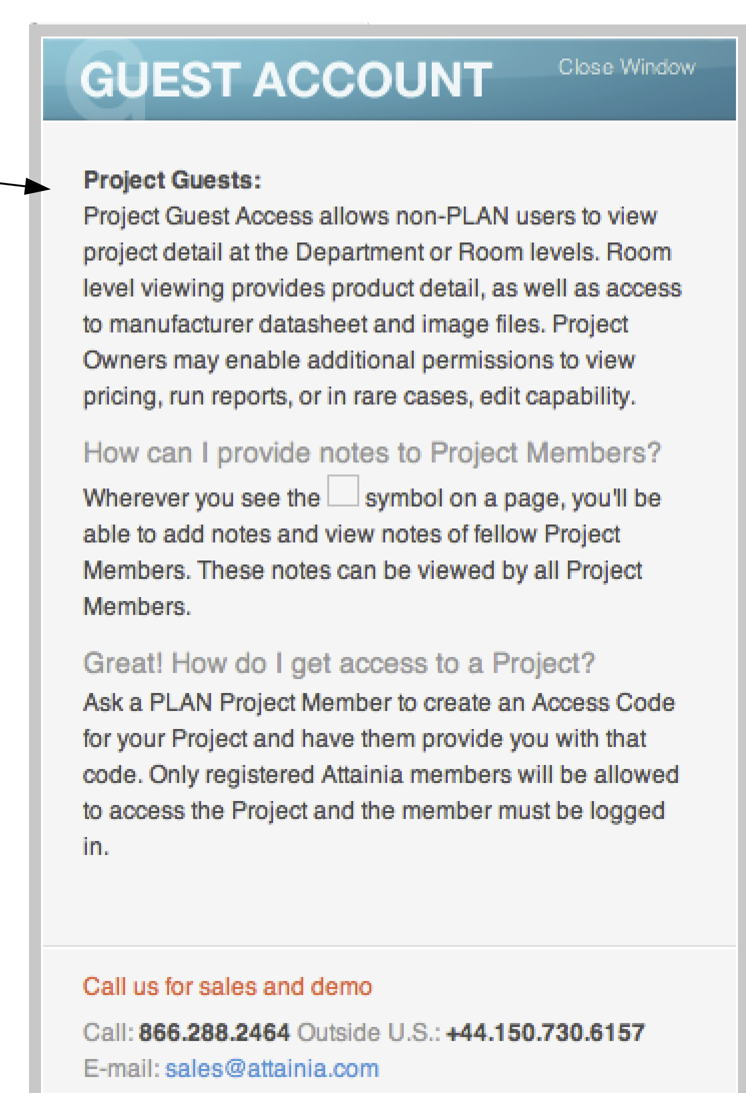


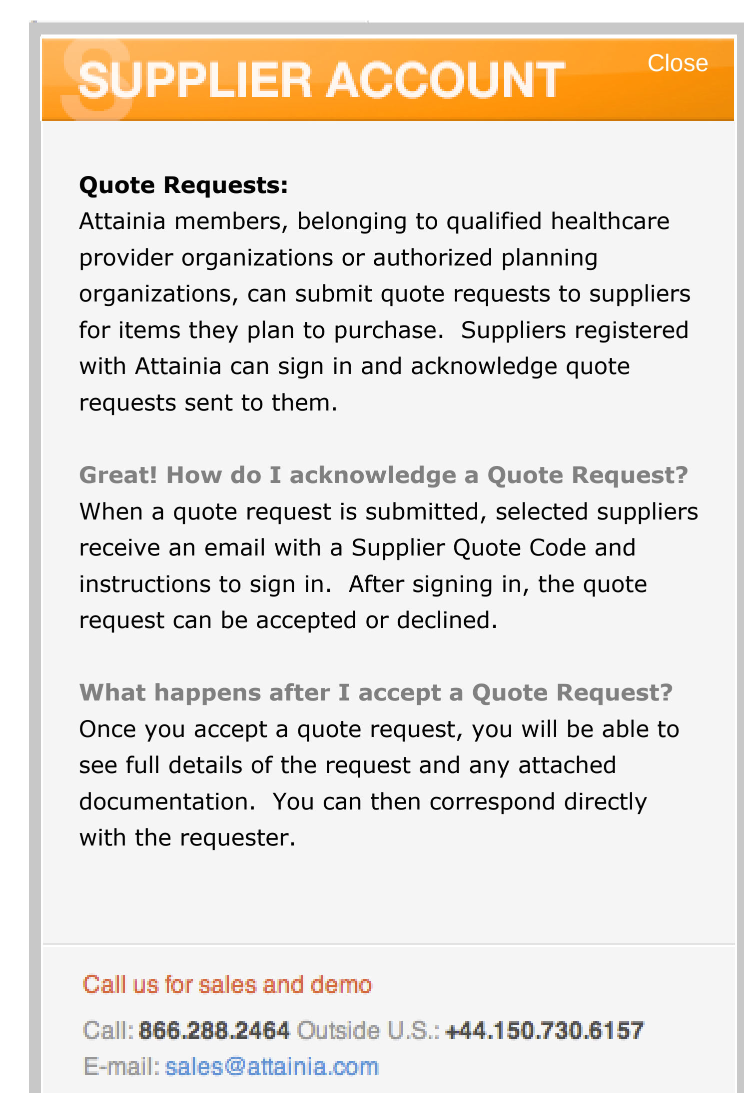
Revise the notes that display in Guest Account popup, as follows:

Project Guests:
Project Guest Access allows users to sign in and view project detail at the Department or Room level. Room level viewing provides product detail, as well as access to manufacturer datasheet and image files. Project Owners or Administrators may enable additional permissions to view pricing, run reports, or in rare cases, edit project details.

Great! How do I get access to a Project?
Ask a PLAN Project Owner or Administrator to add and invite you as a guest. You will then receive an email with a Guest Access Code and instructions to sign in and access the project.

How can I provide notes to Project Members?
Once you sign into a project, you will be able to add notes and view notes of fellow Project Members. These notes can be viewed by all Project Members.





The Supplier Welcome page displays when the link to this page that is provided in the email sent to a supplier contact (Email: E0049) is clicked, and the user is not signed in. If the quote request tied to the supplier quote code that is associated to the link, is already acknowledged by the supplier (that is, by using the same supplier quote code), the user should be automatically redirected to the Supplier Acknowledged page (Quotes: S0352A). If this is the first time the quote request is being viewed by the supplier (based on supplier quote code), enter a log to DB, that the supplier viewed the quote, along with date/time. Note that a quote request can also be viewed by entering the supplier quote code in the Welcome page.

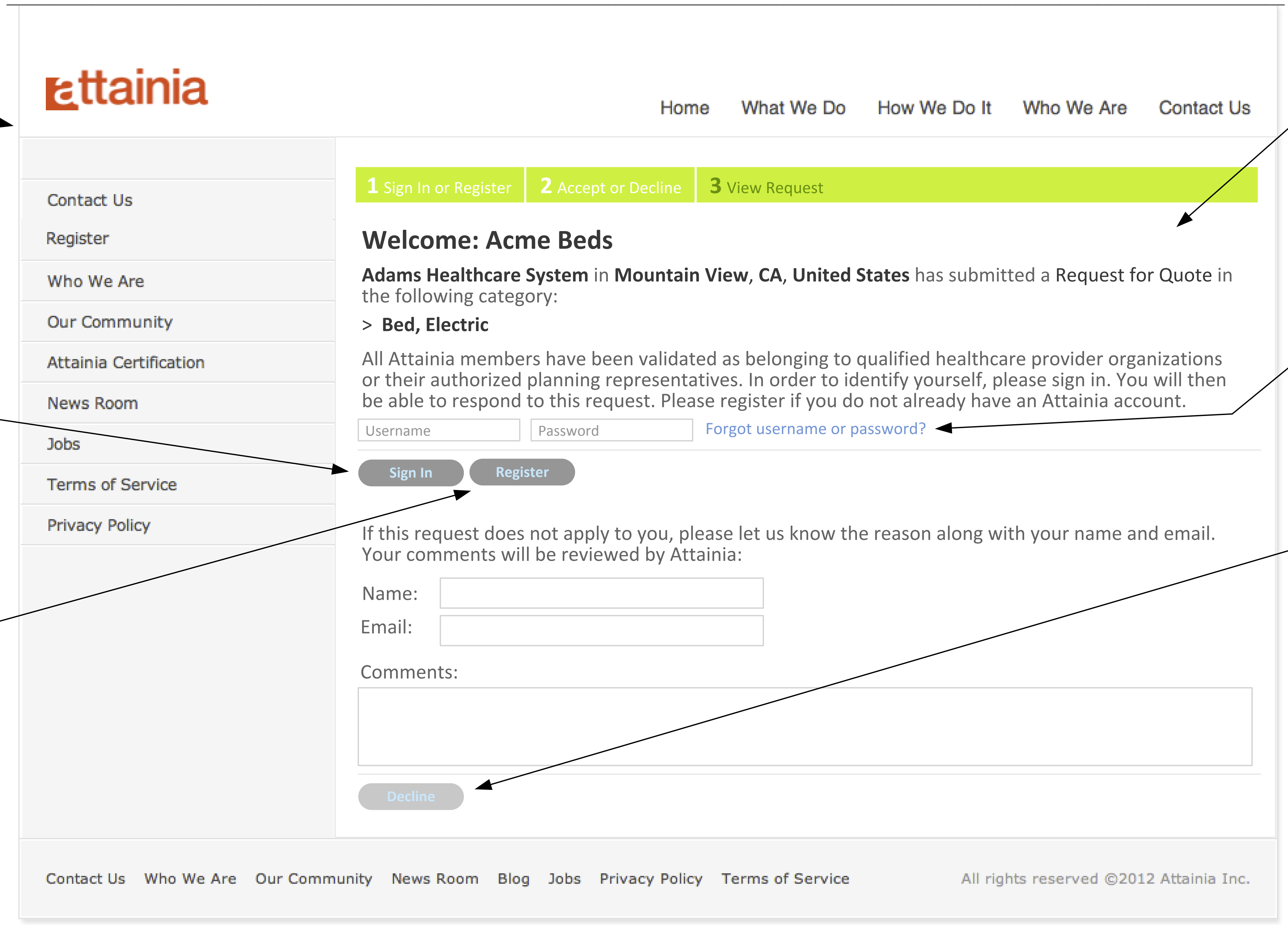
The Sign In button, when selected, should:

- If username and password are valid, display Supplier Acknowledgement page (Quotes: S0349).
- If username and/or password is not valid, prompt the user:
  "The username and/or password you have entered is invalid. Please try again.

  Note: Passwords are case sensitive.

  Need Help? Click on Forgot username or password link to reset your password."
  <OK>.

The Register button should open a new browser window and function same as the Register link on Attainia home page.



Quote – Supplier Welcome Page
S0348

Welcome: <SupplierOrgName tied to supplier quote code>

<RequesterOrgName> in **<RequesterCity,** only if it can be disclosed to supplier**>**, **<RequesterState,** only if it is not blank**>**, **<RequesterCountry>** has submitted a <QuoteType> in the following category:

> **<Category** of originating product, request, item or template item**>**

All Attainia members have been validated as belonging to qualified healthcare provider organizations or their authorized planning representatives. In order to identify yourself, please sign in. You will then be able to respond to this request. Please register if you do not already have an Attainia account.

The "Forgot Username or Password?" link should function same as "Forgot username or password?" link on Attainia home page.

The Decline button should:

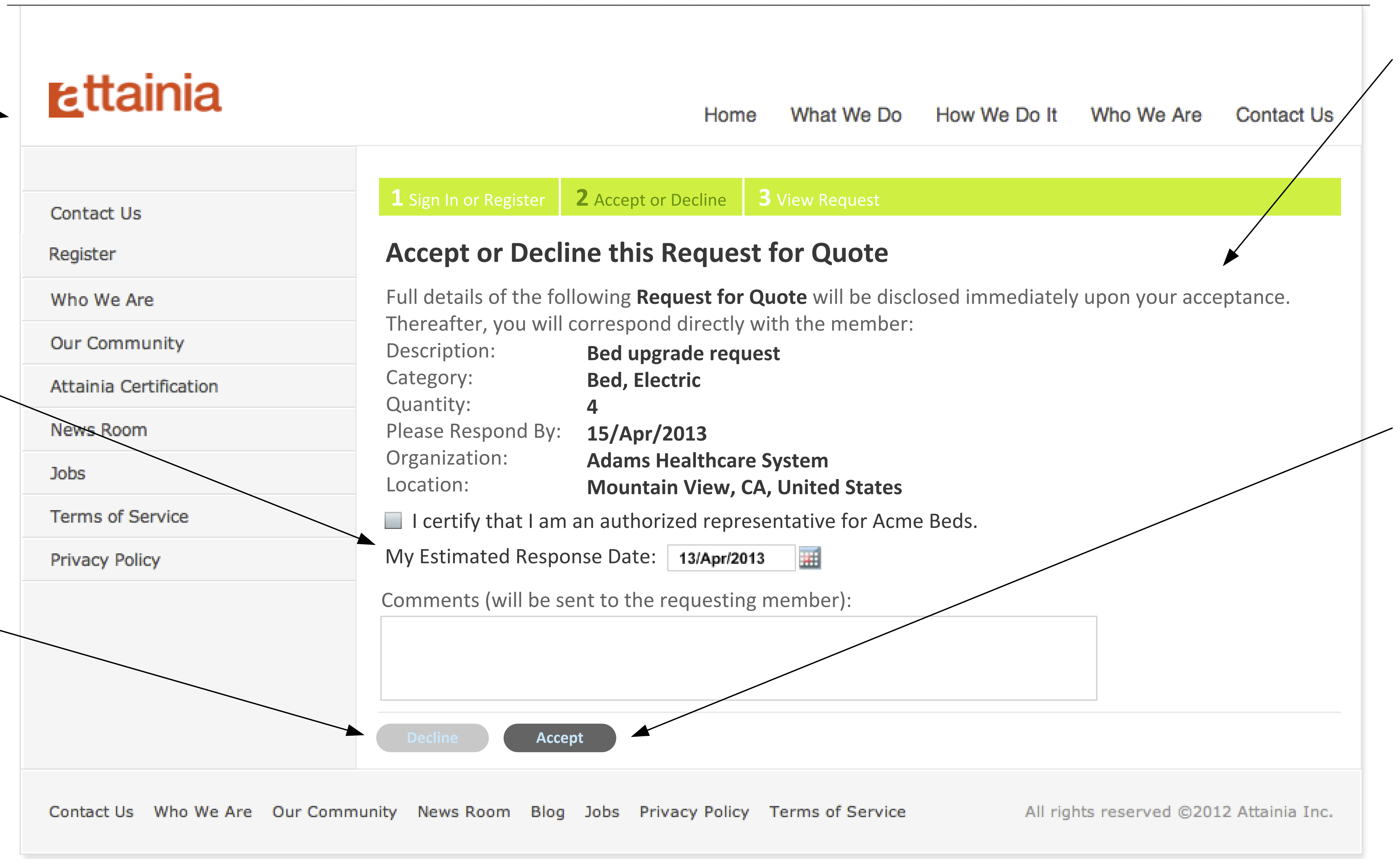
- Be enabled only when the Name, Email and Comments controls are not blank, and Email is validated.
- When selected,
  - If the quote request is already acknowledged by the supplier (that is, by using the same supplier quote code), display Supplier Acknowledged page (Quotes: S0352A).
  - If the quote request is not already acknowledged by the supplier,
    - Display Supplier Declined page (Quotes: S0351).
    - Enter a log to DB, that the supplier declined the quote request in Supplier Welcome page. Log the name, email, comments and the date/time. Note that the comments in this form should stored in a different field than the comments entered in Supplier Acknowledgement page (Quotes: S0349).
    - If quote request is originating from a PLAN item or a BUDGET request, add one of the following history actions: "Quote – RFB – Declined", "Quote – RFI – Declined", "Quote – RFP – Declined" and "Quote – RFQ – Declined" (Items: S0215A), whichever is appropriate, for the supplier declining the quote request.
    - Send Supplier Declined email (Email: E0052) to the requester. If there are others to be notified (Quotes: S0344), add their email addresses in CC section. And add quotes@attainia.com in BCC section.
    - Send confirmation email (Email: E0053) to the email address entered on this form, and add quotes@attainia.com in BCC section.
    - Send email with decline comments (Email: E0056) to quotes@attainia.com.

The Supplier Acknowledgement page displays when the link to this page that is provided in the email sent to a supplier contact (Email: E0049) is clicked, and the user is already signed in, OR when a supplier quote code is entered in Welcome page. If the quote request is already acknowledged by the supplier, the user should be automatically redirected to the Supplier Acknowledged page (Quotes: S0352B). If this is the first time the quote request is being viewed by the supplier (based on supplier quote code), enter a log to DB, that the supplier viewed the quote, along with date/time.

The estimated response date should be in the format d/M/Y.

The Decline button should:

- Be enabled only when the checkbox adjacent to "I certify that I am an authorized representative for <SupplierOrgName>" is selected, and comments control is not blank.
- When selected,
  - If the quote request is already acknowledged by the supplier (that is, by using the same supplier quote code), display Supplier Acknowledged page (Quotes: S0352B).
  - If the quote request is not already acknowledged by the supplier,
    - Display Supplier Declined page (Quotes: S0351).
    - Enter a log to DB, that the supplier declined the quote request in Supplier Acknowledgement page. Log the username, comments and the date/time. Note that the comments in this form should stored in a different field than the comments entered in Supplier Welcome page (Quotes: S0348).
    - If quote request is originating from a PLAN item or a BUDGET request, add one of the following history actions: "Quote – RFB – Declined", "Quote – RFI – Declined", "Quote – RFP – Declined" and "Quote – RFQ – Declined" (Items: S0215A), whichever is appropriate, for the supplier declining the quote request.
    - Send Supplier Declined email (Email: E0054) to the requester. If there are others to be notified (Quotes: S0344), add their email addresses in CC section. And add quotes@attainia.com in BCC section.
    - Send confirmation email (Email: E0055) to the user who declined the quote request, and add quotes@attainia.com in BCC section.



Quote – Supplier Acknowledgement Page
S0349

Accept or Decline this <QuoteType>

Full details of the following **<QuoteType>** will be disclosed immediately upon your acceptance. Thereafter, you will correspond directly with the member:

Description:	**<QuoteDescription>**
Category:	**<Category** of originating product, request, item or template item**>**
Quantity:	**<QuoteQuantity>**
Please Respond By:	**<QuoteResponseDueBy,** in the format d/M/Y**>**
Organization:	**<RequesterOrgName>**
Location:	**<RequesterCity,** only if it can be disclosed to supplier**>**, **<RequesterState,** only if it is not blank**>, <RequesterCountry>**

I certify that I am an authorized representative for <SupplierOrgName tied to supplier quote code>.

The Accept button should:

- Be enabled only when the checkbox adjacent to "I certify that I am an authorized representative for <SupplierOrgName>" is selected, and My Estimated Response Date field is not blank.
- When selected,
  - If the quote request is already acknowledged by the supplier (that is, by using the same supplier quote code), display Supplier Acknowledged page (Quotes: S0352B).
  - If the quote request is not already acknowledged by the supplier,
    - Display Supplier Accepted page (Quotes: S0350).
    - Enter a log to DB, that the supplier accepted the quote request. Log the username, estimated response date, comments and the date/time. Note that the comments in this form should stored in a different field than the comments entered in Supplier Welcome page (Quotes: S0348).
    - If quote request is originating from a PLAN item or a BUDGET request, add one of the following history actions: "Quote – RFB – Accepted", "Quote – RFI – Accepted", "Quote – RFP – Accepted" and "Quote – RFQ – Accepted" (Items: S0215A), whichever is appropriate, for the supplier accepting the quote request.
    - Send Supplier Accepted email (Email: E0050) to the requester. If there are others to be notified (Quotes: S0344), add their email addresses in CC section. And add quotes@attainia.com in BCC section.
    - Send email with full quote request details (Email: E0051) to the user who accepted the quote request, and add quotes@attainia.com in BCC section.

The Manufacturer, Vendor, Model and Mfr # rows should display only if they can be disclosed to supplier. Mfr # can be disclosed only if Model can be disclosed.

The Contract rows should display only if contracts are selected for the supplier, in "Choose suppliers" quote wizard step.

The Facility row should display only if a facility is mapped to the requester.

The City row should display only if it can be disclosed to supplier.

The State row should display only if it is not blank.

The Project row should display only if the quote request originates from an item in PLAN, and it can be disclosed to supplier.

The Phone row should display only if it can be disclosed to supplier.

The Alt Phone row should display only if the requester has a non-null Alt Phone number, and it can be disclosed to supplier.

The Other Phone row should display only if the user has entered an other phone number in "Choose request details" quote wizard step.

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1 Sign In or Register 2 Accept or Decline 3 View Request

Please respond to this Request for Quote:

The following information, along with any attached documentation, has been sent to your email address.
John Doe has been notified that you will respond directly via the contact information below:

Description:	**Bed upgrade request**
Category:	**Bed, Electric**
Manufacturer:	**Acme Beds**
Vendor:	**Acme Beds**
Model:	**Acme 1234**
Mfr #:	**2000-ABCD**
Quantity:	**4**
Estimated Need By:	**15/Jun/2013**
Response Due By:	**15/Apr/2013**
Estimated Response:	**13/Apr/2013**
Contract(s):	**MedAssets: 1234ABCD** **My Org: A987654**
Organization:	**Adams Healthcare System**
Facility:	**Main Campus**
City:	**Mountain View**
State/Province:	**California**
Country:	**United States**
Project:	**New ER Expansion**
Name:	**John Doe**
Title:	**Director of Planning**
Email:	**john.doe@ahs.org**
Phone:	**(555) 123-4567**
Alt Phone:	**(555) 123-4567**
Other Phone:	**(555) 123-4567**
Reference ID:	**1234ABCD**

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Please respond to this <QuoteType>:

The following information, along with any attached documentation, has been sent to your email address.
<RequesterName> has been notified that you will respond directly via the contact information below:

Description:	**<QuoteDescription>**
Category:	**<Category** of originating product, request, item or template item**>**
Manufacturer:	**<Mfr** of originating product, request, item or template item**>**
Vendor:	**<Vendor** of originating product, request, item or template item**>**
Model:	**<Model** of originating product, request, item or template item**>**
Mfr #:	**<Mfr #** of originating product, request, item or template item**>**
Quantity:	**<QuoteQuantity>**
Estimated Need By:	**<QuoteEstimatedNeedBy,** in the format d/M/Y**>**
Response Due By:	**<QuoteResponseDueBy,** in the format d/M/Y**>**
Estimated Response:	**<SupplierEstimatedResponse,** in the format d/M/Y**>**
Contract(s):	List of GPO contracts selected for the supplier, in "Choose suppliers" quote wizard step, in the format: **"<GPOName>: <Contract#>"**, in descending order by creation date, followed by, List of My Org contracts selected for the supplier, in "Choose suppliers" quote wizard step, in the format: **"My Org: <Contract#>"**, in descending order by creation date.
Organization:	**<RequesterOrgName>**
Facility:	**<RequesterFacility>**
City:	**<RequesterCity>**
State/Province:	**<RequesterState>**
Country:	**<RequesterCountry>**
Project:	**<PLAN Item's parent project name>**
Name:	**<RequesterName>**
Title:	**<RequesterTitle>**
Email:	**<RequesterEmail>**
Phone:	**<RequesterPhone>**
Alt Phone:	**<RequesterAltPhone>**
Other Phone:	**<OtherPhone,** entered in "Choose request details" quote wizard step**>**
Reference ID:	**<QuoteMyReferenceID>**

Quote – Supplier Accepted Page
S0350

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Quote Request Declined:

You declined the Request for Quote (Reference ID 1234ABCD) from **Adams Healthcare System** in **Mountain View**, **CA**, **United States,** in the following category:

> **Bed, Electric**

The quote requester has been notified that you declined this request. No further action is needed from you.

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Quote Request Declined:

You declined the <QuoteType> (Reference ID <QuoteMyReferenceID>) from **<RequesterOrgName>** in **<RequesterCity,** only if it can be disclosed to supplier**>**, **<RequesterState,** only if it is not blank**>**, **<RequesterCountry>,** in the following category:

> **<Category** of originating product, request, item or template item**>**

The quote requester has been notified that you declined this request. No further action is needed from you.

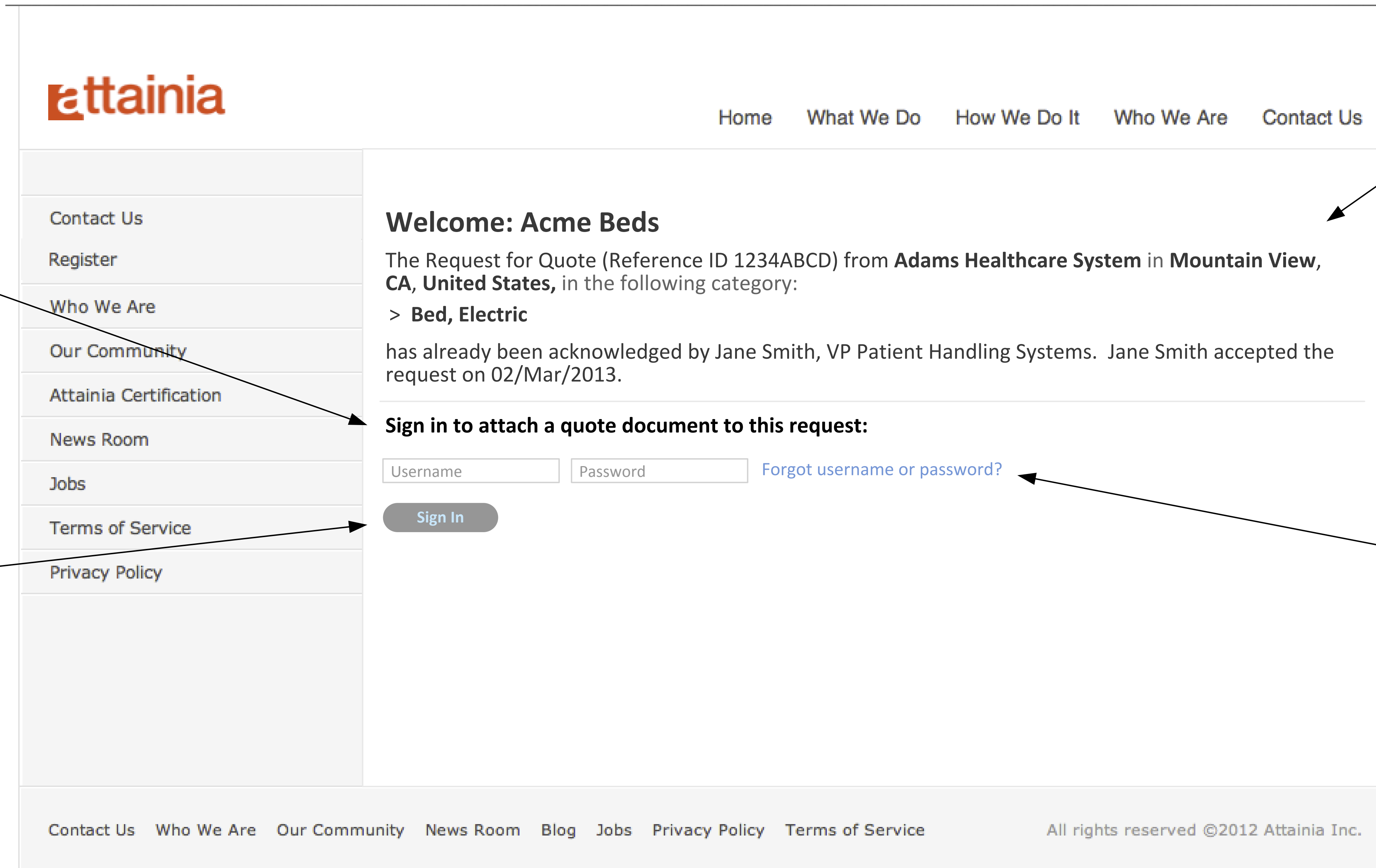
Quote – Supplier Declined Page
S0351

The Sign in section should display only if the quote originates from an item in PLAN or a request in BUDGET, the quote request was accepted by the supplier, and the user is NOT signed in.

The Sign In button, when selected, should:
- If username and password are valid, display Supplier Acknowledged page as shown in Quotes: S0352B.
- If username and/or password is not valid, prompt the user:
  "The username and/or password you have entered is invalid. Please try again.

  Note: Passwords are case sensitive.

  Need Help? Click on Forgot username or password link to reset your password." <OK>.



Quote – Supplier Acknowledged Page –
User is NOT Signed In
S0352A

Welcome: <SupplierOrgName tied to supplier quote code**>**

The <QuoteType> (Reference ID <QuoteMyReferenceID>) from <**RequesterOrgName**> in <**RequesterCity**, only if it can be disclosed to supplier>, <**RequesterState,** only if it is not blank>, <**RequesterCountry**>**,** in the following category:

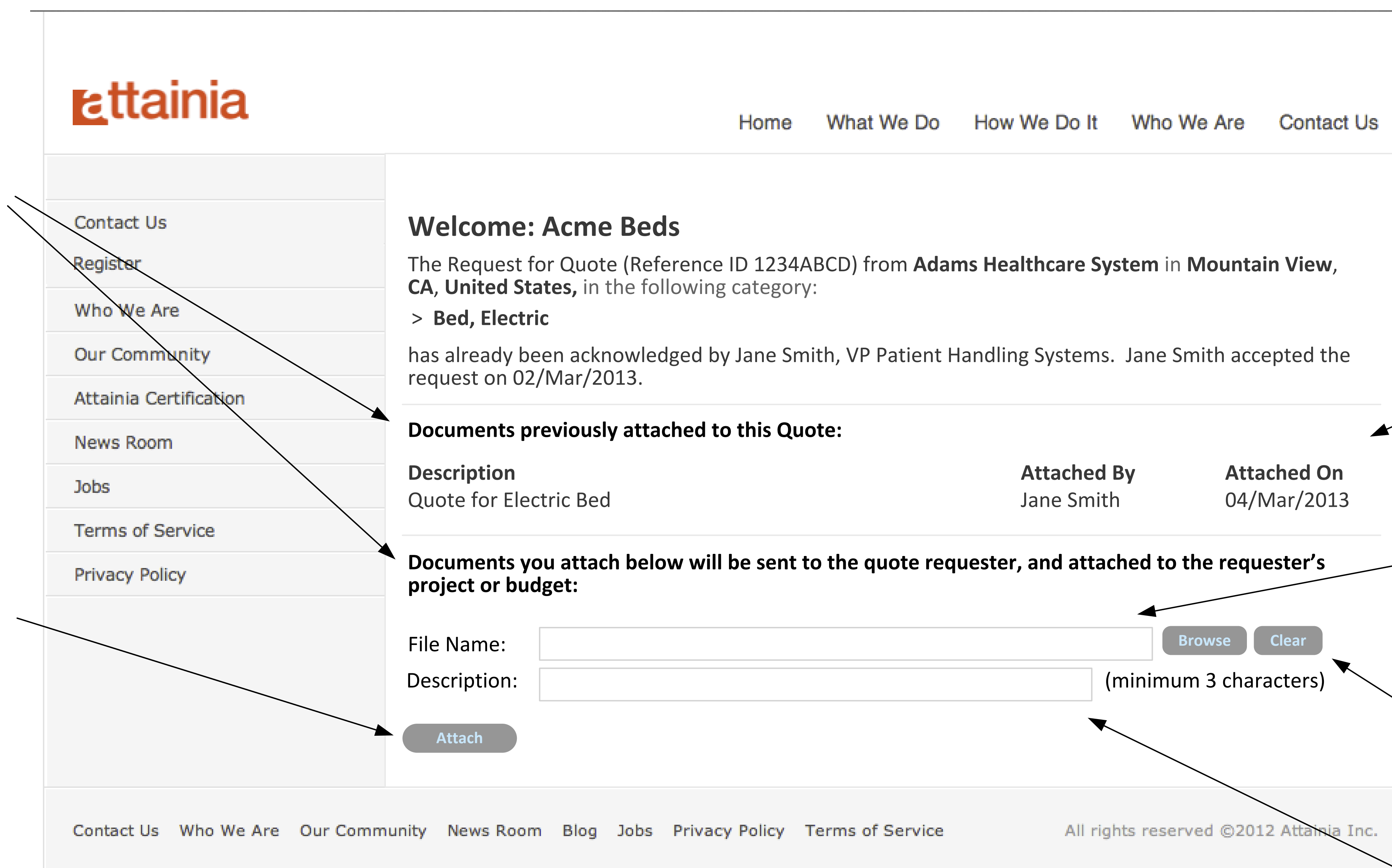
> <**Category** of originating product, request, item or template item>

has already been acknowledged by <Name of user who accepted or denied the quote request (from user profile if user was signed in and acknowledged in Supplier Acknowledgement page, otherwise, the name entered in the Name control in Supplier Welcome page) ><", ", only if user Title is not blank><Title of user, only if user was signed in and acknowledged in Supplier Acknowledgement page>. <Name of user> <"**accepted**" or "**declined**"> the request on <QuoteAcceptedOrDeniedDate, in the format d/M/Y>.

The "Forgot Username or Password?" link should function same as "Forgot username or password?" link on Attainia home page.

The Documents sections should display only if the quote originates from an item in PLAN or a request in BUDGET, the quote request was accepted by the supplier, and the user is signed in.

The Attach button, when selected, should:
- If a file is selected in the File Name control, and Description control has at least 3 characters,
  - Attach the selected file to the originating PLAN item or BUDGET request, as a "Quote - From Supplier" document type, and add "Document - Attached" and "Quote - Response Attached" history actions to the item.
  - Associate the document to the quote request and the supplier, and refresh the page so that the document displays in the "Documents previously attached to this Quote" section. The username and date should be logged in DB, so that the user's name and "attached on" date can be shown in the "Documents previously attached to this Quote" section.
  - Send an email to requester notifying that the supplier has attached a document to the quote request (Email: E0058).   If there are others to be notified (Quotes: S0344), add their email addresses in CC section. And add quotes@attainia.com in BCC section.
- If a file is not selected in the File Name control, prompt the user: "Please browse and select a file, and try again."
- If a file is selected, but Description control is empty, prompt the user: "Please enter a description for the attached document and try again."
- If a file is selected, and less than 3 characters are entered in Description control, prompt the user: "Please enter at least 3 characters in Description and try again."



Quote – Supplier Acknowledged Page –
User is Signed In
S0352B

If any documents were previously attached to the quote by the supplier, in this page, they should display in descending order of "Attached On" date.

The File Name control should:
- Not be directly editable.
- Enable a file of any type to be browsed and attached.
- Display name of the selected file as read-only text. If another file is selected using the Browse button, the previously selected file should be replaced with the current file.

The Clear button should:
- Display only when a file is selected.
- Have a mouseover: "Remove selected file.".
- When selected, remove the selected file from the File Name text box and hide the Clear button.

The Description control should display as a text box, and the text "(minimum 3 characters)" should display adjacent to it.