**Checklist for Schools preparing Tender Documentation for Schoolbooks**

**Stage1**

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| **Complete the Schoolbook List contained within the Primary School Quotation Template (guidance video available** [**here**](https://www.spu.ie/post-primary-school-quotation-template-guidance-video/)**):** | |
| **Task** | **Complete?** |
| Identify the schoolbooks required and enter the numbers of each in the Schoolbook List |  |
| Add any books to the blank lines provided at the end of each subject to allow for entries of books that are not identified on this list. Where additional book(s) are being added by you to the list, please remember to also include a unit price. |  |
| Indicate Yes/No in cells for Barcoding/Covering/Labelling as required. |  |
| When an estimated overall value, ex-VAT, has been identified, save a second version of the MS Excel file and adjust all RRP values, ex-VAT to €0.00. |  |
| If the estimated value is below €50,000 ex-VAT, then complete the necessary cells in this Excel file to be readied to send to a minimum of three suppliers seeking quotes. |  |
| If the estimated value is above €50,000 ex-VAT, delete the worksheets Instructions/Stationery Framework Guidance/Stationery Template. The remaining worksheets, Schoolbook List and Subject Totals, will be published to eTenders alongside the Call for Tenders (CFT) document and Tender Response Document (TRD) when schools are publishing their tender. |  |

**Stage 2**

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| **Download and complete the Call for Tender (CFT) document (guidance video available** [**here**](https://www.spu.ie/call-for-tender-cft-template-guidance-video/)**)** | |
| **Task** | **Complete?** |
| Save the downloaded CFT using this file naming convention: ‘CFT for the supply of Primary Schoolbooks\_School Name and Roll number\_current date’. |  |
| Make the necessary edits, highlighted thus, throughout the document up to Appendix 5. (Please note, there is no need at this stage to make any edits to the model contract at Appendix 5, and beyond). |  |
| Review the bullet points at Appendix 1, Section 1.1 – Specification of Requirements. |  |
| Keep the listed requirements (bullet points) that define school requirements and delete those that don’t. |  |
| Insert any other bespoke (school specific) requirements including in respect of how the books are to be delivered. |  |
| Then, remove all highlighting and return text to black. |  |

**Stage 2A**

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| **Download and complete Tender Response Document (TRD)** | |
| **Task** | **Complete?** |
| Save the downloaded TRD using this file naming convention: ‘TRD for the supply of Primary Schoolbooks\_School Name and Roll number\_current date’. |  |
| Make the necessary edits, highlighted thus, throughout the document. Then, remove highlighting and return text to black |  |
| Then, remove all highlighting and return text to black. |  |

**Stage 3**

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| **Using eTenders** | |
| **Task** | **Complete?** |
| Download the Introduction to eTenders Guide available [here](https://www.spu.ie/wp-content/uploads/2024/04/20240412-Introduction-to-eTenders-v1.0.pdf) |  |
| Follow step-by-step instructions which match your profile:   1. [Existing user but do not know your username](https://youtu.be/j_NKI09RINM) (guidance video [here](https://www.youtube.com/watch?v=j_NKI09RINM)) 2. [Existing user login/forgot password](https://youtu.be/0cvLZjZGFIE) (guidance video [here](https://www.youtube.com/watch?v=0cvLZjZGFIE)) 3. [If registered on old eTenders platform](https://youtu.be/A2p64JCRyaQ) (guidance video [here](https://www.youtube.com/watch?v=A2p64JCRyaQ)) 4. Registering a School as a Contracting Authority (CA) (guidance video [here](https://www.youtube.com/watch?v=PsQvvXdAyO4)) 5. Once you have successfully logged into eTenders, fully complete your school’s (Contracting Authority) profile details (see Figure 3.17 in Section 3.1.1 of the Introduction to eTenders Guide available [here](https://www.spu.ie/wp-content/uploads/2024/04/20240412-Introduction-to-eTenders-v1.0.pdf)) |  |

**Stage 3A**

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| **Create and Publish a Contract Notice on eTenders** | |
| **Task** | **Complete?** |
| Download the ‘How to Create & Publish Call for Tender’ guide available [here](https://www.spu.ie/wp-content/uploads/2024/04/20240416-eTenders-Document-for-Schools-Create-Publish-Call-for-Tender-V1.1.pdf) |  |
| Create Workspace Call for Tender (CFT) (guidance video [here](https://www.youtube.com/watch?v=NymsYtvOy5U)) |  |
| Finalise CFT Core Information (guidance video [here](https://www.youtube.com/watch?v=3sfzl6-WW5o)) |  |
| Associating Contracting Authority Users (guidance video [here](https://www.youtube.com/watch?v=7x3MH1-bixY)) |  |
| Define CFT Workflow (guidance video [here](https://www.youtube.com/watch?v=fN1tip5eCfA)) |  |
| Publish Contract Notice/Add Contract Documents (guidance video [here](https://www.youtube.com/watch?v=NymsYtvOy5U)) |  |
| Create Notice (guidance video [here](https://www.youtube.com/watch?v=vESWPBUoB1Q)) |  |
| Publish the CFT Notice (guidance video [here](https://www.youtube.com/watch?v=cpdUqih9rOw)) |  |

**Checklists for later stages will follow.**