Viewing and Editing Contractor Data Sheet

Reference Guide

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	The Contract Business Analysis Repository (CBAR) is a tool, accessible by both internal Cognizant Administration employees and external DoD and non-DoD Federal Agencies, which provides acquisition-related data on contractors (CAGE/UEI) and negotiations completed by DoD Procuring Contracting Officers.

Viewing and Editing Contractor Data Sheet

All CBAR Contractor Data Sheet Records are viewable to all CBAR user role types. Records are editable or read-only, depending on a user's role and/or span of control based on their registered DoDAAC(s).

- CBAR ACO: May edit only Contractor Data Sheet Records within the user's span of control
- CBAR Contracting Officer: May edit only Contractor Data Sheet Records within the user's span of control
- CBAR View Only: May only view Contractor Data Sheet Records in read-only status
- CBAR PMO: May edit all Contractor Data Sheet Records

For purposes of example, the following information relates to a user accessing CBAR with a role and DoDAAC access allowing editing capabilities.

To view and/or edit Contractor Data Sheet records, locate the desired records in the CBAR Contractor Data Sheet search results and select the **Edit/View** button in the Actions column.

Corporate Information

The Corporate Information section displays the corporate information of the record. If the record is a child record, select the E**dit/View Parent** button to view the parent record. Information of any child records will be displayed below in the Child Record(s) section.

Contractor Data Sheet

The Contractor Data Sheet section displays the Contractor and Cognizant Administration Office information.

Point(s) of Contact

Two required Points of Contact (Cognizant ACO/DACO, Contracts Director or CACO/DACO Group Director) will be displayed with name phone number, and email.

1. Select the **Add Point of Contact** button to add a new Point of Contact record.
   - Provide all necessary information for the Point of Contact.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
2. Select the **Edit** button in the Action column to edit the Point of Contact record.

Contractor Data Sheet Details

Corporate Details are displayed. To save any updates, select the **Submit** button to confirm changes. Changes made here will reflect only in CBAR.

Indirect Costs and Labor Rates

Forward Pricing

The Forward Pricing Rate Recommendations and Agreements section will display a list of all Forward Pricing Recommendations/Agreements and any available attachments.

1. Select the **Add Recommendation/Agreement** button to add a new Recommendation or Agreement to the list.
   The Add Recommendation/Agreement modal will display.
   - Provide all necessary information for the Recommendation/Agreement.
   - Select the **Add Attachment** button to add any attachments.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
2. To view files attached to the Recommendation record, select the **View** link in the Attachment(s) column.
   The Edit Recommendation/Agreement modal will display.
   - Select the **file name** in the Attachment column to view the attachment(s).

- Select the **Cancel** button to close the modal.
3. Select the **Edit** icon in the Action column to edit a Recommendation/Agreement.
   The Edit Recommendation/Agreement modal will display.
   - Make any necessary updates to the Recommendation/Agreement.
   - Select the **Add Attachment** button to add any attachments.
   - Select the **file name** in the Attachment column to view the attached file.
   - Select the **Edit** icon in the Actions column to edit the attachment.
   - Select the **Delete** icon in the Actions column to delete the attachment from the Recommendation/Agreement.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
4. Select the **Delete** icon in the Action column to delete a Recommendation/Agreement.
   The Confirm Recommendation/Agreement modal will display.
   - Select the **Yes** button to confirm deletion of the Recommendation/Agreement or select the **No** button to close the modal without deleting the record.
5. Select the **Add Attachment** button to attach a file to the Forward Pricing section.
   The Add Attachment modal will display.
   - Select the **Add Attachment** button to select a file to attach to the record.
   - Add a description of the attachment in the **Description** field.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
6. To view any attachments added to the Forward Pricing section, select the **file name** in the Attachment column.
7. Select the **Edit** icon in the Actions column to edit an Attachment.
8. Select the **Delete** icon in the Actions column to delete an Attachment.

IR&D and B&P

The Independent Research & Development and Bid and Proposal Costs section will display related details, and any available attachments. To view any attachments added to the IR&D and B&P section, select the **file name** in the Attachment column.

1. Select the **Add Fiscal Year** button to add an IR&D and B&P Fiscal Year record.
   The Add IR&D and B&P modal will display.
   - Provide all necessary information for the Fiscal Year Details.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
2. Select the **Edit** icon in the Action column to edit the Fiscal Year data.
   The Edit IR&D and B&P modal will display.
   - Make any necessary updates to the IR&D and B&P record.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
3. Select the **Delete** icon in the Action column to delete the Fiscal Year record.
   The Confirm Recommendation/Agreement modal will display.
   - Select the **Yes** button to confirm deletion of the IR&D and B&P or select the **No** button to close the modal without deleting the record.

1. Select the **expander** toggle buttons to expand or hide the IR&D and B&P information for the corresponding fiscal year.
2. Select the **Add Attachment** button to attach a file to the IR&D and B&P section.
   The Add Attachment modal will display.
   - Select the **Add Attachment** button to select a file to attach to the record.
   - Add a description of the attachment in the **Description** field.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
3. Select the **file name** in the Attachment column to view the attached file.
4. Select the **Edit** icon in the Actions column to edit the attachment.
5. Select the **Delete** icon in the Actions column to delete the attachment from the IR&D and B&P record.

Cost Estimating Relationship

The Cost Estimating Relationship section will display related details, and any available attachments. To view any attachments added to the Cost Estimating Relationship section, select the **file name** in the Attachment column.

1. Select the **Add Attachment** button to attach a file to the Cost Estimating Relationship section.
   The Add Attachment modal will display.
   - Select the **Add Attachment** button to select a file to attach to the record.
   - Add a description of the attachment in the **Description** field.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
2. Select the **file name** in the Attachment column to view the attached file.
3. Select the **Edit** icon in the Actions column to edit the attachment.

4. Select the **Delete** icon in the Actions column to delete the attachment from the Cost Estimating Relationship record.

Final Overhead

The Final Overhead section will display related details, and any available attachments. To view any attachments added to the Final Overhead section, select the **file name** in the Attachment column.

1. Select the **Add Attachment** button to attach a file to the Final Overhead section.
   The Add Attachment modal will display.
   - Select the **Add Attachment** button to select a file to attach to the record.
   - Add a description of the attachment in the **Description** field.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
2. Select the **file name** in the Attachment column to view the attached file.
3. Select the **Edit** icon in the Actions column to edit the attachment.
4. Select the **Delete** icon in the Actions column to delete the attachment from the Final Overhead record.

Business Systems

The Business Systems section will display details of Business Systems records, Disclosure Statements, and any available attachments. To view any attachments added to the Business Systems section, select the **file name** in the Attachment column.

1. Select the **Add Business System** button to add a new Business System Status record.

   The Add Business System modal will display.
   - Enter all necessary Business System information.
   - Select the **Add Attachment** button to attach a file to the record.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
2. Select the **View** link to view a Business System record.
   - In the Edit Business System modal, select the **file name** in the Attachment column to view the attached file.
3. Select the **Edit** icon in the Actions column to edit the Business System record.

   The Edit Business System modal will display.
   - Enter all necessary Business System information.
   - Select the **Add Attachment** button to attach a file to the record.
   - Select the **file name** in the Attachment column to view the attached file.
   - Select the **Edit** icon in the Actions column to edit the attachment.
   - Select the **Delete** icon in the Actions column to delete the attachment from the Business System record.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.

4. Select the **Delete** icon in the Actions column to delete the Business System record.
   The Confirm Delete Business System modal will display.
   - Select the **Yes** button to confirm deletion of the Business System or select the **No** button to close the modal without deleting the record.
5. Enter the Adequacy Status and Compliance Status information in the Disclosure Statements section.
6. Select the **Save** button to add the Disclosure Statement record.
7. Select the **Add Attachment** button to attach a file to the Business System section.
   The Add Attachment modal will display.
   - Select the **Add Attachment** button to select a file to attach to the record.
   - Add a description of the attachment in the **Description** field.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
8. Select the **file name** in the Attachment column to view the attached file.
9. Select the **Edit** icon in the Actions column to edit the attachment.
10. Select the **Delete** icon in the Actions column to delete the attachment from the Business System Status record.

Cost Accounting Standards

The Cost Accounting Standards section will display details of Cost Accounting Standards records, Disclosure Statements, and any available attachments. To view any attachments added to the Cost Accounting Standards section, select the **file name** in the Attachment column.

1. Enter Cost Accounting Standards Details using the **CAS Coverage** dropdown menu.
2. Select the **Save** button to save the CAS Coverage status.
3. Select the **Add Cost Accounting Standard** button to enter a new Cost Accounting Standard record. The Add Cost Accounting Standard modal will display.
   - Enter all necessary Cost Accounting Standard Details.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
4. Select the **Add Attachment** button to attach a file to the Cost Accounting Standards section.
   The Add Attachment modal will display.
   - Select the **Add Attachment** button to select a file to attach to the record.
   - Add a description of the attachment in the **Description** field.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
5. Select the **file name** in the Attachment column to view the attached file.
6. Select the **Edit** icon in the Actions column to edit the attachment.
7. Select the **Delete** icon in the Actions column to delete the attachment from the Cost Accounting Standards record.

Corporate Information

The Corporate Information section will display related details, and any available attachments. To view any attachments added to the Corporate Information section, select the **file name** in the Attachment column.

1. Select the **Add Attachment** button to attach a file to the Corporate Information section.
   The Add Attachment modal will display.
   - Select the **Add Attachment** button to select a file to attach to the record.
   - Add a description of the attachment in the **Description** field.
   - Select a **Contractor(s)** from the list to apply the attachment to.
   - Select the **Save** button to continue or select the **Cancel** button to close the modal without saving changes.
2. Select the **file name** in the Attachment column to view the attached file.
3. Select the **Edit** icon in the Actions column to edit the attachment.
4. Select the **Delete** icon in the Actions column to delete the attachment from the Corporate Information record.

Working Papers

The Working Papers section will display all vendor-related workpapers within the Contractor Data Sheet and is available to CBAR ACO and CBAR View Only users. CBAR ACO and CBAR View Only users may utilize the Working Papers section to view or edit (CBAR ACO only) vendor-related documents for which the CFAO DoDAAC matches the user's registered DoDAAC.

Property Management System Analysis (PMSA)

The user may view all documentation previously uploaded to the PMSA tab and upload further documentation. If no documentation has been previously uploaded, the following message will display: "No Property Management System Analysis (PMSA) present".

1. All uploaded documentation will be displayed on the PMSA tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
   - Attachments will be displayed by document type in the following order:
     - PMSA Engagement Letter
     - Data resulting from PMSA Engagement Letter
     - Plan Of Action (POA)
     - Completed Property Guide
     - Supporting workpapers for the Property Guide
     - Draft Report
     - Reviewer Notes
     - Final Report
     - Transmittal Letter
     - Corrective Action Plan
     - Other Documentation (PMSA)
     - PMSA Backup
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.

4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the PMSA tab, select the **Add Property Management System Analysis (PMSA)** button. The Add PMSA modal will display.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit PMSA modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

Contracting Purchasing System Review (CPSR)

The user may view all documentation previously uploaded to the CPSR tab and upload further documentation. If no documentation has been previously uploaded, the following message will display: "No Contracting Purchasing System Review (CPSR) present".

1. All uploaded documentation will be displayed on the CPSR tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
   - Attachments will be displayed by document type in the following order:
     - Entrance Briefing Notes
     - Procedures checklist
     - CPSR Questionnaire
     - CPSR Spreadsheets (by dollar categories)
     - Recommendation letter
     - CPSR Report Transmittal letter
     - CPSR Final Report
     - CPSR Backup
     - Other Documentation (CPSR)
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.

5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the CPSR tab, select the **Add Contracting Purchasing System Review (CPSR)** button. The Add CPSR modal will display.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit CPSR modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

Single Audit

The user may view all documentation previously uploaded to the Single Audit tab and upload further documentation. If no documentation has been previously uploaded, the following message will display: "No Single Audit present".

1. All uploaded documentation will be displayed on the Single Audit tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
   - Attachments will be displayed by document type in the following order:
     - Audit Report (Single Audit)
     - IG Initial Review
     - Plan of Action and Milestones (Single Audit)
     - Management Decision Letter
     - Demand Letter (Single Audit)
     - Notification to Command or Other Customer
     - Letter requesting Initial Review
     - Request for additional data
     - Contractor Response
     - Other Documentation Related to Findings
     - Business Clearance Memorandum (Single Audit)
     - Quality Control Review
     - Other Documentation (Single Audit)
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.

5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the Single Audit tab, select the **Add Single Audit** button. The Add Single Audit modal will display.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit Single Audit modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

DCAA Audit

The user may view all documentation previously uploaded to the DCAA Audit tab and upload further documentation. If no documentation has been previously uploaded, the following message will display: "No DCAA Audit present".

1. All uploaded documentation will be displayed on the DCAA Audit tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
   - Attachments will be displayed by document type in the following order:
     - Audit Report (DCAA)
     - Plan of Action and Milestones (DCAA)
     - ACO Letter to DCAA
     - DCAA response to ACO letter
     - ACO Decision Letter
     - Contractor response
     - Demand Letter (DCAA)
     - Refund documentation
     - Disclosure Statement Determination
     - Initial Notice of Noncompliance
     - Final Determination Letter
     - Business Clearance Memorandum (DCAA)
     - Legal recommendations
     - Technical report
     - Other Internal Approval Record
     - Other ONR Response
     - Other resolution document
     - Other disposition document

- Other Documentation (DCAA Audit)

2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the DCAA Audit tab, select the **Add DCAA Audit** button. The Add DCAA Audit modal will display.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit DCAA Audit modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

Indirect Cost Rate Negotiations

The user may view all documentation previously uploaded to the IDC Rate Negotiations tab and upload further documentation. If no documentation has been previously uploaded, the following message will display: "No IDC Rate Negotiations present".

1. All uploaded documentation will be displayed on the IDC Rate Negotiations tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the IDC Rate Negotiations tab, select the **Add IDC Rate Negotiations** button. The Add IDC Rate Negotiations modal will display.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable document type from the **Document Type** dropdown menu.

- Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
- Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
- A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
- Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.

7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit IDC Rate Negotiations modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

Predetermined Rate Negotiations

1. All uploaded documentation will be displayed on the Predetermined Rate Negotiations tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the Predetermined Rate Negotiations tab, select the **Add Predetermined Rate Negotiations** button. The Add Predetermined Rate Negotiations modal will display.
   - Enter a date in the **Beginning Year** dropdown menu.
   - Enter a date in the **End Year** dropdown menu.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable value from the **Sub Rate Type** dropdown menu.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit Predetermined Rate Negotiations modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

Fixed Rate Negotiations

1. All uploaded documentation will be displayed on the Fixed Rate Negotiations tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the Fixed Rate Negotiations tab, select the **Add Fixed Rate Negotiations** button. The Add Fixed Rate Negotiations modal will display.
   - Enter a date in the **Beginning Year** dropdown menu.
   - Enter a date in the **End Year** dropdown menu.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable value from the **Sub Rate Type** dropdown menu.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit Fixed Rate Negotiations modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

Fixed/Final CFW Combined Rate Negotiations

1. All uploaded documentation will be displayed on the Fixed/Final CFW Combined Rate Negotiations tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the Fixed/Final CFW Combined Rate Negotiations tab, select the **Add Fixed/Final CFW Combined Rate Negotiations** button. The Add Fixed/Final CFW Combined Rate Negotiations modal will display.
   - Enter a date in the **Fixed Year** dropdown menu.

- Enter a date in the **Final Year** dropdown menu.
- Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
- Select the applicable value from the **Sub Rate Type** dropdown menu.
- Select the applicable document type from the **Document Type** dropdown menu.
- Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
- Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
- A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
- Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit Fixed/Final CFW Combined Rate Negotiations modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

Final Rates or Final CFW

1. All uploaded documentation will be displayed on the Final Rates or Final CFW tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the Final Rates or Final CFW tab, select the **Add Final Rates or Final CFW** button. The Add Final Rates or Final CFW modal will display.
   - Enter a date in the **Beginning Year** dropdown menu.
   - Enter a date in the **End Year** dropdown menu.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable value from the **Sub Rate Type** dropdown menu.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit Final Rates or Final CFW modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

Provisional Rate Negotiations

1. All uploaded documentation will be displayed on the Final Rates or Final CFW tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the Final Rates or Final CFW tab, select the **Add Final Rates or Final CFW** button. The Add Final Rates or Final CFW modal will display.
   - Enter a date in the **Beginning Year** dropdown menu.
   - Enter a date in the **End Year** dropdown menu.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable value from the **Sub Rate Type** dropdown menu.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit Final Rates or Final CFW modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

General Performer Documents

The user may view all documentation previously uploaded to the General Performer Documents tab and upload further documentation. If no documentation has been previously uploaded, the following message will display: "No General Performer Documents present".

1. All uploaded documentation will be displayed on the General Performer Documents tab under the applicable fiscal year. Fiscal years will be sorted in descending order by default.
   - Attachments will be displayed by document type in the following order:
     - Pre-Award Review
     - High Risk Award Review
     - Memorandum of Understanding
     - Performer/ Vendor Issues
     - Refund Check Log

- Cost Accounting Disclosure Statement
- Investigations
- Performer/ Vendor Policy
- Small Business Master Plan
- Summary Subcontracting Report (SSR)
- Press Articles
- Site Visit Reports
- Financial Documents
- Other Documentation (General Documents)

2. Data within each column may be sorted in ascending or descending order by selecting the column **heading**.
3. To download and view attachments, select the **file name** within the Document Name column under each fiscal year.
4. To simultaneously download attachments from multiple Working Papers tabs, select a value from the **Fiscal Year** dropdown menu and one or more values from the **Section** dropdown menu at the top of each Working Papers tab and select the **Download All** button. The download will be accessible from the Task Download page.
5. Any data in the Notes column will be truncated to fit the cell. To view complete notes, select the **Edit/View** button in the Actions column.
6. Users may add one document per Note/Document Type. Attachments up to 100 MB of the following types are permitted: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx. The following characters are permitted in the file name: A-Z, a-z, 0-9, dash ('-'), underscore ('_'). To upload external documents to the General Performer Documents tab, select the **Add General Performer Documents** button. The General Performer Documents modal will display.
   - Select the applicable fiscal year from the **Fiscal Year** dropdown menu. The menu will display the current year ±10 years.
   - Select the applicable document type from the **Document Type** dropdown menu.
   - Enter any desired notes in the **Notes** field. Up to 4,000 characters are permitted.
   - Select the **Add** button to upload one or more documents to the tab from the local drive. Uploaded attachments will be displayed below.
   - A list of available contractors will be displayed. Select one or more **contractors** to apply the attachment to.
   - Select the **Save** button to apply the attachment and close the modal, or select the **Save and Add Another** button to apply the attachment and keep the modal open to add further attachments.
7. To edit attachment details, select the **Edit/View** button in the Actions column. The Edit General Performer Documents modal will display. Once all edits have been made, select the **Save** button to apply changes.
8. To delete an attachment, select the **Delete** button in the Actions column. Deleted documents will remain available via the History tab.

History

The History section will display all changes that occurred over a selected period of time for the Contractor Data Sheet and attachments. The ability to view History for Working Papers tab is restricted to CBAR ACO and CBAR View Only users whose registered DoDAAC matches the CFAO DoDAAC.

Contractor Data Sheet History

The Contractor Data Sheet History tab will display all changes that occurred to CBAR Working Papers over a period of time.

1. Enter a beginning date in the **Change Date From** field.
2. Enter an end date in the **Change Date To** field.
3. Select the **Filter** button to apply the selected date range.
4. The information returned includes the section a change was applied to, event type, date and time of event, and the user who applied the change.

Attachment History

The Attachment History tab will display all changes that occurred to attachments for Working Papers over a period of time.

1. Select the **Section Level** or **Line Item Level** radio button in the Display Attachments section.
2. Select a Working Papers section in the **Attachment Section** dropdown menu.
3. Apply any desired date range in the **Change Date From** and **Change Date To** fields.
4. Select the **Filter** button to apply filter criteria.
5. The information returned includes the section a change was applied to, event type, date and time of event, and the user who applied the change.

Deleting Contractor Data Sheet	CBAR PMO users have the unique capability to delete a Contractor Data Sheet record. To delete a record, select the **Delete** icon in the Actions column within the Contractor Data Sheet Search results. In the Confirm Delete Contractor Data Sheet modal, select the **Yes** button to confirm deletion of the Contractor Data Sheet or select the **No** button to close the modal without deleting the record.