

FAQ Sheet

1Q: My organization's hierarchy/structure is inaccurate. How do I get it corrected?

1A: The hierarchy in CROSS is auto populated from DON TRACKER, which is primarily a task management system. The org structure is NOT tailored to records management. In some cases, the command structure is too comprehensive; in other cases, it is not comprehensive enough. It is the responsibility of the CDRM to ensure that the org structure in CROSS is an accurate reflection of day to day RM business practices. This org structure will ultimately be exported to MCTILM (see 8Q for questions related to MCTILM).

Is the organizational structure in the subsection list correct?

Upload Correct Org Structure
(.xlsx or .docx preferred):

Filename	Upload Date
<input type="button" value="Save NJDA Setting"/> <input type="button" value="+ Add Org Hierarchy File"/>	

On the CROSS homepage under the **Organizational Info** tab, there is an option which says: "Is the organizational structure in the subsection list correct?" Toggle this to "No." An option will appear to "Add Org Hierarchy File." Upload your correct org structure here. An email notification will be triggered to the ARDB Contract staff. Most org structure requests are resolved within 48-72 business hours.

2Q: How do I delete users that are no longer in my organization?

2A: Currently, CDRMs cannot delete users that are no longer within their organization (i.e. PCS, EAS etc.). If you wish to have users removed from your organization, submit a request to the ARDB Helpdesk via the **Contacts** email box at the bottom left of the CROSS homepage. Please include your 1) unit name and ID, along with 2) justification for why the user should be removed.

3Q: How do I change my role within CROSS?

3A: If you wish to change your role (ex. from primary CRDM to alternate CDRM), please submit a request to the ARDB Helpdesk via the **Contacts** email box at the bottom left of the CROSS homepage. Please include the role you would like to switch to.

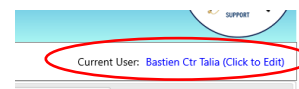
Contacts

You can send an email directly by providing an email body below, and checking the requested recipients:

Tech and Help Desk Support Selected RMs

4Q: I've moved to a different organization. How do I change my unit?

4A: Select your name (in blue) next to "Current User" in the top right-hand corner of the dashboard.



Name *
Bastien Ctr Talia

Email *
taliamastien@hartwoodcg.com

Role *
Primary Unit CDRM

Phone Number *
571-628-7711

Region *
Northeast Region

Installation *
Pentagon (Other NCR), Washington, D.C.

You have listed the following as your unit: *
HQMC AR ARD ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS
MANAGEMENT SECTION *LEVELS

[Click to change units](#)
(Changing units will require a new appt letter from your new unit)

Version: 5.0
Created at 12/9/2019 6:01 PM by Bastien Ctr Talia
Last modified at 12/11/2019 12:47 PM by Workflow on behalf of Van Corbach CTR Andrew J

An edit user box will appear on the screen. Select "Click to Change Units" and type in the organization you are looking for. Click outside the box until you see the organization listed in red and hit save.

You have listed the following as your unit: *
 HQMC_AR_ARD_ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS
 MANAGEMENT SECTION *LEVEL5

Click to change units
 (changing units will require a new appt letter
 from your new unit)

Find your unit: *

The following are the RMs listed for your organization:
 (If none listed, an RM is not assigned to your unit)

Please ensure that the list below represents your direct hierarchy
 structure above your unit:

• 418: HQMC_AR - ADMINISTRATION AND RESOURCE
 MANAGEMENT DIVISION

Version: 5.0
 Created at 12/9/2019 6:01 PM by Bastien Ctr Talia
 Last modified at 12/11/2019 12:47 PM by Workflow on behalf of Van Corbach CTR Andrew J

Save

Cancel

5Q: I cannot find my unit, what should I do?

5A: If you cannot find your unit using its short name (i.e. MCCDC, ARDB, MCESG etc.), try spelling out the long name (i.e. Marine Corps Combat Development Command). You can also search by unit ID if you happen to know someone who already belongs to that unit.

RMs for 463: HQMC AR ARD ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS MANAGEMENT SECTION *LEVEL5
[Click to View Your Organizational Structure](#)

Find your unit: *

The following are the RMs listed for your organization:
 (If none listed, an RM is not assigned to your unit)

If you still cannot find your unit, please contact the ARDB Helpdesk via the **Contact** email box at the bottom left of the CROSS homepage.

6Q: Why can't I see/edit my file plan?

6A: If you cannot see and/or edit your command file plan, it is because you are in the command level of your organization. **Note: Commands do not produce records** – their file plan is comprised of a “roll up” of their subordinate staff sections. (Ex. The S-3 produces records on behalf of the battalion). If you wish to manipulate your command file plan, select a subsection (in blue) and the file plan for that section will appear. **You must ALSO ensure that the “NJDA” selection is toggled to “No.”** This indicates that your section is NOT a command entity, which will enable you to view your file plan.

7Q: Can I register to more than one organization at a time?

7A: Currently, no. We are currently working on functionality to make this possible, but as of right now you are only able to align your profile to one role/section at a time (i.e. you cannot be both the CDRM and the staff section RM for the S-1.)

8Q: What is MCTILM?

8A: MCTILM (Marine Corps Tool for Information Lifecycle Management) is a configured SharePoint solution that ascribes metadata to declared records. It identifies a record’s author, the record schedule it belongs to, and a disposition date. Additionally, it disposes of records via an automated workflow, alleviating the need for records managers to go in and manually dispose of/retire records. We are currently working on a comprehensive MCTILM package, which will speak to the technical installation, permissions assignments, and training for RM staff. Anticipated release date is June 2020.

9Q: How do I get my command started on MCTILM?

9A: To build MCTILM, your organization must meet several prerequisites. **Note: you cannot configure MCTILM until you have a complete RM program established in CROSS.**

1. You must have an identified CDRM for your organization in CROSS.
2. You must have a complete and accurate org structure in CROSS
3. You must have 100% of your staff sections RM personnel identified
4. You must have a **complete** file plan built in CROSS (across all sections—this will be directly imported into MCTILM).
5. Your organization must have a thorough and comprehensive standard operations procedure dictating how to implement electronic records management—templates are available in CROSS.
6. Finally, you must identify your Site Collection Administrator (SCA). This will be the technical POC (generally someone from your S-6/G-6) responsible for the content control, permissions, and maintenance of your local Sharepoint.

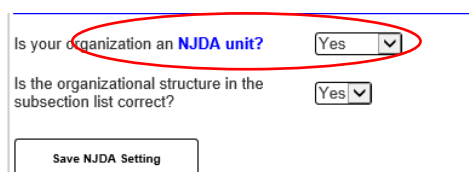
Once these prerequisites are met, please contact us at smb_hqmc_rm_outreach@usmc.mil or one of the emails on the Contact page, and we will work with your SCA to configure MCTILM for your command/organization. *Note: We are encouraging organizations to temporarily hold off on MCTILM installation until our comprehensive implementation and training package is available for public use (see 8Q for more details).*

10Q: Do Staff Section RMs need an appointment letter?

10A: Per current policy, only the primary Command Designated Records Manager (CDRM) is required to have an appointment letter. However, the registration process in CROSS automatically creates appointment letters for every RM role, to include Staff Section RMs. An organization’s CDRM is the approving official for Staff Section RM appointment letters in CROSS.

11Q: How do I view the IG Checklist?

11A: The automated IG Checklist is only available to commands with Non-Judicial Disciplinary Authority (NJDA). Commands may designate their status by selecting the **NJDA** toggle in the **Organizational Info** tab.



Is your organization an NJDA unit? Yes

Is the organizational structure in the subsection list correct? Yes

Save NJDA Setting

All CROSS users have access to the **File Plan** tab, but only subsections have “view” and “edit” permissions. Subsections’ file plans “roll up” to the command element above them.

12Q: I went to save my file plan and the homepage timed out, erasing all my changes. Why did this occur?

12A: The platform on which CROSS is hosted (EIS) refreshes every 5 minutes or so. This issue is beyond our control. Please save early and often in order to mitigate the loss of work.

13Q: What is the difference Primary/Alternate CDRMs and Staff Section RMs?

13A: Each role has varying responsibilities and permissions:

Primary CDRMs are the Records Manager (RM) POC for the command/organization they represent. They are responsible for implementing RM on behalf of their commander/organizational head while serving as the ARDB liaison for all things RM. Their responsibilities include:

1. Updating all organizational information (i.e. Commanding Officer, Capstone info etc.)
2. Reviewing the IG Self-Checklist for RM compliance on behalf of organization
3. Overseeing the completion of their organizational file plan
4. Creating, reviewing, or updating their organizational SOP (Standard Operating Procedure), as required per question 0103 of the 5210 IG Checklist
5. Overseeing their organization's RM training and uploading training verification (i.e. rosters, certificates, MCTMS print out, etc.) to CROSS annually
6. Auditing subordinate section's RM program(s)/file plan(s)
7. Ensuring that each section has appointed Staff Section RMs
8. Serving as the appointment letter approving official for Staff Section RMs

Alternate CDRMs assist Primary CDRMs in the same capacity and act as a secondary POC in the event of turnover. They utilize the same permissions as the Primary Unit CDRM. No more than three Alternate Unit CDRMs are needed at major commands.

Staff Section RMs are responsible for identifying and managing the records that belong to their respective section as well as annotating their file plan in CROSS. They are responsible for:

1. Adding types of ERM (electronic Information Management) that are utilized within their subsection.
2. Creating file plans for their section
3. Communicate with the CDRM regarding section RM compliance

14Q: I am unable to register in CROSS/my email is not showing correctly. What should I do?

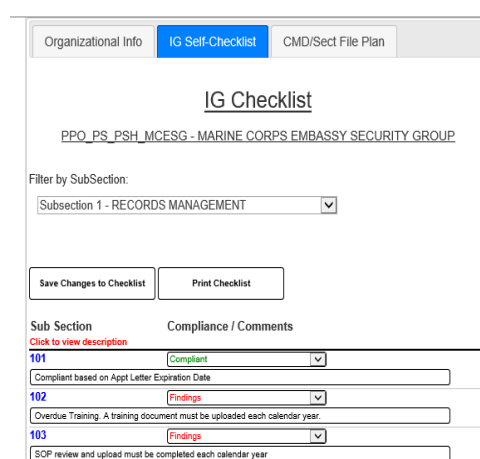
14A: CROSS pulls the email directly associated with your CAC. If the email address there is not correct, please contact the MCEITS Help Desk at: (816) 705-4865 or EISHelpDesk@usmc.mil.

15Q: How do I change my rank in CROSS?

15A: You will need to contact the MCEITS Help desk: (816) 705-4865 or EISHelpDesk@usmc.mil.

16Q: I submitted an account request for CROSS, but it has not been approved. What should I do?

16A: The approving authority is different for each role in CROSS (i.e. primary/alternate CDRM or Staff Section RM). Primary/Alternate CDRMs are approved by the organization's commanding officer, section head, or other delegated authority (i.e. Executive Officer, Chief of Staff). Section RMs are



approved by the organizational CDRM. **All approving authorities must have a prior existing MCEITS account (sharepoint access) with a CORRECT email address in order to receive and approve/deny your registration request.** If your approving authority does not have a MCEITS account, they will first need to create one, utilizing the “RM MCEITS Account Request Guide,” which is available for download on the ARDB website: <https://www.hqmc.marines.mil/ar/Branches/Publishing-and-Logistics-Management/Records-Reports-and-Directives/>

RECORDS MANAGEMENT RESOURCES

Records Management Resources

CROSS

CROSS is a SharePoint tool designed to provide support to Command Designated Records Managers (CDRMs) in the development and maintenance of Records Management Program.

Name	Description	Resources
MCEITS Account Request	Prior to gaining access to CROSS, all users MUST have a MCEITS account	Download
CROSS End User Registration Guide	After obtaining MCEITS account, Register for CROSS	Download
CROSS End User Guide	After obtaining access to CROSS, utilize CROSS end user guide	Download

ARCIS

ARCIS is the records transfer and reference request system that the National Archives and Federal Records Centers (FRC) use, which replaces the paper SF-135s.

Name	Description	Resources
ARCIS Account Request Form - NA Form 13170	Complete Section 1 only (Other Sections not required) and send to HQMCREC-MGR@usmc.mil for processing. Type 127 for the Record Group in Section 1.	Click for NA Form 13170
FRC Location by Geographic area	FRC location by Geographic area reference	Download
ARCIS User Guide	After obtaining access to ARCIS, utilize ARCIS end user guide	Download

FUNCTIONS

[ARDB Records, Reports, and Directives Management SharePoint Portal](#)

17Q: I am unable to view anything within the “Search CROSS Articles and Documents” feature. What should I do?

Name
AISSICCrosswalk
ARD MCTILM Project Plan
Audit Report Template
Chapter 01 - Military Personnel
Chapter 02 - Telecommunications and Information Technology
Chapter 03 - Operations and Readiness
Chapter 04 - Logistics
Chapter 05 - General Administration and Management
Chapter 06 - Medicine and Dentistry
Chapter 07 - Financial Management
Chapter 08 - Ordnance Material
Chapter 09 - Ship Designs and Material
Chapter 10 - General Material
Chapter 11 - Facilities and Activities Ashore
Chapter 12 - Civilian Personnel
Chapter 13 - Aeronautical and Astronautical Material
CROSS FAQ
DIRECTIVES REVIEW PROCESS WORKFLOW 01NOV2017
Essential Records Fact Sheet
Essential Records Plan
How to use the Crosswalks

17A: We are aware that a small percentage of our users are unable to utilize the drop-down feature. Selecting the link entitled “Click here to view Document Library in list view” will redirect end users to a list of all CROSS resources and materials. Please do not add anything to this list!

[Search CROSS Articles and Documents](#)

[Click here to view Document Library in list view.](#)

Select...

Title Uploaded

18Q: My organizational leader/section head does not have Non-Judicial Disciplinary Authority (NJDA)? Do I still need a records management program?

The screenshot shows a web interface with three tabs: "Organizational Info", "IG Self-Checklist", and "CMD/Sect File Plan". The "IG Self-Checklist" tab is active and circled in red. The main heading is "Organization Information" for "HQMC_AR - HQMC ADMINISTRATION AND RESOURCE MANAGEMENT DIVISION *LEVEL3". A link "Click to View Org Structure" is present. Under "Unit Info", there is a section "Types of ERM (Electronic Records Management) Utilized" with checkboxes for "MCTILM (Marine Corps Total Information Lifecycle Management)", "DON TRACKER", "Other", "Local SharePoint", and "Share Drive". Below this is a "Specify:" text box. Two questions are asked: "Is your organization an NJDA unit?" (with "Yes" selected and circled in red) and "Is the organizational structure in the subsection list correct?" (with "Yes" selected). A "Save ERM Selections" button is at the bottom, followed by a "Commander:" label.

Ex. HQMC_AR Division is provided as an example. While their Director does not have NJDA, as a HQMC program office, he/she is responsible to implement a RM program across AR Division’s subordinate sections.

18A: Yes. Every organization in the Marine Corps is required to have a records management program (i.e. appointed CDRM, SOP, training etc.), regardless if their commander or organizational head has “NJDA” authority. Note: The “NJDA” feature in CROSS is NOT tied to policy—it is a general rule of thumb to help commands/program offices distinguish themselves from their subordinate staff sections (i.e. S-1, G-2, MCCS etc.). **If your organization belongs to HQMC, it is still highly encouraged that your front office toggles the “NJDA” feature to “Yes.”** This will give the Primary/Alternate CDRM access to the IG Self-Checklist tab, as well as the ability to input information into the “Organizational Info” tab.