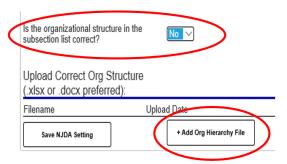
- 1. My organization's hierarchy/structure is inaccurate. How do I get it corrected?
- 2. How do I delete users that are no longer in my organization?
- 3. How do I change my role within CROSS?
- 4. I've moved to a different organization. How do I change my unit?
- 5. I cannot find my unit, what should I do?
- 6. Why can't I see/edit my file plan?
- 7. Can I register to more than one organization at a time?
- 8. What is MCTILM?
- 9. How do I get my command started on MCTILM?
- 10. Do Staff Section RMs need an appointment letter?
- 11. How do I view the IG Self-Checklist?
- 12. I went to save my file plan and the homepage timed out, erasing all my changes. Why did this occur?
- 13. What is the difference Primary/Alternate CDRMs and Staff Section RMs?
- 14. I am unable to register in CROSS, my email is not showing correctly, or CROSS keeps telling me to re-register. What should I do?
- 15. How do I change my rank in CROSS?
- 16. I submitted an account request for CROSS, but it has not been approved. What should I do?
- 17. I am unable to view anything within the "Search CROSS Articles and Documents" feature. What should I do?
- 18. My organizational leader/section head does not have Non-Judicial Disciplinary Authority (NJDA)? Do I still need a records management program?
- 19. My command information (i.e. Training, SOP, Commander, Capstone info) disappeared; how do I get it back?
- 20. There is no RM annual training available on Marine.Net. How does our command meet this requirement?
- 21. <u>Did Record Schedules replace SSICs/Have SSICs gone away?</u>

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 practices.



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.

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

2A: Currently, CDRMs cannot delete users. 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 submit your unit name and ID, along with 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.



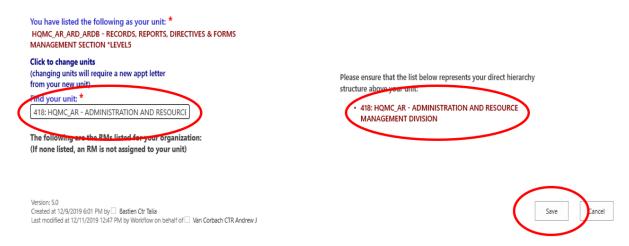
4Q: I've moved to a different organization. How do I change my unit?

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

Name * Bastien Ctr Talia	Email * talia.bastien@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 - IEVES	
Click to change units: (ch. units units require a new appt letter from your new unit)	
Version 5.0 Created at 12/12/2019 601 PM by: Bastlen Ctr Talia Last modified at 12/11/2019 1247 PM by Workflow on behalf of: Van Corbach CTR Andrew J	Save



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.



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

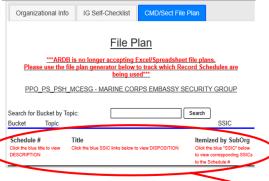
5A: If you cannot find your unit using its short name (i.e. MCCDC, ARDB, MCESG etc.), try spelling out the long name (i.e. Marine Corps Combat Development Command). You can also search by unit ID if you happen to know someone who already belongs to that unit.

RMs fo 463: HQMC AR ARD ARDB - RECORDS, REPORTS, DIRECTIVES & FORMS MANAGEMENT SECTION *LEVEL5 Click to View Your Organizational Structure



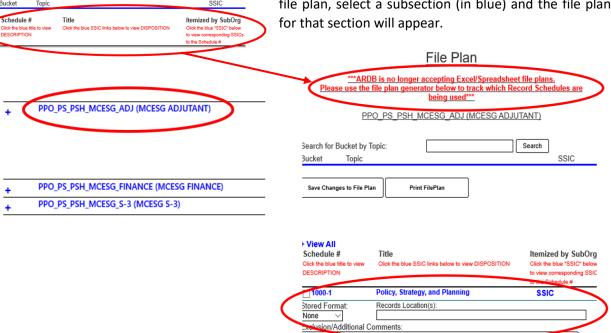
The following are the RMs listed for your organization: (If none listed, an RM is not assigned to your unit) If you still cannot find your unit, please contact the ARDB Helpdesk via the **Contact** email box at the bottom left of the CROSS homepage.

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. 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.

ata 3/15/21



1000-2

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

7A: 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 records. It identifies a record's author, the record schedule (formerly SSIC) it belongs to, and a disposition date [note: SSICs are used for content categorization (Navel Letter Format) but are no longer used to determine a records disposition.]. Additionally, it disposes of records via an automated workflow, alleviating the need for records managers to go in and manually dispose of/retire records.

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. 2)You must have a complete and accurate organizational 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. 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.

	Co	<u>intacts</u>	
You can send an email directly by providing an email body below, and checking the requested recipients:			
Tech and Help Desk Support	D	Selected RMs	0

Once these prerequisites are met, please contact us at smb_hqmc_rmoutreach@usmc.mil or utilize the Contacts box at the bottom left of the CROSS homepage, and we will work with your SCA to configure MCTILM for your command/organization.

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

10A: No. Per current policy, only the primary Command Designated Records Manager (CDRM) is required to have an appointment letter. However, this is the commander's prerogative. Staff Section

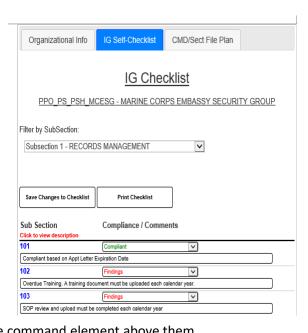
RM appointment letters may be approved by the CDRM in CROSS.

11Q: How do I view the IG Self-Checklist?

11A: The automated IG Self-Checklist tab (below) is only available to commands with Non-Judicial Disciplinary Authority (NJDA). CDRMs and Program Owners no longer have the ability to adjust their NJDA status under the Organizational Info tab (see 19Q). Commands may submit a request to change their NJDA status via the Tech and Help Desk Support box at the bottom left of their CROSS homepage. When a command has their NJDA status approved by the help desk, the IG Self-Inspection checklist tab will become available.

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:

Primary CDRMs are the Records Management (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. Creating a file plans for their section

2. Communicating with their CDRM regarding RM compliance

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

14A: CROSS pulls the email directly associated with your CAC. If all things are working correctly, the two boxes at the top of the registration form will auto-populate your information and be grayed out (non-editable). This indicates that CROSS has successfully pulled the data directly linked to a user's CAC (name and email address).



If one or both data elements do not appear, contact the HCS (formerly MCEITS) Help Desk at: (816) 705-4865 or EISHelpDesk@usmc.mil using the email template (below).

If you continue to receive a registration error/loop:

Step 1: Contact ARDB CROSS Site Support (smb_hqmc_rmoutreach@usmc.mil) to notify them of the failed registration attempt. The Helpdesk will delete your account to avoid duplication:

Step 2: Use the email template below to contact the HCS (formerly MCEITS) Help Desk:

To: eishelpdesk@usmc.mil
Cc: tiffany.gianquinto@usmc.mil

[Greeting],

I am reaching out to request assistance with my email address within the HCS Active Directory. I am registering to the CROSS website which relies on email address for validation and registration. I need to verify that the HCS Active Directory contains my email address and that it is current. Thank you for your assistance.

[Signature]

Step 3: Once a reply has been received from the HCS Help Desk with conformation of account correction, attempt to re-register to CROSS at https://eis.usmc.mil/sites/CROSS.

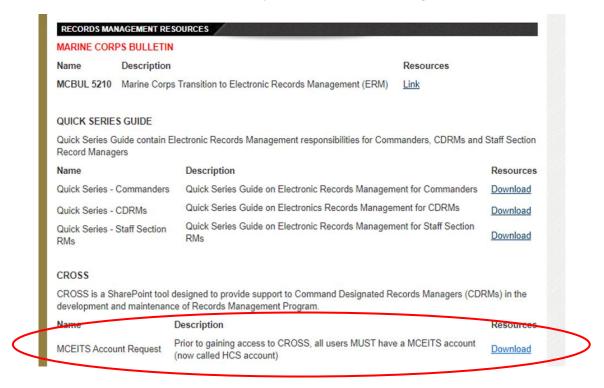
Step 4: Contact ARDB support staff from **Step 1** to confirm CROSS access.

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

15A: You will need to contact the HCS (formerly 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: Records Reports and Directives Management (marines.mil)



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

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



AllSSICCrosswalk ARD MCTILM Project Plan Chapter 01 - Military Personne Chapter 02 - Telecommunications and Information Technology Chapter 04 - Logistics Chapter 05 - General Administration and Management Chapter 07 - Financial Management Chapter 08 - Ordnance Material Chapter 10 - General Material Chapter 11 - Facilities and Activities Ashore Chapter 12 - Civilian Person Chapter 13 - Aeronautical and Astronautical Materia CROSS FAQ DIRECTIVES REVIEW PROCESS WORKELOW 01NOV2017 MCO 5215.1K (MC Directives Mgmt Prgrm) Monthly Audit Report NA FORM 13170 ARCIS Application NAVMC 11786 Instruction

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

18A: Yes. Every command or organizational command equivalent (i.e. HQMC program office, M&RA, etc.) 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.

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.

19Q: My command information (i.e. Training, SOP, Commander, Capstone info) disappeared; how do I get it back?

19A: The ability to select the NJDA toggle was removed from the Organization Info tab in order to prevent Staff Section RMs from adjusting their command statuses and losing their file plan edits. All adjustments must now be made on the back end. If you are NOT a command or organizational command equivalent—such as a supporting staff section (i.e., S-3, G-2, SJA etc.)— you will no longer have access to the IG Self-Checklist Tab or the "editable" information under the Organizational Info Tab. Requests to change your unit's NJDA status may be made via the "Tech and Help Desk Support" box at the bottom left of the CROSS homepage. Please provide your unit ID when contacting the Help Desk.

20Q: There is no RM annual training available on Marine.Net. How does our command meet this requirement?

20A: To meet RM annual training requirements, civilians, contractors, and Marines with access to Total Workforce Management System (TWMS) should take "Records Management in the DON: Everyone's Responsibility" via https://twms.dc3n.navy.mil/my.policy. For those without access to TWMS, utilize the Power Point presentation available on CROSS, "Records Management, Everyone's Responsibility." To track training completion, commands should create an annual training occasion in MCTIMS (Marine Corps Training Information Management System) and upload a printout/pdf to CROSS. CDRMs can also maintain all training rosters in CROSS, if necessary.

21Q: Did Record Schedules replace SSICs/Have SSICs gone away?

21A: No. SSICs will continue to identify a record's content or subject matter and should be placed in the upper right-hand corner for Naval Letter Correspondence purposes. Formerly, SSICs also determined a record's disposition, resulting in over 6,000+ dispositions. Now, DON Record Schedules categorize, or group, SSICs into "buckets" to narrow the list of potential dispositions to about 712. Follow the steps below to determine a record's disposition and how to determine which record schedules to include in your file plan:

Utilize the "AllSSICCrosswalk V1.1" document, available on CROSS under "Search CROSS Articles and Documents," for the entire Crosswalk process.

- **Step 1:** Column D features paragraph descriptions that fall under each four to five-digit SSIC (formerly found in SECNAV 5210.1 [2007]). Utilize Column D to determine the SSIC subparagraph that most closely matches the content or subject of your record.
 - **Step 2:** Utilize Column A to assign your record's SSIC.
 - Step 3: Utilize Column B to determine the assigned Record Schedule (or Bucket) to your SSIC.

- **Step 4:** Utilize Column E to determine the disposition of the assigned Record Schedule.
- **Step 5:** Include this Record Schedule in your section file plan in CROSS.

Note: Crosswalks available on CROSS are subject to change by the Department of the Navy. The "AllSSICCrosswalk V1.1" document compiles all 13 Record Schedule Chapters, for convenience of use and search when developing a file plan, from the SECNAV Portal here.