

# Department of the Navy

## Task, Records, and Consolidated Knowledge Enterprise Repository



In accordance with OMB-19-21, all federal agencies are required to transition to electronic records management (ERM) by 31 December 2022. To achieve this mandate, the Marine Corps and the Navy are pursuing two different paths for implementation. The Marine Corps is pursuing a three phased migration plan, utilizing the following systems: CROSS, MCTILM, DON TRACKER; the Navy, by contrast, is directing all end users to DON TRACKER.

As a Department of the Navy, the Marine Corps is required to participate in DON TRACKER Train the Trainer Training (T3), sponsored by PMW-250 (the DON TRACKER Program Office) and Progeny Systems. The graphic below delineates the path forward and deliverable items applicable to Marine Corps participants only. Command Designated Records Managers (CDRMs), with delegated authority from their respective command/ organizational leadership, are responsible to oversee and enforce a successful ERM migration for their command/organization.




**PHASE I: CROSS**  
*Programmatic Tool (Replaces Turnover Binder)  
Applicable to the entire command/organization*

- Required Action(s) by the CDRM:**
1. Set up the command org structure in CROSS
  2. Assign Staff Section RMs to each section
  3. Create a command file plan (file plan metadata is exportable to both MCTILM and DON TRACKER)
- \*All actions must be complete in Phase 1 before moving to Phase 2



**PHASE II: MCTILM**  
*Records Repository (All Records)  
Applicable to the CDRM/Site Collection Administrators (SCA) only*

- Required Action(s) by the CDRM/SCA:**
1. Notify ARDB of MCTILM readiness (ARDB will confirm and send the SCA a .wsp file template to download)
  2. Customize/audience records libraries as needed
  3. Upload/declare records in MCTILM (including Essential Records)
- \*All actions must be complete in Phase 2 before moving to Phase 3



**PHASE III: DON TRACKER**  
*Records Repository (Long Term Temporary and Permanent Records only)  
Applicable to the CDRM only. For DON TRACKER permissions purposes, the CDRM also serves as the Command Content Manager (CCM)*

- Required Action(s) by the CDRM:**
1. Set up an org structure in DON TRACKER (the org structure is exported from CROSS by ARDB and input into DON TRACKER by ARID)
  2. Create record schedule folders based on the file plan from CROSS (metadata is exported from CROSS)
  3. Assign document management rules to each folder (i.e., ability to declare records, legal holds, etc.)
  4. Manage records through to disposition (i.e., destruction, transfer to NARA etc.)

### THINGS TO KNOW

1. **PMW-250 requires all T(3) participants to attend a series of pre and post requisite information sessions, to include a:**
  - Kick Off Meeting
  - Two Day Virtual Instructor Led Training(ILT) - schedule is posted at the link below
  - Webinar
  - Post Training HotwashCDRMs must ensure they or their alternate representative are available to attend all (4) sessions or be counted as non-compliant.
2. **CDRMs are responsible to fill out the DON TRACKER T(3) Deployment Checklist prior to training and return to ARDB. It has been tailored to reflect USMC DON TRACKER processes only.**
3. **The Records, Reports, Directives & Forms Section (ARDB) is available to provide guidance and answer questions! All CROSS and MCTILM End User Guides, as well as the most recent DON TRACKER T(3) training schedule, may be found at:**  
<https://www.hqmc.marines.mil/ar/Branches/Publishing-and-Logistics-Management/Records-Reports-Directives-and-Forms/>

### FOR MORE INFORMATION



HQMC Records, Reports, Directives and  
Forms Management Section (ARDB)

Contact the ARDB Outreach Team at:  
SMB\_HQMC\_RM\_OUTREACH@usmc.mil