



NCDIT Enterprise Project Management Office Phoenix Project Management System

Document Type	Phoenix Screen Aid
Title	Contract, Security & Architecture
Revision	1.0
Effective Date	10/19/26

1.0 SCOPE

This document assists with entering field-level information into the Contract, Security, and Architecture screen in the EPMO Phoenix Project Management System. The purpose of entering this information is to understand the base information needed to have awareness of each contract the project has a financial obligation towards, and to provide information for the location of architectural or security artifacts.

This information is required after the project's Business Case has been approved when the project has either a procurement action or must fulfill an Architecture or Security Review decision point.

2.0 COMMON

- The Project Manager (PM) is responsible for all data entry and ensuring the project is completely represented in Phoenix and kept current.
- When unsure, consult with your Project Management Advisor (PMA) for any project related questions or data entry selections. Your PMA will periodically review this information and may recommend changes.
- The contents of this document cover the fields in the Contract, Security, and Architecture screen. Other fields may contain information already populated from elsewhere within Phoenix and inherited here.
- Open your project at [NCDIT EPMO Project Governance & Oversight](#).
- Icons in Use:

*	Required – no saving or advancing until data entry is satisfied.
🔒	Locked – no data entry is allowed.
▼	Dropdown – click on icon to select from list.
🔍	Search – click on icon to engage search function.
📅	Date – click on icon to engage calendar selection.
🔗	Go to Record – click icon to edit record.

- All other fields are text entry and have edit and length limitations based on purpose or a project's workflow phase.
- ALWAYS Save!

3.0 CONTRACT, SECURITY, and ARCHITECTURE DATA ENTRY

3.1 Project Contract Solicitations

The Project Contract Solicitations section is provided to list each contract associated with the project. Many projects have multiple procurements, each leading to some agreement, and ideally all are listed to enable comprehensive insight into the type and nature of fiscal obligations the project has.

Contract Solicitation Number

Though a solicitation refers to the act of requesting proposals or bids from potential vendors, which will have its own number issued by an agency Procurement department for an RFP, RFQ, or other solicitation document, and a contract is a legally binding agreement between parties that may have a different number, the characters or numbers entered should be the generally understood and commonly recognized identifier used for a contract.



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	Do not use Ariba Contract Workspace (CW), Workspace (WS), or Task (TSK) numbers. Not all project team members, reviewers, or approvers have Ariba access. Project Managers should collaborate with the agency Procurement department to identify the correct contract number and enter it in this field for the project. This field is editable and limited to 15 characters.
Contract Award Amount	The approved dollar value authorized by Statewide IT Procurement for the agency to obligate itself to a vendor for a contract's term. The award amount is captured as the Cost in a Contract Award Recommendation. Generally, an award amount does not include optional year's renewals. Enter the whole number dollar amount, less cents. This field is editable and limited to 999,999,999.
Contract Expiration Date	Considering the term of the contract, select the expiry date. This field is editable but must align with the executed contract referenced in the Contract Solicitation Number field.
Vendor Name	The formal legal name of an individual or entity that enters a binding agreement with the state. This name is used within a procurement action, as noted in the Contract Award Recommendation, and generally understood as one of two parties to a contract, with the primary being the State and the other the vendor. Do not use a short name, acronym, or any variation other than how the vendor is officially recognized. This field is editable and limited to 100 characters.

3.2 Security and Architecture

The Security and Architecture section points to multiple sets of information. Security related information assists with identifying what assessments and attestations the project is submitting, and architecture entries indicate where artifacts may be found and whom to contact.

PTA Reference #	The unique ID associated with a Privacy Threshold Analysis (PTA) required by ESRMO during the planning stage of any system, project, or process that will potentially involve the access, use, or sharing of PII. A PTA is required for every project and must be created before submitting the project for a Business Case decision point. Once the PTA is complete, the PTA Workflow Number must be recorded in this field. Examples of current SharePoint-based PTA ID formats: #### - up to a four-digit numeric ####-#### - up to a nine-character string where two four-digit numerics are separated by a hyphen Example of an alternate PTA ID format, once the PTA system has migrated to ServiceNow: - PTK##### - a 10-character string Refer to ESRMO-PTA for instructions and creating a PTA. This field is editable and limited to 10 characters.
Attestation	Select the most suitable option from the list.



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- Select All – Select this option **only** when all three clearly apply. This only occurs when a provider is both GovRAMP and FedRAMP listed, and the project may need additional attestation types. Consult your agency information security team prior to considering this choice.
- [GovRAMP](#) – This option is most suited for procurements involving partners that participate with the GovRAMP state-level compliance program that provides a standardized approach to security assessment, authorization, and continuous monitoring for cloud products and services.
- [FedRAMP](#) – This option is most suited for procurements involving partners that participate with the federal government’s FedRAMP compliance program that provides a standardized approach to security assessment, authorization, and continuous monitoring for cloud products and services.
- Other – Consult with your agency’s Information Security and Procurement teams prior to selecting this option. If Other is selected, an explanation of the nature and type of attestation will be required.

The Statewide IT Procurement Office has updated all procurement templates to include language regarding attestation type with additional information at the NCDIT [GovRAMP Adoption](#) webpage.

This field is editable and should not be changed from the original submission unless there is a fundamental shift in attestation type after the Business Case has already been approved.

Other Approved Attestation
Description

An explanation of the Other attestation type selected that has been approved for use after consultation with your agency’s Information Security team. Generally, this should have already been agreed to between agency Information Security and NCDIT Enterprise Security and Risk Management Office.

This field is editable and limited to 100 characters.

OrbusInfinity Reference

The URL to the location of the project’s architectural artifacts within OrbusInfinity; this is generally a SharePoint link. Consult your agency Enterprise Architecture team as they should have someone assigned to the project that can provide this link. This link is used by NCDIT Enterprise Architecture to go directly to the location affiliated with the project without having to search for it.

Locations generally originate from:

<https://ncconnect.sharepoint.com/sites/iserver365>.

This field is editable and limited to a 1000-character URL.

Vendor Name

The formal legal name of an individual or entity that enters a binding agreement with the state and has agreed to submit to an attesting third-party entity, e.g., GovRAMP or FedRAMP. This should be a Vendor Name from the Project Contract Solicitations list. If there is more than one vendor, enter the one functioning as the primary solution provider, architect, and emphasis behind the PTA entries.

Do not use a short name, acronym, or any variation other than how the vendor is officially recognized.

This field is editable and limited to 100 characters.

Will Vendor Host Any Part of State Data

Either **all** state data is hosted on state infrastructure and within an NC datacenter, or it is not. Is **any** portion of state data stored or managed in any way through vendor services?

- Yes – A portion or all data may be hosted by a vendor and be under their storage, management, and handling processes.



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- No – ALL data will reside within full control of the State, to include all storage, management, or handling.

This field is editable but should not be changed from an original submission unless there is a fundamental shift in scope where the agency has decided to either internalize or externalize some or all data.

Vendor Architecture Documents
Loaded into Phoenix

Have any requested architectural artifacts been uploaded to the project's Documents screen?

- Yes – Documents have been uploaded to the Documents screen so they are in a location where the Project Manager may either share them with those not having access to OrbusInfinity or have them reviewed prior to an Architecture Review decision point.
- No – Documents have not been uploaded to the Documents screen within the project.

NOTE: This notice operates independent of those at the OrbusInfinity Reference. Ultimately, all project artifacts should be stored with the project, but architecture documents will need to be in OrbusInfinity.

This field is editable.

Architect Name

Enter the name of the Enterprise or Solution Architect the project is working with for architectural review. This person may be with NCDIT or your agency. Do not enter a vendor name.

This field is editable and limited to 100 characters.

4.0 CONTACT EPMO

- EPMO@nc.gov
- [Feedback](#)
- [NCDIT EPMO Project Governance & Oversight](#)