



NCDIT Enterprise Project Management Office Phoenix Project Management System

Document Type	Phoenix Screen Aid
Title	Project Initiation
Revision	1.0
Effective Date	10/19/26

1.0 SCOPE

This document assists with entering field-level information into the Project Initiation screen in the EPMO Phoenix Project Management System. The purpose of entering this information is to create the project and enable progressive elaboration of all other informational attributes needed to understand the entire project lifecycle.

This information is required for the project's Business Case and is to be maintained as a function of ongoing applied project management.

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 Project Initiation screen. Other fields may contain information already populated from elsewhere within the Phoenix and inherited here.
- Open your project at [NCDIT EPMO Project Governance & Oversight](#).
- Fields icons:

*	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 PROJECT INITIATION DATA ENTRY

The initiation section is used to set up the initial framework for the IT project. It establishes the general outline of how the project is identified, the owning organization, areas of business or technical impact, procurement approach, methodology employed, and primary stakeholders. Its purpose is to provide a reference overview of how the project is constructed and organized.

Project Name	The name of the project as established during project creation in Phoenix. This name may not be changed or edited without EPMO Phoenix System Administrator support. A name must be spelled out and may not contain acronyms or abbreviations. It cannot contain a vendor name but may contain a product name. Once entered, the name is locked. A Project Name may not contain: Special Characters (e.g., “*:<>? ”), Plan, Program, Project, Acquisition, Amendment, Bid, Contract, Invitation, Offer, Option, Procurement, Purchase, Proposal, Quotation, Quote, Renewal, Request, Statement, IFB, RFP, RFQ, or SOW.
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This text field is limited to 60 characters.	
Agency	A unit of executive, legislative, or judicial branch of State Government such as an Agency, Department, Institution, Division, Commission, or Board. Select the agency from the list.
Project Manager	The person assigned by the Agency to lead the team that is responsible for achieving the project objectives. Select the Project Manager from the list.
Project Management Advisor	The NC DIT EPMO PMA assigned to your agency. Select the PMA from the list.
Workflow Stage	This field indicates the current Phoenix workflow phase and is changed as the project progresses. Project Workflow Stages include: • Business Concept – A type of pre-project due diligence phase where market research and funding options are explored. This is also where initial assumptions are made regarding stakeholders, requirements, and outcomes expectations. • Initiation – The formalized first stage where all project information is collocated within Phoenix. At this point, all requirements for an approved Business Case are formulated, entered, and fully fleshed out. • Plan & Procure – Generally, all procurement and solution planning are addressed and capable of being expressed through a variety of planning and schedule artifacts the Project Manager produces and seeks buy in for. • Build & Implement – The phase where the bulk of activity is performed to construct and deliver the solution, to include all testing, training, and final acceptance. • Closeout – Project management activity necessary for project closure, such as receiving all invoices, ensuring all deliverables have been met, and wrapping up any activity necessary to move the project to complete. This field is locked from edit and will be maintained by the EPMO PMA.
Project End Date	This field inherits the approved end date of the project from either the approved Business Case or a Change Request. This date equals either the project's Original End Date or the Approved End Date, respectively. This field is locked from edit.
Business Case Approved Date	This field inherits the date the Business Case is approved by all required reviewers. This date will only be updated in rare cases when a project's scope changes significantly enough that it must be fully reapproved. This field is locked from edit.
Legacy Created Date	If the project was migrated from the prior Touchdown system, the original creation date is populated here. This field is locked from edit.
Portfolio Manager	The Agency manager or director over a collection of projects or number of Project Managers.



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	Select the Portfolio Manager from the list or contact your PMA for changes.
Prior Project Manager	If previously assigned to a different Project Manager, the former person assigned by the Agency to lead the team that is responsible for achieving the project objectives. Select the Prior Project Manager from the list. If there is no Prior Project Manager, leave blank.
Project Sponsors	The Agency-level executive(s) who commit resources and support for the project or program and is accountable for enabling success. More than one Project Sponsor may be identified. This field should be maintained by the Project Manager when sponsor changes are warranted.
Business Owners	The Business Division-level director(s) or manager(s) who provides vision for what is needed from the project and are directly accountable for expressing accuracy in both need and requirements. More than one Business Owner may be identified. This field should be maintained by the Project Manager when owner changes are warranted.
Project Methodology	• Waterfall – a predictive, traditional preplanned approach. • Agile – includes iterative and incremental project deliveries utilizing Agile techniques or practices. • Hybrid – a combination of predictive and iterative approaches Select the most applicable from the list.
Program Name	A list of pre-approved programs related to projects, subsidiary programs, and program activities that are managed in a coordinated manner to obtain benefits not available from managing them individually. If a program needs to be created and listed, consult with your PMA. If a program does not represent your project, select None.
Business Divisions	The operating sub-entity or sub-entities of an agency's organizational design that will be responsible for funding and operating the implementation of the project once completed. More than one Business Division may be identified. This field should be maintained by the Project Manager when division changes are warranted.
Business Capability	A list of currently monitored competencies that identify function or activity utilized by agencies to perform or execute business strategy to achieve objectives and outcomes. This list is not exhaustive and may change over time. Select the most applicable capabilities. If none apply, select None.
Technology Capability	A list of current state-offered technical abilities that assist with implementing technology and technical resources to achieve business strategy and realize objectives and outcomes. This list is not exhaustive and may change over time. Select the most applicable capabilities. If none apply, select None.
Procurement Method	Follow your agency's Procurement department advice for selecting the most appropriate procurement vehicle representing your project's procurement



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need. It is understood there may be multiple procurement actions; therefore, select the ones that represent your project's solicitation needs.

Refer to [IT Procurement Forms & Templates](#) for additional information.

- Amendment – used when a project is implementing an additional IT component to an existing agreement;
- Cooperative Agreement – used when procuring from a type of joint agreement or an existing contract established by another agency;
- IFB – Invitation for Bid;
- NASPO – [National Association of State Procurement Officials](#), generally associated with cooperative contracts opened for multi-state participation;
- None – used only when the project has no procurement activity;
- Notice of Extension – generally not used;
- RFI – Request for Information, and not a suitable procurement option as nothing may be procured against an RFI. However, it may result in an actual procurement, e.g., RFQ, RFP, SOW, etc.;
- RFP – Request for Proposal;
- RFQ – Request for Quote;
- SOW – Statement of Work, generally only used against an existing [Statewide IT Contract](#); or,
- State Term Contract – used for procuring against a specific [Statewide IT Contract](#).

4.0 CONTACT EPMO

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