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**PURPOSE:** This Quick Reference Guide is designed to create awareness for R.E.P.s around PMI’s rules and policies. This aid is not intended to replace or substitute any other PMI policy, but rather to help R.E.P.s overcome common PMI Intellectual Property-related mistakes.
WHAT IS PMI INTELLECTUAL PROPERTY (IP)?

Project Management Institute (PMI) IP includes all PMI trademarks, service marks, and certification marks, and copyrighted materials, as used in conjunction with PMI’s credentials, products, services, reproductions of standards and publications, and logos. Examples are shown below. (This is not a complete list of PMI’s IP.)

<table>
<thead>
<tr>
<th>CREDENTIAL NAMES</th>
<th>PRODUCTS &amp; SERVICES</th>
<th>PMI-PUBLISHED STANDARDS, PRACTICE STANDARDS &amp; FRAMEWORKS, AND PRACTICE GUIDES</th>
<th>LOGOS</th>
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<tr>
<td>Project Management Professional (PMP)®</td>
<td>PMBOK® Guide</td>
<td>PMI-PUBLISHED STANDARDS, PRACTICE STANDARDS &amp; FRAMEWORKS, AND PRACTICE GUIDES</td>
<td>Project Management Institute</td>
</tr>
<tr>
<td>Project Management Professional®</td>
<td>PM Network®</td>
<td></td>
<td>Project Management Institute</td>
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<tr>
<td>PMP®</td>
<td>PMI Today®</td>
<td></td>
<td>Project Management Institute</td>
</tr>
<tr>
<td></td>
<td>Pulse of the Profession®</td>
<td></td>
<td>Project Management Institute</td>
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</table>
TRADEMARK NOTICES & ATTRIBUTION STATEMENTS

A trademark notice, such as a registered symbol (®), must be placed after a PMI trademark, such as PMP®, PMI Today®, or Certified Associate in Project Management (CAPM)®.

The registered symbol should appear in superscript font.

PMP®

In printed material (texts, flyers, slideshows, etc.), the registered symbol must be present with the first instance of the registered mark. Subsequent instances don’t require the symbol.

On websites, the registered symbol must be present with the first instance of the registered mark on each page of a website where the mark appears. (See page 6 for more information).

In book and product titles, the registered symbol must always accompany a PMI registered mark. For example, PMP® Exam Prep Study Guide.

Each PMI credential has multiple registered marks. Each version requires the use of the registered symbol following the mark.

- Project Management Professional (PMP)®
- Project Management Professional®
- PMP®

Note that the symbol must be placed outside of the parenthesis.

Each time you use a registered symbol, you’ll need to include the accompanying attribution statement. See the following page for details.
When using a registered symbol, you must show the accompanying attribution statement on the same page, both in print and in electronic formats.

For more information, visit PMI Trademarks Usage Guidelines.
USING PMI IP ON THE WEB

PMI MARKS ON THE WEB

Registered marks have different rules depending on the media in which they are used.

The registered symbol must appear with the **first instance** of a registered mark on **every page** of a **website**.

Be sure to include the accompanying attribution statement on **each webpage** where the mark appears.

PMI LOGOS ON THE WEB

This logo may not be used in any printed materials.

The PMI logo may only be used on your website to show as a reference/resource. R.E.P.s should not use the PMI logo in any way that implies endorsement or approval by PMI of an R.E.P.’s courses.

It may link only to the PMI homepage.

Don’t forget to include the registered symbol and an attribution statement at the bottom of the page where the logo appears. It should read, “The PMI logo is a registered mark of the Project Management Institute, Inc.”

The R.E.P. logo may only be used by current R.E.P.s in good standing and must be used with the registration mark and attribution statement.

AUTHORIZED USE OF PMI.ORG CONTENT ON THE WEB

R.E.P.s may link to PMI URLs on their websites but are not permitted to reproduce content from pmi.org without PMI’s written permission.

USE OF PMI COPYRIGHTED MATERIALS ON THE WEB

PMI copyrighted material is not permitted for use on public websites.
USING PMI IP IN SOCIAL MEDIA

There are special considerations with use of PMI IP on social media websites.

PMI marks should always include the trademark notice (i.e. the registered symbol).

The attribution statement should be included, where possible.

However, websites such as Facebook, LinkedIn, and Twitter present special issues to consider due to inherent limitations:

- If the registered symbol cannot be replicated due to technical website limitations, replace it with a capital R in parenthesis “(R)” after the mark to convey the registered status (as shown in the Twitter messaging example above).

- On websites such as Twitter where a character limit exists, there is no requirement to spell out the full PMI credential name or to include an attribution statement. Use of the PMI acronym is permitted (as noted in the above example).
USING PMI IP IN PRINTED MATERIALS

PMI TRADEMARKS IN PRINT

The registered symbol must appear with the **first instance** of a registered mark in printed materials, such as books, manuals, slide shows, or marketing brochures. You do not need to include the registered symbol after the first mention, except when it is part of the title of a book or product, in which case it must **always** be used.

Be sure to include the accompanying attribution statement at the bottom of the page where the mark is first mentioned.

An attribution statement can cover multiple trademark citations and be placed on the first page of the document. (See title page of this document).

PMI LOGOS IN PRINT

The PMI logo may **not** be used in any printed materials. It may be used only as a link to pmi.org homepage in your web content.

The R.E.P. logo may only be used by current R.E.P.s in good standing. Don’t forget to include the registered symbol and attribution statement, i.e., “The PMI Registered Education Provider logo is a registered mark of the Project Management Institute, Inc.”

AUTHORIZED USE OF PMI COPYRIGHTED CONTENT IN PRINT

As an R.E.P., you have a license to use a specific amount of PMI IP. Review pages 15-21 for appropriate use of PMI IP in your course and marketing materials.
REFERRING TO A GUIDE TO THE PROJECT MANAGEMENT BODY OF KNOWLEDGE (PMBOK® GUIDE)

The PMBOK® Guide has two special rules involving its use. The rules apply to its use in any medium.

It must always be written like this:

A Guide to the Project Management Body of Knowledge (PMBOK® Guide)

or

PMBOK® Guide

1. PMBOK® Guide must always include the registered symbol.
2. The abbreviated version of the title must always include the words, “PMBOK®” and “Guide”.


The only exception to these rules is use of the mark in the attribution statement, as written here (it does not require use of the ® symbol or the word “Guide”).
Do not use a certification acronym alone as a noun, or pluralize the acronym.

For certifications (PMP, PMI-ACP, etc.), always use the certification acronym as an adjective followed by the appropriate certification term.

The only exception is the use of the acronym after a person’s name.

No trademark notice or attribution statement is required.

Do not incorporate any PMI marks in a company name, domain name, or email address.

Adding a dash to this company’s email address is an acceptable format, thereby avoiding misuse of the PMP mark.
USING PMI LOGOS

Logos may not be altered in any way, with the exception of adjusting their size. Visit the Marketing Portal to download logos. See page 20 of this document.

- The PMI logo may be used on your website to link to the PMI homepage only.
- It cannot be used in any R.E.P. printed materials.

- The PMI R.E.P. logo can only be used by current R.E.P.s in good standing.
- Make sure the logo includes the registered symbol.

- Add this attribution statement to the bottom of the page every where this logo appears. (See pages 6 and 8 for specifics on usage in different types of media.)

Certain PMI logos are for the exclusive use of PMI credential holders to demonstrate achievement of the PMP certification. The PMP credential logo and PMI credential badges cannot be used by R.E.P.s in marketing materials, or training materials, or on websites.

- Only PMP credential holders in good standing are authorized to use the PMP logo, which may only be used on business cards in close proximity to the credential holder’s name.
- Only PMP credential holders in good standing are permitted to use the PMP digital badge, for use in electronic formats, such as email signature, on websites, and on social media platforms. Likewise, digital badges for other specific PMI certifications are for exclusive use by PMI credential holders who have attained the requisite PMI certification(s).
R.E.P.s may use the PMI Talent Triangle logo on websites and promotional materials.

- Include the following attribution statement, “The PMI TALENT TRIANGLE and the PMI Talent Triangle logo are marks of Project Management Institute, Inc.”

- When placed on a website, the PMI Talent Triangle must link to the following URL: http://www.pmi.org/learning/training-development/talent-triangle

- The colors of each skill segment may not be altered.

- The copyright line may not be removed from the Strategic and Business Management skill segment.

- For more specifics relating to this logo’s use, refer to the PMI Talent Triangle Usage Guidelines on the PMI Marketing Portal.
You may only use images of the covers of the *PMBOK® Guide* and other PMI standards and publications if you sell the book on your website or have included a legally purchased copy of the PMI publication in your course materials.

You may **not** use cover images to note that a course contains references to the standard, or for any other reason.

You may **not** use an image of the PMP certification in your training or marketing materials, slide shows, or on your website.

*Images of PMI Publications & Certificates*

Make the most of your certificate in today’s marketplace. Purchase these standards and guidelines and more like them through PMI.org.

**Our Trainers Are Project Management Professional (PMP)® Credential Holders**

Click on an instructor below to read their profile

Dr. Jared McKissock has been with our organization for fourteen years. He is a customer-focused leader with 20+ years of solid project management.
MAKING STATEMENTS & CLAIMS

You may say the following:

► [Your company name] has been reviewed and approved as a provider of project management training by the Project Management Institute (PMI).

► As a PMI Registered Education Provider (R.E.P.), [Your company name] has agreed to abide by PMI-established quality assurance criteria.

► [Your company name] has been approved by PMI to issue PDUs for your courses.

► Your trainers are PMP credential holders.

You may not say the following:

► PMI has accredited, certified, sponsored, endorsed, or guaranteed any of your courses, products, publications or services.

► PMI is your partner.

► You are a PMI-preferred R.E.P.

► Your organization is a former R.E.P., if you are no longer part of the R.E.P. Program.

► Your trainers are PMI certified.

You may not do the following:

► Use wording that minimizes the amount of time required to achieve a PMI credential.

► Make negative remarks about PMI.

► Use superlative language; for example, saying your organization is “the best” or “the only.”

► Advertise dollar-per-PDU claims, pass rate claims, or any other guarantees, which are not substantiated, qualified, and quantified.

To properly substantiate a pass rate, use the following language: “Of 100 students randomly surveyed, X passed the certification exam.”
PMI INTELLECTUAL PROPERTY (IP) 
LICENSING OPTIONS FOR R.E.P.S

R.E.P.s are assigned one or more of the following licensing options: Basic Level IP License, Premium Level IP License, or a Custom Level IP License. Use of content beyond your selected license option without permission from PMI is copyright infringement and program non-compliance and can result in termination from the Program.

<table>
<thead>
<tr>
<th>BASIC</th>
<th>PREMIUM</th>
<th>CUSTOM</th>
</tr>
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<tbody>
<tr>
<td><strong>Fee: Included with annual R.E.P. Enrollment Level fee</strong></td>
<td><strong>Fee: $1,000 per year in addition to annual R.E.P. Enrollment Level fee</strong></td>
<td><strong>Complete a Permissions Request Form from the PMI Legal Department to apply</strong></td>
</tr>
<tr>
<td>The following copyrighted materials can be used in Courses/Events registered in the R.E.P. Directory on pmi.org:</td>
<td>The following copyrighted materials can be used in Courses/Events registered in the R.E.P. Directory on pmi.org:</td>
<td>Custom Level IP Licenses can be used for:</td>
</tr>
<tr>
<td>‣ 15 of the 20 pre-selected figures, and 5 excerpts from the current edition of the <em>PMBOK® Guide</em> (visit the Marketing Portal for access)</td>
<td>‣ Basic Level IP License permissions, and:</td>
<td>‣ Courseware that exceeds the Premium Level License use of IP</td>
</tr>
<tr>
<td>‣ Full use of the <em>PMBOK® Guide</em> Glossary</td>
<td>‣ 60 additional figures and 20 additional excerpts from the current edition of the <em>PMBOK® Guide</em></td>
<td>‣ Commercial products like flash cards and smartphone apps sold outside of the classroom</td>
</tr>
<tr>
<td>‣ Pre-selected figures from <em>Managing Change in Organizations: A Practice Guide</em> and <em>Change Management Practice Guide</em></td>
<td>‣ 50 figures and 25 excerpts from any combination of other current PMI Global Standards, Practice Guides, and Practice Standards <em>This license may be required for PMI certification exam prep courses as determined by PMI during the Quality Review. See page 18 for policy on paraphrasing and the requirement of the Premium Level IP License.</em></td>
<td>‣ Distributing an electronic version of the <em>PMBOK® Guide</em> or any PMI publication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>An R.E.P. cannot provide an electronic copy or offer students a link to the <em>PMBOK® Guide</em> or any PMI publication unless the R.E.P. has a Site License to place an electronic, secure version on a secure network</td>
</tr>
<tr>
<td></td>
<td></td>
<td>There is a one-time Site License fee and an annual payment based on the estimated number of users</td>
</tr>
</tbody>
</table>

Contact R.E.P. Support (repsupport@pmi.org) for more information, or to upgrade your existing license.
USING EXCERPTS FROM PMI PUBLICATIONS

An excerpt is text (up to 650 words) taken from one section of a PMI publication. Portions of subsections can be combined to form one excerpt.

Excerpts do not include accompanying figures, graphs, or illustrations.

R.E.P.s with a Basic Level IP License may use up to 5 excerpts from the current edition of the PMBOK® Guide in their training materials and slide shows.

One excerpt may be used multiple times in one course, and in multiple courses and will count as only one excerpt. It must be cited each time it is used.

You may not combine text from multiple sections such as 1.4.3 and 5.6. This is considered multiple excerpts.

You may not use your Basic Level IP License excerpts in commercial products or for uses outside of the R.E.P. Program.

“Enterprise environmental factors refer to conditions, not under the control of the project team, that influence, constrain, or direct the project.”


Place the excerpt in quotation marks.

Then, cite the source of the information.
A figure is a figure, table, graph, or other non-text illustration.

The Basic Level IP License allows R.E.P.s to use 15 of the 20 pre-selected figures from the current edition of the *PMBOK® Guide*. Preselected figures are available on the [Marketing Portal](#).

One figure may be used multiple times in one course and across multiple courses and will count as only one figure.

You may not use the Basic Level IP License figures in commercial products or for use outside of the R.E.P. Program.

Remember to cite the source of the figure on the first page where the figure appears.

Text from a *PMBOOK® Guide* figure, graph, or chart placed into a different configuration is counted as one of the 15 figures allowed under the Basic License.

If the content originates from a figure, it is counted as a figure, even if it has been reformatted to look different.

If the wording has been adjusted from the original, it is considered paraphrasing, and not one of the 15 figures allowed under the Basic License.

**Inputs**

Business Documents  
Agreements  
Enterprise Environmental Factors  
Organizational Process Assets

**The inputs are:** business documents, agreements, enterprise environmental factors, and organization process assets.
Figures taken from the *PMBOK® Guide* must be from the current edition.

![Project Boundaries Diagram](image1)

**Figure 2-1. Project Boundaries**


![Project Management Process Groups Diagram](image2)

**Figure 3-1. Project Management Process Groups**


If you would like to use a figure from an outdated version of a PMI text, you’ll need to apply for permission to do so, and indicate in your materials that it is not the current version of the figure.
PARAPHRASING OF PMI PUBLICATIONS

Paraphrasing is done by making changes to another party’s original text, such that it is no longer an exact quote or reproduction, yet conveys the same idea.

**ORIGINAL TEXT FROM THE PMBOK® GUIDE:**

The enterprise environmental factors that can influence the Direct and Manage Project Work process include, but are not limited to:

- Organizational structure, culture, management practices, and sustainability;
- Infrastructure (e.g., existing facilities and capital equipment) and
- Stakeholder risk thresholds (e.g. allowable cost overrun percentage).

**PARAPHRASED TEXT IN COURSE MATERIALS:**

The enterprise environmental factors influencing the Direct and Manage Project Work process include:

- Organizational structure & culture
- Infrastructure
- Stakeholder risk thresholds


You must cite
the source of the information.


This will cover you for any paraphrasing throughout your materials and you won’t need to cite individual instances.
USING THE PMBOK® GUIDE GLOSSARY

R.E.P.s may use an unlimited number of terms from the PMBOK® Guide glossary.

Terms from the PMBOK® Guide are often found in the glossary. Use the glossary definitions when possible to minimize use of excerpts.

Remember to cite the source of the information.

Planned Value (PV). The authorized budget assigned to scheduled work.

Earned Value (EV). The measure of work performed expressed in terms of the budget authorized for that work.

Actual Cost (AC). The realized cost incurred for the work performed on an activity during a specific time period.


If glossary terms from the PMBOK® Guide are mixed with terms from other sources:

* Stakeholder. An individual, group, or organization who may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program or portfolio.

Scrum Master – The person whose role it is to work to facilitate meetings and remove impediments for the team in agile software development.

* Project Manager (PM). The person assigned by the performing organization to lead the team that is responsible for achieving the project objectives.


If you use many glossary definitions in your materials, you may place this statement at the beginning of your course, “Glossary definitions indicated with an asterisk are taken from, A Guide to the Project Management Body of Knowledge, (PMBOK® Guide) – Sixth Edition, Project Management Institute Inc., 2017.” You will no longer need to place a citation on each page where a glossary definition appears.
HELP & SUPPORT

If you have additional questions about PMI Intellectual Property, contact repsupport@pmi.org.

Marketing Portal

Access approved versions of logos and guidelines, and the Basic Level IP License and Glossary definitions in multiple languages. Create and customize marketing materials.

PMI Trademark Usage Guidelines

This document provides general guidance for the proper use of PMI trademarks and lists all PMI registered marks.