Component System

User Guide

2007-027.13
11 January 2018

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1.0.　Introduction

This user guide provides an overview of PMI Component System website features and functions. The Component System, a part of PMI.org, allows a chapter leader to view and change chapter information. PMI staff members administer the Component System. A chapter leader will only have access to his or her chapter information.

Chapters provide formal, established networking and educational opportunities to PMI members. PMI members may join a local chapter to connect with a local network of professional expertise.

> **NOTE**
>
> **The PMI Delaware Valley Chapter is used as an example in this user guide. When using the Component System, the name and information for only the user's Chapter will display.**

1.1. Audience and Prerequisites

Chapter leaders are the primary audience of this document. Chapter leaders must have appropriate access credentials to make changes to information stored in the Component System. This user guide does not include Component System administration tasks. PMI staff members at the Global Operations Center (GOC) perform chapter administration tasks.

1.2. How to Access the Component System

Perform the following steps to access the Component System.

1. Type the following URL into your browser to access the Component System directly.

   URL: http://components.pmi.org

2. Type your PMI.org username and password. You must bookmark the Component System URL. Y.

3. You will automatically see your chapter's information.

4. Perform the following steps to **log off** of the Component System once work is complete.

1.3. Revision History

This user guide will be updated as often as necessary, as determined by Subject Matter Experts (SMEs) or if needed to support changes to the Component System. This document is maintained by the Technical Communication Team. The change log describes new topics and other changes:

Action	Document Number	Effective Date	Changes
Creation	2007-027.0	25 September 2007	Creation of this document.
Revision	2007-027.1	30 November 2007	Revised to include new Charter Renewal section and Membership Activity Email field.
Revision	2007-027.2	16 September 2008	Revised to include chapter location enhancements.
Revision	2007-027.3	05 October 2009	Revised to include Component System access from PMI.org and Officers page changes.
Revision	2007-027.4	19 November 2009	Revised to include automated DEP download process and component leader welcome emails.
Revision	2007-027.5	03 February 2010	Revised section 7.3.3 to include new URL for automated DEP download process.
Revision	2007-027.6	08 September 2010	Revised section 1.2 to describe access via URL instead of Get Involved tab.
Revision	2007-027.7	16 April 2011	Revised section 7.0 to included new DEP utility.
Revision	2007-027.8	23 May 2011	Added information about PHP option to DEP web service documentation.
Revision	2007-027.9	27 May 2011	Changed support email address.
Revision	2007-027.10	29 March 2013	Added information about Chapter Reporting System access management.
Revision	2007-027.11	5 December 2014	Revised to review references to DEP, which has been replaced by CRS.
Revision	2007-027.12	30 May 2015	Updated with changes from Chapter Development.
Revision	2007-028.13	11 January 2018	Replaced code sample text boxes with images.

2.0. Component Home

The **Component Home** screen displays a summary of basic information to describe each chapter.

1. This screen displays automatically after a user logs on to the system. Click **Component Home** to return to this screen from other screens in the Component System.
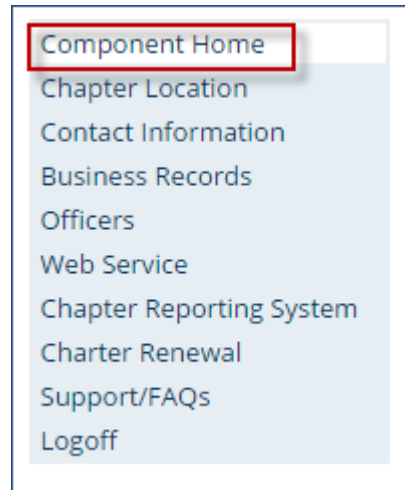
2. The **Component Home** page displays. Refer to **Section 2.1.** for additional information. The Component Home page includes the following sections:

- Chapter Logo and Chapter Name

- Chapter Location

- Chapter Geographical Mapping and Chapter Identification

2.1. Component Home Field Descriptions

The following table describes the information found on the **Component Home** screen.

| Field	Description
Chapter Logo	The chapter's logo and its approval date
Chapter Name	The legal name, incorporated name, and component/region mentor. Legal name is a required field.
Chapter Location	Information describing the region where the chapter operates, including the regional service center supporting the chapter
Chapter Geographical Mapping	Chapter's approved service territory based on the chapter's charter agreement with PMI.
Chapter Identification	Chapter identification information use internally by PMI

3.0.   Chapter Location

The **Chapter Location** screen displays a summary of chapter geographic location information for each chapter. This feature allows a chapter leader to indicate the exact location of the chapter by typing the address or selecting the location from the interactive map. Only chapter leaders and other designated officers with edit rights can change the location address.

1. Click **Chapter Location** from the left navigation choices.
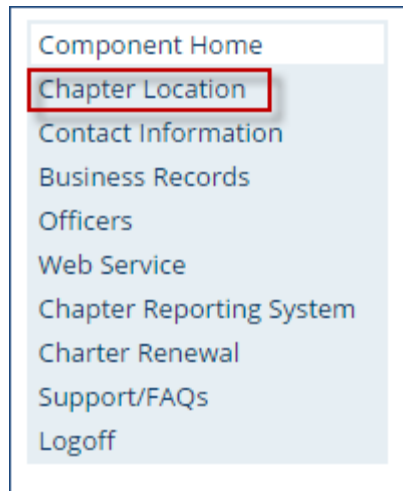
2. The **Chapter Location s**creen displays an interactive map of the chapter location.

3. There are two ways to select the location:

- **Provide information to identify the chapter location (See Figure 1 below).**

    1. Type your address information in the address fields. Fields marked with a red asterisk are required. Do not use a post office box number in your address. The chapter location map cannot generate a latitude and longitude from a post office box number.

    2. Click the **Get Lat/Long From Address** button to complete the latitude and longitude fields based on the address you provided.

    3. Click the **Save** button to save your chapter location.

- **Use the interactive map to change your chapter location address (See Figure 2 below).**

    1. Navigate to the map and right-click on the point you wish to select.

2. Select **Get Lat/Long From Map** from the pop-up menu to update the latitude and longitude fields.

3. Type your chapter address information

4. Click the **Save** button to save your chapter location.

Figure 1: Type Address Information

Figure 2: Use Interactive Map

3.1. Chapter Location Field Definitions

Field	Description
Location Address	The physical address of the chapter or primary meeting location (for example, the street or building address)
City	The city where the chapter is located.
State/Province/Territory	The state, province, territory, or other regional locale where the chapter is located.
Zip/Postal Code	The postal code for the chapter location. Postal codes will vary by country. The Zip code is used only in United States address
Region	Select the appropriate region from the list of drop-down choices.
Country	Select the country where the chapter is located from the list of drop-down choices.
Latitude	The latitude of the chapter location, computed by the chapter location map.

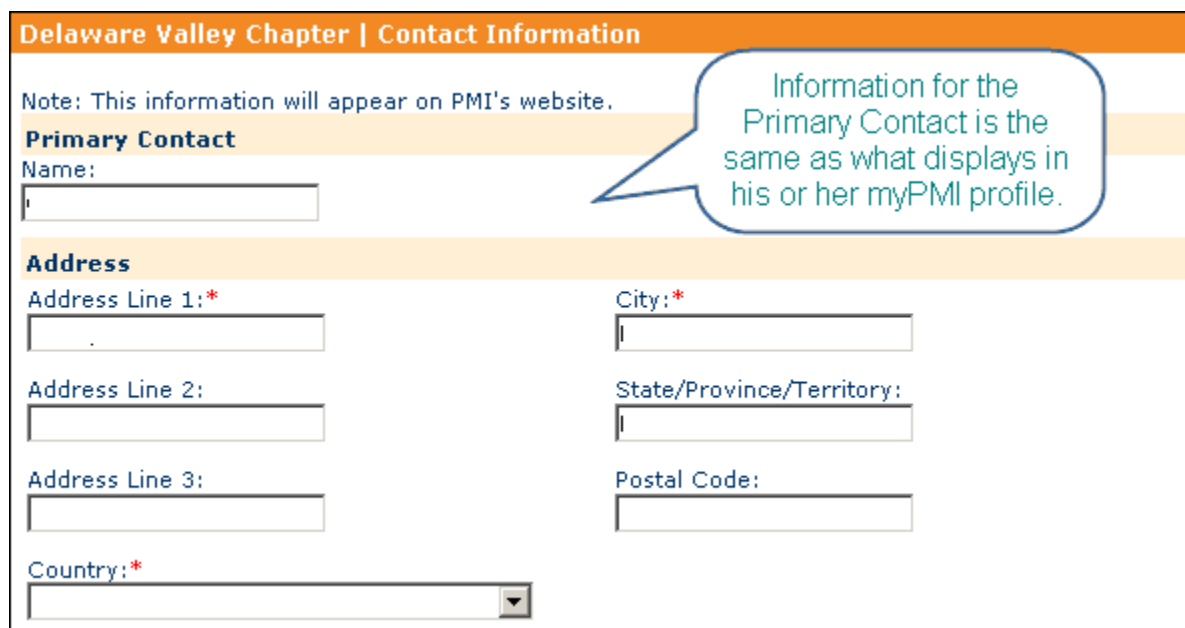| Field	Description
Longitude	The longitude of the chapter location, computed by the chapter location map.

4.0. Contact Information

The **Contact Information** screen displays a summary of contact information for each chapter.

1. Click **Contact Information** from the left navigation choices.
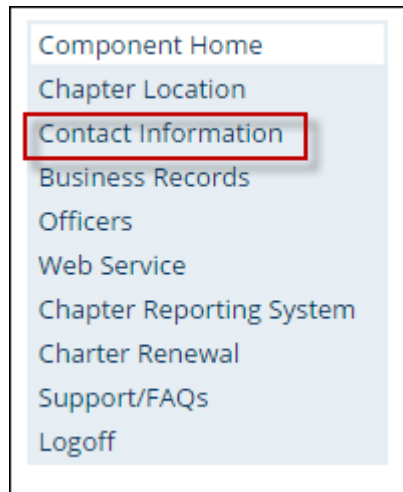
2. The **Contact Information** screen displays the following information:

   - Primary Contact and Address

   - Other Information

- Special Notes

4.1. Contact Information Field Definitions

Field	Description
Primary Contact	This section of the screen includes the name of the chapter's primary contact, usually the Chapter President.
Address	This section of the screen includes the address information for the chapter primary contact.
Other	This section of the screen includes the following information for the primary contact: • Phone Number • Email Address • Fax Number • Web site URL • Membership Activity Email Address (A notification is sent to this address when a member joins or renew their chapter membership.)
Special Notes	This section allows a chapter leader to add any special notes pertaining to the chapter in this field and click **Save**. Users with view rights cannot add text in this field.

5.0.   Business Records

The **Business Records** section of the Component System provides access to several types of chapter records.

5.1. Legal Records

Click the **Legal Records** link to view information about component incorporation details, articles, charter, and governance. Legal records include the following:

- Incorporation Details

- Articles

- Charter

- Governing Document

Click the **View Charter** link on the Legal Records screen to review a copy of the chapter's Charter Agreement. A sample charter agreement is shown below.
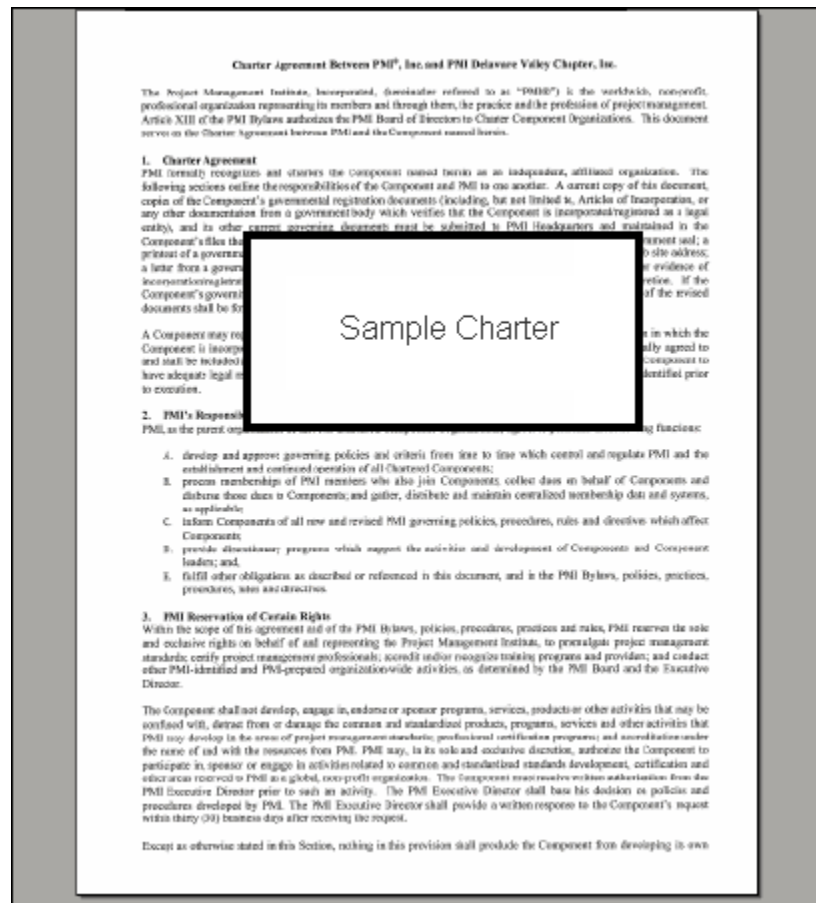
5.1.1.   Legal Records Field Descriptions

Field	Description
Incorporation Details	All chapters have to be incorporated unless they are still in the formation process.
Articles	Whether or not articles of incorporation are on file
Charter	Chapter's charter date and charter agreement date, a copy of the charter agreement is available via PDF.
Governing Document	Chapter's governing document (Bylaws) last approved date

5.2. Financial Records

Click the **Financial Records** link to view these business records. Select the **Fiscal Year** from the drop-down to view the **Fiscal Year-End Balance**.

5.2.1.   Financial Records Field Descriptions

Field	Description
Financial Information	Financial information available for a fiscal year
Dues Disbursements	Dues disbursements sorted by method, on hold status, schedule, currency, and service center

5.3. Insurance Records

Click the **Insurance Records** link to view these business records. Select the **Payment Year** from the drop-down to view insurance payment information.

5.3.1.   Insurance Records Field Descriptions

Field	Description
Payment Year	The year in which an insurance payment was made
Insurance Paid?	Whether or not the insurance was paid for a payment year
Payment Information	Information including date and check number describing the insurance payment
Event Insurance Application on File	Chapters will submit an Event Insurance Application to PMI GOC

5.4. Tax Records

Click the **Tax Records** link to view these business records. Select the **Tax ID Number** from the drop-down to view tax records.

A copy of the past year's tax filings is available by from the **Tax History** portion of the screen.

Sample Tax History

5.4.1. Tax Records Field Descriptions

Field	Description
Tax ID number	The chapter's tax ID number
Tax Exempt? and Tax Exempt Letter on file?	Whether or not the chapter is tax exempt, and whether or not a letter stating this status is kept on file
PMI Group Tax Exemption Participant	Whether or not the chapter participates in PMI group tax exemption for United States (US) based components
Filed taxes for previous year?	Whether or not the chapter filed taxes for the previous year (i.e., for 2015 the previous year is 2014)
Tax History	This portion of the screen provides a link to past tax filings for the chapter

5.5. Dues Specifications

Click the **Dues Specifications** link to view these business records.

1. **Current** dues specifications display as the default.

2. Select **Expired** to view the specifications for expired membership dues.

5.5.1.　　Dues Specifications Field Descriptions

Field	Description
Member Class	The type of membership for which the dues are being paid
Start Date and End Date	The time period during which the dues amount is valid
Amount	The amount of the dues in United States Dollars (USD)

6.0. Officers

The **Officers** section of the Component System provides access information about current and past chapter officers. You can use the **Officers** section to add or remove chapter officers.

NOTE **If the Add New Officer button does not display on the Officers page, you do not have Edit permissions for the page.**

Add New Officer

6.1. How to View Officers

1. Click the **Officers** link to view officer information.

Component Home
Chapter Location
Contact Information
Business Records
Officers
Web Service
Chapter Reporting System
Charter Renewal
Support/FAQs
Logoff
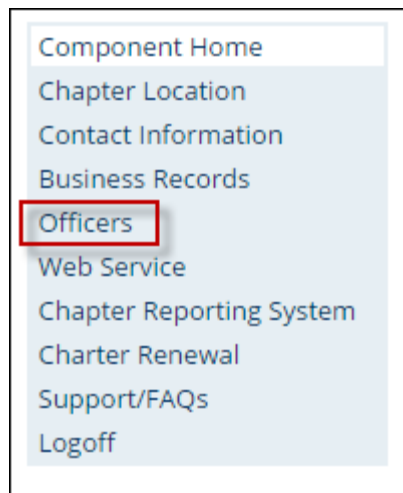
2. The **Officers** information screen displays showing the **PMI ID**, **Name**, **Group**, **Title**, and terms of the chapter officers. Twenty officers are listed on each page, including officers who hold more than one position.

3. Click on a **Name** and the **Officer Information** screen displays.

| NOTE | If you do not have Edit permissions, you may view, but not edit officer information. |

Officer Information

Name:
Frank Walker PMP

State/Province:
PA

Addr

This section includes address, postal code, city, country, and phone contact information for the officer.

City:

Phone Number:

Mobile Phone:

Officer Assignments

Title:*
Director at Large

Group:*
Other

Term Start Date - First Day of:*
Month: Year:
September   2006

Term End Date - Last Day Of:*
Month: Year:
December   2007

E-mail:
Primary E-mail Address

E-mail Address to be used:*

Officer Access

To Component System Application:
◉ No Access   ○ View Only   ○ Edit

Officer Rights

This Officer has rights to:
☐ Retrieve the monthly Data Exchange Program (DEP) for this component

6.2. How to Add a New Officer

Perform the following steps to add a new officer:

NOTE

If the Add New Officer button does not display on the Officers page, you do not have Edit permissions for the page.

Add New Officer

1. Click the **Add New Officer** button on the Officers page.

2. The **Add Officer Information Screen** displays Type the PMI ID number of the person who will be added as an officer and click Go to search for that person.

3. The **Add Officer Information** screen displays Officer Information. Add any needed information that is missing.

4. Type a title for the officer or select a title from the drop-down list choices. Provide all other **Officer Assignment** information to describe the officer.

5. Select an **Officer Access** choice. This choice will determine the level of Component System access for the new officer.

6. Select the **Officer Rights** that apply to the new officer. Click **Save** when all selections are complete. Or, click **Cancel** to exit from the Add Officer Information screen without saving information.

6.3 Officer Access to Chapter Reporting System

Anyone with CS edit rights for the chapter may assign or remove CRS access rights for region mentors and chapter leaders. Select the **Chapter Reporting System (CRS) and Charter Renewal** checkbox on the **Edit Officer Information** page to give a leader access to CRS. The second checkbox, **Retrieve the monthly DEP for this component**, must be check for the chapter leader to have access to the Finance and Membership tabs in CRS.

6.4. Officer Welcome Email Message

The Component System sends an automated welcome email message to each new officer after he or she has been entered into the system. The welcome email message introduces the officer to the chapter and provides links to and descriptions of PMI publications, information, and resources to assist chapter officers.

6.5. How to Remove a Past Officer

Perform the following steps to remove an officer whose term has expired.

| NOTE | **If a new officer is entered in error, please contact the Component System administrator to delete this entry.** |

1. Click the **Officers** link to view officer information.

2. Select the officer whose term has expired and view that officer's information in the **Officer Information Screen.**

3. Click **Save** on the **Officer Information Screen** without making any changes.

4. If the officer's term end date is in the past, they will automatically be removed from the **Current Officers** list to the **Past Officers** list.

6.6. Officer Information Field Descriptions

Field	Description
Officer Information	The officer's name and contact information
Officer Assignments	The officer's title, term, and additional chapter information
Officer Access	The officer's component system access privileges
Officer Rights	Additional special rights the officer may be granted for Component System use. Users with view rights cannot add new officers.

7.0.   Web Service

The **Web Service** section of the Component System provides real-time reports of chapter member statistics. Chapter member data is also available from the Chapter Reporting System (CRS), and may be downloaded in Excel format.

PMI provides two options to access this web service. The first option, the Web Service Utility, provides immediate access to the newest chapter membership data without programming. You can obtain the utility as a .zip file from the Component System and install it on your computer so that you can view DEP data updates when your schedule permits. Follow these steps to use the DEP Web Service Utility.

1. Create an API service account password using the Component System (Section 7.1.)

2. Download and install the DEP Web Service Utility (Section 7.2.)

The second option, if you do not use the Web Service Utility, or if you use Mac or Linux, is to access the service directly as described in section 7.3. The automation process needed to access the service directly requires that a member of the chapter perform programming tasks to initiate the web service. Section 7.3 provides sample code to assist with the programming needed for direct access.

NOTE	**At this time, the DEP Web Service Utility is only available to Windows users. Mac or Linux users must use the instructions in section 7.4 to access the service via programming.**

7.1.   Create an API Service Account

You must create a service account to access the PMI web service that provides the *Real-time Member Extract Report*. The API service account consists of a username and password allowing access to the web service that provides the report data.

NOTE	**The API Service Account password does not conform to the same specifications as your PMI.org registration password. Additionally, this password is not part of the PMI single-sign-on password feature. Chapter leaders can share this password with other members of their chapter who have a need to access DEP data.**

1. You must create a service account before accessing the *Real-time Member Extract Report* via the web service.

2. Navigate to the **Web Service** menu in the component system.
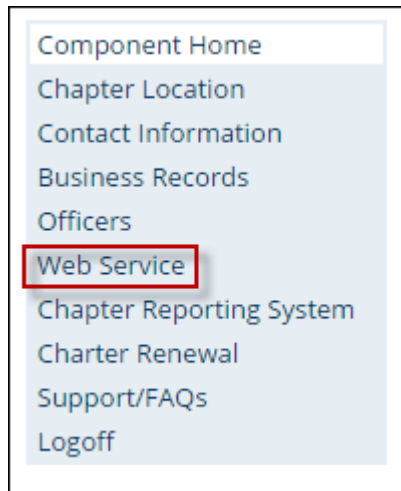
3. Create a **Password**. The username is automatically provided by the Component System.

4. You may click the **Reset** button to create a new password, if needed

7.2. Download and Install the DEP Web Service Utility

1. Click the **DEP Service Package.zip** link on the **DEP Web Service Account** page.

2. Select **Open** at the **File Download** prompt to begin extracting the .zip file contents. Alternatively, select **Save** if you would prefer to install the utility at another time.
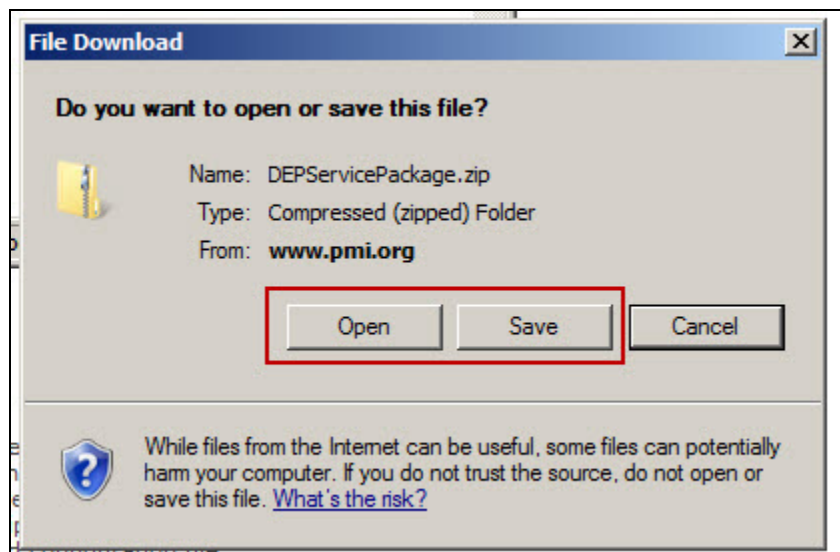
3. The contents of the .zip file display. Click **Extract all** to extract the files and install the utility on your computer.
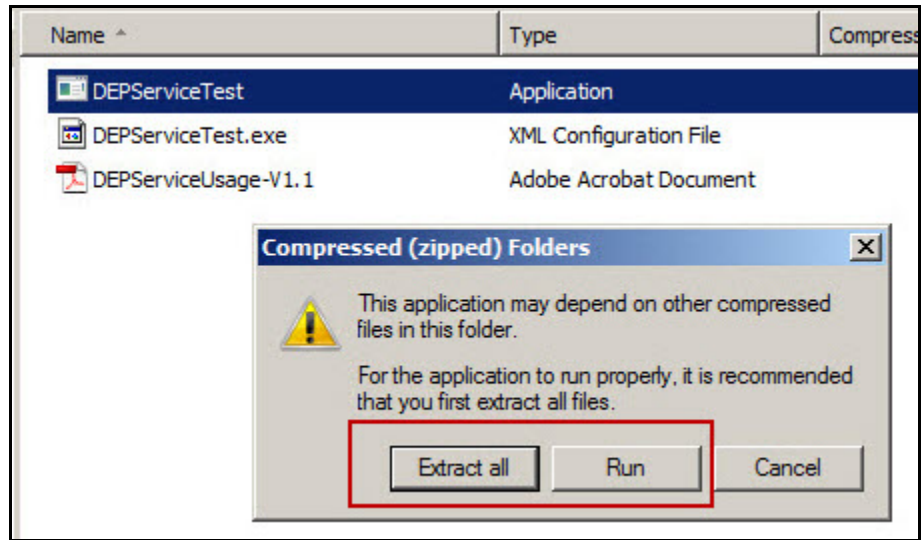
4. **Browse** to a location to store the DEP Service Utility files and click **Extract**.
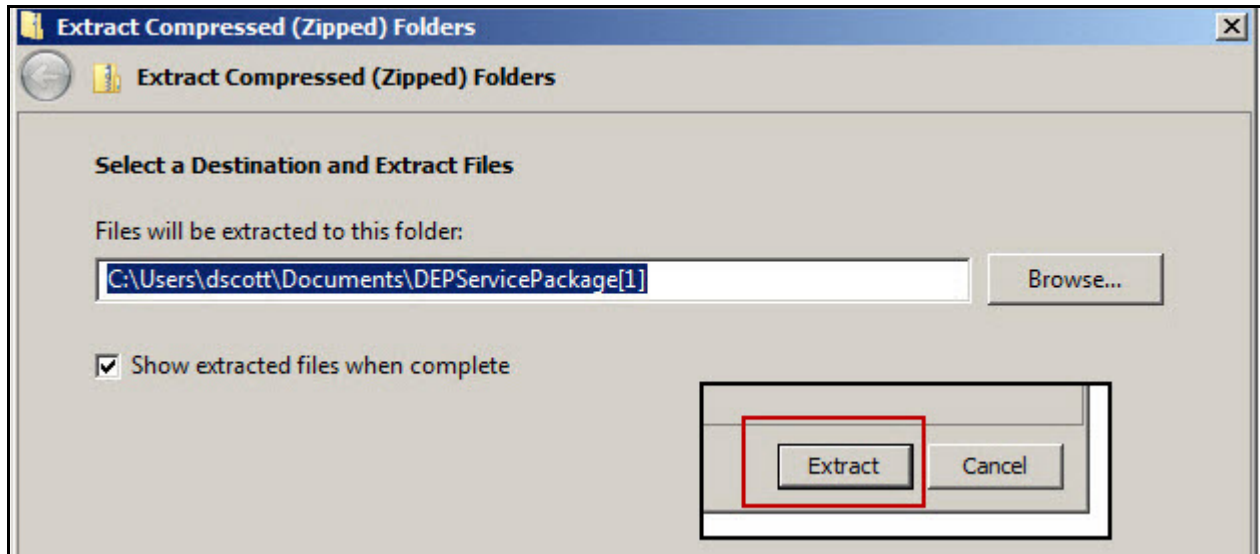
5. After the extract completes, the contents of the zip file display. Click the **DEPServiceTest** application file to open and view the DEP Web Service Utility.

6. The DEP Web Service Utility displays. Type your **DEP Service Username** and **Password**, which you created in section 7.3.1. Click either the **Get Member Data** or the **Get Last Data Update Date** buttons to view the latest DEP data.
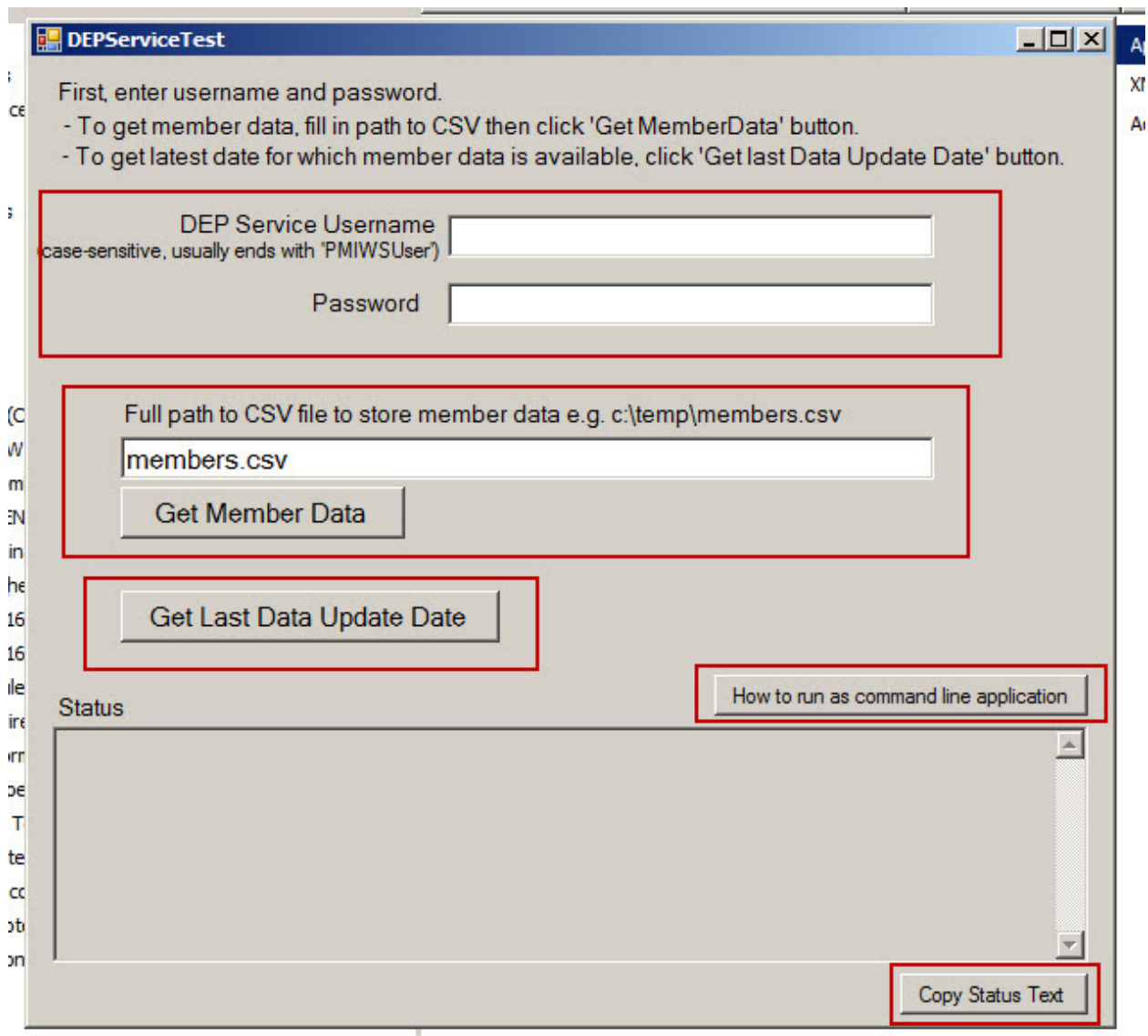
7. As an option, the DEP Web Service Utility can also be run in command line mode to access member info without the need for any programming.

- Click the **How to run as a command line application** button to get detailed instructions on the parameters required to run this utility in command line mode.

- In command line mode, this utility can be used to get both member info and the last data date on which member data was updated.

- Use **Copy Status Text** button to create a copy of the status message, if needed for troubleshooting.

Status

How to run as command line application

This application can also be run as a command line application. This could eliminate the need
to write any code to pull down member data.

To get member data, use this command
DEPServiceTest.exe memberinfo [username] [password] [filepath]
e.g. DEPServiceTest.exe memberinfo C001PMIWSUser jinglebells c:\\temp\\members.csv

Copy Status Text
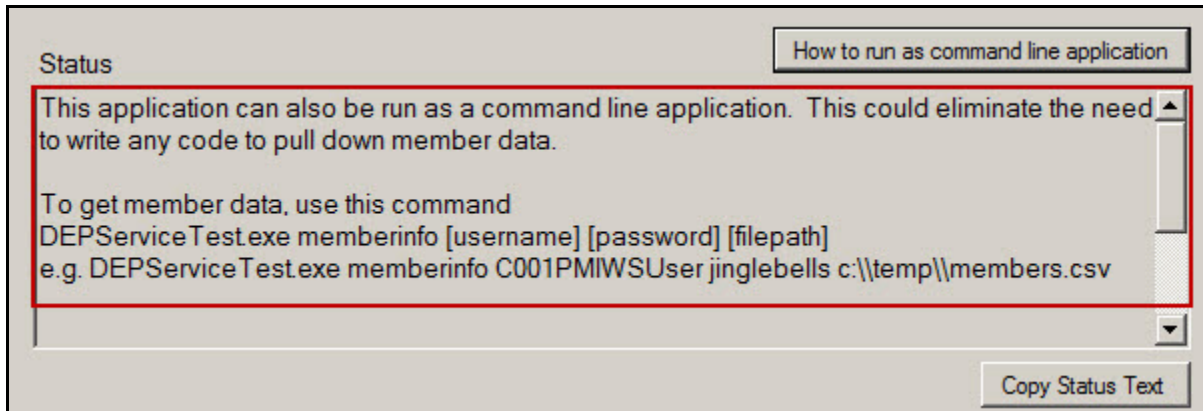
8. Right-click the **DEP Service Utility icon** and select **Pin this program to taskbar** for
    easy access.
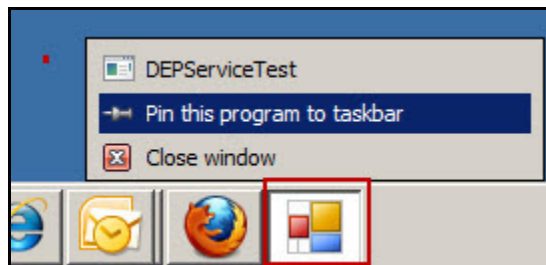
9. The **DEP Service Utility Icon** now displays in your Taskbar – click the icon to open the
    utility and run the report whenever you want the most recent DEP data.

7.3. Web Service Access via Programming

PMI provides an option to automate the process of downloading the *Real-time Member Extract Report* via a public web service using either .Net C# or PHP code. The automation process requires that a member of the chapter perform programming tasks to initiate the web service.

The WSDL to use the service is located at https://svc.pmi.org/wsdl/DEP/DEPService.wsdl

7.3.1. GetMemberExtract Method

This method returns a list of members for the chapter, and also information about each member. Periodically, PMI runs a process called the Chapter Member Extract Process. This is the process that makes the latest member data available for download via this method.

Interface: `IDEPService`

Method Signature: `DEPDownloadResult GetMemberExtractReport();`

Inputs: None

Returns: DEPDownloadResult

DEPDownloadResult members:

Type	Name	Description
Bool	Success	Was the user successfully authenticated? True if yes.
string	Message	Any appropriate message if, for example, the authentication was not successful.
string	ExtractFile	String containing the actual member data. This string is formatted as a CSV file.
DateTime	DataDate	This is the date on when the internal Chapter Member Extract Process was last run. In other words, the member information returned by this method was current as of this date.
int	MemberCount	This is the number of members within the Chapter. This count is consistent with the data contained in ExtractFile.

7.3.2.   GetMemberExtractReportLastRun

Method:

As background information, please see the documentation on the GetMemberExtract method first. This method returns information about the last time the Component Member Extract Process was run.

Interface: IDEPService

Method Signature: DEPDownloadResult GetMemberExtractReportLastRun();

Inputs: None

Returns: DEPDownloadResult

DEPDownloadResult members:

Type	Name	Description
Bool	Success	Was the user successfully authenticated? True if yes.
string	Message	Any appropriate message if, for example, the authentication was not successful.
string	ExtractFile	Empty String
DateTime	DataDate	This is the date on when the internal Chapter Member Extract Process was last run. In other words, the member information returned by this method was current as of this date.
int	MemberCount	This is the number of members within the chapter.

7.3.3. Sample .Net C# Code and Usage for DEP Service

The example below shows sample C# code for use with the DEP Service. In Visual Studio, before you can use this code, you will need to create a service reference in the **DEPService** namespace, and then add the appropriate 'using' statements.

```csharp
private static void DEPServiceSample()
{
    //Chapter-specific username and password to access service
    //These are set up and managed in the ComponentSystem website
    string serviceUsername = "C005PMIWSUser";
    string servicePassword = "abcde";

    //Create client to access DEP service and set client's credentials
    DEPService.DEPServiceClient dsc = new DEPServiceClient();
    dsc.ClientCredentials.UserName.UserName = serviceUsername;
    dsc.ClientCredentials.UserName.Password = servicePassword;

    //Check date for which data is last available
    DEPDownloadResult dr = dsc.GetMemberExtractReportLastRun();
    if (!dr.Success)
        throw new Exception("GetMemberExtractReportLastRun() failed");

    DateTime lastRunDate = dr.LastRun;

    //this date has no special significance
    DateTime baselineDate = new DateTime(2001, 01, 01);

    if (lastRunDate > baselineDate)
    {
        //Get actual member data
        dr = dsc.GetMemberExtractReport();
        if (!dr.Success)
            throw new Exception("GetMemberExtractReport() failed");
        string memberData = dr.ExtractFile;

        //Write member data out to CSV file
        using (StreamWriter outfile = new StreamWriter(@"C:\Temp\MemberData.csv"))
        {
            outfile.Write(memberData);
        }
    }
}
```

	If the volume of data for your chapter is very large, you will also need to increase certain size settings in your configuration file as shown in the red boxes in the example below.

```xml
<configuration>
    <system.serviceModel>
        <bindings>
            <basicHttpBinding>
                <binding name="BasicHttpBinding_IService" closeTimeout="00:01:00"
                    openTimeout="00:01:00" receiveTimeout="00:10:00"
                    sendTimeout="00:01:00"
                    allowCookies="false" bypassProxyOnLocal="false"
                    hostNameComparisonMode="StrongWildcard"
                    maxBufferPoolSize="524288"
                    maxReceivedMessageSize="2621440"
                    maxBufferSize="2621440"
                    messageEncoding="Text" textEncoding="utf-8"
                    transferMode="Buffered"
                    useDefaultWebProxy="true">
                    <readerQuotas maxDepth="32" maxStringContentLength="5120000"
                                  maxArrayLength="16384"
                                  maxBytesPerRead="4096"
                                  maxNameTableCharCount="16384" />
                    <security mode="None">
                        <transport clientCredentialType="None"
                                   proxyCredentialType="None" realm=""/>
                            <extendedProtectionPolicy policyEnforcement="Never" />
                        </transport>
                        <message clientCredentialType="UserName"
                                 algorithmSuite="Default" />
                    </security>
                </binding>
            </basicHttpBinding>
        </bindings>
```

7.3.4.　Sample PHP Code and Usage for DEP Service

The example below shows sample PHP code for use with the DEP web service. You will need to change the placeholder user name and password in the code sample to your chapter's specific user name and password to access the DEP web service using this PHP code. Refer to section 7.1. of this guide for information on how to select a user name and password for your chapter to access the web service.

```php
<?php /*
 *
 * SoapClient
 *
 * Requires Extensions:
 * - php_soap.dll
 * - php_openssl.dll
 *
 */

// Args
$endpoint_url = 'https://svc.pmi.org/DEPServices/services/DEP.svc';
$method_name = 'GetMemberExtractReport';
$service_name = 'DEPService';
$username = 'CO41PMIWSUser';
$password = 'ChangeThisPassword';
$method_namespace = 'http://svc.pmi.org/2011/01/15';
$auth_namespace = 'http://docs.oasis-open.org/wss/2004/01/oasis-200401-wss-wssecurity-secext-1.0.xsd';

// Build Credential Header
$token = new stdClass;
$token->Username = new SOAPVar($username, XSD_STRING, null, null, null, $auth_namespace);
$token->Password = new SOAPVar($password, XSD_STRING, null, null, null, $auth_namespace);
$wsec = new stdClass;
$wsec->UsernameToken = new SoapVar($token, SOAP_ENC_OBJECT, null, null, null, $auth_namespace);
$auth_header = new SOAPHeader($auth_namespace, 'Security', $wsec, true);

// Build Client Object with Headers
$arrOptions = array(
    'soap_version' => SOAP_1_1,
    'trace'        => 1, // DEBUG
    'exceptions'   => true, // DEBUG
    'cache_wsdl'   => WSDL_CACHE_NONE,
    'features'     => SOAP_SINGLE_ELEMENT_ARRAYS,
    'location'     => $endpoint_url,
    'uri'          => $method_namespace
);
$soapClient = new SoapClient(NULL, $arrOptions);
$soapClient->__setSoapHeaders(array($auth_header));

try {


    // Build Method Call
    $arguments = array( /* empty */ );
    $action = array('soapaction' => "$method_namespace/$service_name/$method_name",
                    'uri'        => $method_namespace);
    $result = $soapClient->__soapCall($method_name, $arguments, $action);

    // Nothing fancy - just print it out
    print_r($result);

}
catch (SoapFault $fault)
{
    // Print out exception
    print("{$fault->faultcode} : {$fault->faultstring}");
}

?>
```

7.4. Support

For questions concerning the use of the DEP Web Service Utility or for support please contact the PMI Component and Community Relations team:

PMI Global Operations Center - Chapter Support
14 Campus Boulevard
Newtown Square, PA 19073-3299 USA
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7.5. International Characters in DEP CSV files

Occasionally, you may experience problems with the display of international characters in DEP CSV files. International character display is only an issue if you open the file in Excel. The file displays correctly in Notepad. Here is the workaround to correct problems with the display of international characters:

1. Use the DEPServiceTest program to download a .CSV file.

2. Use Notepad to open the file you just downloaded.

3. The first few characters in the file will be **ID** (uppercase). Change them to **id** (lowercase).

4. Save the file. Use the .CSV extension, not .txt.

5. Open the new .CSV file in Excel. The international characters will now appear correctly.

8.0.   Chapter Reporting System

The Chapter Reporting System (CRS) provides a central point for to view global, regional, and chapter aggregate reports. CRS provides role-based access to chapter reports and customizes report data to needs of various leadership roles.

Chapter leaders and region mentors will access through the navigation links at the left side of Component System home page.
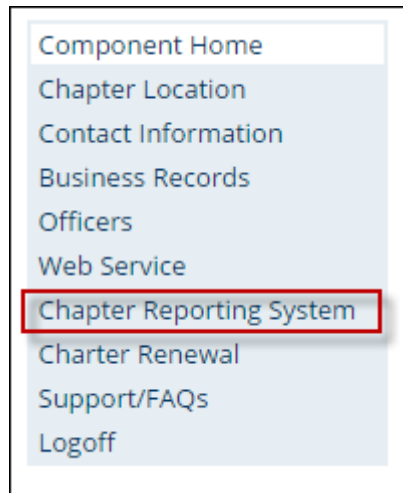
9.0. Charter Renewal

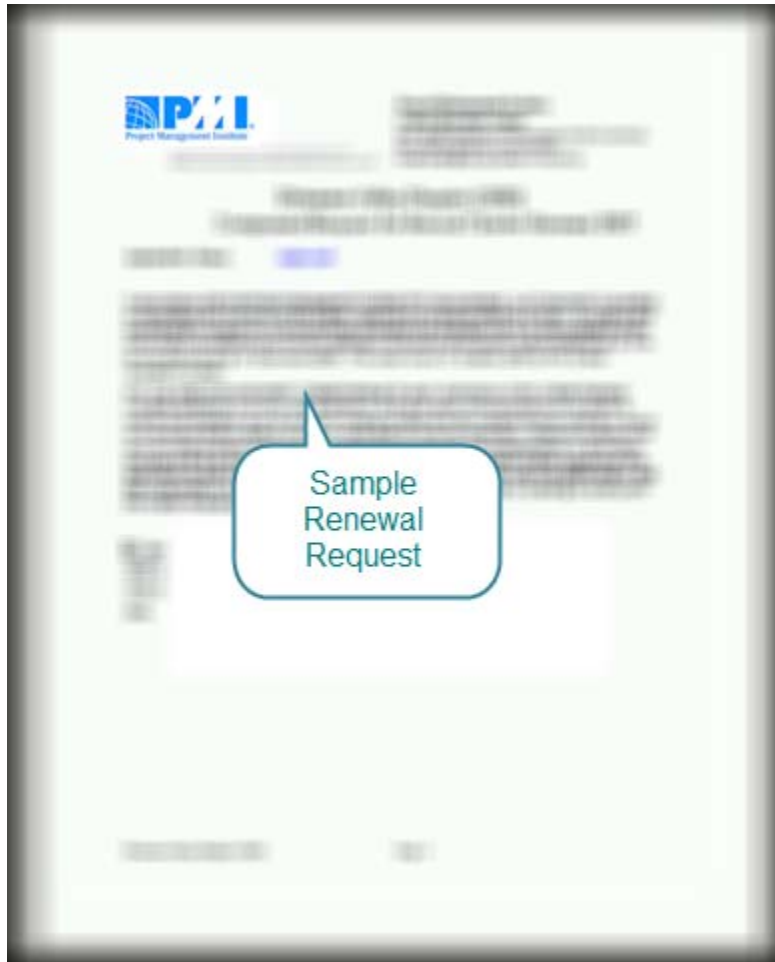The **Charter Renewal** screen allows a chapter leader to submit a charter renewal application.

9.1. How to View a Charter

Select the **Business Year** of the charter from the **Name** column to view charters from past years. The charter renewal application displays.

Sample Renewal Request

9.2. How to Submit a Charter Application

Perform the following steps to submit a charter application.

1. From the **Name** column, select the **Business Year** (for example, 2014 Business Year) of the charter you wish to complete and submit. This business year will have a status of **Not Yet Started**.

2. Click the **Business Year** link to begin (for example, 2014 Business Year). The charter renewal application for the selected year cannot be started before the displayed start date.

Name	Year	Start Date	End Date	Status
2005 Business Year	2005	01 Nov 2004	01 Sep 2005	Approved
2006 Business Year	2006	01 Nov 2005	01 Aug 2006	Approved
2007 Business Year	2007	01 Nov 2006	31 Oct 2007	Approved
2008 Business Year	2008	01 Nov 2007	29 Feb 2008	Not Yet Started

Start date must be prior to today's date to submit an application.

Status of application.

3. Review the **Charter Renewal Statement** and indicate your approval. Provide the name and PMI ID of the **Chapter President** or **Chair**. Select the date from the drop-down choices. Click **Contact Information** to continue.

4. The **Contact Information screen** displays. Provide the chapter's primary contact information. PMI will use this information to display on PMI.org and/or contact the chapter directly. Click **Officers** to continue.

5. The **Officers** screen displays to show current chapter officers. If the officer will continue his or her tenure, check the **Import** check box and click **Import** to bring the officer contact information into the new application. Refer to **Section 5.0.** for more information regarding officer information.

6. Each chapter must have at least three officers. Click the **Add New Officer** button to complete the following steps and add additional officers:

   - Look up the officer using his or her PMI ID number

   - Add officer's contact information

   - Add the officer's responsibilities

   - Click **Financials** to continue the application process once all officer additions are complete.

7. Provide chapter financial information including financial reports, tax ID, and financial highlights. Click **Operational Performance** to continue.

   - The **Operational Performance** section includes governing documents and governance activities.

   - Provide information describing chapter governing documents (for example, incorporation and registration documents, charter agreement, and bylaws) and click **Next** to continue.

   - Provide information describing chapter governance activities (for example, annual election, business meetings, board attendance, meeting minutes, and insurance.) and click **Next** to continue.

8. The application is now complete and your changes are saved. You may review the application at this time before submitting it to PMI for approval. **Click View Application** to review your application prior to submission. When you are ready to submit your application to PMI, click **Submit Application**.

9. A message displays to indicate successful application submission. The application now has a status of **Submitted**.

10.0. Support/FAQs

The **Support/FAQs** section of the Component System provides access to this user guide and other information to answer questions and assist system users.

Component System : Support/FAQs

CS Admin Home	**Support Contacts**
Component Home	
Chapter Location	For help with Component System, please contact chaptersupport@pmi.org.
Contact Information	
Business Records	**Frequently Asked Questions**
Officers	
Web Service	How do I use Component System application? PDF Document
Chapter Reporting System	
Charter Renewal	What is the information policy on the membership and prospect database? PDF Document
Support/FAQs	
Logoff	