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INFO: PM Central R4.0 Customization Best Practices

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KB.12866

APPLIES TO:

- SharePoint Project Management Central R4.0
- SharePoint Foundation 2010 and SharePoint Server 2010

SharePoint Project Management Central (PM Central) features custom site templates that allow project managers to easily begin managing their projects, tasks and resources as soon as PM Central has been installed and set up. The site templates can also be modified and customized so that organizations can tailor PM Central to meet their standards.

Please read this article carefully before customizing your PM Central site templates or making other modifications. These best practices apply to PM Central R3.0 or newer. For customization best practices for PM Central R2.x, read [KB.12367](#). For customization best practices for PM Central R1.8 or older, read [this blog post](#).

This article includes the following sections:

- [Recommended Best Practices for PM Central Customization](#)
- [The Building Blocks of the PM Central Site Templates](#)
- [What Happens During an Upgrade](#)
- [Customizing the Master Page and Style Sheets](#)
- [Adding and Viewing Additional Columns Using List Rollup R5.0 and the Data-Viewer Web Part](#)
- [What Customizations Are Possible?](#)
- [Frequently Asked Questions \(FAQs\)](#)
- [Don'ts When Customizing PM Central](#)

Recommended Best Practices for PM Central Customization

In general, we recommend that you do the following:

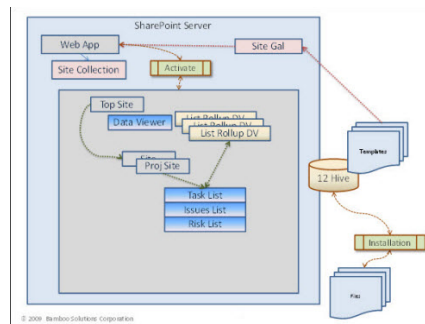
1. Always back up your existing sites before making modifications.
2. Keep a detailed log of your changes.

The Building Blocks of the PM Central Site Templates

Before you customize PM Central, make sure you understand how the PM Central site templates work and how modifications can impact them.

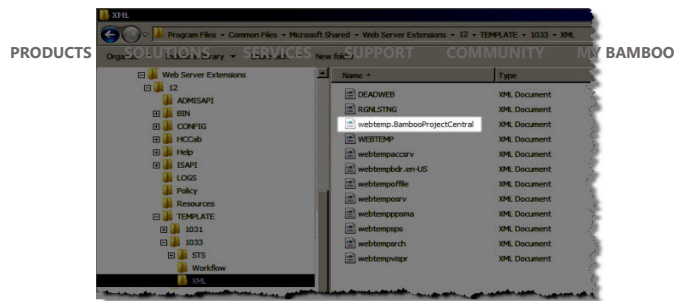
The site templates consist of:

- [The site definition](#)
- [The master page and style sheets \(CSS\)](#)
- [ASPX pages and SharePoint Navigators](#)
- [Bamboo Web Parts](#)
- [Lists](#)

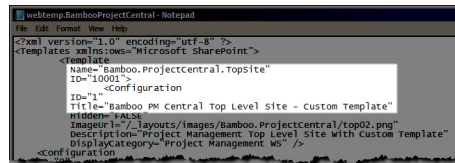


Site Definitions

PM Central's site definition file is located under `\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\TEMPLATE\1033\XML` as `webtemp.BambooProjectCentral.xml`.



The **webtemp.BambooProjectCentral.xml** contains IDs that are associated with the site template and configuration. We use these IDs as identifiers for future upgrades.



For more information about templates and site definitions, read this [Microsoft MSDN article](#).

Master Page and Style Sheets (CSS)

The table below lists the master pages and CSS files that are used for the portfolio, department, and project sites in PM Central R3.0 or newer. **Please note that there are changes to how the files are named in R3.0 or newer compared to previous versions.**

Site Type	Master Page	CSS
Top Site	<p>TopSite_Parent.master: main master page for the regular SharePoint theme</p> <p>SA12Top.master: nested master page for the regular SharePoint theme</p> <p>TopSite_Template_Parent.master: main master page for the custom template</p> <p>SA12Top_Template.master: nested master page for the custom template</p> <p>TopSite_Template_Classical_Parent.master: main master page for the Classical skin template</p> <p>TopSite_Template_Classical.master: nested master page for the Classical skin template</p>	<p>TopSite_TeamSite.css: main CSS file for the regular SharePoint theme</p> <p>TopSite_TeamSite_Customer.css: CSS file that can be customized for the regular SharePoint theme</p> <p>TopSite_Template.css: main CSS file for the custom template</p> <p>TopSite_Template_Customer.css: CSS file that can be customized for the custom template.</p> <p>TopSite_Template_Classical.css: main CSS file for the Classical skin template.</p> <p>TopSite_Template_Classical_Customer.css: CSS file that can be customized for the Classical skin template.</p>
Department Site	<p>DepartmentSite_TeamSite_Parent.master: main master page for the regular SharePoint theme</p> <p>DepartmentSite_TeamSite.master: nested master page for the regular SharePoint theme</p> <p>DepartmentSite_Custom_Parent.master: main master page for the custom template</p> <p>DepartmentSite_Custom.master: nested master page for the custom template</p> <p>DepartmentSite_Custom_Classical_Parent.master: main master page for the Classical skin template</p> <p>DepartmentSite_Custom_Classical.master: nested master page for the Classical skin template</p>	<p>DepartmentSite_TeamSite.css: main CSS file for the regular SharePoint theme</p> <p>DepartmentSite_TeamSite_Customer.css: CSS file that can be customized for the regular SharePoint theme</p> <p>DepartmentSite_Custom.css: main CSS file for the custom template</p> <p>DepartmentSite_Custom_Customer.css: CSS file that can be customized for the custom template</p> <p>DepartmentSite_Custom_Classical.css: main CSS file for the Classical skin template</p> <p>DepartmentSite_Custom_Classical_Customer.css: CSS file that can be customized for the Classical skin template</p>
Project Site	<p>ProjectSite_Parent.master: main master page for the regular SharePoint theme</p> <p>sa12.master: nested master page for the regular SharePoint theme</p> <p>ProjectSite_Template_Parent.master: main master page for the custom template</p> <p>sa12x.master: nested master page for the custom template</p> <p>ProjectSite_Template_Blue_Parent.master: main master page for the Blue skin template</p> <p>ProjectSite_Template_Blue.master: nested master page for the Blue skin template</p> <p>ProjectSite_Template_Classical_Parent.master: main master page for the Classical skin template</p> <p>ProjectSite_Template_Classical.master: nested master page for the Classical skin template</p> <p>ProjectSite_Template_SkyBlue_Parent.master: main master page for the Sky Blue skin template</p> <p>ProjectSite_Template_SkyBlue.master: nested master page for the Sky Blue skin template</p> <p>ProjectSite_Template_YellowGreen_Parent.master: main master page for the Yellow Green skin template</p> <p>ProjectSite_Template_YellowGreen.master: nested master page for the Yellow Green skin template</p>	<p>ProjectSite_TeamSite.css: main CSS file for the regular SharePoint theme</p> <p>ProjectSite_TeamSite_Customer.css: CSS file that can be customized for the regular SharePoint theme</p> <p>ProjectSite_Template.css: main CSS file for the custom template</p> <p>ProjectSite_Template_Customer.css: CSS file that can be customized for the custom template</p> <p>ProjectSite_Template_Blue.css: main CSS file for the Classical skin template</p> <p>ProjectSite_Template_Blue_Customer.css: CSS file that can be customized for the Blue skin template</p> <p>ProjectSite_Template_Classical.css: main CSS file for the Classical skin template</p> <p>ProjectSite_Template_Classical_Customer.css: CSS file that can be customized for the Classical skin template</p> <p>ProjectSite_Template_SkyBlue.css: main CSS file for the Sky Blue skin template</p> <p>ProjectSite_Template_SkyBlue_Customer.css: CSS file that can be customized for the Sky Blue skin template</p> <p>ProjectSite_Template_YellowGreen.css: main CSS file for the Yellow Green skin template</p> <p>ProjectSite_Template_YellowGreen_Customer.css: CSS file that can be customized for the Yellow Green skin template</p>

The Main Master Page and the Nested Master Page

When one master page references another master page as its master, the master pages are called **nested master pages**. You can have any number of nested master pages in a single master. This type of structuring enables the designers to create a number of nested masters without compromising the look and feel of the site.

In PM Central R3.0 or newer, the "parent" master pages, or the "main" master pages, will be customized by the Bamboo Engineering team. All of the necessary component are defined in the main master page. Users should not customize the main master page, as this page will be updated in future product upgrades.

Best Practices for Nested Master Pages and CSS Files

- Nested master pages need to have the **.master** extension appended to its name.
- Nested master pages also need to have all the controls that are mapped to the **content placeholders** and have content placeholders for the nested master pages themselves as well.
- Users should not change the **ContentPlaceHolderID** of **asp:content controls**.
- Nested master pages cannot be created in the **design view** of SharePoint Designer.
- If users customize the **nested** master page for the site, it will not be updated when users upgrade to a newer version. Therefore, users' modifications will be retained. If users did not modify the **nested** master page, the look and feel will be based on the **parent/main** master page after they upgrade to a newer version.
- In the **nested** master pages, users should not rename the **ContentPlaceHolder** on **asp:content controls**. Renaming the **ContentPlaceHolder** results in errors on the pages when they are displayed in a Web browser.
- If users customize the **nested** CSS file for the site, it will not be updated when upgrading to a newer version (upgrade by timer job in the newer version). Therefore, users' modifications will be retained. If users did not modify the **nested** CSS file, the look and feel will be based on the **parent/main** CSS file after they upgrade to a newer version (upgrade by timer job in the newer version).

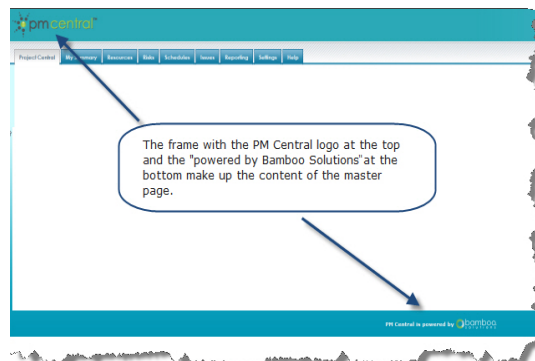
```
<% Master Language="C#" MasterPageFile="TopSite_Template_Parent.master" %>
<% Register TagPrefix="SharePoint" Namespace="Microsoft.SharePoint.WebControls" Asse
<% Import Namespace="Microsoft.SharePoint.ApplicationPages" %>
<% Register TagPrefix="WebPartPages" Namespace="Microsoft.SharePoint.WebPartPages" %>
<% Register TagPrefix="wssuc" TagName="Welcome" src="~/_controltemplates/Welcome.asc
<% Register TagPrefix="wssuc" TagName="DesignModeConsole" src="~/_controltemplates/I
<% Register tagPrefix="WebParts" namespace="Bamboo.WebParts" assembly="Bamboo.Navig

<asp:Content ContentPlaceHolderId="BSPlaceHolderPageTitle" runat="server">
<asp:ContentPlaceHolder id="PlaceHolderPageTitle" runat="server"/>
</asp:Content>
<asp:Content ContentPlaceHolderId="BSPlaceHolderAdditionalPageHead" runat="server">
<asp:ContentPlaceHolder id="PlaceHolderAdditionalPageHead" runat="server"/>
</asp:Content>
```

In general, the main master page references the CSS file. This design presents the banner, the font, and the color that you see when you browse to the portfolio site.

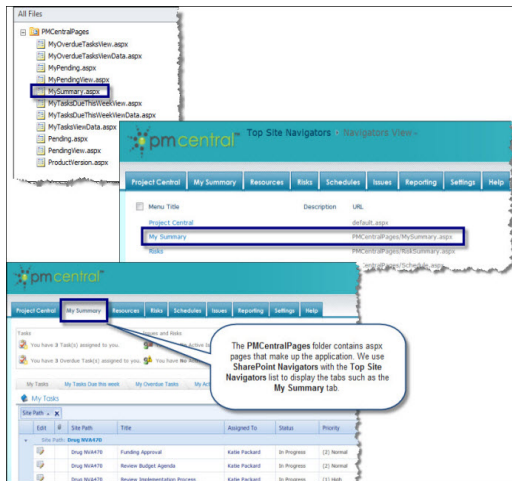


This is what the browser displays with just the portfolio site's master page:



ASPX Pages and SharePoint Navigators

Multiple pages make up the portfolio and project sites, such as **My Summary**. These pages are displayed as tabs via **SharePoint Navigators** and the **Top Site Navigators** li. The list lists the pages and the URLs in order. For example, the **Project Central** tab would be first, followed by the **My Summary** tab. The ASPX pages contain Web Parts th are used as data sources or to display data.



Bamboo Web Parts

The following is a list of the Web Parts included in PM Central and their function.

- **Alert Plus Web Part:** Sets up custom alerts
- **Bamboo KPI Column:** Displays indicators for the schedule, risks, issues, etc.
- **Bamboo Visual Indicator:** Displays the percent complete as a progress bar
- **Calendar Plus Web Part:** Displays various calendar events with color-coding
- **Chart Plus Web Part:** Displays various charts
- **Data-Viewer Web Part:** Displays Data in a grid view with the ability to filter and sort
- **Group Email Web Part:** Sends team notifications on any topic
- **List Print Web Part:** Prints the lists using specified templates
- **List Rollup Web Part:** Aggregates data from multiple lists and multiple sites
- **List Simple and Advanced Search Web Parts:** Search through the columns of a list
- **SharePoint Navigators:** Displays custom tabs and menus
- **SharePoint Project Portfolio Dashboard:** Displays the Gantt view for the project schedules at the portfolio site
- **SharePoint Task Master:** Tracks tasks and schedules
- **Site Creation Plus Web Part:** Creates new project sites using a standard template
- **Tree View Web Part:** Organizes documents in a tree view with expand and collapse options

Lists

PM Central uses multiple lists to display data within the portfolio and project sites, including **Tasks**, **Project Health**, **Issues**, **Risks**, and more. These lists—especially the **Task** list—contain custom columns. The code references the columns using internal names in order to perform processes and to aggregate and display data. For example, the **Parent Task** column's internal name is **Owning Task ID**. If this column is deleted, errors will occur.

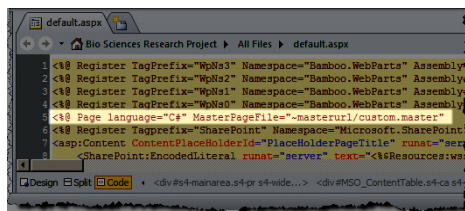
What Happens During an Upgrade

For PM Central R3.0 and newer, the following actions occur during an upgrade:

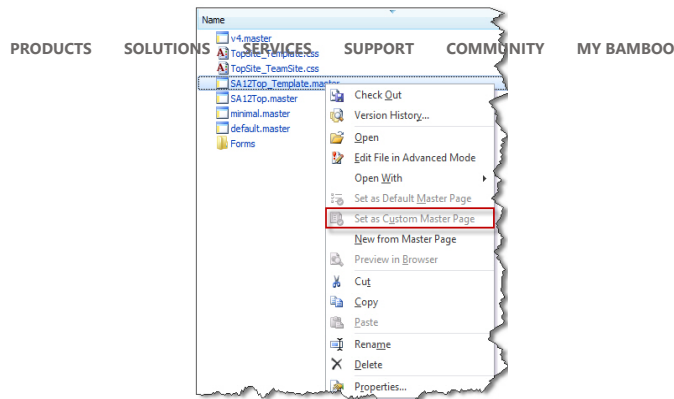
- The old site templates are backed up and replaced with new site templates, which reference the new master page and CSS using the IDs. If users made changes in the nested master pages and in the nested CSS files, those changes will not be touched.
- New Web Parts and tabs are added using code.
- The features are activated.

Customizing the Master Page

To check which pages use the master page, open the site using Microsoft SharePoint Designer. Open the page you want to check. Make sure the page is in the code view to view the **MasterPageFile** properties.



Then go to the **_catalogs/masterpage** folder and right-click on the master page to see what master page is used for the site. If the master page is used for the site, the **Set as Default Master Page** and **Set as Custom Master Page** options are grayed out. If the master page is not used for the site, you can select the **Set as Default Master Page** and **Set as Custom Master Page** options.



To customize the CSS for tags, we set a class or ID for those tags. Customize them using `<style type="text/css"></style>` in the CSS file or by inline style.

Using Custom CSS

The CSS can be customized three ways:

1. By adding `<style type="text/css"></style>` to `<head runat="server"></head>`

```
<head runat="server">
<style type="text/css">
.s4-nothome {
display:none;
}
</style>
```

2. By inline style on the tags where you want to customize the CSS

```
<span class="s4-heig">
<span style="height:17px;width:17px;position:relative;display:inline-block;overflow:hidden;"
</span>
```

3. Or by including the CSS file in `<head runat="server"></head>`

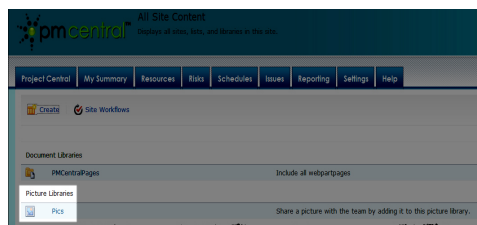
```
<link rel="stylesheet" type="text/css" href="TopSite_Template.css" />
```

Changing Images at the Portfolio, Department, or Project Sites

You can customize your portfolio, department, or project sites by adding your own graphics. For example, to change **poweredBy.png** to **button.png**:

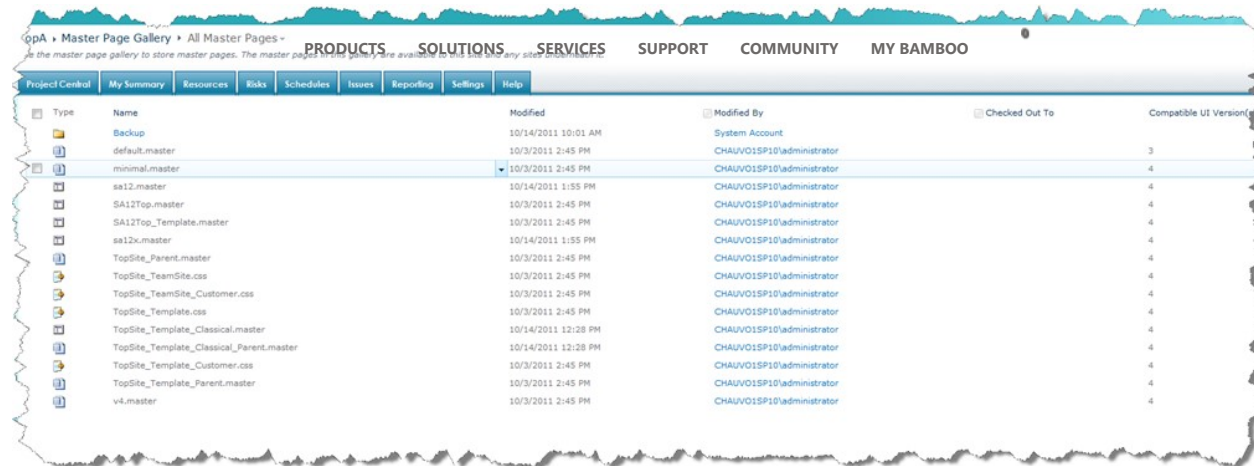


Navigate to **Site Actions > View All Site Content**. Under **Picture Libraries**, select **Pics**.

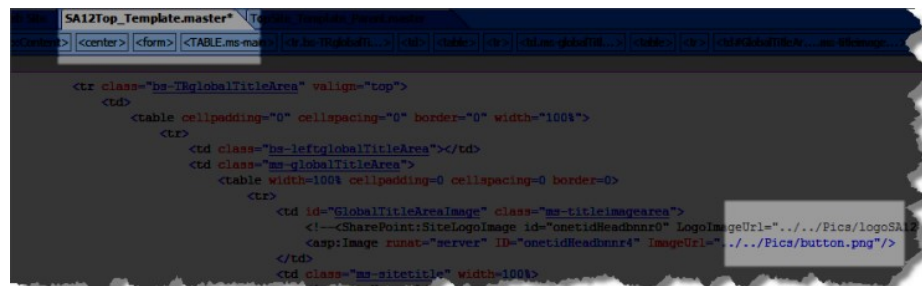


Upload your image to the **Pics** folder. Navigate to the portfolio site and select **Site Actions > Site Settings > Master Page Gallery**. Open the following two pages in SharePoint Designer:

- **TopSite_Template.Parent.master**: the main master page for the custom template
- **SA12Top_Template.master**: the nested master page for the custom template



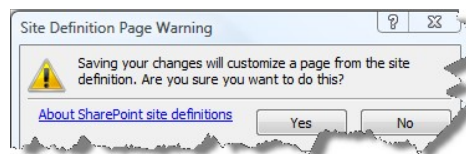
From the nested **SA12Top_Template.master**, change the name **logoSA12.png** to **button.png**. Click **Save**.



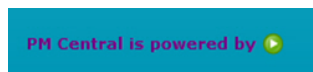
Click **Save** for the **TopSite_Template_Parent.master**.

Note: When you open and save the nested master page, although you do not change anything to the main **TopSite_Template_Parent.master**, you must "un-ghost" the main/parent master page as well by opening and saving the parent master page file using SharePoint Designer. If you skip this step, all of the Web Parts will be closed, and pages will be shown as blank pages. If you forget to un-ghost the parent master page and all of the Web Parts are no longer there, see the steps below in [How to Restore the Lost Web Parts](#).

The following dialog box is displayed. Click **Yes** to save.

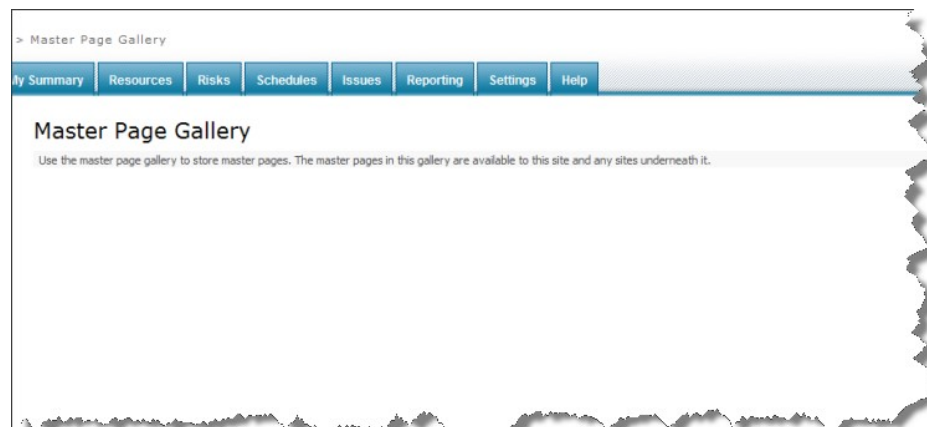


Now the new logo is displayed.

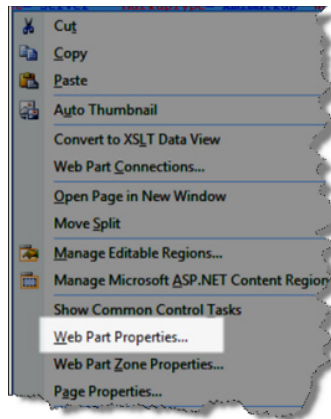
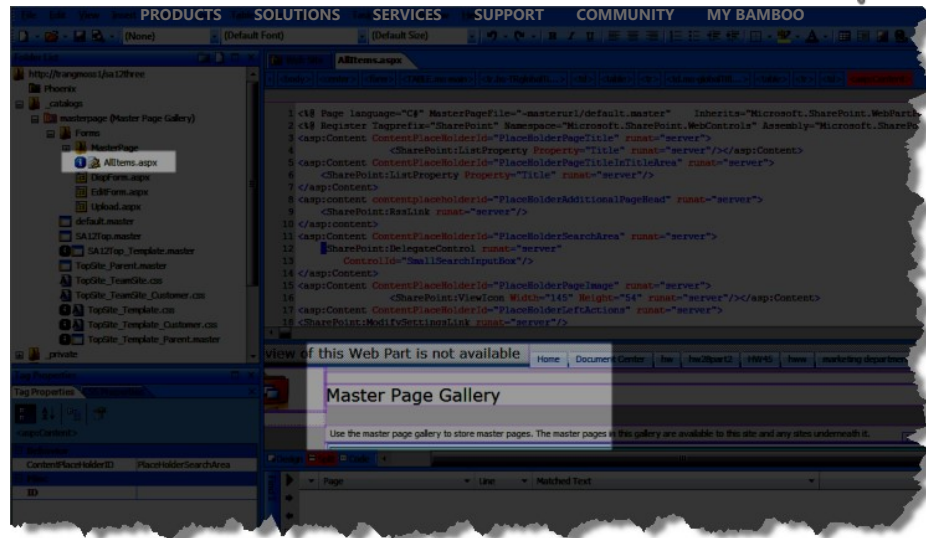


How to Restore the Lost Web Parts

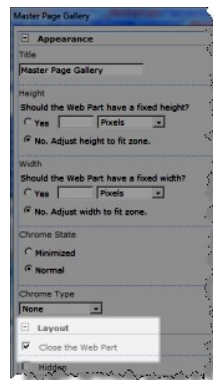
After you have made changes to the master pages and go back to the Web browser, your site might look like this:



Go back to SharePoint Designer. Select **AllItems.aspx** from the left pane. From the split option on the right pane, right-click and select **Web Part Properties**.



Deselect **Close the Web Part** and click **OK**.



Or, open the code and locate "`<IsIncluded>false</IsIncluded>`", meaning that the Web Part is closed, and change it to "`<IsIncluded>>true</IsIncluded>`".

Changing the Style Sheet for the Portfolio, Department, or Project Sites

For example, to change the black text color to purple for the **PM Central is powered by** logo:

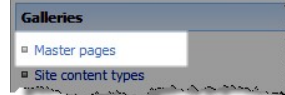


All CSS files are stored under `_catalogs\masterpage`. In this case, because we are using the custom template for the portfolio site, we need to modify the nested `TopSite_Template_Customer.css`:

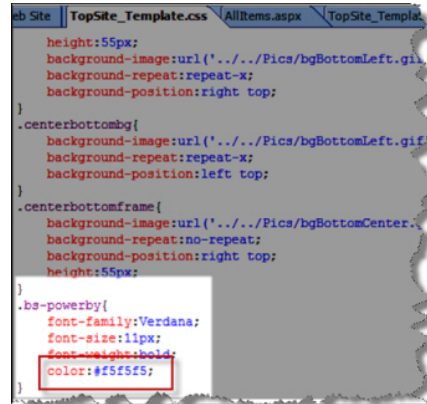
- `TopSite_Template.css`: the main CSS files for the custom template
- `TopSite_Template_Customer.css`: CSS file that can be customized for the custom template

To change the style sheet, navigate to **Site Actions > Site Settings**. Under **Galleries**, select **Master Pages**. Choose the **TopSite_Template_Customer.css** file that you want to modify and check it out. Modify the file using SharePoint Designer, then check it back in.

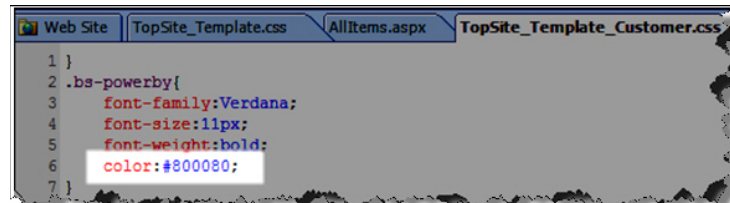
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Copy the lines from **TopSite_Template.css** into **TopSite_Template_Customer.css** and change the color from **#f5f5f5** to **#800080**.



Copy to **TopSite_Template_Customer.css** or define the class:

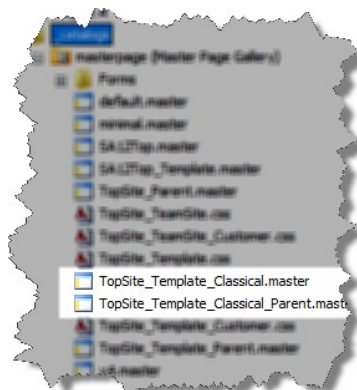


}

```
.bs-poweredby{
    font-family:Segoe UI;
    font-size:10pt;
    font-weight:bold;
    color:#800080;
}
```

Changing the Style Sheet for the Portfolio, Department, or Project Sites after Applying a Skin

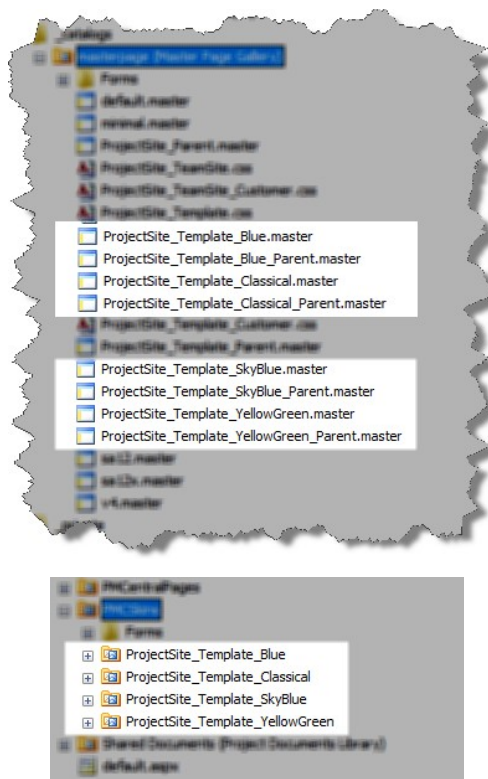
When you apply a skin to a portfolio or department site using the new Change Skin feature in PM Central R3.0 or newer, two master pages are added for each skin:



Two CSS files are also added to the PMCSkins folder:



There are 4 new skins available in PM Central R3.0 or newer. If you apply all skins to a project site, 8 new master pages and 8 new CSS files are added:



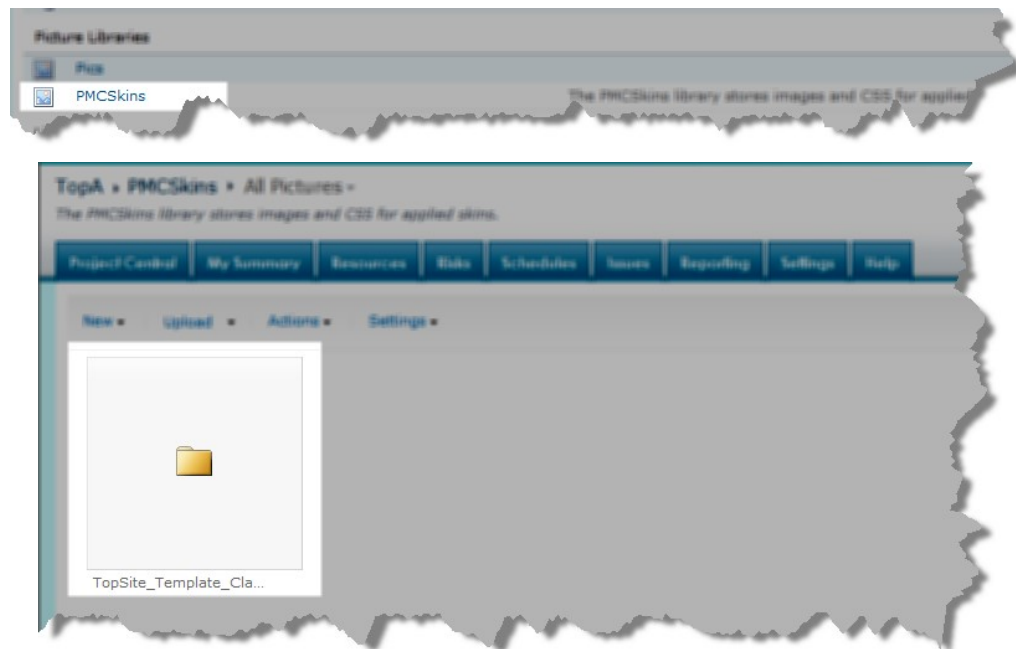
The following example describes how to change the graphics and style for the logo of a portfolio site customized with the "PM Central Classic" skin. In this example, we will change the logo graphic file from **poweredBy.png** to **next.png**, and the text color of the **PM Central is powered by** text from black to purple.



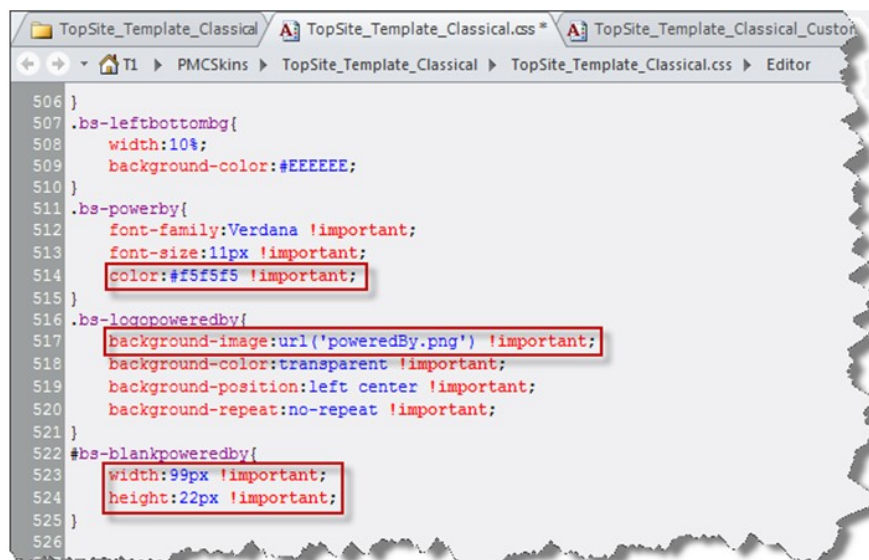
The CSS files for skins are stored in **PMCSkins/[Skin name]**. In this case, because we are using the "classical" skin for the portfolio site, the CSS files for the skin are stored under **PMCSkins/TopSite_Template_Classical**. In this folder, we have two CSS files:

- **TopSite_Template_Classical.css**: the main CSS file for the PM Central Classic skin (do not modify this file)
- **TopSite_Template_Classical_Customer.css**: CSS file that can be customized for the PM Central Classic skin.

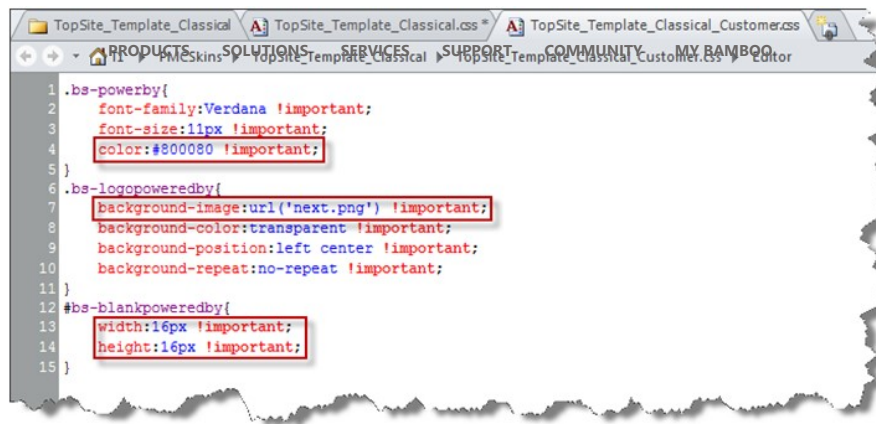
To modify the style sheet to include the new logo and text style, navigate to **Site Actions > View All Site Content**. Under **Picture Libraries**, select **PMCSkins** and click the **TopSite_Template_Classical** folder. Upload your new logo image (**next.png**, with width and height of **16px**) to this folder, which contains the images for the skin. Check out the **TopSite_Template_Classical_Customer.css** file and check it out. Edit the file using Microsoft SharePoint Designer following the example below, and then check it back in.



Copy the logo style entries from the **TopSite_Template_Classical.css** file into **TopSite_Template_Classical_Customer.css**.



Copy to **TopSite_Template_Classical_Customer.css** or define the class. Change the color from **#f5f5f5** to **#800080**, the background-image from **poweredBy.png** to **button.png**, the width from **99px** to **16px**, and the height from **22px** to **16px**.

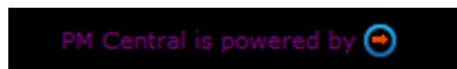


```
.bs-poweredby{
    font-family: Segoe UI;
    font-size: 10pt;
    font-weight: bold;
    color: #800080;
}

.bs-logopoweredby{
    background-image: url('next.png') !important;
    background-color: transparent !important;
    background-position: left center !important;
    background-repeat: no-repeat !important;
}

#bs-blankpoweredby{
    width: 16px !important;
    height: 16px !important;
}
```

After you check in the updated **TopSite_Template_Classical_Customer.css** file, the new logo and the new text style are displayed.



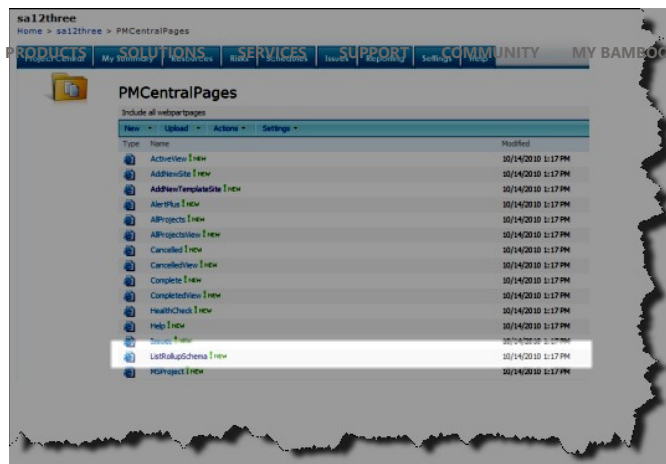
You can also change the color in the 12 or 14 hive folder, but if you do this, the change occurs globally and will affect all new sites that are created.

Adding and Viewing Additional Columns Using List Rollup R5.0 and Data-Viewer Web Part R3.3

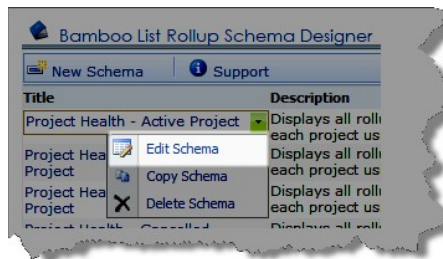
For example, we want to add an additional column named **Overall Health** to the Project Health List, and we want the information in the column to be rolled up to the portfolio site.

First, navigate to the Project Health List at the portfolio and project sites and go to **List Settings**. Create a new column as a **Choice** column and name it **Overall Health**. Add the values as **Neutral**, **Good**, and **Poor**.

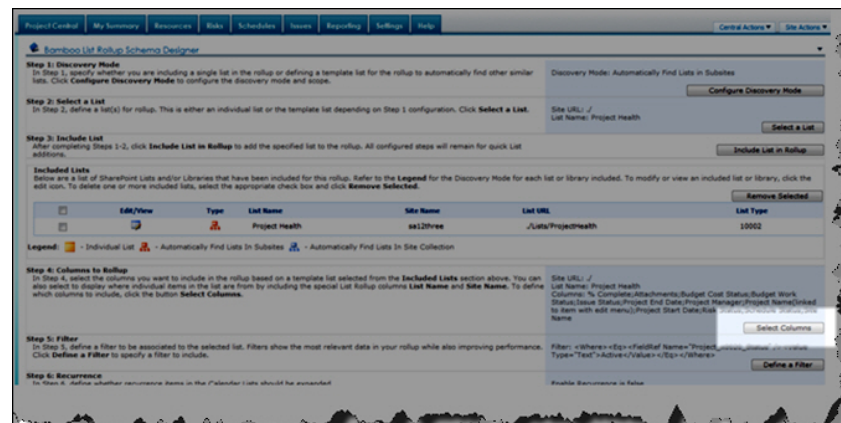
From the portfolio site, navigate to `./PMCentralPages/ListRollupSchema.aspx`.



Edit the **Project Health - Active Project** schema.



Click on **Select Columns**.



Add **Overall Health** from **Available Columns** to **Selected Columns**.

Select Columns

In this screen, select the columns to include in the rollup. First, you must select the Template List. This is one of the lists included in the rollup. You can then select which columns from that list to include. These columns are then included in the rollup or all other lists included in the rollup. You can additionally select to include the special List Rollup columns **List Name** and **Site Name** which display the list name and site name where each rolled up item resides.

Select Template List: Project Health (./)

Available Columns:

- Auto Update
- Baseline Budget Cost
- Baseline Budget Work
- Budget Cost
- Budget Work
- Content Type
- Created
- Created By
- ID
- Project Actual Cost
- Project Actual Duration
- Project Actual Work
- Project Baseline Cost
- Project Baseline Due Date
- Project Baseline Duration

Selected Columns:

- % Complete
- Attachments
- Budget Cost Status
- Budget Work Status
- Issue Status
- Modified
- Modified By
- Overall Health
- Project End Date
- Project Manager
- Project Name(linked to item with edit m
- Project Start Date
- Risk Status
- Schedule Status

Special List Rollup Columns: ☐ List Name ☒ Site Name

Save Cancel

Select **Create/Update Schema**.

Schema Name: Project Health - Active Project

Schema Description: Displays all rollup summary of all projects, including Bamboo KPI status indicators for schedule, issues, and risks related to each project using List Rollup Web Part.

Schema Settings

Cancel Preview Rollup Create/Update Schema

Navigate to the portfolio site. From the **Project Central** tab's Project Summary, edit **Data-Viewer Web Part**.

sa12three

Home > sa12three

Project Central My Summary Resources Risks Schedules Issues Reporting Settings Help

Welcome to PM Central by Bamboo Solutions. Setup and configuration of this site is not yet complete. Please visit the Configuration Checklist and complete any open tasks before using PM Central. For more help, please

All Projects My Projects

Active Projects Pending Projects Completed Projects Cancelled Projects All Projects

Project Summary

Project Name	Site Path	Project Start Date	Project End Date	% Complete	Project Manager	Risk Status	Issue Status
Phoenix New	Phoenix	3/1/2010 11:00 PM	6/4/2010 8:00 AM	0.00%	Nate Sullivan	Green	Yellow

Page: 1 of 1

Add **Overall Health** to **Selected Columns** again. Click **Apply** and then **OK**.

Project Summary

Enter the URL for the page where the Bamboo List Rollup data view/form resides:

./

Click the arrow button to populate List and View drop-down selections.

Master List: Project Health - Active Project

Available Columns

- % Complete
- Attachments
- Budget Cost Status
- Budget Work Status
- Issue Status
- Modified
- Modified By
- Overall Health
- Project End Date

Selected Columns

- Project Name
- Site Path
- Project Start Date
- Project End Date
- % Complete
- Project Manager
- Risk Status
- Issue Status
- Schedule Status

The new **Overall Health** column is displayed on the Project Summary.

Project Health

The Project Health List is used as project information and contains information such as Project Manager, Start Date, Due Date, % Complete and key performance indicators. Please do not delete this list.

New Actions Settings View: All Items

Project Name	Project Start Date	Project End Date	% Complete	Project Manager	Project Type	Project Status	Risk Status	Issue Status	Schedule Status	Budget Cost Status	Overall Health
Phoenix New	3/2/2010 12:00 AM	6/4/2010 8:00 AM	0.00%	Nate Sullivan	Custom	Active	Green	Yellow	Green	Green	Neutral

What Customizations Are Possible?

With a better understanding of how PM Central's pages are created, you can determine what customizations can be applied to PM Central R3.0 and higher and what will happen to your customizations after an upgrade.

In general, you can modify your portfolio, department, or project sites using the recommended guidelines on how to customize any SharePoint site. Most modifications using the standard browser interface are acceptable. Please note, however, that in PM Central R3.0 or newer, if you have added Web Parts to pages that need to be replaced in the next upgrade (due to new features having been added to the .aspx pages), those Web Parts **will not** be retained in the upgrade process.

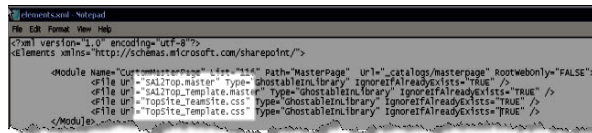
The table below covers several customizations and whether or not you will lose the customizations after an upgrade.

	Description	Can I Make The Following Customizations In The Current Version? (PM Central R4.0 or Older)	Will The Following Customizations Be Retained After I Upgrade? (PM Central R3.0 Or Newer)
1	Add new Web Parts to the pages	Yes, new Web Parts can be added in the current or older version.	Yes, the new Web Parts will be retained after the upgrade from R3.0 or higher to R4.0. If upgrading from a pre-R3.0 version, Web Parts will not be retained.
2	Add additional columns and views to existing Lists Add new Lists (e.g., project tasks list, status reports, custom lists, etc.) and Document Libraries (Wiki, Collaboration, translation, Shared Documents folders, etc.)	Yes, you can add additional columns and views to existing Lists as well as add new Lists and Document Libraries in the current or older version.	Yes, the additional columns, views, Lists, and Document Libraries will be retained after the upgrade.
3	Change the look and feel of themes and graphics	Yes, you can modify graphics and themes in the current or older version. In R2.x or higher, please follow the Customization Best Practices described in this article to use the nested master page and the nested CSS files for modification.	Yes, these modifications will be retained when upgrading from R3.0 or higher to R4.0. if you used the nested master page and the nested CSS files for modifications in R2.x. Note: Please follow the policies for customization described in this article. If upgrading from a pre-R3.0 version, modifications to graphics or themes will not be retained.
4	Add new navigation tabs on the portfolio, department, and project sites	Yes, you can add new navigation tabs in the current or older version.	Yes, the new navigation tabs will be retained after the upgrade.
5	Create new pages from a Web Part page in SharePoint	Yes, you can create new pages from a Web Part page in the current or older version.	Yes, new pages from Web Part pages will be retained after the upgrade, as long as the new pages are stored in the PMCentralPages Document Library.
6	Modify the master page and CSS files with or without SharePoint Designer	Yes, you can modify the master page and CSS files with or without SharePoint Designer in the current or older version. In R2.x or higher, please follow the Customization Best Practices described in this article to use the nested master page and the nested CSS files for modification.	Yes, these modifications will be retained when upgrading from R3.0 or higher to R4.0. if you used the nested master page and the nested CSS files for modifications in R2.x. Note: Please follow the policies for customization described in this article. If upgrading from a pre-R3.0 version, modifications to the master page or CSS files will not be retained.
7	Add additional columns and views to existing Lists, add new Lists, add documents to the Document Libraries, change logos, and save the template as a standard site template to use for creating other project sites.	Yes, you can add additional columns and views to existing Lists, add new Lists, add documents to the Document Libraries, change logos, and save the template as a standard site template in the current or older version.	Yes, these modifications will be retained after the upgrade.

Frequently Asked Questions (FAQs)

Can I replace the master page with another master page that has a different name?

This is possible, but when PM Central is upgraded, you will lose this customization. The new version of PM Central will reference the original master page name. Instead, follow the customization best practices described in this article to modify the nested master pages and customer CSS files.



When you rename the master page to another master page with a different name, the features will not be activated on your existing sites; therefore, you will not see any new changes with your existing sites. The workaround is to save your master page. After the upgrade, rename the build's master page to **old** and rename your master page to **SA12Top.master** or **SA12Top_Template.master**.

Can I redesign the pages by adding a new Web Part?

Yes, you can add new Web Parts to pages. This customization will be retained in future upgrades. If you added Web Parts to pages in PM Central R2.x, these customizations will be retained when upgrading to R3.0 or newer.

Can I modify CSS?

Yes, you can modify the CSS for PM Central R3.0 or newer pages. Follow the steps outlined above in [Changing the Style Sheet for the Portfolio, Department or Project Sites](#).

Can I change the master page to point to another CSS file?

If you change the master page to another CSS file, you will lose this customization when PM Central is upgraded. Instead, follow the steps in this article to modify the nested master pages and customer CSS files.

Can I save PM Central sites as site templates and then use them to create new sites?

Yes, you can save the project site as a site template, but there are future implications if you customize the site using SharePoint Designer.

Any new site that is created from a site template that is derived from the original PM Central site needs to access the required site definitions. If you create a site in the same Web application where PM Central is installed, you should not have any problems. However, if you create a new site in a *different* farm or Web application, you need to install PM Central on that farm first. This is because the site templates contain pages with the Bamboo Web Parts, and these Web Parts were deployed to the original Web application, not the new Web application.

For more information about templates and site definitions, read this [Microsoft MSDN article](#).

Can I modify the site and save it using SharePoint Designer?

If you use SharePoint Designer to further customize your site, it will be disconnected from the site definition. SharePoint will store the site in a database instead of using the template in hive 12 when the site is rendered. (See this [SharePoint Branding for the KB Accelerator](#) article for more information.)

When this happens, future upgrades to the PM Central site definition will no longer be reflected in your site. During the upgrade, the application will activate some features using the references in the site definition. As explained in the [Site Definition](#) section above, the site definition file, **webtemp.BambooProjectCentral.xml**, contains IDs that are associated with the site template. During the upgrade, the application uses what is in the site definition to upgrade and to activate the features on the pages. However, customizations that you have made and saved using SharePoint Designer are saved in the database, not the site definition. Therefore, customizations are lost after the upgrade because the application reads the site definition and the IDs, not the database. Customizations are lost after an upgrade because they no longer exist in the site definition. Use the steps above to modify the nested master pages and the customer CSS files.

Can I upgrade an existing site when future releases of PM Central become available?

Yes, you can. Our installation will upgrade the site definition and Web Parts when a new release becomes available. For sites that are created based on the old site definition we will provide a feature that will perform the upgrade. However, please note that the upgrade program will be based on our **base** template. The upgrade could fail if you make non-approved changes to the site, such as adding a new class to the CSS file, renaming the columns in the list, renaming the master page to another master page, referencing another CSS file with a different name, and so on.

Read the following section and be aware of any unsupported modifications made to the site. See the above section on modifying and saving a site using SharePoint Designer for information on why you may not see your customizations after an upgrade.

Don'ts When Customizing PM Central

The following is a list of items that you should **not** change from the base application.

Be aware of the harmful effect of using SharePoint Designer to edit the site directly. Doing so will disconnect the site from the site definition. The upgrade process will automatically activate the features. However, your original changes that you made using SharePoint Designer will be gone.

Do not change the site definition in hive 12/hive 14.

Do not modify the following master pages, CSS files, and column names in these lists. The columns use aggregated data and perform business logic, and any changes will result in unpredictable behavior. You **can** rename the nested master page, but you **cannot** rename the CSS files, nested or parent, and you **cannot** rename the parent master page.

• Master Pages:

Site Type	Name
Top Site	TopSite_Parent.master
Top Site	TopSite_Template_Parent.master
Top Site	TopSite_Template_Classical_Parent.master
Department Site	DepartmentSite_Parent.master
Department Site	DepartmentSite_Custom_Parent.master
Department Site	DepartmentSite_Custom_Classical_Parent.master
Project Site	ProjectSite_Parent.master
Project Site	ProjectSite_Template_Parent.master
Project Site	ProjectSite_Template_Blue_Parent.master
Project Site	ProjectSite_Template_Classical_Parent.master
Project Site	ProjectSite_Template_SkyBlue_Parent.master
Project Site	ProjectSite_Template_YellowGreen_Parent.master

• CSS Files:

Site Type	Name
Top Site	TopSite_TeamSite.css
Top Site	TopSite_Template.css
Top Site	TopSite_Template_Classical.css
Department Site	DepartmentSite_TeamSite.css
Department Site	DepartmentSite_Custom.css
Department Site	DepartmentSite_Custom_Classical.css
Project Site	ProjectSite_TeamSite.css
Project Site	ProjectSite_Template.css
Project Site	ProjectSite_Template_Blue.css
Project Site	ProjectSite_Template_Classical.css
Project Site	ProjectSite_Template_SkyBlue.css
Project Site	ProjectSite_Template_YellowGreen.css

• Project Health List: If you modify the following columns, you will break List Rollup Web Part.

Column	Type
Project Name	Single line of text
Project Start Date	Date and Time
% Complete	Date and Time
Project Status	Choice
Project Manager	Person and Group
Risk Status	Bamboo KPI Column
Issue Status	Bamboo KPI Column
Schedule Status	Bamboo KPI Column
Project Department	Choice

- **Tasks List:** Do not delete or modify any of the columns in this list.
- **Issues List:** Do not delete or modify any of the columns in this list.
- **Risks List:** Do not delete or modify any of the columns in this list.
- **Pics Picture Library:** Do not delete any images in this Picture library. You can replace the images as long as the new image has the same file name as the image you are replacing. You can add new images to this Library.

- PRODUCTS SOLUTIONS SERVICES SUPPORT COMMUNITY MY BAMBOO
- **Department Site List:** Do not delete the columns in this list.
 - **Monthly Resource Work Allocation Summary List:** Do not delete or modify any of the columns in this list.
 - **Monthly Resource Cost Allocation Summary List:** Do not delete or modify any of the columns in this list.
 - **Monthly Resource Actual Cost Allocation Summary List:** Do not delete or modify any of the columns in this list.
 - **Modify Pages List:** Do not delete or modify any of the columns in this list.
 - **Portfolio Site Navigators List:** Do not change the URL column. It is used to create the tab navigation.
 - **Configuration Checklist:** Do not delete prebuilt items in the list. The Configuration Checklist Web Part will show erroneous data if the default items are deleted.
 - **Change Requests:** The Change Requests list is used to submit a project change request. Do not delete or modify any of the columns in this list.
 - **Favorites:** The Favorites list stores favorite links added from the PMC Favorites section of the Page ribbon. Do not delete or modify any of the columns in this list.
 - **Project Baseline:** The Project Baseline list is used to track information for multiple baselines in the Project Baseline Web Part. Do not delete or modify any of the columns in this list.
 - **Task Baseline:** The Task Baseline list is used to track information for multiple baselines in the Task Baseline Web Part. Do not delete or modify any of the columns in this list.
 - **Department Site Navigators:** Do not change the URL column. The code uses them from the back end to display them as tabs.
 - **Report Information:** This list is used for the system to store a history of reporting requests submitted for background processing. Do not delete or modify any of the columns in this list.
 - **Change Requests Workflow Configuration:** The Change Requests Workflow Configuration list defines settings for change request workflows used with Workflow Conductor. Do not delete or modify any of the columns in this list.
 - **Timesheet Links:** The Timesheet Links list stores the Time Tracking and Management site URL, if Time Tracking and Management is integrated with PM Central. Do not delete or modify any of the columns in this list.
 - **PMCSkins:** The PMCSkins list stores images and CSS for applied skins. Do not delete or modify any of the columns in this list.
 - **Project Status Report:** The Project Status Report list is used by project managers to report the weekly status of projects, including accomplishments and issues for that week. Do not delete or modify any of the columns in this list.
 - **Report Settings:** This list stores all information for configuration of reports where weekends or holidays have been excluded. Do not delete or modify any of the columns in this list.
 - **Project Creation Request:** The Project Creation Request list is used to submit a request for a new project site for approval using a project creation workflow. Use this list only if Workflow Conductor is used for project creation approval.
 - **Project Creation Workflow Configuration:** The Project Creation Workflow Configuration list defines settings for project creation workflows used with Workflow Conductor.
 - **Project Status Report:** The Project Status Report list is used by project managers to report the weekly status of projects, including accomplishments and issues for that week.
 - **Report Information:** This list stores all information when a timer job runs. Do not delete or modify any of the columns in this list.
 - **Weekly Resource Actual Cost Allocation Summary:** This list is used to store the weekly resource actual cost allocation for the resources of all the projects.
 - **Weekly Resource Cost Allocation Summary:** This list is used to store the weekly resource cost allocation for the resources of all the projects.
 - **Weekly Resource Work Allocation Summary:** This list is used to store the weekly resource work allocation for the resources of all the projects.
 - **Lessons Learned :** This list is used for the project team to record the lessons learned. Do not delete or modify any of the columns in this list.
 - **Report Info Project Site:** This list is used to store all information regarding calculating for Work when a timer job runs.
 - **Report Info Cost Project Site:** This list stores all information regarding calculating for Cost when a timer job runs.
 - **Alert Plus Configuration List:** Do not delete items or edit data in the following columns:

Column	Type	Comments
Alert List	Single line of text	
Alert Event Alert List Name	Single line of text	
Alert Event	Choice	
E-mail Frequency	Choice	
CAML Query	Multiple lines of text	
Message Alert	Multiple lines of text	
Recipient Type	Choice	
Recipient Lookup Alert Source	Single line of text	
Recipient Lookup Type	Choice	
Alert List DataView Path	Single line of text	Cannot change /PageName.aspx

- **PMCentralPages Document Library:** Do not rename the supplied .aspx pages in this library. Modifying this list will affect the navigation.
- **Help.aspx at the Portfolio Site:** Do not delete the JavaScript code at the bottom of the **Help** page in the portfolio site.

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