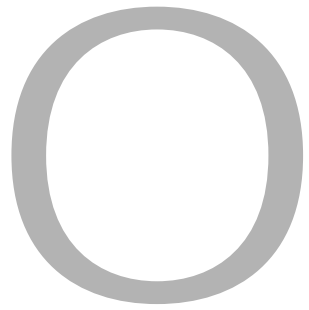# WORKFLOW & COLLABORATION

We got acquainted with the Site window in the first few chapters of this book—it's a great built-in FTP tool in which you can also manage local files across all your local sites. Dreamweaver MX also offers tools that can better your experience working with coworkers, workgroups, or even just working by yourself over different computers.

Dreamweaver's collaborative features include file check-in and check-out, which is a low-tech way of identifying who is working with which files. You mark the files you're working on with your name and e-mail address, and your coworkers will know not to make changes to a file that someone else is working on.

Design Notes are another nifty feature that helps you track characteristics of specific files or folders. You can mark files as "in progress" or with version numbers, or you can customize Design Notes and flag specific pages with comments. When Design Notes were introduced in their nascent form in Dreamweaver 3, they were difficult to manage, not very flexible, and they carried no visual flag in the Site window, so it was damn nigh impossible to actually use them. Now, they're much more user friendly, and they allow for some innovative site management shortcuts.

Using Design Notes, you can also customize the columns in the site window, so that you can sort files according to, for example, a version number or a file check-out name. Additionally, you can run site reports to find all files carrying specific Design Notes flags.

And finally, we'll show you the basics of setting up Dreamweaver to work with some popular content management or workflow programs, such as RDS, SourceSafe, and WebDAV.

✔ **Tips**

■ To use any of the features in this chapter, you must first define a local site. If you have any sites listed in the Site window, you've already done this (**Figures 20.1** and **20.2**). A local site is a folder designated within the Dreamweaver environment as the one that holds all the in-progress and completed files for a specific Web site. You may also define a remote site, also known as a production server; and a testing server, which is recommended for sites that use an application server.

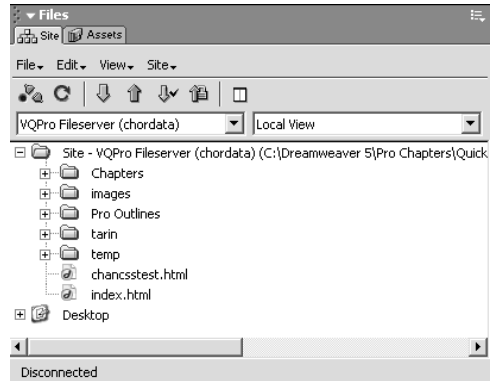■ To define a local site, see *Defining a Local Site*.

Figure 20.1 The Site window, in local view on a PC. You must define a local site before you can use Dreamweaver's site management tools.
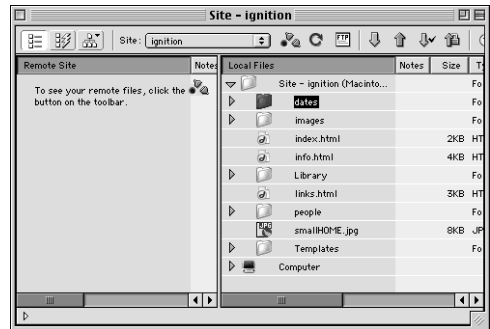

Figure 20.2 On the Mac, the Site window shows Local view on the right and Remote view on the left.

■ You do not need to use file check-in and check-out in order to upload files. To upload a file, a folder, or a batch of files to a remote site, select the pertinent icons in Local view and click on Put ⬆. To download files from a remote site to your computer, connect to the site, select the files you want, and click on Get ⬇.
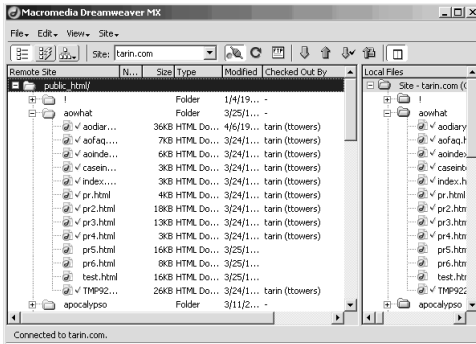
Figure 20.3 The files with checkmarks have been checked out; you can see the check-out names in the Checked Out By column.

Using Names to Check Files In and Out

If several people are collaborating on a site, it might be helpful to know who put which file where, and when they did it. (If there are only one or two of you, you should already know the answer.)

Checking out a file locks it on the remote server and allows you to edit it locally, while a flag appears on it (a red checkmark) that says to others, "Can't Touch This." Checking in a file unlocks it on the remote server, but makes it read-only on your local site so that you don't accidentally edit a file that is not checked out.

Think of it like a library book: When you check out a book, no one else can borrow it until you return it. When someone else checks out a book, you can't check it out yourself. When you or the other person checks the book (or the file, really) back in, anyone can access it.

Checking out a file marks the file with a green checkmark, assigns your username to that file, and locks it in the Dreamweaver Site window. Other team members who use Dreamweaver will not be able to overwrite locked files (files checked out by another person). These files can be overwritten by any other FTP client, however. File check-out in Dreamweaver is a simpler, user-based, and less secure approximation of CVS checkout, a Unix-based tool used in production groups.

Files other people have checked out are marked in the Site window with a red checkmark, and the person's check-out name appears in the Checked Out By column in both the local and remote panes (**Figure 20.3**).

Setting up file check-in

Before you can check files in or out, you must enable that option in the site's definition.

To enable check-in and check-out:

1. From the Site window menu bar, select Site > Edit Sites. The Edit Sites dialog box will appear (**Figure 20.4**).

2. Select the site for which you want to set check-in and check-out options, and click on Edit. The Site Definition dialog box will appear.

   If the Basic tab is selected, click Advanced to show those options. (We don't need to click through a wizard at this stage in the game, do we?)

3. In the Category box at the left, select Remote Info. That panel will move to the front of the dialog box (**Figure 20.5**).

4. To enable check-in and check-out, click that checkbox. More options for file check-in will appear (**Figure 20.6**).

5. If you want to mark all files as checked out when you open them in the Document window, check the Check Out Files When Opening checkbox.

   We suggest unchecking this option until you get used to maneuvering uploads and downloads within Dreamweaver. Otherwise, every time you open a file, it will retrieve it from the remote server, and this may end up being more annoying than helpful. On very clean site setups, however, this may come in handy.

6. Type the name you want others to see when you check out files in the Check Out Name text box. This can be your full name or your username, or it can be a personal designation such as "My Laptop."
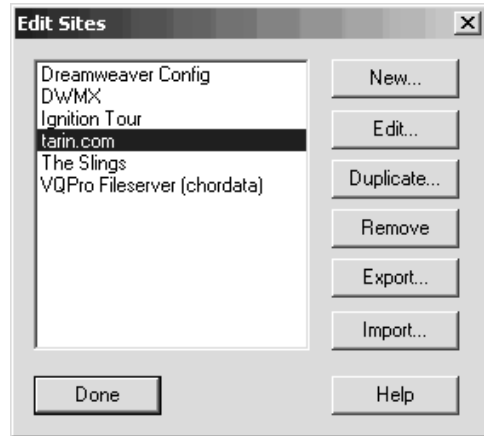

Figure 20.4 Choose which site's check-in preferences to modify in the Edit Sites dialog box.
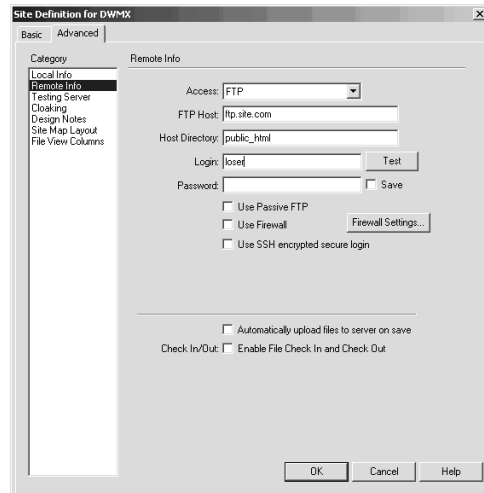

Figure 20.5 The Remote Info panel of the Site Definition dialog box, before file check-in is enabled.
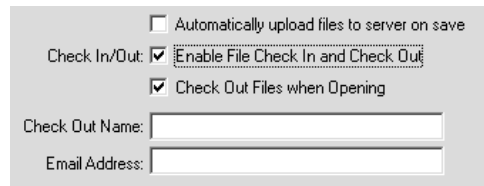

Figure 20.6 Check the Enable File Check In and Check Out checkbox (that's a lot of checks) to show setup information for using this feature with remote files.

Figure 20.7 Check-out names, if they've been entered with e-mail addresses, appear as clickable links in the Site window. The checkout name schlomo appears with the user's name, ttowers@sirius.com, but if the entered e-mail address is different, that e-mail address will appear when the link is clicked.

Figure 20.8 You can see the .LCK files if you examine the site with an FTP client other than Dreamweaver's. (This is WS_FTP for Windows.)

About .LCK Files

When you check out a file using Dreamweaver, a lock is placed on the file in the Dreamweaver Site window. This lock is a text file with the .LCK extension. .LCK files are invisible in the Dreamweaver Site window, but you can see them in a different FTP client (**Figure 20.8**).

An .LCK file contains the username of the person who checked it out. This file also shows the date and time of the checkout in the time stamp.

You can see the date and time of a .LCK file in most FTP clients in the date and time column. The .LCK files we examined were only 7 bytes each (there are 1000 bytes in 1 kilobyte), so they aren't going to make you run out of server space any time soon.

7. If you want colleagues to be able to contact you about checked-out files, type your full e-mail address in the Email Address text box. (See Tips, below.)

8. Click on OK. Now, each time you retrieve a file from the remote server, it will be marked as checked out, and each time you upload a file, it will be marked as checked in.

✔ Tips

■ If you decide to access your files from a different computer and find you cannot perform an upload because the files are checked out, you can still upload or download them by using a different FTP client, such as Telnet/CVS, WS_FTP, Fetch, or Cute FTP.

■ Even if you work alone, you might want to use these features. For instance, if you work on two different machines, you can use check-out names such as PC and Mac, or Home and Work, so you'll know where the latest version is hiding.

■ If you're using the Check In/Out feature to prevent others on your team from overwriting each other's work, make sure they are using Dreamweaver to manage their FTP sessions. If they work with another FTP program, however, they will see Dreamweaver's .LCK file listed after the checked-out file. If you let them know what this means, they can open the .LCK file, see the checkout name, and contact you to find out whether they can work on the file.

■ If you use a valid e-mail address in the Site Definition dialog box, your name will appear as a link in the Checked Out By column in the Site window (**Figure 20.7**). Just like with a mailto: link in the browser window, other users will be able to click the link and pop open an e-mail message window in their default e-mail client. Your e-mail address will be supplied, and the name of the file will appear in the subject line.

USING NAMES TO CHECK FILES IN AND OUT

Checking Out Files

When file check-in is enabled, you'll see two new buttons on the Site window (**Figure 20.9**), one for checking in and one for checking out. You can use these just as you do the Get and Put buttons described in the introduction to this chapter—although if you use the same old buttons, files will still be checked in and out with your name.

To check out one remote file:

1. Connect to the appropriate site in the Site window.

2. Select the file in the Remote Site panel (**Figure 20.10**).

3. Click on the Check Out button ⬇✔.

4. Respond to the Dependent Files dialog box (see Tips, below).

The file (and its folder, if necessary) will be copied to the local site (**Figure 20.11**). To open a file on checkout, see Tips, below.

You may have to refresh the Local site view to see the file (or its folder, if that was freshly created, too).

Check Out Files button

Check In button

Figure 20.9 The toolbar on the Site window will include two new buttons after you enable file check-out.
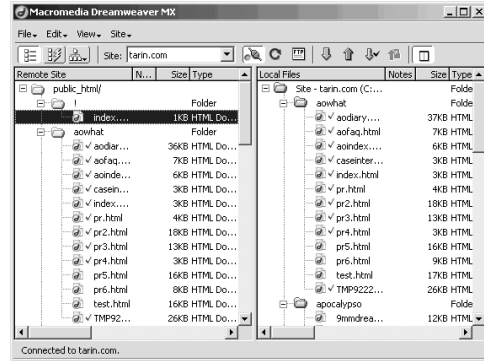

Figure 20.10 Select the file you want to check out in the Remote Site pane.

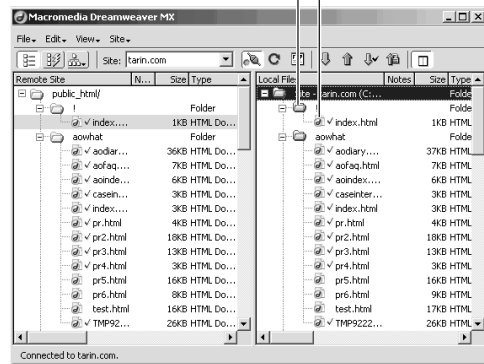*Checked out file*

New folder

Figure 20.11 The file and its folder were both copied to the local site, and the file appears with a green checkmark—indicating you yourself checked it out—in the remote site pane.

✔ **Tips**

■ You can double-click on a remote file in the Site window to open the file in the Document window. Dreamweaver will download the file, but it will not mark the file as checked out. Any changes you make in the Document window will be saved to the local copy, and you'll need to upload (or check in) the page when you're done.

■ If you already have a local copy of the file you want to check out, a dialog box will appear asking if you wish to overwrite your local copy (see the upcoming Figures 20.15 and 20.16). Click Yes to download a new copy, or click No and the file will not be transferred.

About Dependent Files

Dependent files include images, JavaScript files, media elements, and CSS documents. When you check out or check in a page (or when you get or put a file without file check-in enabled), you can choose to simultaneously transfer these files in the Dependent Files dialog box by clicking Yes. Click No to upload only your selected files, or Cancel to think about it for a minute. Check the Don't show me this message again checkbox to permanently dismiss this tool.

Dependent Files

Include Dependent Files?

☐ Don't show me this message again

Yes
No
Cancel
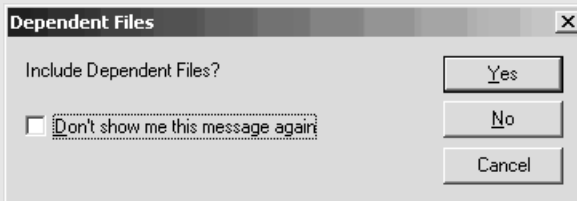
If you dismiss the dialog box and you decide one day it's useful and you want it back, you can set preferences for it in the Site category of the Preferences dialog box. Once there, you can set separate preferences for dependent files for upload (put) and download (get).

CHECKING OUT FILES

To check out more than one file:

1. Select the files or folders you want to check out in the remote site (**Figure 20.12**).

2. From the Document window menu bar, select File > Check Out (Site > Site Files View > Check Out on the Mac), or click on the Check Out button.

3. Respond to the Dependent Files dialog box.

The files will be transferred to the local site (**Figure 20.13**). The files will get a green checkmark and a .LCK file on the remote server. Your check-out name will appear in the Checked Out By column.

To undo a file check-out:

◆ After checking out the files, select File > Undo Check Out (Site > Site Files View > Undo Check Out) from the Site window menu bar.
   If you get a dialog box advising you that files will be overwritten, you can say Yes, No, or Yes or No To All. See Figures 20.15-20.16, next page.

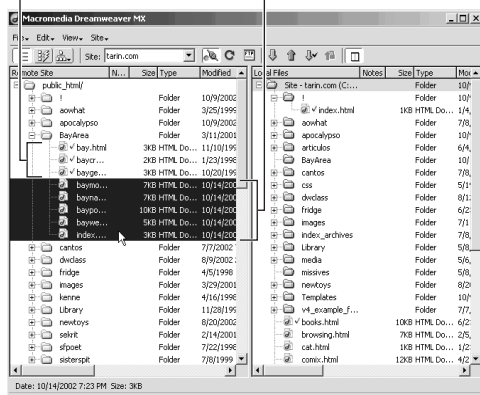*Red checkmarks*   *Files selected for check-out*

Figure 20.12 This time, we're selecting multiple files. The other files in this folder have been checked out by someone else—if this image were color, you'd see that the checkmarks are red.

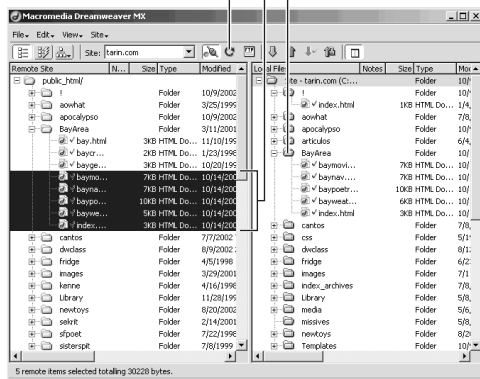*Checked out files*

Refresh button   *New folder*

Figure 20.13 After refreshing the site view, the new folder and the files we checked out appear in the local site pane.
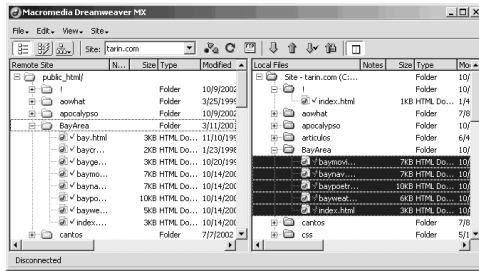
8

Figure 20.14 We updated the files that were checked out earlier, and now we're going to check them back in.
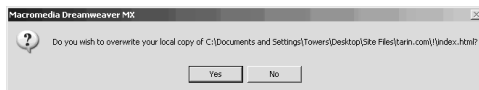

Figure 20.15 You may get a dialog box like this if you try to overwrite a newer, single file, either when checking in or checking out.
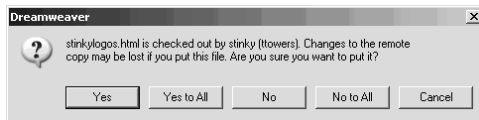

Figure 20.16 You may get a dialog box like this if you try to overwrite a batch of files.

Checked in files

No check-out name   *Files are locked in local site after check-in*
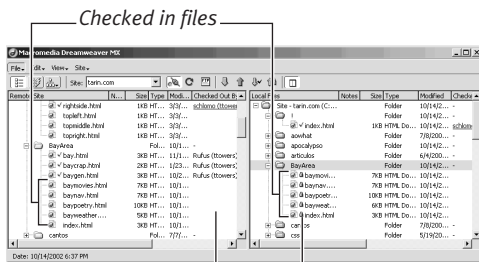
Figure 20.17 We checked the files back in, and now there's no name in the Checked Out By column. When files have been checked into the site, they appear locked in the Local pane of the Site window. That's because you're supposed to check out a file before you edit it locally.

Checking In Files

After you've finished working on a file, you can check it back in. That means two things: you're uploading the current version back up to the live site (or the staging server), and you're freeing up the file so others can work on it.

To check in files:

1. In the local site, click to select the files or folders you want to check in (**Figure 20.14**)

2. From the Document window menu bar, select File > Check In (Site > Site Files View > Check In on the Mac). Or, click on the Check In button 📤.

3. Respond to the Dependent Files dialog box, as well as the overwrite query dialog box in **Figure 20.15** or **20.16**, if one appears.

The file will appear with a locked icon on the local site. The Checked Out status will be removed from the remote server and your name will disappear from the Checked Out By column (**Figure 20.17**).

✔ Tips

■ When you check a file back in, it gets locked on your local machine, and a little lock 🔒 will appear instead of a checkmark. That's because Dreamweaver safeguards the file so that you can't work on it unless you check it out first. If you need to work on a locked file you've checked in, and it hasn't changed, and you don't want to bother checking it out again, just unlock it. From the Document window menu bar, select File > Turn Off Read Only (Macintosh: Sites > Site Files View > Turn Off Read only). You can also select Turn Off Read Only from the File Management menu on the Document toolbar.

■ You can also check files in and out while you're working on them, if need be. On the Document toolbar, select Check In or Check Out from the File Management menu (**Figure 20.18**). Files that you check in will be saved automatically before they're put up on the remote site. Remote files that you check out will *overwrite* your work in the Document window. On the other hand, you can also double-click a file in the remote site, examine it in the Document window, and then check it out.
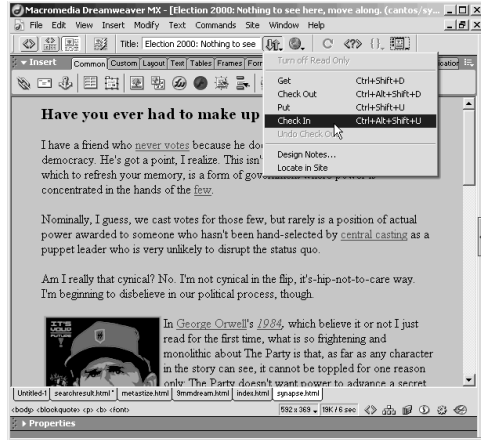

Figure 20.18 You can check in a file while you're working on it, but then it'll lock. You can always select Turn Off Read Only from the same menu to keep working on it.
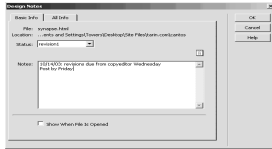
Figure 20.19
Design Notes let you leave love notes for your Web design team. These files are managed each in their own dialog box, where you can enter status, dates, comments, and other data about a file.
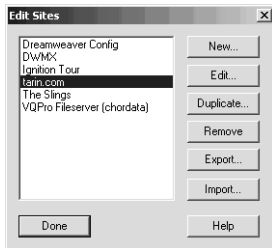

Figure 20.20
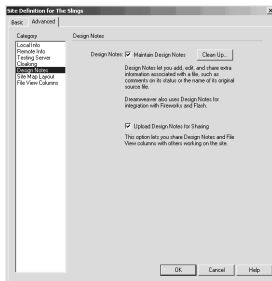Choose your local site in the Edit Sites dialog box.

Figure 20.21
Enable Design Notes by checking the first box in the Design Notes category of the Site Definition dialog box. If you want to share Design Notes and File View Columns, select the Upload Design Notes for Sharing checkbox.

Setting Up Design Notes

Design Notes (**Figure 20.19**) allow you to save workflow information about a file in an attached file—they're discrete XML/text documents. That means you can save non-public information along with a file, rather than saving it as a comment *inside* a file. Using Design Notes, you can flag files that need attention, keep track of who's worked on a file, and store notes regarding just about anything.

In order to use Design Notes, you need to enable the use of them with your local site.

To enable Design Notes:

1. From the Site window menu bar, select Sites > Define Sites. The Define Sites dialog box will appear (**Figure 20.20**).

2. Click on the name of the site for which you want to enable Design Notes.

3. Click on Edit. The Site Definition dialog box will appear.

4. In the Category box at the left, click on Design Notes. That panel of the dialog box will appear (**Figure 20.21**).

5. If the Maintain Design Notes checkbox is checked, leave it alone. If it's unchecked, check the box to enable Design Notes.

6. If everyone in your workgroup is using Dreamweaver to produce a site, you may want to upload Design Notes along with their files. To enable automatic uploading of Design Notes, check the Upload Design Notes for Sharing checkbox.

✔ Tips

■ If you're working alone on a project or if your group isn't using Dreamweaver as a team, you should make sure to uncheck the Upload Design Notes for Sharing checkbox, or the server will be cluttered with files useless to everyone but you.

■ On the other hand, if you want to keep notes on more than one machine, by all means, share them with yourself.

■ To disable Design Notes, follow the steps above and then uncheck the Maintain Design Notes checkbox. See *Turning Off Design Notes* later in this chapter, for details on what this does.

Extending Design Notes

As we said at the beginning of this chapter, Design Notes have improved greatly since their initial implementation in Dreamweaver 3.

Although you can't use Find and Replace with Design Notes or export only those files that use them, you can run a site report that lists Design Note properties.

Fireworks, Macromedia's image editing program, also uses Design Notes. The source files in Fireworks are PNG files; when you export a PNG as a GIF, for example, Fireworks creates a Design Note that lists the name and location of the original PNG file.

If you're a developer, you can use XML and JavaScript to extend Dreamweaver to include a Design Notes inspector or to use a status flag in a Design Note to change tags within a file. You can also write extensions to site reports that search on specific HTML tags as well as on Design Notes. If you're not a developer, check the Macromedia Exchange (Help >Macromedia Exchange) to see if other users have implemented Design Note extensions.

Where Are The Files?

The first time you create a Design Note, Dreamweaver creates a folder called _notes. Unfortunately, there isn't one central folder—Dreamweaver creates a _notes folder for each separate location of each separate file. For instance, if you create a Design Note for a page in the site root folder, and then another note for an image in the /images folder, Dreamweaver creates a _notes folder in each place.

What's more, the _notes folders are not visible using the Site window; to open the folder, you need to use your regular file manager (Windows Explorer or the Finder).

Inside the _notes folder, each Design Note is named for its file, plus an additional extension, .MNO (Macromedia Notes). So if your file is called calendar.html, the Design Note will be called calendar.html.mno.
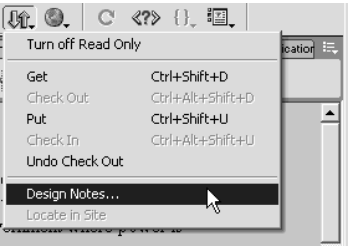
SETTING UP DESIGN NOTES

Figure 20.22 Access Design Notes for the current page by selecting Design Notes from the File Management menu on the toolbar.
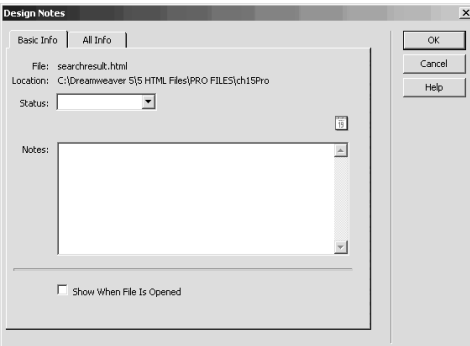

Figure 20.23 Leave notes for yourself or your coworkers in the Design Notes dialog box.

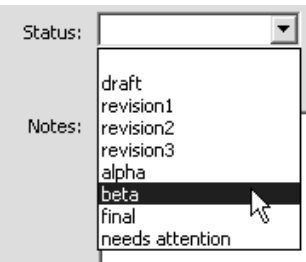**Figure 20.24** Select an option from the status menu. To add a status value that doesn't appear on this menu, see Step 7 and use Status as the Name.

Using Design Notes

A Design Note is basically a hidden text file that stores information about another file. You can use Design Notes not only with Web pages, but also with images, multimedia files, CSS or HTML style sheets, library items, templates, and any other file in your local site.

To create a Design Note:

1. Select the file you want to notate in the Site window, or open it in the Document window. Then, select File > Design Notes from the Site window menu bar or the Document window menu bar.

You can also select Design Notes from the File Management menu on the toolbar (**Figure 20.22**).

Either way, the Design Notes dialog box will appear (**Figure 20.23**), displaying the name of the file and its site path/location.

2. The Status drop-down menu allows you to flag a file with the following labels: draft; revision 1, 2, or 3; alpha, beta, or final; or needs attention (**Figure 20.24**). You may select any or none of these.

3. To stamp the current date in the Design Note, click on the Date button above the vertical scrollbar in the Notes text box. Today's date will be printed in the Notes text box.

4. Type any additional notes in the Notes text box.

5. To have Dreamweaver pop open the Design Notes whenever the file is opened, check the Show When File Is Opened box.

6. To add specific notes to be used consistently from file to file, click on the All Info tab to make that panel of the dialog box visible (**Figure 20.25**).

7. To add a new note, click on the + (plus) button. In the Name and Value text boxes, type the information, such as "Project" and "Intranet," "Due" and "[Date]," or "Author" and "vlad" (Figure 20.25).

8. When you're done, click on OK to close the dialog box and save your Design Notes.

✔ **Tip**

■ You can create file view columns to use with the custom fields you create in Step 7. See *Adding File View Columns*, later in this chapter.
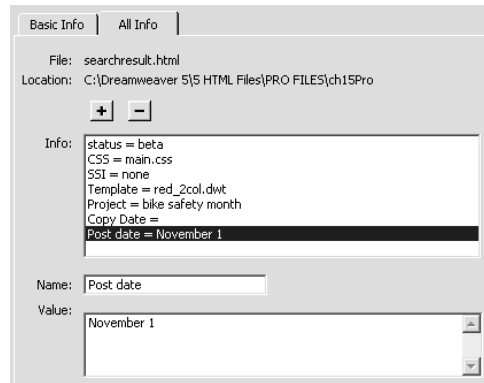

Figure 20.25 Add formatted notes (name=value) in the All Info tab of the Design Notes dialog box. These are some examples of names and values you might find useful.
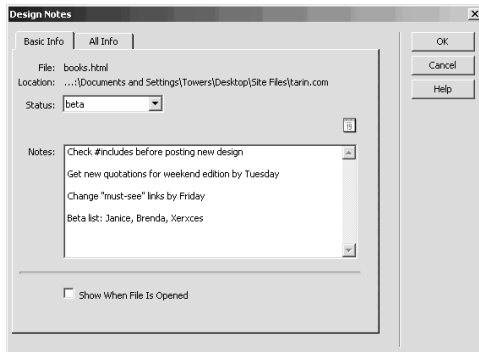
USING DESIGN NOTES

Figure 20.26 The Design Notes dialog box displays information we saved earlier about the progress of the page.

Accessing Design Notes

Opening a Design Note for a Web page or other file is similar to creating one. You open the same Design Notes dialog box, and then you can read and edit the Design Notes.

To open a Design Note:

1. In the Site window, select the file whose Design Notes you want to read.

2. From the Site window menu bar, select File > Design Notes.

or

Double-click the Notes icon 💬 next to the filename in the Site window.

(On Windows machines, you must expand the Site window to view the column for Notes, where you'll see the icon for any files that use them.)

Either way, the Design Notes dialog box will appear (**Figure 20.26**).

You can also open notes for a page in the Document window by selecting Design Notes from the File Management menu on the Document toolbar (see Figure 20.22).

Now you can read, update, or edit the notes.

Cleaning Up Design Notes

After you delete a file, Dreamweaver does not automatically delete its associated Design Notes. You can clean up orphaned Design Notes easily.

To clean up Design Notes:

1. From the Site window menu bar, Sites > Edit Sites. The Edit Sites dialog box will appear.

2. Click on the name of the site for which you want to clean up Design Notes.

3. Click on Edit. The Site Definition dialog box will appear.

4. In the Category box at the left, click on Design Notes. That panel of the dialog box will appear (**Figure 20.27**).

5. Click on the Clean Up button. A dialog box will appear (**Figure 20.28**) asking you if you really want to do that. Click on Yes.

6. Dreamweaver will remove all orphaned Design Notes from the selected site.
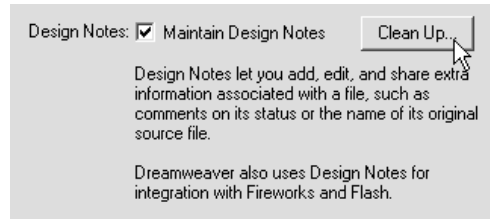

Figure 20.27 A close-up of the Design Notes panel of the Site Definition dialog box.
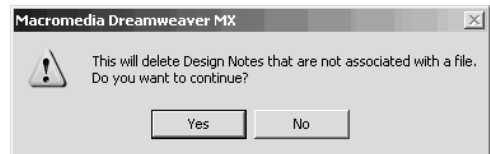

Figure 20.28 After we clicked on Clean Up, this dialog box asked us if we were really sure we wanted to clean up and delete the orphaned files.
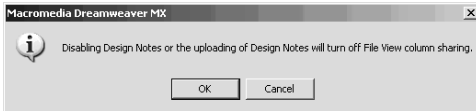
Figure 20.29 If you have File View Column sharing enabled, Dreamweaver will warn you that turning off Design Notes will turn off the columns.
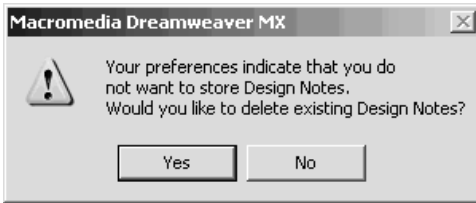

Figure 20.30 You can now choose whether or not to delete all Design Notes after you disable maintaining them.

Turning Off Design Notes

Before you disable Design Notes, keep in mind:

◆ When you disable Design Notes, Dreamweaver can remove notes and _notes folders from your site.

◆ When Design Notes are disabled, you cannot use Personal or Shared File View Columns, and you cannot use any Site Reporting features that include Design Note properties. We cover using both these functions in detail later in this chapter.

To disable and delete all Design Notes:

1. Follow Steps 1–4 in the previous list.

2. Uncheck the Maintain Design Notes checkbox. If you have File View Column Sharing enabled, a dialog box will appear (**Figure 20.29**). Click on OK.

3. Click on OK to close the Site Definition dialog box and save your changes. Another dialog box will appear, asking you if you want to delete Design Notes (**Figure 20.30**). Click on Yes to delete them or No if you want to keep them around.

TURNING OFF DESIGN NOTES

Modifying Columns in the Site Window

In the Site window in Dreamweaver MX, you can add or remove columns, called *File View Columns.* You can hide columns you don't use, and you can also create columns that are associated with particular Design Notes attributes.

✔ Tip

■ On Windows machines in Dreamweaver MX, the column headers are visible only if you expand/undock the Site window, as seen in the figures in this chapter. When the Site window is docked as a panel, only file and folder names are shown.

To show or hide an existing column:

1. From the Site window menu bar, select Edit Sites. The Edit Sites dialog box will appear.

2. Select the site for which you want to define new columns, and click on Edit. The Site Definition dialog box will appear.

3. In the Category box at left, select File View Columns. That panel of the dialog box will appear (**Figure 20.31**).
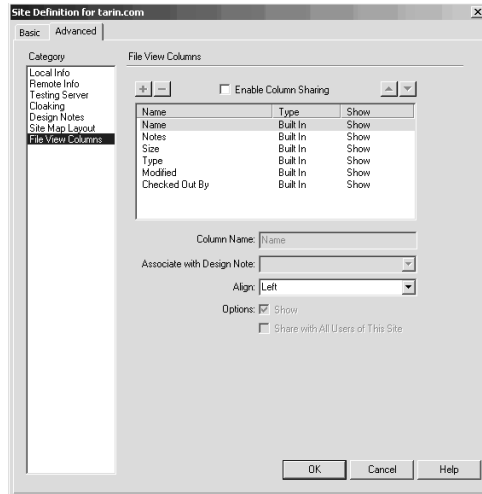

Figure 20.31 The File View Columns panel of the Site Definition dialog box allows you to rearrange and hide columns, as well as add new ones.
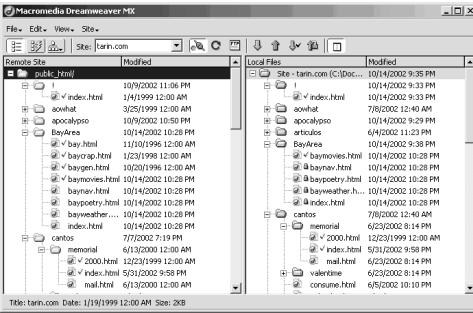
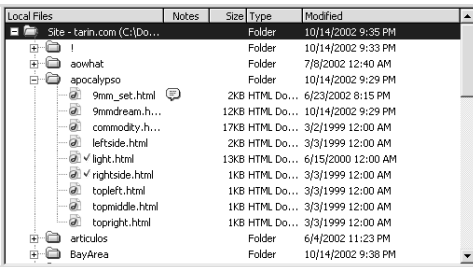**Figure 20.32** Here, we've hidden all but the Name and Modified columns.

Figure 20.33 This is standard text alignment in the Sites window (local view only, in this figure). To see more or less of what's in a column, you can experiment with rearranging alignment options. Note that the Notes column has Center alignment set, but it still looks like left alignment.

4. Six built-in columns are displayed by default in the Local view of the Site window. These are: Name (filename), Notes (a note icon appears for pages with Design Notes; only shown when Design Notes are enabled), Size (file size), Type (file type, such as HTML or GIF), Modified (date last changes were saved), and Checked Out By (check-out name; only shown when file check-in is enabled).

To show or hide any of these columns (except Name) or a column you create yourself, check or uncheck the Show checkbox in the options area of the dialog box. **Figure 20.32** shows the Site window with all but the Name and Modified fields hidden.

5. You can also change the alignment of the text in a column. **Figure 20.33** uses default alignment settings. The Name column is set to Left, so that the beginning of the filename shows; the Notes column is set to Center, so that Notes icons are centered in that column; and the File Size column is set to Right, so that the numbers line up with the file size. You can change any of these.

MODIFYING COLUMNS IN THE SITE WINDOW

To reorder columns in the Site window:

1. In the File View Columns panel of the Site Definition dialog box, select the name of the column you want to move to the right or left in the Site window.

2. To move the column (**Figure 20.34**), click on the Up arrow to move it to the left or the Down arrow to move it to the right (Figure 20.31).

✔ **Tips**

■ One quirk of Design Notes is that if you set only an option that is matched with a column, you will not see an icon for the Design Note. That is, once you create a "Status" column, a Design Note that carries only information for "Status" will not also get flagged with a little 💬 doohickey. Design Notes do get icons if you *type* anything at all in the text boxes. See *Adding File View Columns* for an example of tagging flags in the Site window, including "Status," to specific Design Notes settings.

■ After you add personal columns to your site, you can of course rearrange them, show them and hide them, and so on.
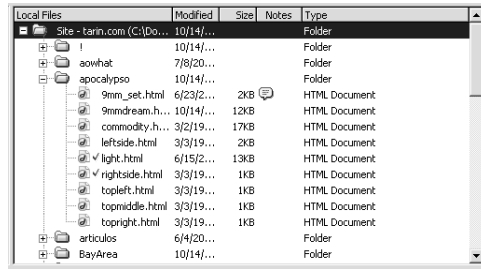

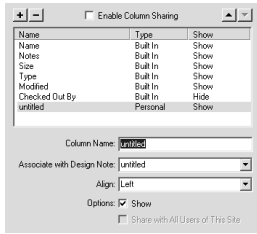**Figure 20.34** Here, we've rearranged the standard columns.

Figure 20.35 Click on the + (plus) button to create a new column in the Sites window.
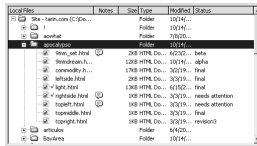

Figure 20.36 We've added a Status column, in which the labels correspond to status settings in Design Notes on this site.
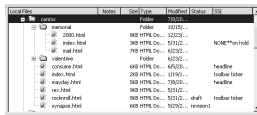

Figure 20.37 Here we've added a brand-new column called SSI, which corresponds to custom settings we added in the All Info section of Design Notes. SSI, in case you're wondering, refers to server-side includes, and these settings are the name of the include the file uses.

✔ Tip

■ In the Associate With Design Note drop-down menu (Figure 20.35), the fields listed include assigned, due, and priority, but these are only suggestions—first off, they don't yet exist until you add them to a Design Note, and second, you can add your own names by typing them in the text box. Other ideas for columns include author names, include or template names, style sheet version names, and weekly or daily site sections. See *Using Design Notes*, earlier in this chapter, to find out how to create these fields and make them available to all Design Note files in your site.

Adding File View Columns

Not only can you show or reorder existing columns, you can add your own columns to the Site window. These columns can display Design Note details, such as the status of a file or other custom fields that you create.

To create a new column in the Site window:

1. Design Notes must be enabled in order for you to add personal or shared columns. See the preceding sections on setting up and creating Design Notes.

2. Follow steps 1–3 under *To show or hide an existing column* earlier in the chapter to display Site View Column details in the Site Definition dialog box.

3. Click on the + (plus) button. A new Personal column called *untitled* will appear (**Figure 20.35**).

4. Type the display name for the column as you want it to appear in the Site window in the Column Name text box.

5. To associate the column with a Design Note field, select it from the Associate With Design Note menu. Not all these fields are already in the Design Notes; see Tip, below. If you have not yet created the field in your Design Notes, you can go ahead and type it in the text box and create it later.

6. To set alignment of the text in the column, select Left, Center, or Right from the Alignment menu.

7. Click on OK to close the Site Definition dialog box and add the column to the Site window.

In **Figure 20.36,** we've added the Status column, which will now display the status we've set for files with Design Notes. In **Figure 20.37**, we've created a new Design Note category called SSI and added a column for it.

ADDING FILE VIEW COLUMNS

Sharing Columns

If you've created a handy column and you want your coworkers or your other machines to be able to use it, you can share the column information.

To share column information:

1. Create a new column, as described above.

2. In the File View Columns category of the Site Definition dialog box, check the Enable Column Sharing checkbox (**Figure 20.38**).

   If you have not previously enabled Design Note sharing in that category of the site definition, a dialog box will appear asking if you wish to do so (**Figure 20.39**). Click on OK.

3. In the File View Columns panel of the Site Definition dialog box, select the column you created.

4. Check the Share With All Users of This Site checkbox. The column Type will change to Shared (**Figure 20.40**).

5. Click on OK to close the Site Definition dialog box and share the column with other users.

The next time your colleagues connect to or refresh their view of the Site window for the selected site, they'll see the new column and the new data (**Figure 20.41**). They can hide this column if they don't want to use it. Keep in mind that anyone can edit or add columns—they can't rearrange the columns in your window, but they can add and rename any Shared column on this site.

✔ Tip

■ You can enable column sharing before you create any columns. In the Design Notes category of the Site Definition dialog box, check the Upload Design Notes for Sharing checkbox.
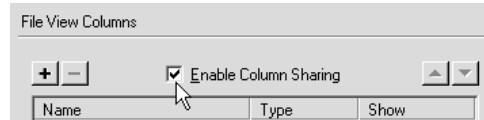

Figure 20.38 Check the Enable Column Sharing checkbox to upload your Design Notes containing file view column information.
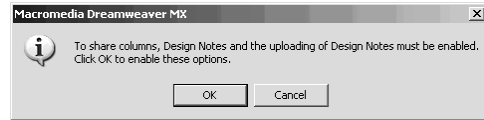
Figure 20.39 If you haven't yet enabled uploading of Design Notes and you want to share columns, this dialog box will ask you to turn on that option.
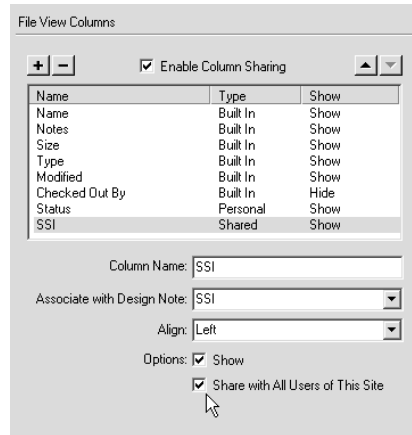
Figure 20.40 When you select the Share With All Users of This Site checkbox, the column type will turn from Personal to Shared, and those columns marked as shared will be uploaded.

Figure 20.41 Users who share access to this site will see the columns we added, Status and SSI, on both their local and remote site. They can hide the columns if they want to.

Editing personal or shared columns

You can delete a column, rename one, or associate it with a different Design Note field at any time. If this is a shared column, the change will affect all users who share Design Notes on your site.
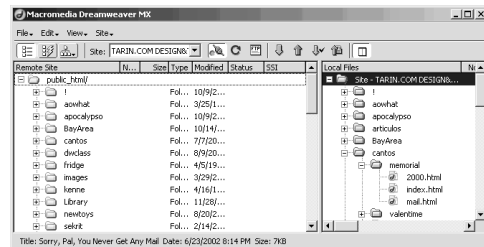
To edit a column:

1. In the File View Columns panel of the Site Definition dialog box, select the name of the column to edit. You cannot rename or delete a Built In column.

2. To delete the column, click on the - (minus) button.

3. To rename the column, type a new name in the Column Name text box.

4. To associate the column with a different Design Note, select a new note from the Associate With Design Note menu, or type a new name.

Using Site Reports with Design Notes

Site reports allow you to run a check on your site that looks for specific characteristics. The report then gives you a list, in the Results panel group, of all pages in your local site that have the criteria you specified.

In the Site Reports dialog box (Site > Reports) you can run a check for all files that use Design Notes, but you cannot specify other search parameters for Design Notes. You can, however, search only a specific folder for Design Notes.

You can search for a specific check-out name. Check the Checked Out By checkbox, and then click on Report Settings and type the name you're looking for.

SHARING COLUMNS

Using Dreamweaver with Content Management

Content management systems, affectionately known as CMS, can be a godsend to large workgroups that are trying to keep track of who touched what file when and whether it's ready for primetime. You must already have these tools installed in order to use them. (We bet you knew that.)

The following systems, which Dreamweaver supports, may not be called CMS in your workplace, but we're placing them under this rubric because they all serve as intermediaries between your local machine and your Web server. Dreamweaver MX supports WebDAV, RDS, and the Visual Source Safe database.

Using WebDAV

WebDAV (pronounced Web Dave) stands for the Web-based Distributed Authoring and Versioning protocol. It's an open standard that's basically an extension of the standard HTTP Web server protocol, and the system allows users to track and edit remote files from their local machines. WebDAV is designed to promote collaboration and accountability.

Many free and commercial products are available for working with WebDAV, including tools for Apache and Microsoft IIS. Once you have WebDAV installed, you (and your colleagues) can mount a WebDAV drive on your desktop as if it were an AppleTalk or local network machine, and then browse and open the files and folders on a remote Web server just as easily as on your own hard drive.

Using WebDAV instead of standard FTP provides stronger security and interoperability features not available with FTP (such as authentication, encryption, proxy support, and caching). Using WebDAV with Dreamweaver shows the contents of the WebDAV drive in the Remote pane of the Site window.
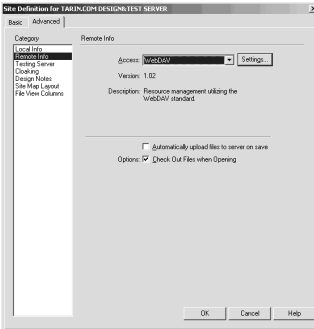
Figure 20.42 Select WebDAV from the Access drop-down menu in the Site Definition dialog box.
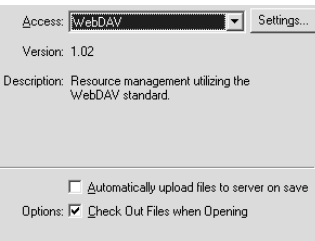

Figure 20.43 A close-up of the options for WebDAV. You can set check-out options like the ones described earlier in this chapter.
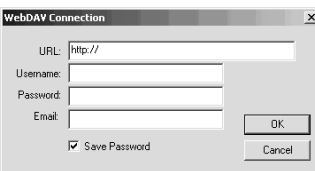

Figure 20.44 In the WebDAV Connection dialog box, specify the URL for the Web server that uses WebDAV.

✔ Tips

- To find out more about installing and using WebDAV, visit www.webdav.org.

- Other products offer WebDAV integration, include Adobe Acrobat, Microsoft Office and Internet Explorer, Mac OS X, and content management software such as Vignette and Documentum.

Setting up WebDAV

When you work with WebDAV using Dreamweaver MX, you set up your remote connection so that WebDAV is your remote site, rather than your FTP or local network server.

To set up your remote site info to work with WebDAV:

1. Open the Site Definition dialog box for the appropriate local site.
   If the Basic tab is in front, click on Advanced.

2. In the Category list, select Remote Info.

3. From the Access drop-down menu, select WebDAV. The dialog box will change appearance (**Figure 20.42**).

4. To set up automatic file check-out with Dave, select that checkbox (**Figure 20.43**).

5. Click on Settings. The WebDAV Connection dialog box will appear (**Figure 20.44**).
   The URL may use local server info, but it must include both the protocol and the port number for Dave. An example would be http://staging/WebDAV/home.
   Your username and password must be those you use with that server. Your e-mail address will be attached to your WebDAV check-out name and will appear with your files in the Checked Out By column of the Site window.

6. Click on OK to save your settings, and OK again in the Site Definition dialog box. You're all ready to go. You can use Get, Put, and all the other features as usual, except you're using them with Dave's help.

DREAMWEAVER AND CONTENT MANAGEMENT

Using Visual Source Safe Databases with Dreamweaver

Microsoft Visual Source Safe is a version control system for all sorts of code, including HTML, scripts, and images. It's a content-management database that supports file sharing, branching, and merging, makes backups of source code, and prevents more than one user from accessing a piece of code at one time (thereby rendering each other's work either redundant or incomplete). VSS is particularly handy, according to Microsoft, if you're working with chunks of ASP.NET code.

Dreamweaver MX emulates VSS client version 6 and can be used with version 5. Use with the Mac is not supported in MX (see Tip, after the list below).

When you work with VSS using Dreamweaver, you set up your remote site information so that VSS is your remote site, rather than your FTP or local network. The contents of the VSS database will appear as the files and folders in the remote pane of the Site window.

To set up your remote site info to work with VSS:

1. Open the Site Definition dialog box for the appropriate local site, and click on Advanced if the Basic version is showing.

2. In the Category list, select Remote Info.

3. From the Access drop-down menu, select SourceSafe Database. The dialog box will change appearance (**Figure 20.45**).

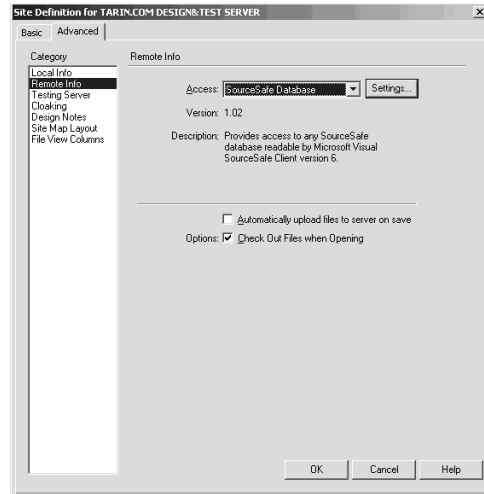4. To check-out files from VSS when you open them, select that checkbox (**Figure 20.46**).

Figure 20.45 Select SourceSafe Database from the Access drop-down menu in the Site Definition dialog box.
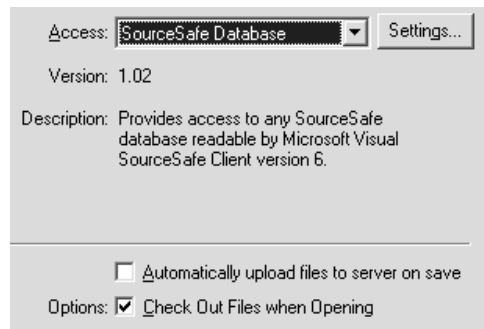

Figure 20.46 A close-up of the options for Visual SourceSafe. You can enable Dreamweaver's file check-out and automatic upload, if you wish.
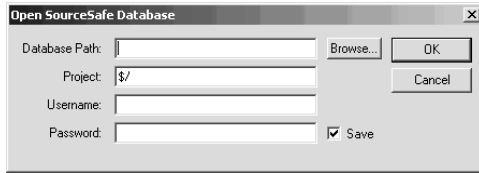
Figure 20.47 In the Open SourceSafe Database dialog box, specify the location of the VSS database file.

5. Click on Settings. The Open SourceSafe Database dialog box will appear (**Figure 20.47**).

6. In the Database Path text box, type the address of the VSS database, or click Browse to select the database file. This file is the srcsafe.ini file used to initialize SourceSafe when you connect using the Site window.

7. In the Project text box, type the name of the VSS Project that you want to use as the root folder for your remote site.

8. The username and password you enter must be those you use to log in to VSS. To save your password, select that checkbox.

9. Click on OK to save your settings, and OK again in the Site Definition dialog box.

You're all ready to go. You can use Get, Put, and all the other features as usual, except you're using them on VSS.

✔ Tip for Mac Users

■ Dreamweaver MX no longer directly supports use with Visual SourceSafe on the Macintosh, and Microsoft no longer produces a Mac OS version of SourceSafe. However, it's possible to fudge use of VSS by setting up FTP or Local/Network information to reflect the location of the VSS server rather than the regular Web server—of course, your mileage may vary. To work with VSS on the Mac, you must have the MetroWerks SourceSafe client and ToolServer tools, and you can work with VSS version 5.0, but not 6.0. Visit www.metrowerks.com for downloads and information. Dreamweaver 4 supports use of VSS with Mac using the 1.1.0 client.

DREAMWEAVER AND CONTENT MANAGEMENT

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Using RDS with ColdFusion Server and Dreamweaver

RDS, remote development services, is a protocol used with ColdFusion servers. RDS is similar to WebDAV in that it is based on the HTTP protocol (rather than FTP), and it allows the user remote interaction with the files, folders, and databases on a ColdFusion server.

If you use RDS with Dreamweaver, you work directly with the files on the server, and the files in your local site folder can be considered to be merely locally stored back-up copies of the existing pages you're managing, rather than the files you operate with until you upload.

Additionally, setting up RDS information to work with the ColdFusion server allows you direct access to the ColdFusion server files not only in the Site window but in Dreamweaver's other application server tools, such as the Databases panel.

To set up Dreamweaver to work with RDS:

1. Open the Site Definition dialog box for the appropriate local site, and click on Advanced if the Basic version is showing.

2. In the Category list, select Remote Info.

3. From the Access drop-down menu, select RDS. The dialog box will change appearance (**Figure 20.48**).

4. To check-out files from RDS when you open them, select that checkbox (**Figure 20.49**).
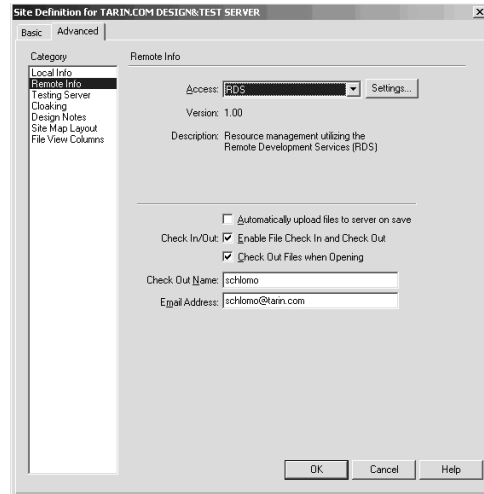

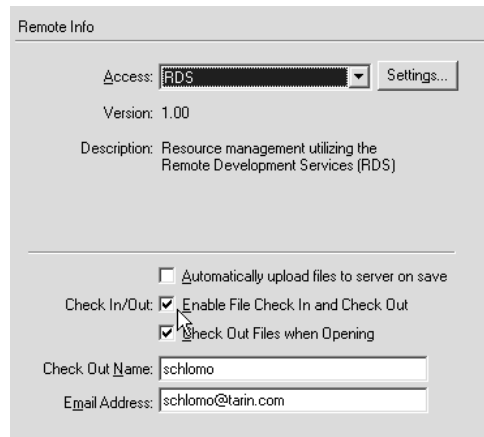**Figure 20.48** Select RDS from the Access drop-down menu in the Site Definition dialog box.

Figure 20.49 A close-up of the options for RDS. You can enable Dreamweaver's file check-out and automatic upload, if you wish.
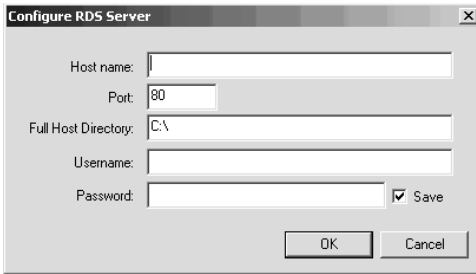
Figure 20.50 In the Configure RDS Server dialog box, specify the host name of the server using RDS, as well as your user information.

5. Click on Settings. The Configure RDS server dialog box will appear (**Figure 20.50**).

6. In the Host name text box, type either the IP number or the URL of the ColdFusion server.

7. In the Port text box, set the port number you communicate with. For HTTP, this port is 80, but check with your administrator if you're not sure.

8. In the Full Host Directory text box, type the full address of the remote root directory that contains your files. An example is c:\server\www\hostdirectory.

9. The username and password information here can be tricky—the options you complete here basically vary based on how the server security is set up.

◆ If you have a username and password, go ahead and type them.

◆ If you are running ColdFusion server locally, these options may not appear at all; don't worry about it.

◆ If you do not have a username, or if you connect using a DSN, you can specify only the server password. If you have neither a username nor a password but connect as part of a "user group" you can try leaving these options blank; otherwise, contact the administrator and have them set up or provide a password for you.

10. Click on OK to save your settings, and OK again in the Site Definition dialog box. You're all ready to go. You can use Get, Put, and all the other features as usual, except you're using them to interact with the ColdFusion server using RDS as the intermediary.

Ye Olde Microsoft RDS

RDS, which in the world of Microsoft stands for remote *data* services, is an interoperability platform originally designed to manage live data in Access or Visual Basic databases by allowing the user to manage the data using forms in a Microsoft Web browser. Like the RDS used with ColdFusion, it's basically just an intermediary way for an administrator to interact with a database.

Microsoft RDS permits interaction with local or remote ODBC database connections and is particularly useful for managing ASP data.

RDS can be considered a precursor to Web services, and it also allows insertion of recordsets onto Web pages by defining the data strings as MIME types, similar to plug-ins (remember ActiveX, anyone?).

Microsoft has deprecated RDS and may remove it from future releases of its Microsoft Data Access Components (MDAC). However, its constituents are big fans, even though the tool is optimized for use with Internet Explorer 4.0 and doesn't work precisely the same way with later versions.

(Those of you who are more familiar with single-user software packages may be surprised to know that people who run servers don't necessarily upgrade every time something new comes down the pike, because if you find something you like in the data-management world, it's generally easier and better to stick with the known-and-liked quantity than to build your systems all over again, unless there's a serious security risk.)

Engineers who have decided to replace RDS components usually do so using a combination of XML Web Services and either ASP.NET server-side controls or the Microsoft SOAP toolkit. Of course, if you wanted to change horses completely, you could commit to ColdFusion and its own, not-too-dissimilar RDS.

DREAMWEAVER AND CONTENT MANAGEMENT