DataAssist - Getting Started Guide

DataAssist creates all the pages you need to display, search and manage your online database. With DataAssist, you can create Web pages intended for administrative use or those to be viewed by the public with database-driven content.

Creating new DataAssist pages is an easy process that combines power with flexibility. You'll need a couple of items to start:

- A standard dynamic Dreamweaver site in ASP, ColdFusion or PHP. If you have SiteAssist, create a new dynamic site using that software.
- A connection to a data source like an Access or MySQL database. If you want to follow the tutorial steps exactly, create a connection named connBlueSkyMusic to the Blue Sky Music datasource included as a download from your WebAssist Download Center for DataAssist.
- Optionally, a template with an editable region to hold the generated forms and other content.

Note: If you're using a SiteAssist site, the SiteAssist-created template will work well; if you're using a CSS Sculptor created page, be sure to save your page as a template first with an editable region in the main content area.

The DataAssist wizard guides you through the entire procedure. The key steps are:

- Starting the DataAssist wizard
- Specifying site-wide details
- Choosing the overall design
- Setting the Results page options
- Defining the Results page layout
- Choosing the Search page options
- Defining the Detail page options
- Selecting the Update page options
- Setting the Insert page options
- Testing your pages



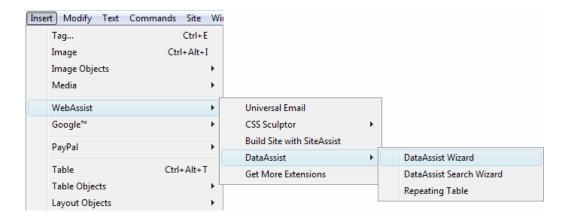
Starting the DataAssist wizard

Once you've set-up your dynamic Dreamweaver site and established a datasource connection, you're ready to begin the DataAssist wizard.

1. Open a file previously saved in the site.

If you're working in a new site, create a new dynamic page and save it

- 2. From the Files panel, make sure you're in the Dreamweaver-defined site you want to contain the DataAssist pages.
- 3. Choose Insert > WebAssist > DataAssist > DataAssist Wizard.



You can also select DataAssist Wizard from the WebAssist category of the Insert bar.

The initial page of the DataAssist wizard will appear.

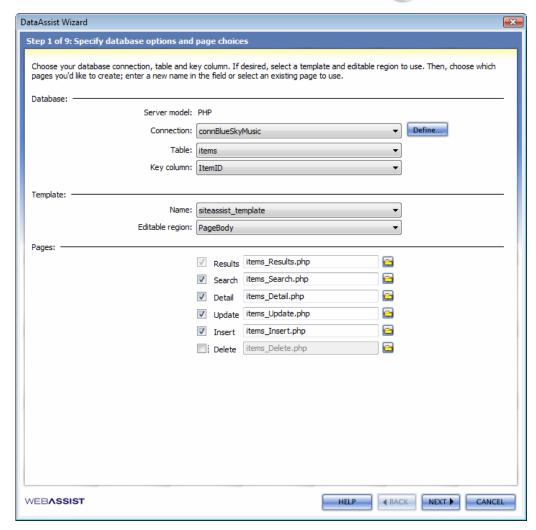


Specifying site-wide details

The first step in the DataAssist wizard asks that you specify the database table you want to work with and the pages you want to build. You also have an option to select a template and editable region to hold the form elements and other generated content.

- 1. From the Connection list, select the data source connection you want, like **connBlueSkyMusic**.
- 2. From the Table list, choose the database table you want to manage, like **Items** (**items** in PHP).
- 3. Make sure the Key column list has selected the table's primary key, like **ItemID**; if not, select it from the list.
- 4. If you're working in a ColdFusion site and need to supply the User name and Password, enter that information in the appropriate fields.
- 5. If desired, select a template to use from the Name list in the Template area, like **siteassist_template**.
- 6. If you've chosen a template, select the area to store the generated content from the Editable region list, like **PageBody**.
- 7. In the Pages area, choose which files you want created. For this tutorial, clear the checkbox next to **Delete**.





You'll take advantage of a DataAssist feature that adds a delete function to the detail page, so the Delete page is not needed.

8. When you're done, click Next.



Choosing the overall design

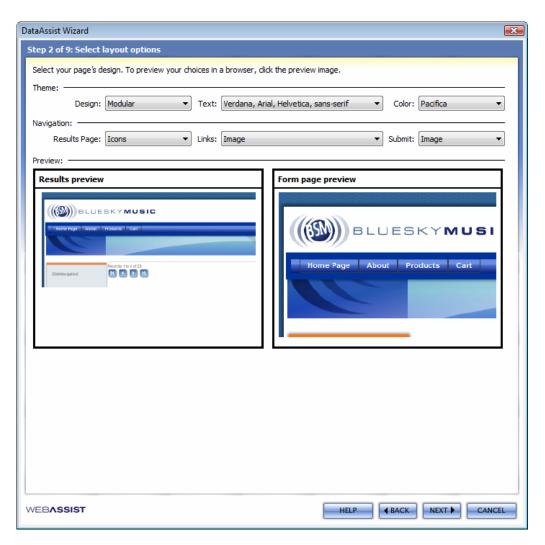
In the next step of the wizard, you'll select the options that provide the look and feel for your data management pages. In addition to selecting an overall design, CSS text styling and color scheme, you'll also determine the type of navigation to use. The preview areas update with each change you apply.

- 1. From the Design list, choose the overall style you'd like for your pages, like **Modular**.
- 2. From the Text list, choose the font family to use, like **Verdana**, **Arial**, **Helvetica**, **sans-serif**.
- 3. From the Color list, select the color scheme that best matches your site, like **Pacifica**.

Now you're ready to set the navigation options. The first option sets the look of the recordset navigation and controls found on the Results page.

- 4. In the Navigation area, select the style of navigation from the Results Page list, like **I cons**.
- 5. From the Links list, choose the style to use, like **Image**.
- 6. From the Submit list, choose an entry to represent the Submit button, like **I mage**.





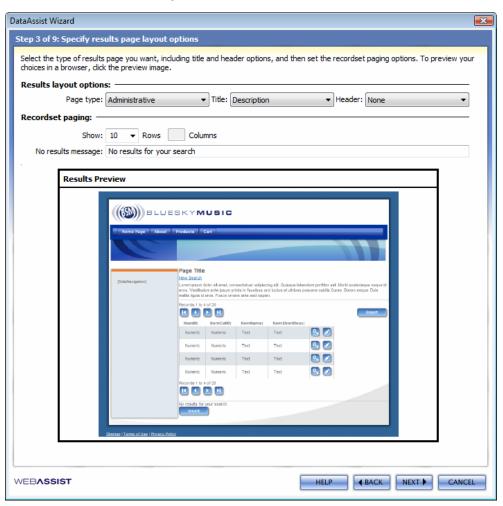
- 7. Click on the **Results preview** to view the results page design in a browser and the **Form page preview** to see a sample Insert form.
- 8. Click **Next** when you're done.



Defining the Results page layout

DataAssist creates database-driven displays for both public and administrative sites. In step 3 of the wizard, you choose the type of layout you'd like to use for your results page. You can also set the amount of data to display through the Recordset paging options.

- 9. From the **Page type** list, choose whether you'd like to use a layout intended for Public or Administrative display. For this tutorial, I'll choose **Administrative**.
- 10. From the **Title** list, choose the content you want to appear above the results listing. To provide the site visitor with some added detail, let's choose **Description**.





- 11. If desired, you can add a single or dual item header between the title content and results table from the **Header** list. Here, I'll leave the default option, **None**.
- 12. Set the number of data rows and, if available, columns to display in the Recordset paging area. Let's choose **10** from the **Rows** list.

The Columns list becomes available if a Public Page type is selected. Enter the number of desired columns for your data in the Columns field.

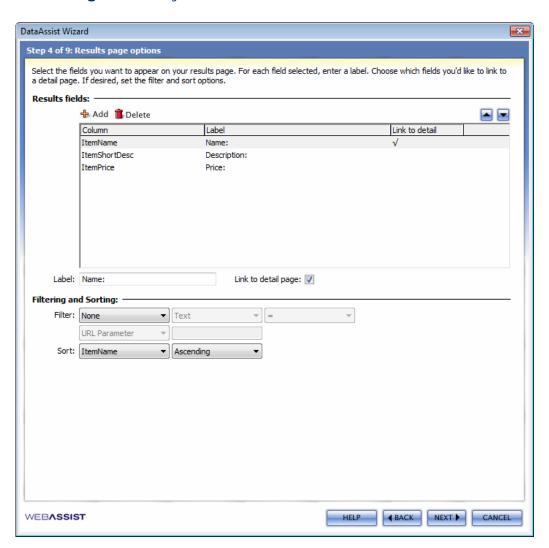
- 13. Leave the **No results message** field at its default setting.
- 14. When you're done, click Next.



Setting the Results page options

On the next step of the wizard, you'll determine which fields will be displayed on the results page and their accompanying labels. You'll also have an opportunity to designate certain fields as links to the detail page.

- 1. Select ItemID and click Delete.
 - For this results page, you want to display just the item name, short description and price. You could remove each of the other fields one at a time, but DataAssist supports a faster method.
- Press Ctrl+click (on Windows) or Command+click (on Mac) to select the remaining unwanted data fields: ItemCatID, ItemLongDesc, ItemSKU, ItemThumb, ItemImage and ItemWeight. When you're done, click Delete.





- 3. Select ItemName and, in the Label field, change ItemName: to Name:.
- 4. Select ItemShortDesc and, in the Label field, change ItemShortDesc: to Description:.
- 5. Select ItemPrice and, in the Label field, change ItemPrice: to Price:.

The next step is to set the field(s) you'd like to use to link to the detail page. Here we'll set both remaining fields as links.

- 6. Select ItemName and check the Link to detail page option.
- 7. In the Sort fileds, select ItemName and Ascending:
- 8. Click **Next** to continue.

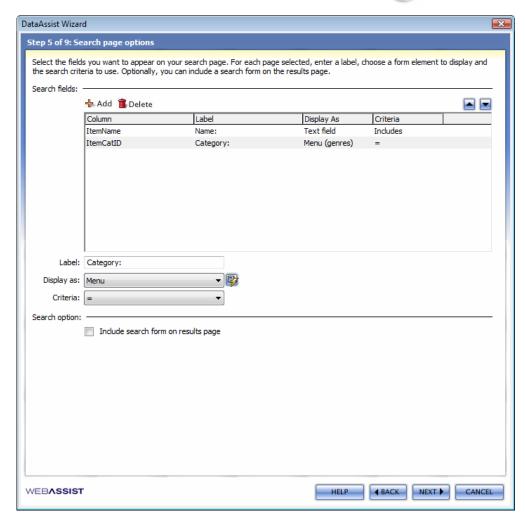


Choosing the Search page options

The next step of the wizard sets up the Search page. Here, you can determine which fields will be included in the search, how they should be displayed and how searched. You also have an option to include a similar search form on the results page to allow continued searching.

- Press Ctrl+click (on Windows) or Command+click (on Mac) to select the unwanted data fields (everything except ItemName and ItemCatID): ItemID, ItemPrice, ItemShortDesc, ItemLongDesc, ItemSKU, ItemThumb, ItemImage and ItemWeight. When you're done, click Delete.
 - This simple search requires only the ItemName field. You'll notice that you don't need to change the label for a field previously altered; the DataAssist wizard automatically carries over any previously defined label—such as Name—to lessen repetitive data entry.
- Select ItemCatID and click the Down arrow to move it below ItemName; then, in the Label field, change ItemCatID: to Category:.





You can re-order how the search fields appear by using the Up and Down arrows.

3. Leave the **Display As** and **Criteria** at their default settings for **ItemName**.

The Name search criteria should be displayed as a text field so that users can enter any search words.

DataAssist also allows you to include menu-based search criteria.

- 4. Select ItemCatID and, from the Display As list, choose Menu; leave Criteria at its default setting.
- 5. Click the **Display As** list **lightning bolt** icon.

With the Menu option is selected, you have the option of populating the menu list dynamically from within the DataAssist wizard.



Note: To populate the menu with static items, select the menu form element and, from the Property inspector, choose List Values.

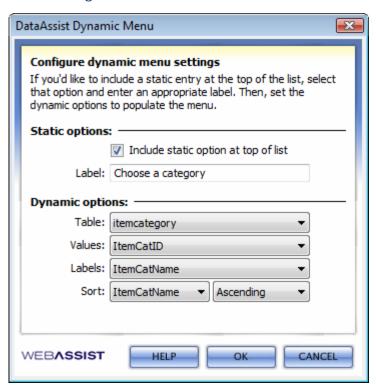
6. When the DataAssist Dynamic Menu dialog box appears, click the Include static option at top of list option and enter Choose a category in the Label field.

Text in the Label field appears as the first item in the menu with a null value and can be used to provide instructions to the user.

- 7. From the **Table** list, choose the table to populate the list. Here, choose **ItemCategory**(in PHP, **itemcategory**).
- 8. Set the **Values** list entry to the primary key for the data table. For this example, choose **ItemCatID**.

For the Blue Sky Music store example, there are two categories: CD and Gear.

- 9. From the **Labels** list, choose the data field with the entries you want displayed in the list; here, choose **ItemCatName**.
- 10. From the Sort list, select the data field you want to order the list by such as ItemCatName and set the order to either Ascending or Descending.



DataAssist



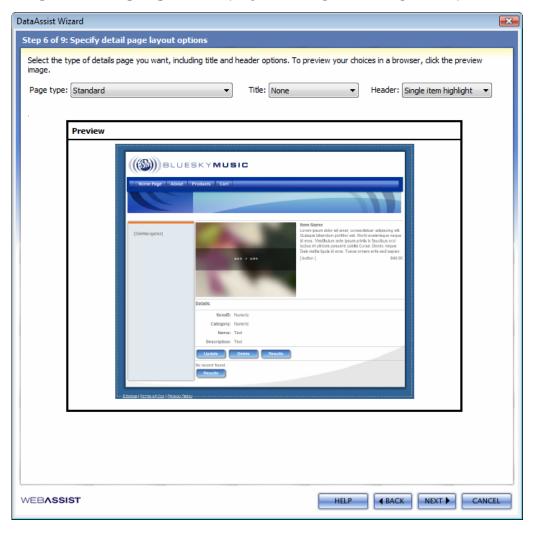
- 11. Click OK when you're done to close the DataAssist Dynamic Menu dialog.
- 12. Leave the Include search form on results page option unchecked
- 13. When you're ready, click **Next**.



Determine the Detail page layout

On this page of the wizard, you're given an opportunity to control the lookand-feel of the Detail page.

- 1. From the **Page type** list, choose the style of layout. For this tutorial, I'll choose **Standard**.
- 2. From the **Title** list, choose the content you want to appear above the results listing. Let's choose **Page title**.
- If desired, you can add a single or dual item header above the title content and results table from the **Header** list. Here, I'll choose **Single item highlight** to display the image and long description.



4. When you're done, click **Next**.



Defining the Detail page options

For this page of the wizard, you'll define which fields are to be displayed on the detail page; you'll also have an option to include a delete button to remove records.

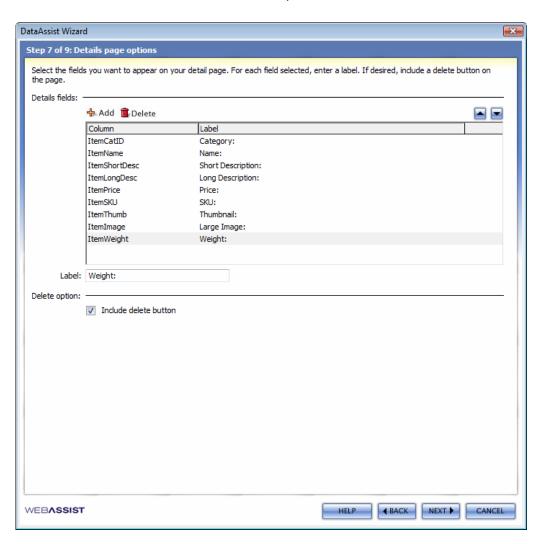
- 1. Select ItemID and click Delete.
- 2. Set the necessary item labels.

For this example, let's change the following column labels:

- Change ItemShortDesc to Short Description
- Change ItemLongDesc to Long Description
- Change ItemSKU to SKU
- Change ItemThumb to Thumbnail
- Change ItemImage to Large Image
- Change ItemWeight to Weight



3. Select the Include delete button option.



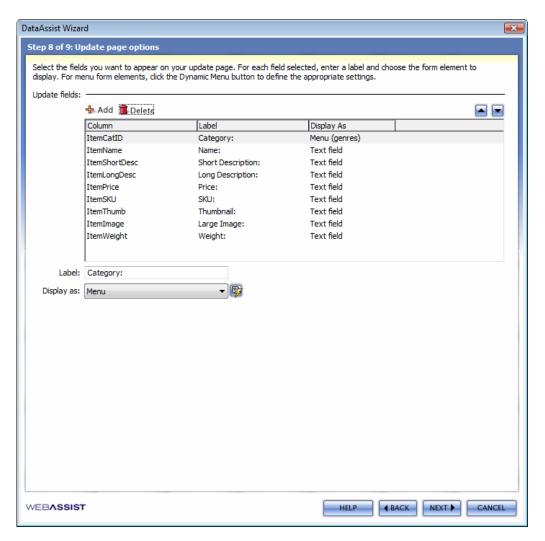
4. Click **Next** to continue.



Selecting the Update page options

The Update page fields are next to be selected. Typically, the detail page and update pages display the same fields; because DataAssist remembers your labels this step is very quick.

1. Select ItemID and click Delete.



2. Click **Next** to continue.

Note that DataAssist even remembers that the ItemCatID field can be represented as a menu.

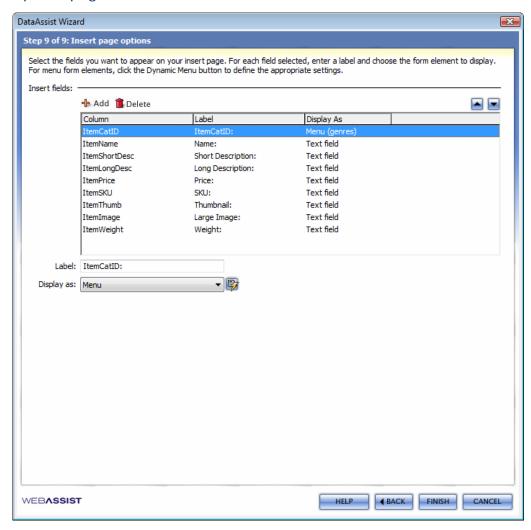


Setting the Insert page options

The final step in the wizard for our tutorial is to set the Insert page options. This page follows the same pattern as the completed Update page and is even easier to complete.

1. Click **Finish** to complete the wizard.

DataAssist remembes that the ItemID field was removed for the Update page and removes it here as well.



DataAssist proceeds to create the requested pages, inserting all the desired forms and appropriate server-side code. When finished, all pages will be opened and available for customization and testing.



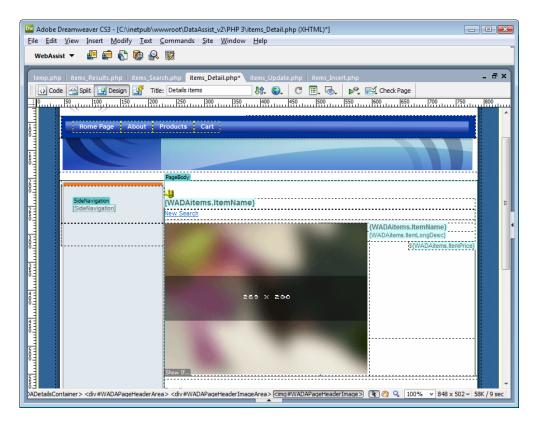
Customizing your pages

DataAssist has done the heavy lifting in creating your online database management application and now you're ready to personalize them with just a few clicks of the mouse.

Although you're free to modify any page generated, in our example, you'll want to pay special attention to the Detail page. The Detail page, as you'll recall, has a special single image highlight header. To properly make use of this page, you'll need to bind data from the already created recordset to a few of the header elements. Once completed, your Detail page will display your record information format that's quite easy to read.

- 1. Select the detail page generated by the DataAssist wizard; in our example, it's **items_Detail.php**.
 - First, let's expose the dynamic data in the recordset to be inserted into the page or bound to particular tags.
- 2. Choose **Window > Bindings** to open the Bindings panel.
- 3. Expand the recordset entry. In this example, its **Recordset** (WADAitems).
 - Next, let's replace the generic Page Title text with the product name.
- 4. Select the placeholder text **Page Tit**le and press **Delete**.
- 5. From the Bindings panel, choose the primary name field which, here, is **ItemName**, and click Insert at the bottom of the Bindings panel.
- 6. Select the placeholder text **I tem Name** and press **Delete**. Repeat step 5.
- 7. Select the placeholder descriptive paragraph and press **Delete**. From the Bindings panel, select **ItemLongDesc** and click **Insert**.
- 8. Repeat the process to replace the placeholder price **49.95** with the dynamic entry **ItemPrice**.
- Place your cursor in the placeholder text [button] in the same line as the price and, from the Tag Selector, choose <div # WADAPageHeaderButtonPrice>. Press Delete to remove it.





The final dynamic element to add is the image.

10. Select the placeholder image and, from the Bindings panel, choose **ItemImage**. Click **Bind** from the bottom of the Bindings panel.

Note: The image will appear with a placeholder symbol at the default size (32 x 32). When populated with dynamic data, the image will be displayed at it's proper size.

In our example, the database stores just the filename of the graphic—which means that the path needs to be specified for the image.

11. With the dynamic image selected, prepend the relative path to the **Src** value in the **Property inspector**. For our example, you would add **images/detail/**.

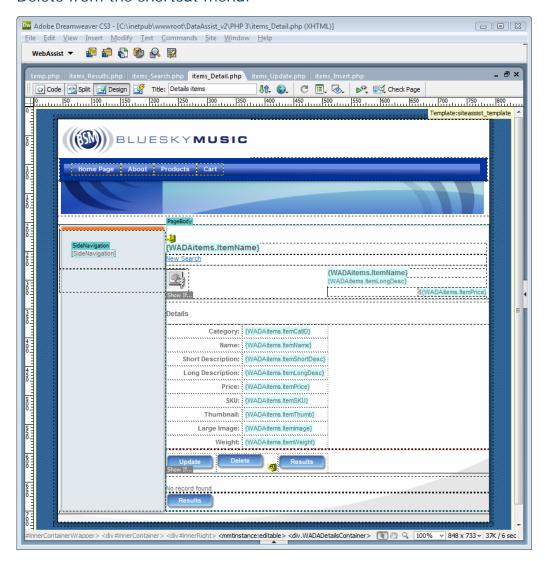
There's one final adjustment to make: remove the static height value to allow the header area to expand dynamically.

12. From the **Tag Selector**, choose **<div #WADAPageHeaderArea>**. Select **Window > CSS Styles** and switch to **Current** mode. In the



Properties pane, select the **Height** entry and click the the **trashcan icon** to remove it.

Note: Dreamweaver 8 users can right-click on the entry and choose Delete from the shortcut menu.



You're all ready to move to the next stage of development: testing.



Testing your pages

After the pages have been generated and customized, you'll want to try them out. All the pages are interconnected, so you can begin your testing by selecting the Search page.

Coldfusion users: Please note that the Coldfusion pages created by the wizard require session management variables to be set for your website. If you are not configured appropriately for session management, your pages may return a ColdFusion runtime error: "Cannot lock session scope".

ColdFusion sites that use DataAssist have the following two requirements:

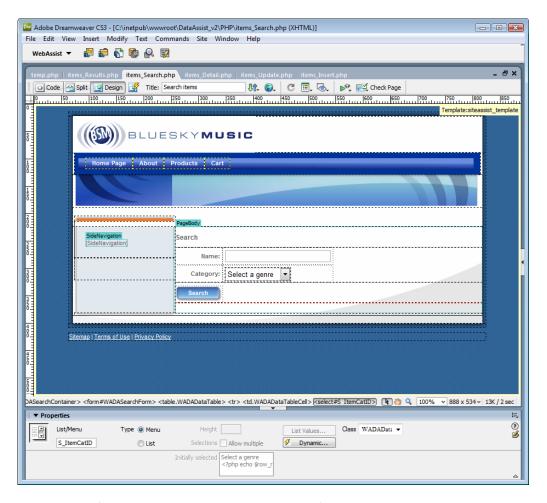
• a file named *Application.cfm* must be included at the root of your site and contain the following code:

```
<cfapplication name="YourSiteName"
sessionmanagement="Yes">
```

Your ColdFusion Server must have session variables enabled. Log in to your ColdFusion Server Administrator and under *Server Settings*, click the *Memory Variables* link to navigate to that configuration section. Make sure that **Enable Session Variables** is checked, and click the *Submit Changes* button to update your settings. If you do not administrate your server or have it hosted elsewhere, please contact your hosting provider to confirm these settings.



1. Locate the tab for the **Items_Search** page for your server model.



- 2. Press F12 (Option+F12 on the Macintosh) to preview the page in your browser.
- 3. When the page opens in your browser, click Search—without entering any search criteria—to view all the Items.

The Items_Results page is displayed, complete the recordset navigation and controls in place.

Note: If you'd like to test the search function, select one of the two items from the **Category** list—CD or Gear—and press Search.

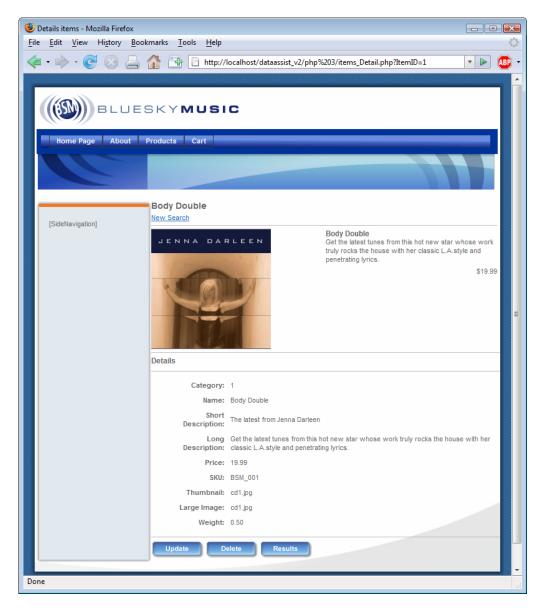
Alternatively, enter **cap** into the **Name** field and click Search.

4. In the recordset navigation controls, click **Next** to view the next set of records.



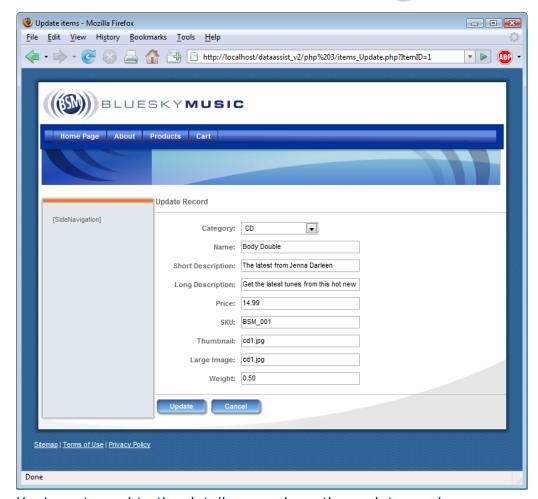
You'll note that the recordset navigation controls automatically display controls as needed; for example, Previous and First controls are now displayed.

5. To see a detailed record, select the associated **View** icon; for example, click the View icon next to the Body Double record.



- Click **Update** to display the Items_Update page for the current record.
- On the Items_Update page, change the price from 19.99 to 14.99 and click Update to confirm your modification.





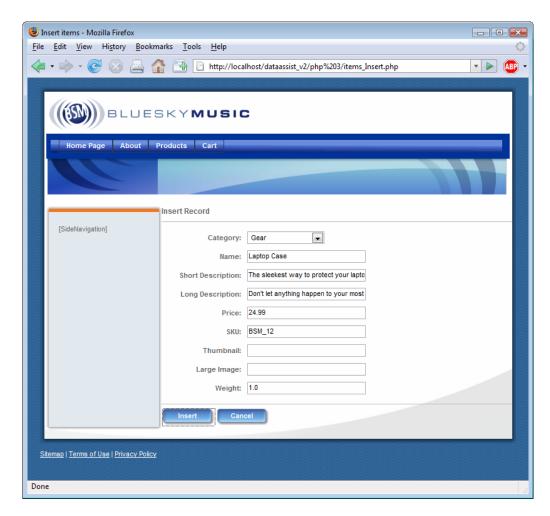
You're returned to the detail page where the update can be seen.

8. From the Items_Detail page, click Cancel.

You can also add new records.

- 9. From the Items_Results page, click Insert.
- 10. When the Items_Insert opens, enter the following new record information:





- From the Category list, choose Gear
- In the Name field, enter Laptop Case
- In the Short Description field, enter The sleekest way to protect your laptop
- In the Long Description field, enter Don't let anything happen to your most precious gear. Travel safely and stylishly with the Blue Sky Music laptop case.
- In the SKU field, enter BSM_12
- Leave both the Thumbnail and Large Image fields blank
- In the Weight field, enter 1.0
- 11. When your finished, click **Insert**.



The newly added record is displayed on the detail page. Let's now try removing a record.

12. From the Items_Detail page, click **Delete**.

The results page is displayed; to confirm that the inserted record has been deleted, let's search for the record.

- 13. In the Search form's **Name** field, enter **laptop** and click **Search**.
- 14. The Items_Result page is shown, with your custom no results message.

Feel free to continue exploring your new administrative front-end.