

Getting Started with SecurityAssist

SecurityAssist allows you to provide a variety of security features to your site. This Getting Started Guide shows you how to start implementing various security features through using the simple user interfaces provided.

Note: Cookies Toolkit is an additional extension included with the purchase of SecurityAssist. These two extensions integrate seamlessly, and should both be installed prior to applying any security to your site.

What Do You Need to Start?

- Dreamweaver 8, CS3 or CS4
- SecurityAssist 1.1.6 or higher
- Cookies Toolkit
Included in your purchase of SecurityAssist
- Already created dynamic site defined in Dreamweaver
- Database table for storing user names, password, access level, etc.

The Wizard

The wizard is the first step to using SecurityAssist. Much of the security required for you site, can be implemented here.

Step 1 of 6

1. From the Insert menu, choose **WebAssist > SecurityAssist > Wizard**.
2. In Step 1, choose the database connection you intend to use.
*If a database connection is not already defined, you can do this by choosing the **Define...** button.*
3. Choose the table that contains your user information.
This is referred to as the "visitors" table throughout this document.
4. Choose the Key column of your visitors table.
5. Select the template that you wish to use for the pages that will be created.
6. Choose the appropriate editable region for the page content to be inserted.

- Select the pages and filenames you want to be created. The following pages are available:
 - Registration:** Creates a page with the necessary form fields for user to register with your site.
 - **User Update:** Creates a page that allows user to update their information.
 - **Log In:** Creates a page for entering log in credentials.
 - **Email Password:** Creates a page that a user can have their password emailed to them from. This is used as a *forgot your password* option.
- 7. Check whether you wish to have the Access Pages Manager open once you complete the wizard.
- 8. Click **Next**.

Step 2 of 6

Step 2 allows you to specify the basic design that will be used for the pages that will be created. Use the preview window to determine which choice best suits your needs.

1. Choose the design from the Design menu.
2. Choose the appropriate text from the Text menu.
3. Choose the color you would like to use. *This primarily applies to the color of the buttons that will be created.*
4. Choose the type of Submit button you would like to provide.
5. Click **Next**.

Step 3 of 6

Step 3 allows you to specify what options you wish to be included in your Registrations page. By default, you will see all the columns that are included in your visitors table. In order to keep your pages concise, and registration a straight forward process you should limit the number of form fields that you require.

An example of an appropriate visitors database can be found in the SecurityAssist Solution Recipe Files found in your Download Center.

The following options are recommended:

- **Username**
Depending on the usage throughout your site, this could be replaced by the user's email address.
 - **Password**
 - **Email**
1. To remove fields from being included, select the database column, and choose the **Remove (-)** icon.
 2. Select each column individually; enter the label that you would like to be used for that form field.
 3. Specify which type of form field you want used for the selected column.
For password fields, make sure to specify Password.
- Note:** If choosing Menu, Radio group, or Check box, you will need to define the options that will be available within Dreamweaver, once you complete the wizard.
4. In the Unique column section, you have the opportunity to specify a field that must be unique. This prevents duplicate accounts being created.
Typically, the unique column used is the Email column.
 5. Select the unique database column from the Column menu list.
 6. Enter a file name that you wish to redirect to in the event that the email address entered matches one already included in the database.
Note: If this page has not yet been created, simply enter a file name that you wish to use for the page once it has been created. In such a case, make sure to remember to create this page before publishing your site.
 7. Specify the page you wish to redirect to, once a new user has registered.
If you chose to create the Log in page in step 1, this will be entered by default.
 8. Click **Next**.

Step 4 of 6

Step 4 allows you to specify what options will be available to a user on the update page. It is not uncommon to provide more options on the update page that were not available in the registration page. This will provide your users with the option to create a personal profile. This would also be the page for users to change their username or password.

1. To remove or add columns to be included, choose the **Add (+)** or **Remove (-)** icon.

Note: It is advised that you do not provide the ability to change the column you specified as unique in the previous step.

2. Enter the desired Label for each form field.
3. Specify the type of form field you wish to be used for each column.
4. Click **Next**.

Step 5 of 6

Step 5 allows you to specify various settings for the Log in page.

1. From the User name menu, choose the column in visitors table that contains user names.
If you wish to use the email address for logging in, select that column here.
2. Select the password column from the Password menu.
3. Choose whether to include "Remember me" and "Automatic log in" options.
If selected, check boxes will be provided, that when selected, will create cookies that remember log in credentials on the visitor's machine.
4. Choose the page to be directed to if log in succeeds.
If you have not yet created this page, simply enter the filename, and remember to create this page later.
Please note, that if you leave the default entry that SecurityAssist has provided, this page will be created by SecurityAssist.
5. Choose the page to be directed to if log in fails.

6. Select to include a log out page.
When visitors enter this page, they will be automatically logged out from your site.
7. Click **Next**.

Step 6 of 6

In step 6 you configure the email password page options. When this page is submitted, an email will be sent the users email address with the password.

1. From the **Email to** menu list, select the email column.
2. Manually enter the address to be used as the from address, or choose the lightning bolt to specify a dynamic address.
3. Manually enter the display name to be used, or choose the lightning bolt to specify a dynamic display name.
4. Enter a Subject to be used for the email.
5. Choose the user name column from the User name menu.
6. From the Password menu, choose the password column.
7. From the Email object menu list, choose the appropriate email object for your mail server.

Note: If you do not know the appropriate Email object, choose Mail for Linux, as this seems to work most universally. If you have problems with this setting, try a different option.

8. Enter the server name address in the Server name field. Or choose the lightning bolt to specify a dynamic server name.

Note: If you do not know the appropriate server name address, leave this field blank. Most hosting services utilize the default mail server when this option is blank. If this does not work, contact your hosting provider.

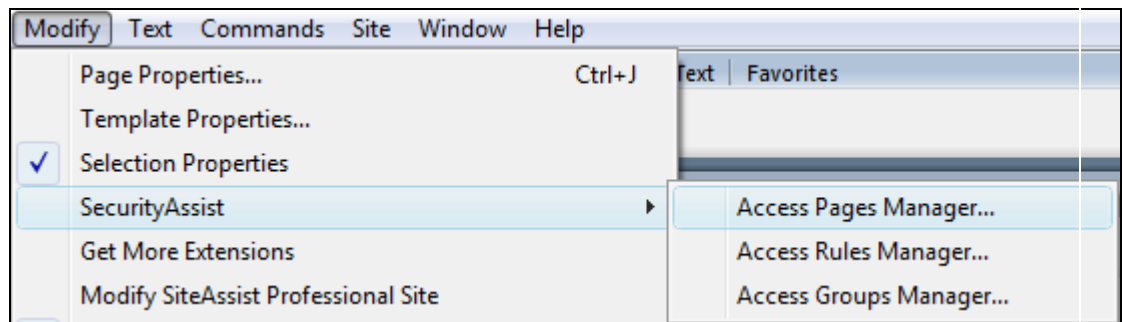
9. Leave the Return path field empty unless required for your needs.
10. Specify the redirect pages for success or failure.
11. Click **Finish** when you are ready.

Configuring Access Rules

With SecurityAssist's Access Pages Manager you can specify various settings that determine which users can access which pages.

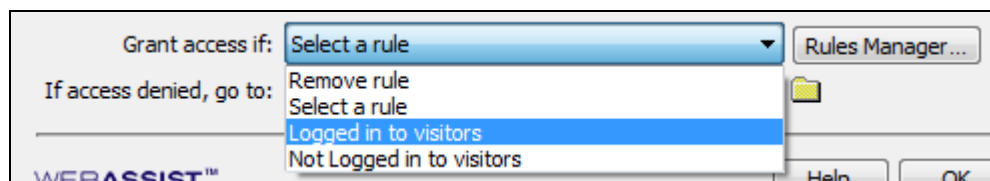
With this menu, combined with the Access Rules Manager and Access Groups Manager, your site will be completely secured.

1. From the **Modify** menu, choose **SecurityAssist > Access Pages Manager**.



Once the Access Pages Manager loads, you will see a site tree of all the files in your site. Here you can restrict or allow access to any of your site visitors, depending on their user level.

2. Select the pages you wish to give access to visitors, once they log in.
Use Ctrl + Shift to select multiple pages at once.
3. From the **Grant access if:** menu choose **Logged in to Visitors**.



This provides access to the selected pages to anyone who has logged in to the site.

4. From the **If access denied, go to** field enter the file name for the page that you would like non-visitors to be redirected to when attempting to access the selected pages.
5. If you wish to restrict access to pages when a user is logged in, you can choose the **Not logged in to visitors** option.

You can create a wealth of complex security settings that restrict users based on their user levels. Including, creating administrative permissions, and creating groups of users.

This process is clearly covered in the *User Level Authentication Solution Recipe* available from the SecurityAssist Support page.

Additional Resources

The following resources are available to help you get the most of SecurityAssist.

Solution Recipes

User Level Authentication

- Learn how to create custom user levels in your database, applying access rules for your pages, and using the Show Region Server behavior to restrict/allow visibility of page elements to specific users.

Using SecurityAssist with DataAssist

- Learn how to combine the pages and functionality from DataAssist with the security provided in SecurityAssist. An important step in the process for creating an administrative back-end and encrypting passwords.

Context Sensitive Help Documentation

All WebAssist products include help documentation built into the product. As you progress through any SecurityAssist interface, choose the Help button to view information for that step.

How To's

A number of How To's that have been created to help you implement various functionality using SecurityAssist.