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Setting Up Dreamweaver for FTP and Site Management

This document explains how to set up Dreamweaver CS5.5 so that you can transfer your files to a hosting server. The information is applicable to the CS6 version for Dreamweaver with only a few minor differences. The steps outlined here explain how to set up the FTP (File Transfer Protocol) features. File transfer over a network is not discussed here. Consult your network administrator for assistance.

The file transfer function available in Dreamweaver does more than simply move files to and from a server. The function actually serves as a file management system where the user is able to upload and download files, synchronize files on the server and local computer, and much more.

Although the site set up function is readily available from any Dreamweaver user interface, to make it easy to follow this tutorial set your user interface to Classic by selecting that option form the drop down list in the top right corner of your screen. It is circled in the illustration below.
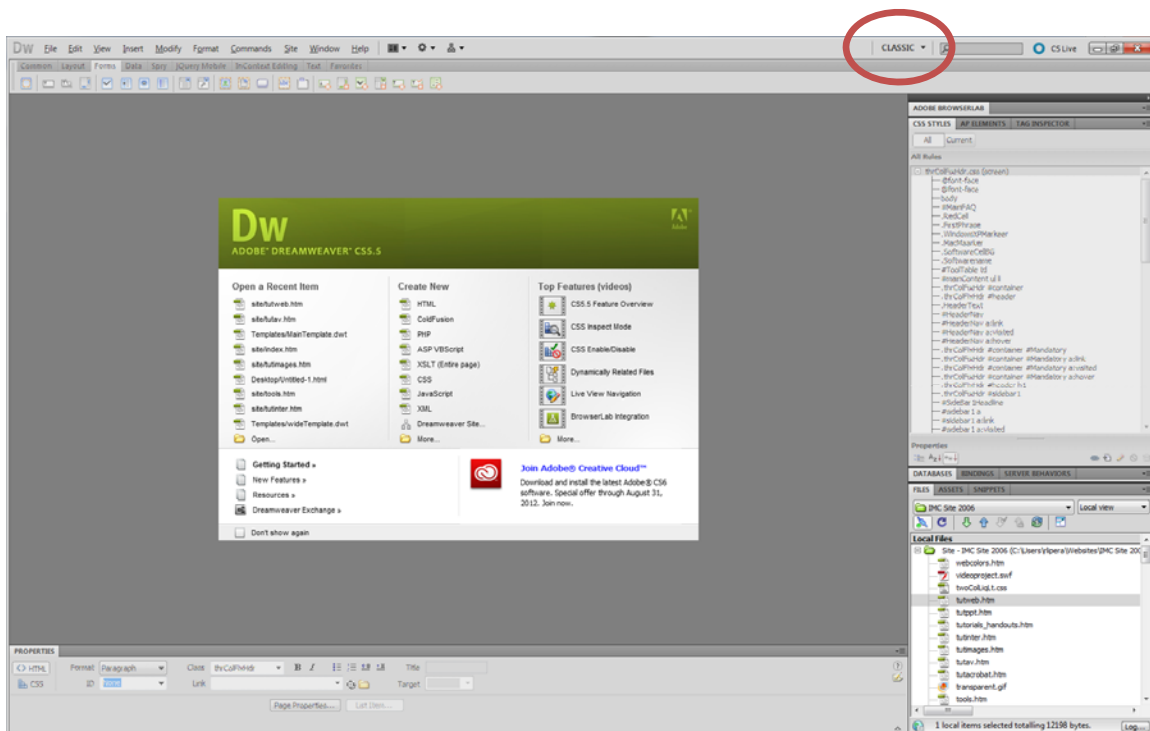
Click Site on the Menu bar. A drop down list will appear as illustrated on the right.
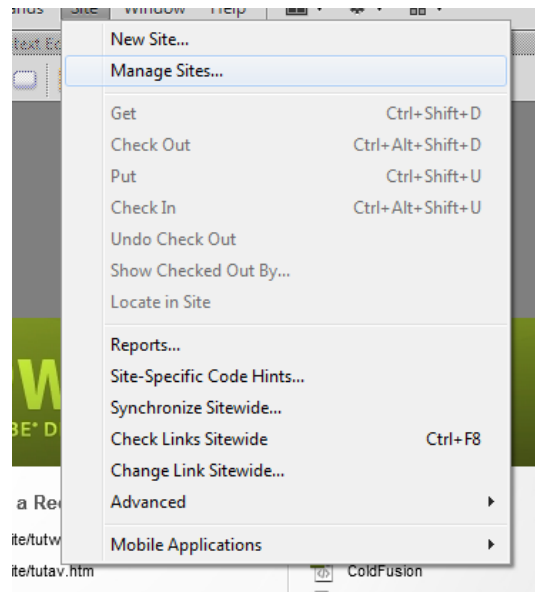

Select New Site. The Set Up panel will appear. It will resemble the illustration below.
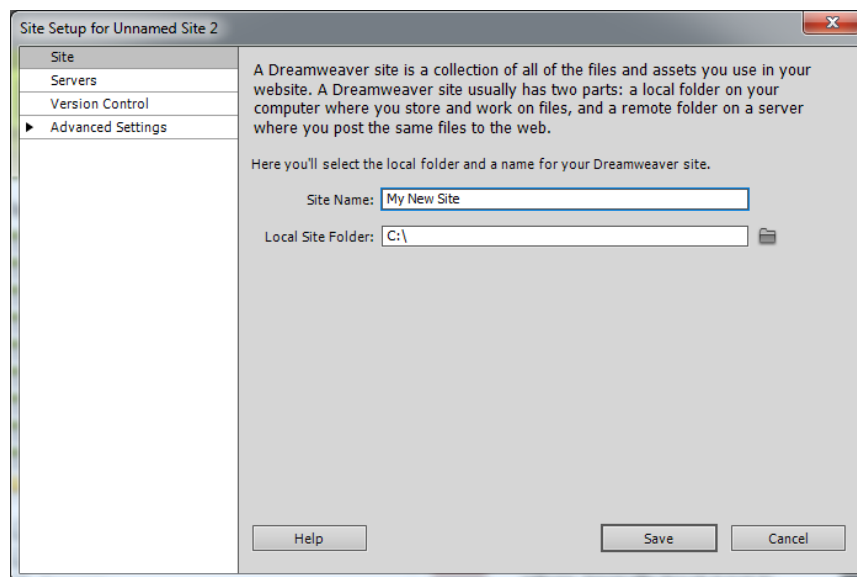

Enter the name of your Web site in the Site Name space. This is the name by which you will recognize your site. It can be any name you wish, but if you work on several sites you will want to be sure that it is a name that cannot be confused with another site.

You must enter the Local Site Folder information. This is the site's root folder on your computr. You can click the Folder   button to navigation to the root folder location.

Find the root folder then click Save. You will return to the Site Setup panel. It will now resemble the illustration below.
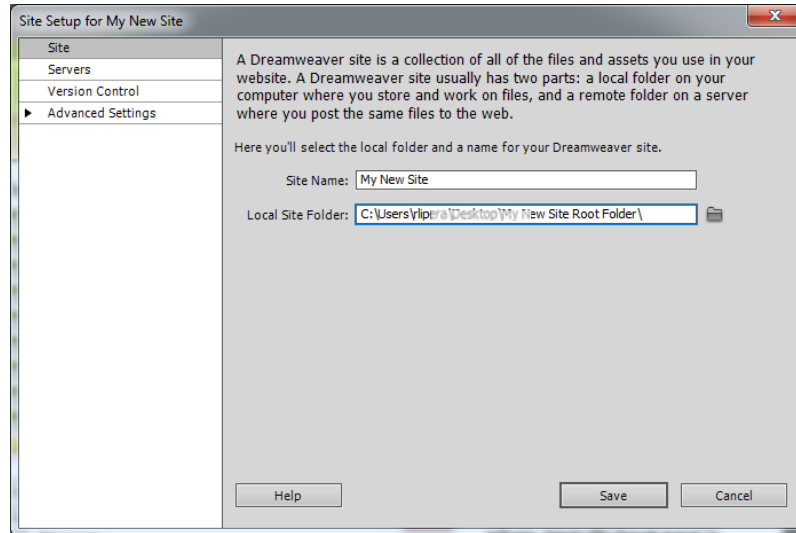
Click Servers in the left column of the Set Up panel. The panel will change to look like the illustration below.
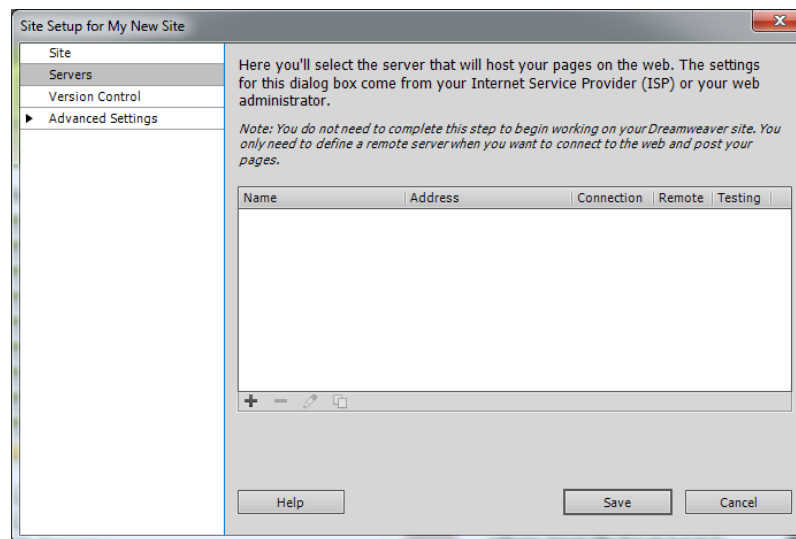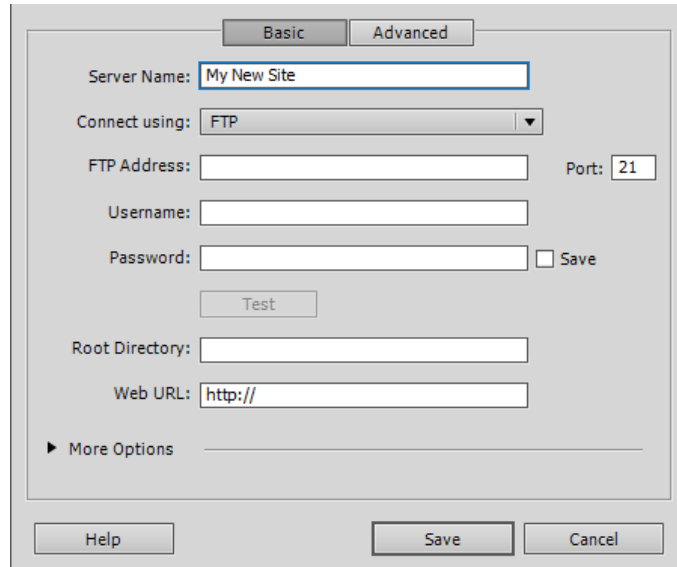

This is where you will specify the server that hosts your Web site. Your Web master or the company that provides your hosting service will supply the information that you need. It will include a username, path to the server, password, and, perhaps, other details.

NOTE: If you do not have that information on hand, you can still work on your site. The details about the root folder location and name that you set up in the previous panel are

enough for Dreamweaver to start to track your project. However, until you complete the
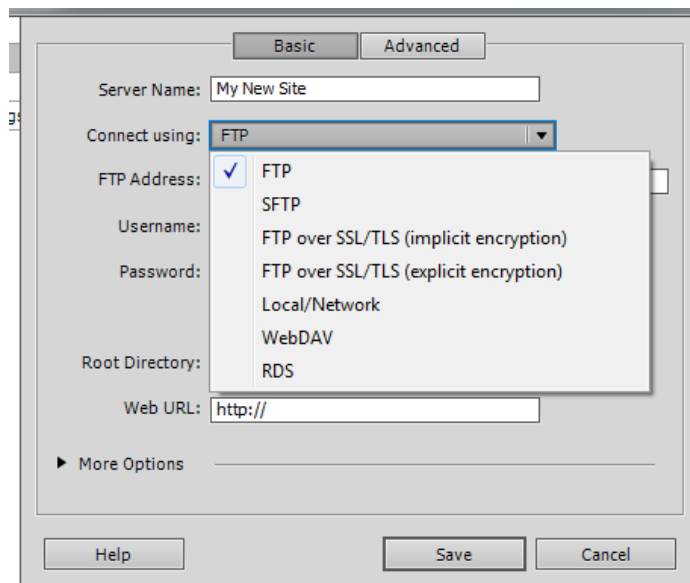*FTP setup you will not be able to transfer the files to the hosting server.*
Click the Add New Server + button. The Server Information panel appears as shown
below. Click the Basic tab at the top of the panel.

Enter the Server Name. In some instances a server may have a special name. This is not
always the case. Your Web master or host provider will tell you what this special name
might be, if it is needed. Otherwise the server name can be just about anything you wish.
You may find it easiest if the server name matches the Web site name.

Make sure that FTP is selected in the Connect Using drop down box.

Your Web master or host provider will advise you if a special version of FTP is required, such as SFTP for secure file transfer. Local/Network is used if you connect without using FTP over a network. That and WebDav and RDS are beyond the scope of this tutorial.

Using this illustration below as a guide, enter the following information:

FTP Address: This is the "place" on the Internet where your Web site resides. This address specifies not only the location, but also the method by which you get there. In simple terms, this example indicates that you get to "mywebsite.com" via FTP (File Transfer Protocol). In some instances the FTP address will actually start with "www" as in www.mywebsite.com. Your Web master or host company will tell you which to use.

It is also possible that you may not be given a typical URL for connection purposes. In that case your Web master or host company might provide an IP address, which is a string of numbers such as 128.123.45.86. Sometimes host companies require specialized access pathways that incorporate their domain names. In such a case your FTP address could be something similar to www.amazinghostcompany.com/x429/mywebsite/.

Username: Type in the username that your Web master or host company gives you.

Password: Type in your password.

Root Directory: If your Web master or host company specifies a special directory (also called a "folder"), enter it here. The most common name for such a directory is public_html. This is common industry practice. Any file in this directory is "officially" part of the Web site. If it is not in this directory it is not a Web site file.

Not all host servers require specifying a root directory, so be sure to check with your Web master or hosting provider. It is very important to make sure you files go to the right place!

Click the Test button. If Dreamweaver connects to the server properly you will get a success message. If there is a problem you will receive a message that indicates possible solutions.

The More Options selector will expand the panel to show additional FTP choices. They will include using Passive FTP, IPV6, and more. If you receive an error message when you test, trying some of these options may help.
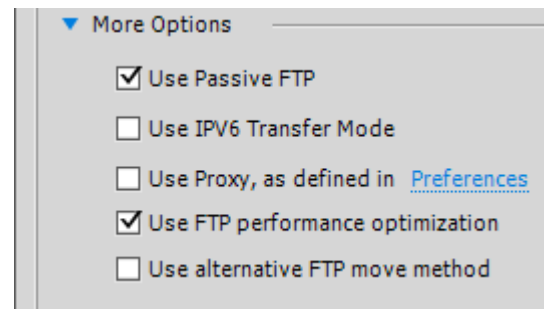
If you continue to receive error messages, check your FTP Address, Username, and Password choices. These are the most common sources of connection problems. If the connection errors continue, contact your Web master of host company for assistance.

Once connection is successful, click the Save button once or twice until the Site Setup Panel disappears. You are now ready to transfer files.

On your main Dreamweaver screen you will find the Files panel in the lower right corner. It is circled in the illustration below. If it is not displayed, click Windows on the Menu bar and then click the Files option.
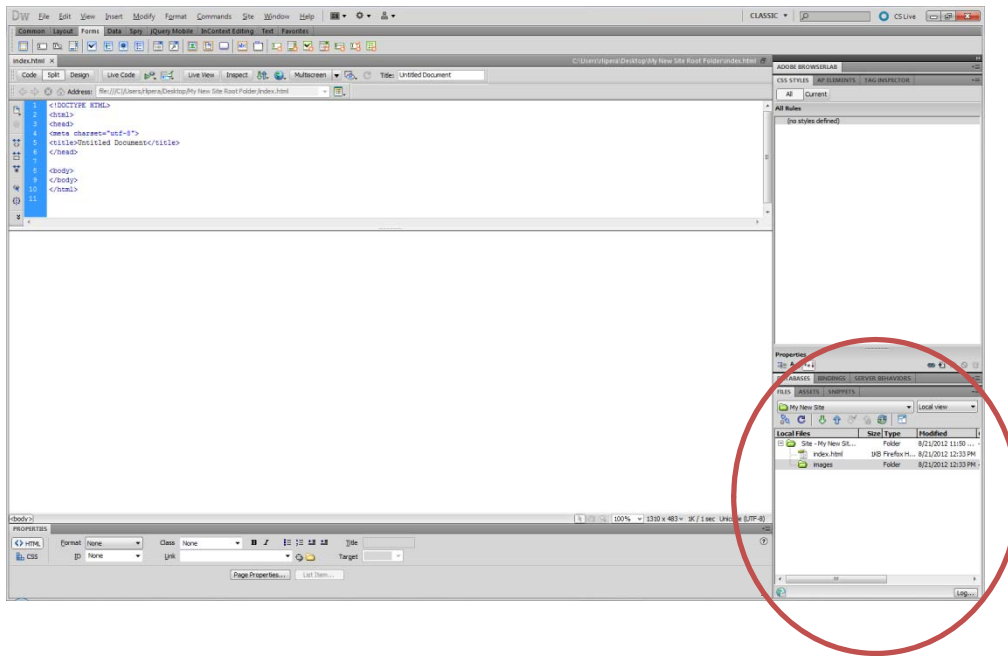
The Files panel has a series of buttons across the top. The diagram below identifies them:

Connection   Refresh   Get   Put   Sync   Expand
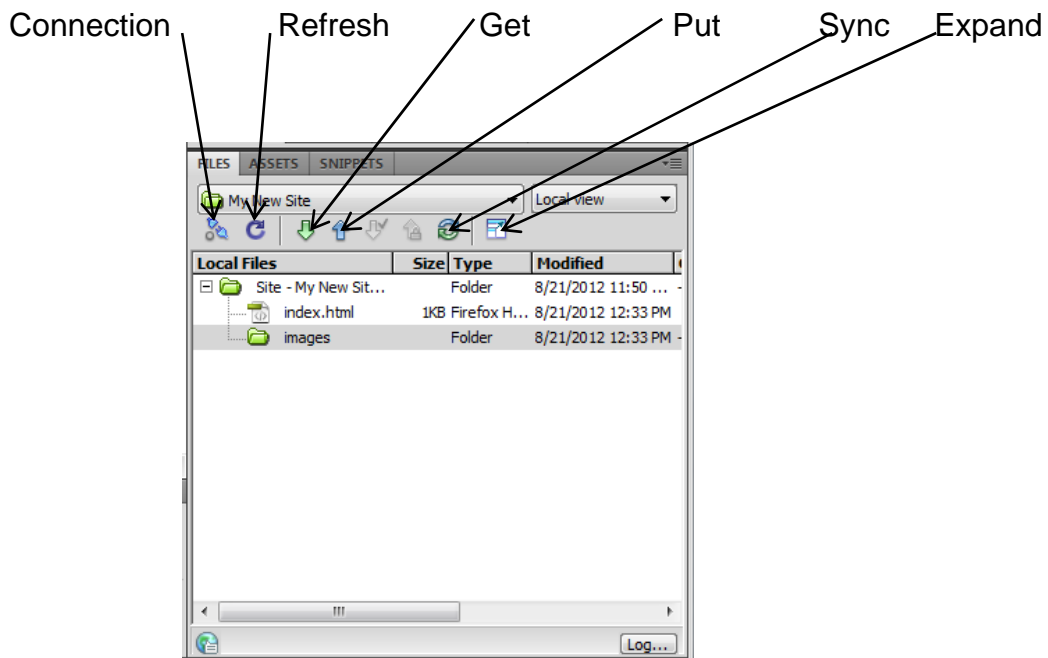
Connection: The Connection button activates the FTP connection between your computer and the host server. It does not necessarily start a file transfer, it only makes the connection.

Refresh: The Refresh button updates the list of files to reflect changes you have made.

Get: The Get button is the download button. It "gets" the files from the server and brings them to your computer.

Put: The Put button is the upload button. It "puts" the files from your computer onto the host server.

Sync: The Sync button starts a process of synchronizing the files between the host server and your computer. Be very careful using this button. It has several options, once you have clicked it, and it is important to choose the right option. This sync feature makes managing a Web site easier than many people expect.

Expand: The Expand button opens a new window that has two panes. The right side pane will show all of your Web site files on your computer, the left side pane will show all of the Web site files on the host server.

The illustration below shows what the expanded panes might look like

These are the various buttons you use for Put, Get, Sync, etc.

This side shows the files that are on your computer

This side shows the files that are on the hosting server
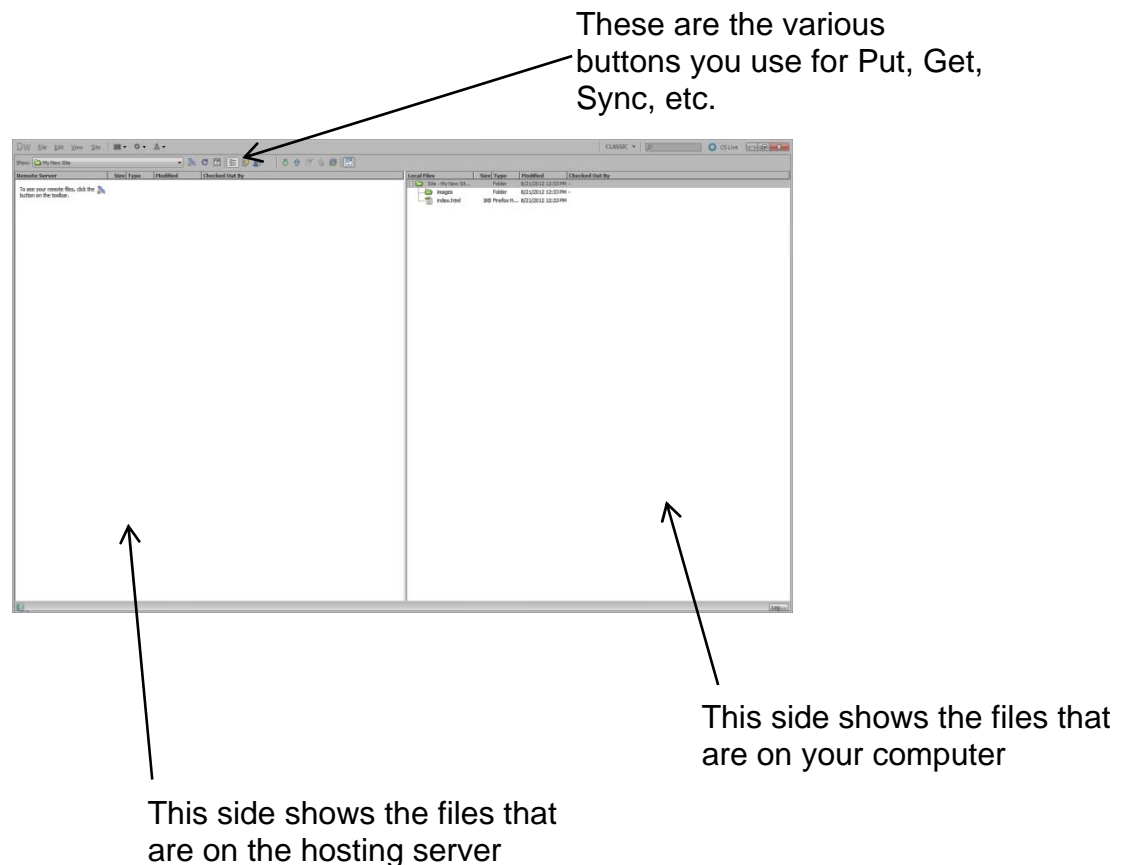
Uploading and Downloading Files

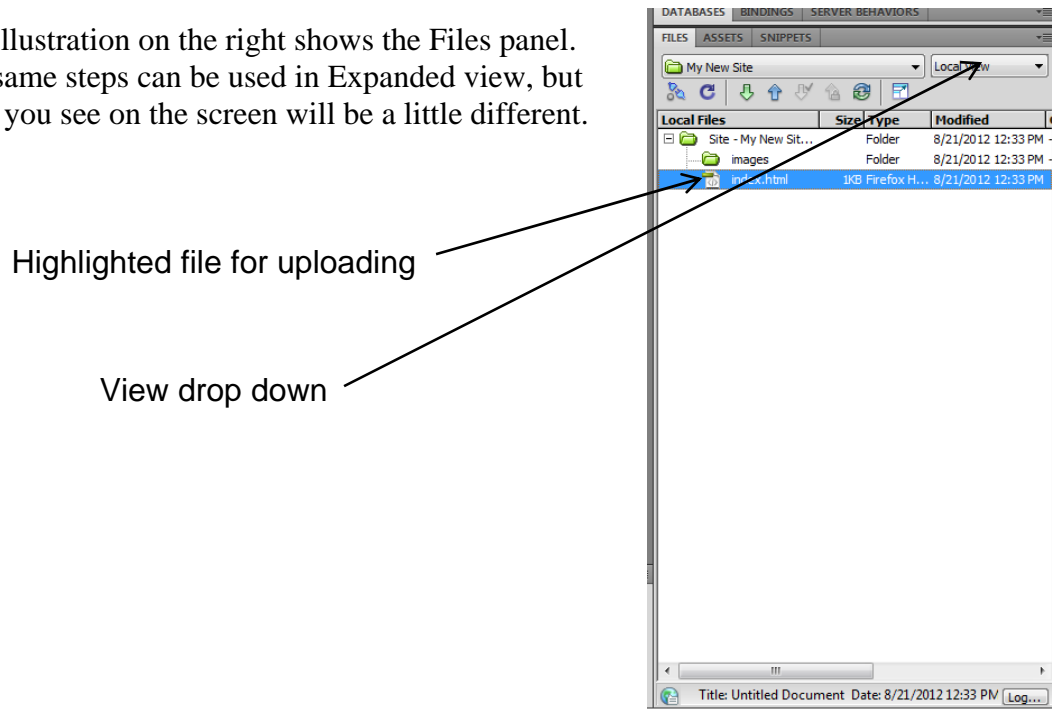Once you have set up your connection to your host server, uploading and downloading (or "Put" and "Get" as Dreamweaver likes to say) is very easy.

The illustration on the right shows the Files panel. The same steps can be used in Expanded view, but what you see on the screen will be a little different.

Highlighted file for uploading

View drop down

Make sure that the Local View is selected in the View drop down selector on the top right corner. This shows the files that are on your computer.
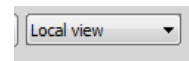
NOTE: If you select Remote Server you will see what is on your hosting server. While this is handy for downloading (or "Get"), it is not appropriate for what we are doing here. See the steps below for more information and how to use Get.

Highlight the file you wish to upload. You may highlight more than one file. You can also select entire folders.

Click the Put button.

The Dependent Files panel will appear, it is illustrated below.
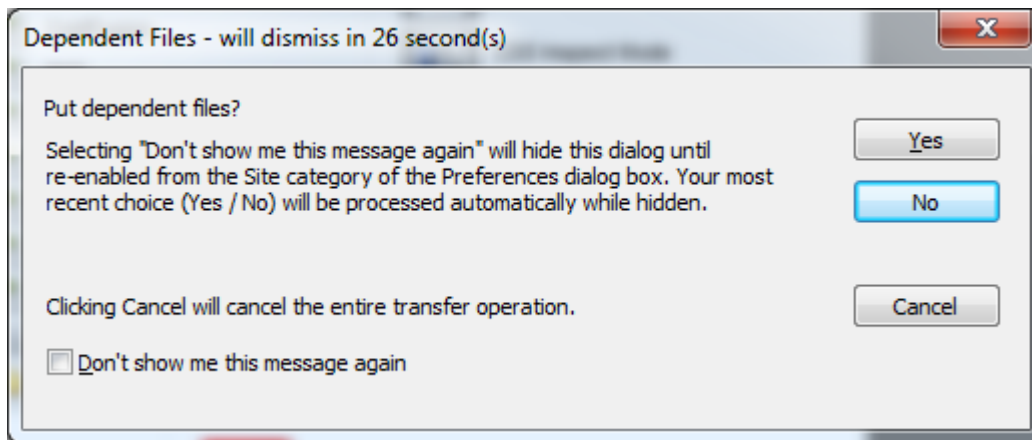

The question in the panel is asking if you want to upload the dependent files associated with main file, or file, that you have elected to upload. But what are dependent files?

To understand the concept of dependent files it easiest to image a Web page that you wish to upload. That page will consist of the HTML file of the page itself, and associated files that give the page its look and feel. These include image files. If you click Yes in the Dependent Files panel the HTML file and the images will be uploaded. It is possible that additional files may also be uploaded. Clicking Yes *does not guarantee* that CSS, video, sound, or other files will be uploaded as they are probably considered "linked" but not dependent.

If you click No only the file, or files, that you have selected will be uploaded.

Clicking Cancel will stop the download action.

Your decision to click Yes or No can be based on many considerations. Among them are:

- Clicking Yes will almost for sure upload all the files necessary to display your Web page.
- Clicking Yes will probably lengthen the time it takes to accomplish the upload because of the number of files.
- Clicking No will result in a quicker upload
- Clicking No means you could miss important files

Once you click Yes or No the upload (or Put) process will start. If everything goes perfectly a panel will appear that displays the progress of the Put operation. You can monitor the Put progress from this panel.

If there are problems or questions that Dreamweaver encounters other panels may be displayed. One of the most common is the panel shown below.
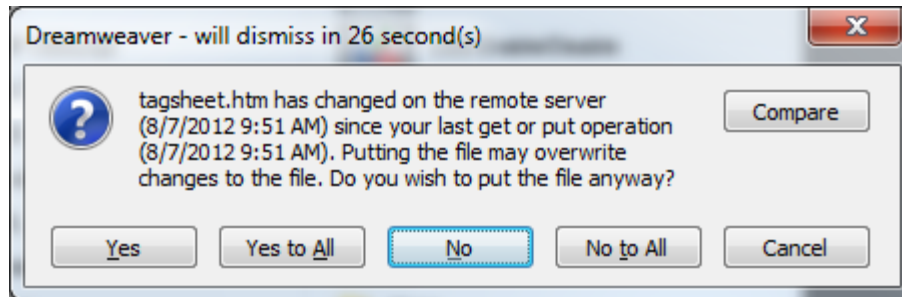
This panel indicates that Dreamweaver has discovered that the file on the server is believed to be newer than the file you are Putting. If you click Yes, the file you selected for upload will overwrite the file on the server. If you click Yes to All this action will occur whenever this conflict is detected.

Clicking No will prevent the Put file from overwriting the file on the server, and clicking No to All does the same for all conflicts.

The problem that is often encountered is that the new file selected for upload is not really older than the file on the server. The conflict can be a reflection incorrect dating of the files on the hosting server. If you are confident that you are REALLY NOT uploading an old file it is perfectly OK to click Yes or Yes to All.

Downloading, or Getting, a file is just as easy as Putting a file. But, you have one important decision to make regarding the selection of the file.

If you have the Local View in the Files panel selected, you can simply highlight that file and click the Get button.

If you are not sure about which file you need to Get, change the view to Remote Server. All the files on the host server will be displayed. Highlight the file and then click the Get button.

In either instance, when you Get a file you will be asked about overwriting your local file, the one on your computer, and whether or not you want to download the dependent files. Make your selections as appropriate to the situation.

The Synchronize function in Dreamweaver is very powerful and a good example of how Dreamweaver goes beyond having a simple FTP feature and becomes a total site management tool.

When you click the Sync [icon] button Dreamweaver will ask a series of questions. Make your selection of the options carefully as they will affect what happens next. The Synchronize Files panel is shown below.
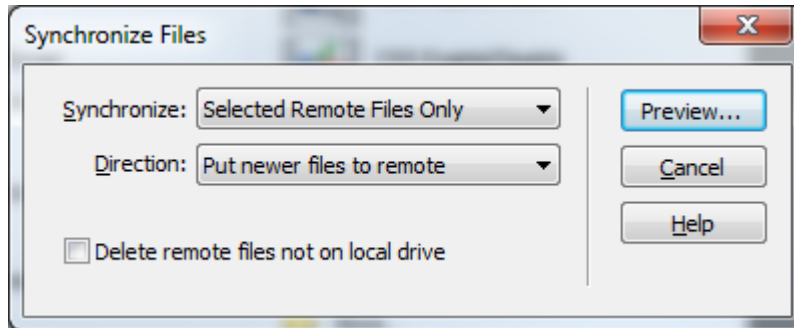
You will be given the options to:

- Synchronize the entire Web site or only the files you select.
- Put (upload) the newest files to the host server; Get (download) the newest files to your computer; or Put *and* Get the newest files to and from the server and your computer.

Click the Preview button. Dreamweaver will analyze the files on your computer and the server and list the ones that need to be uploaded or downloaded. You will be given the option to take action as desired.

Once you have synced the server and your local files on your computer you have duplicate file structures on each machine. This means that site management, maintenance, updating, and editing are easy.

Advanced Site Management Considerations

In addition to the features and functions described in this document, Dreamweaver has a number of advanced features that you may wish to consider.

One such feature is the option to set up a testing server. Testing servers are servers, or reserved folders on a regular server, that are not "open to the public." When you are working on a new Web site, or a new feature for an existing site, you may wish to test it live on the Web, but not in a place that is accessible to the public. This location is a testing server.

Dreamweaver allows you to set up a testing server in addition to the regular "public" server. Files can be uploaded to either server depending on the need. This means that a new page can be tested to find and resolve problems without it being open to regular view. Then once it is ready to go the page can be Put to the regular live Web server for general viewing.

Another useful feature in the Dreamweaver site management collection of options is the ability to set up check-in/check-put procedures. Check-in/checkout is particularly important where Web sites are edited by more than one person. Users with editing privileges are specified in the Site Management areas and can be listed during site setup. Any page that is being worked on is "checked out" and cannot be edited by another user until it is "checked in."

The check-in/check-out feature is especially handy when sites are managed by a Webmaster using Dreamweaver but edited by others with Contribute.

NOTES TO CS6 USERS: The steps outlined in this document are nearly identical to those that will be used by users of Dreamweaver CS6. However, Dreamweaver CS6 has some important new upgrades. Most notably are two advancements that make the Put and Get operations better.

In Dreamweaver CS6 the Put and Get operations can now be performed simultaneously. In older versions of Dreamweaver you could not upload and download at the same time. With CS6 you can now send files "both ways" and reduce the time it takes to manage your site.

To clarify which way the files are going, in the Files panel and the Expanded view small arrows are now displayed next to the files that are being transferred. The direction and color of the arrows indicate if they are in the process of being uploaded or downloaded, or if they are in the queue for transfer.