

# iText DITO 2.3

## Release Preview Guide

March 2022

Disclaimer - This Release Preview Guide contains highlights that are expected to be included in the next minor release of iText DITO. It is not meant to be complete, nor does it guarantee that all of the listed items will be fully implemented.

# Introduction

We are excited to announce the public release of iText DITO 2.3, the latest version of our collaborative, data-driven, and template-based PDF generator. We have continued to improve upon the changes iText DITO 2.2 brought this past November by further enhancing the Manager component along with the Editor.

The focus of this release was to further support the variety of features that has helped make iText DITO, the efficient, collaborative PDF solution it is today. One of the biggest updates for the 2.3 release is that we now support non-incremental updates. This encourages users to stay up-to-date with the latest version of iText DITO, allowing them to take advantage of our newest features & updates.

In addition, to ease the template creation process, our team incorporated a helper guide to some of the features that are commonly used when creating a template. We also wanted to update the design on some of the features for the Editor, to be more consistent and visually pleasing to our users.

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# iText DITO Updates

## Non-incremental updates

One of the main concerns our team wanted to address in the 2.3 release was the inefficient method users had to go through in order to update to the latest version of iText DITO. We now allow users to update non-incrementally, in other words, users can now update straight to the latest version of iText DITO. We wanted to encourage users to stay up-to-date with the latest version of iText DITO, allowing them to take advantage of our newest features and updates. Kubernetes deployment was introduced in iText DITO 2.2.x, and so, the minimum version that you can update from is iText DITO 2.2.1. If you wish to update using the Kotlin script, the minimum version that you can update from is iText DITO 2.0.1.

# iText DITO Manager Updates

## Server Motto

One of the major updates for iText DITO 2.3 is the ability for users to set a server motto to make an announcement. A user with an 'Administrator' role on the root workspace can set an announcement that will be communicated to all of the users. This can be helpful in keeping your team in-sync and making sure the team is aware of any major updates. Mottos can be used to announce maintenance work, help on distinguishing between staging and production environments, etc. This feature is located in the 'advanced settings' tab of the Manager component.

## Set server motto

Motto can be used to announce maintenance work, help on distinguishing between staging and production environments, etc.

## Child Workspaces

We introduced the addition of child workspaces in our previous release, iText DITO 2.2. The purpose of this feature was to allow for better logical separation of permissions & entities without having to install several application versions. This allowed the larger organizations we work with to have two or more departments with their own independent workspace.

Since then, there has been an update to give users a bit more flexibility when creating their child workspaces. Our team has added an additional control in the 'Advanced settings' that gives users the option to create a child workspace with, or without a required SDK instance. Previously, users would have to create these workspaces by first connecting them to an SDK instance.

<p><b>Allow creation of child workspaces from this workspace</b></p> <p>If you activate this item, then you will be able to manage workspaces</p> <p><input checked="" type="checkbox"/> Allow creation workspaces</p>	<p><b>Force child workspaces to have SDK instance</b></p> <p>Enforce that the child workspaces have at least one SDK instance attached</p> <p><input type="checkbox"/> Force child workspaces to have SDK instance</p>
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## Detailed Notifications

Our team really wanted users to see a more detailed report for when they perform a certain action or use a certain control. One of the messages that we wanted to improve was the notification that appeared when a user tried to import a template, for both legacy import (.dita files.) and the usual import (.dta files).

Previously, there would be a generic message saying "Template is imported" but never showed a detailed list on what specifically was imported. When users now import a template, a modal window will pop up displaying all the entities that have been imported, and is grouped by entity type. This includes all the templates, data collection, & resources that were attached to the imported template, and each item is represented by its name, type & number of versions the new item has.

## Template import report

Entity type	IMAGE
File name	iText_dito_logo
Number of versions	2
Entity type	TEMPLATE
File name	Recreated_Bank_Statement-Footer
Number of versions	2

CLOSE

# iText DITO Editor Updates

## New Calculations UI

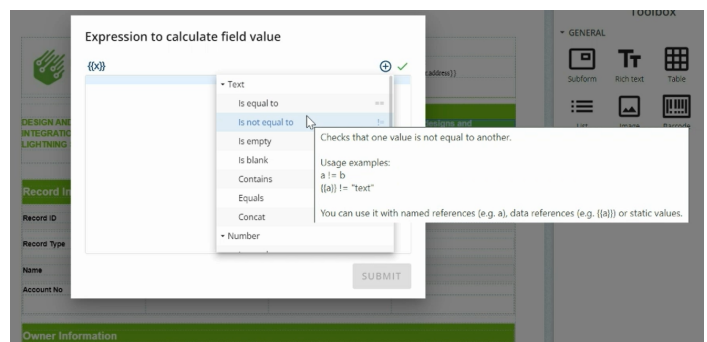
With the release of iText DITO 2.3 there has been tremendous effort in making iText DITO up-to-date in its design and UI. One of the many examples is the updated calculation expression that now matches the style of the redesigned Editor. The new layout allows users to choose from a variety of expressions to calculate field value, including text, number, Boolean, list, & logical expressions.

Our team has now gone a step further with this by adding examples for these expressions. There is also a list of required elements that are needed to perform the calculations correctly. The purpose of this was to help users execute their calculations while creating minimal errors.

### Old Calculation Model



### New Calculation Model



## Copy/ Edit Data Sample in Editor

In iText DITO 2.0, we tried to encourage users to update & edit their data samples in their data management by introducing the Manager component. However, we have taken into account feedback from our users & re-implemented a way for them to edit their data sample within the Editor component of iText DITO as well. You can now make temporary changes to your data sample before previewing the template to see how those changes will appear. If you click 'Custom Data' your data fields will automatically be copied over, allowing you to make the necessary changes in your data fields.

Please note that these changes will not be permanently saved, nor will it create a new data sample within the data collection you are using. This can be done through the Manager component where users can have more control over their data collections and samples.

EXISTING SAMPLE    CUSTOM DATA

```

1 {
2   "header":{
3     "phone":"+1 785 426 989",
4     "country":"Marcellus",
5     "email":"Hello@DocTech123.com",
6     "address":"247 Main Street, Chicago 97518 IL"
7   },
8   "recordId" : "001090000V2rtTAAR",
9   "recordType" : "Account Record Sample",
10  "Name" : "Edge Communications",
11  "AccountNumber" : "CD451796",
12  "Description" : "Edge, founded in 1998, is a start-up based in Austin,
13  "OwnerId" : "0050900008GjDZAA0",
14  "Ownership" : "Public",
15  "CreateDate" : "2021-07-16T13:49:40.000+0000"
16 }

```

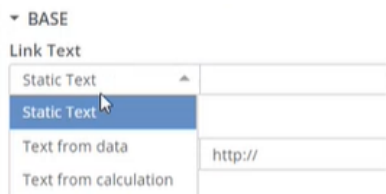
To save the data as a permanent data sample you should use Template Manager

PREVIEW

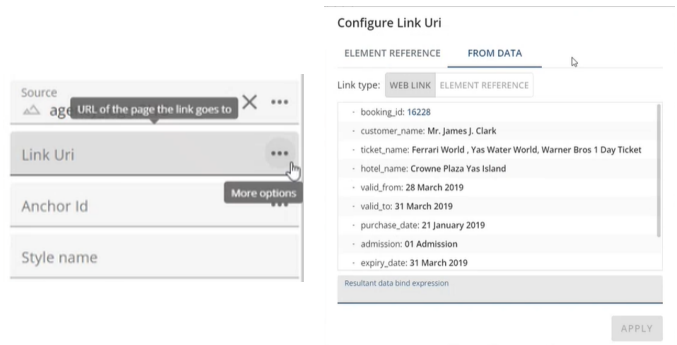
## Link Uri

When updating our Editor UI our developers stressed the importance of making certain functions more efficient while expanding on its capabilities. A prime example of this is the update to the Link Uri, which can be found under the properties tab. Users now have the ability to type the URL of the page that the link is going to while also being able to click on the ellipsis to reference an element. However, before doing so the user must define its 'Anchor ID' property first. You also have the ability to provide value from data, either through a web link or element reference.

### Old Link Uri

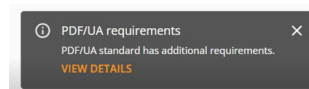
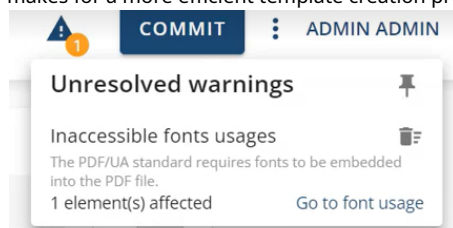


### New Link Uri



## Warnings

We also wanted to inform users whether or not their templates met the PDF/UA requirements, if they are in fact, creating a PDF/UA document. However, it can be confusing at times locating exactly where the error might have occurred, especially if there are multiple errors. This is why our development team wanted to create a more informative warning message that specifically illustrates where the mistake or error took place. This makes for a more efficient template creation process, without having our users wonder where they went wrong.



# iText DITO SDK/API

## Additional Kubernetes Support

For our latest update, if users are creating a PDF/UA document we wanted to inform them whether or not their templates met the PDF/UA requirements. However, it could be confusing at times to know exactly where the error might have occurred, especially if there were multiple errors or you have already built out a template.

This is why our team wanted to create a more informative warning message that specifically shows where the mistake or error took place, as well as the elements that were affected. Having our messages be more informative can really help our users know exactly what needs to be fixed in the template to meet the PDF/UA requirements.