How to get multiple Hyperlink MergeFields to work correctly

The Background:

In the Laserfiche Records Management certification course it is shown that Laserfiche Workflow can notify records managers by email of entries eligible for cutoff. In replicating the steps shown in the video as well as the accompanying guide, the email refused to have all the hyperlinks work properly. The email shown contained two parts:

1) A simple field merge with a hyperlink at the top which should open Laserfiche to the search results of all entries eligible for cutoff
2) A table field merge containing links to each entry found in those search results.

Only one field merge or the other would work depending on which was last modified in the word document uploaded to the Laserfiche Workflow server.

The Issue:

Microsoft Word does not save documents with more than one mergefields wrapped in a hyperlink if you alter the link text. The mergefields are replaced with plain text representations and as such no longer function as mergefields.

Replicating the Issue: (refer to Appendix A for screenshots)

1) Create Microsoft Word document
2) Create a hyperlink mergefield
   a. Insert > Quick Parts > Field
   b. Select Hyperlink
   c. Click the Hyperlink button
   d. Enter the desired link text in the Text to Display field
   e. Enter some placeholder text in Address field
   f. Click OK to see the result
   g. ALT-F9 to toggle field codes on
   h. Delete the placeholder text leaving the quotation marks.
   i. Place the cursor in between the quotation marks
   j. Insert > Quick Parts > Field
   k. Select MergeField
   l. Provide the desired mergefield name
   m. Click OK
3) Repeat step #2 to add one or more hyperlink mergefields
4) CTRL-A to select everything in the document
5) F9 to update all selected mergefields
6) Save the document
7) Close the document

8) Re-Open the document

One will notice that all the mergefields, except perhaps occasionally the last mergefield modified before saving, have been converted to plaintext and will no longer function as mergefields.

Correcting the issue: (refer to Appendix B for screenshots)

In order to correct the issue, some additional steps need to be performed. Specifically, one needs to add an additional field code called SET. According to the Microsoft documentation:

The SET field assigns specific information to a named variable, called a bookmark. One can use the bookmark to process the information invisibly. When one views the SET field in your document, the syntax looks like this:

{ SET Bookmark "Text" }

Bookmark is the name that stands for the information: a variable – for example, InterestRate

"Text" is information that is assigned to the bookmark: a literal value. Enclose the text in quotation marks; numbers don't require quotation marks.

To correct the overall issue, some additional actions need to be added to step 2:

2) Complete actions a. thru m. as previously described then perform the following actions
   n. Place the cursor behind the newly added mergefield but inside the quotations of the hyperlink field
   o. Insert > Quick Parts > Field
   p. Select SET
   q. Enter some unique placeholder text in the Bookmark text field
   r. Click OK to see the result
   s. Place the cursor behind the placeholder text you added in the Bookmark text field
   t. Add a space and the number 1 (we are using numbers for the "Text" value, so we do not need to enclose it in quotations)
   u. Repeat for each hyperlink mergefield

Once these actions have been accomplished, ensure that that steps 3 through 8 are also completed. By adding the SET fields alongside each mergefield inside of the hyperlink fields the mergefields will no longer be converted to plaintext when one closes and reopens the document. This will allow the creation of Word documents with multiple hyperlink mergefields that one can then use in Laserfiche Workflows.

Appendix A: Replicating the issue screenshots

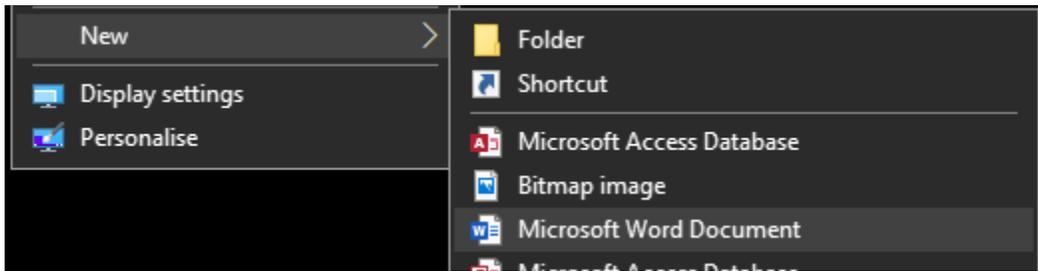Fig. 1: Create Microsoft Word Document

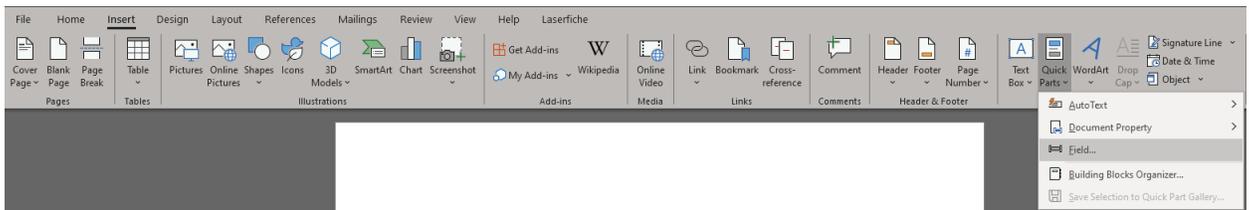Fig. 2a: Create a hyperlink mergefield: Insert > Quick Parts > Field
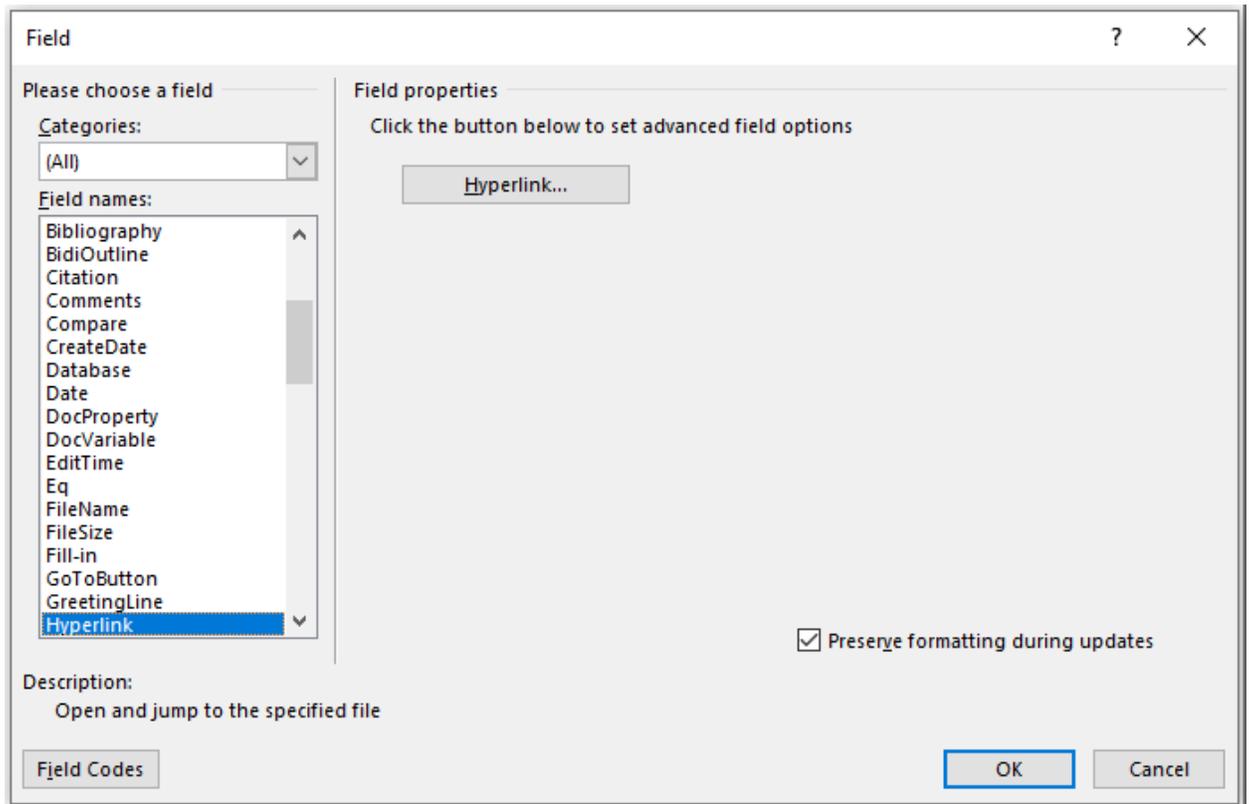

Fig. 2b: Select Hyperlink
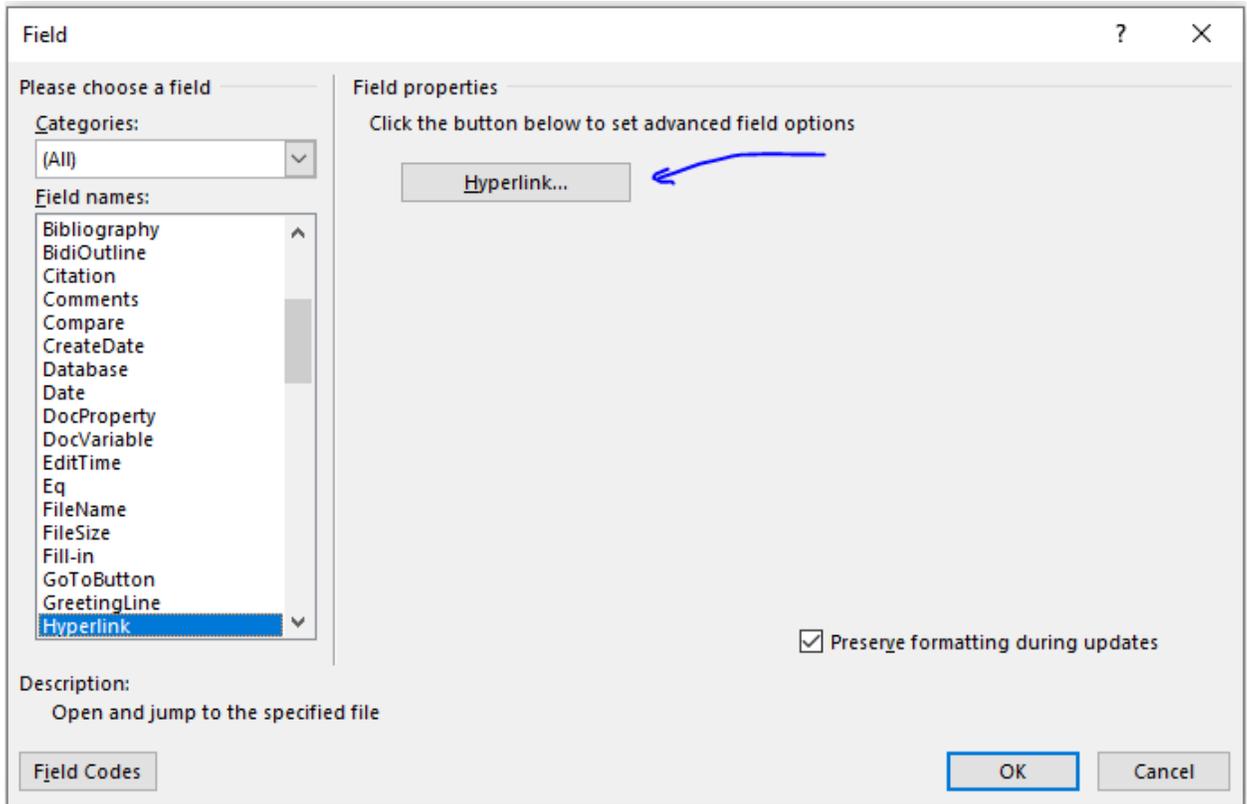

Fig. 2c: Click the Hyperlink button

Fig 2d: Enter the desired link text in the Text to Display field

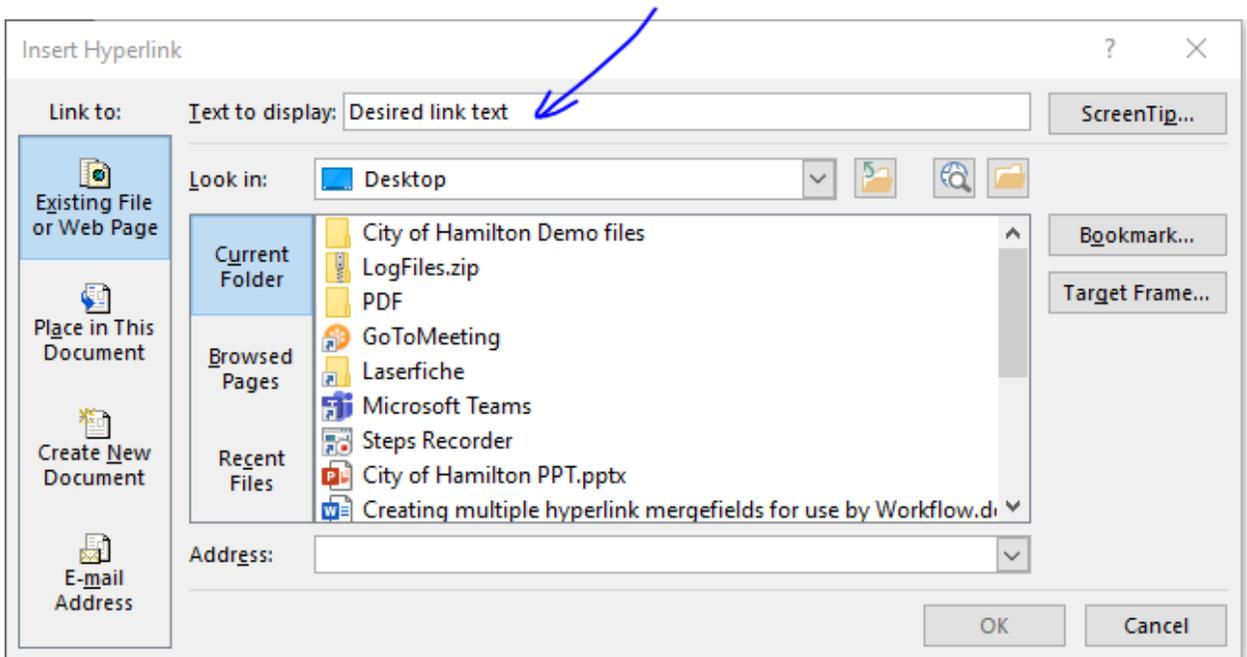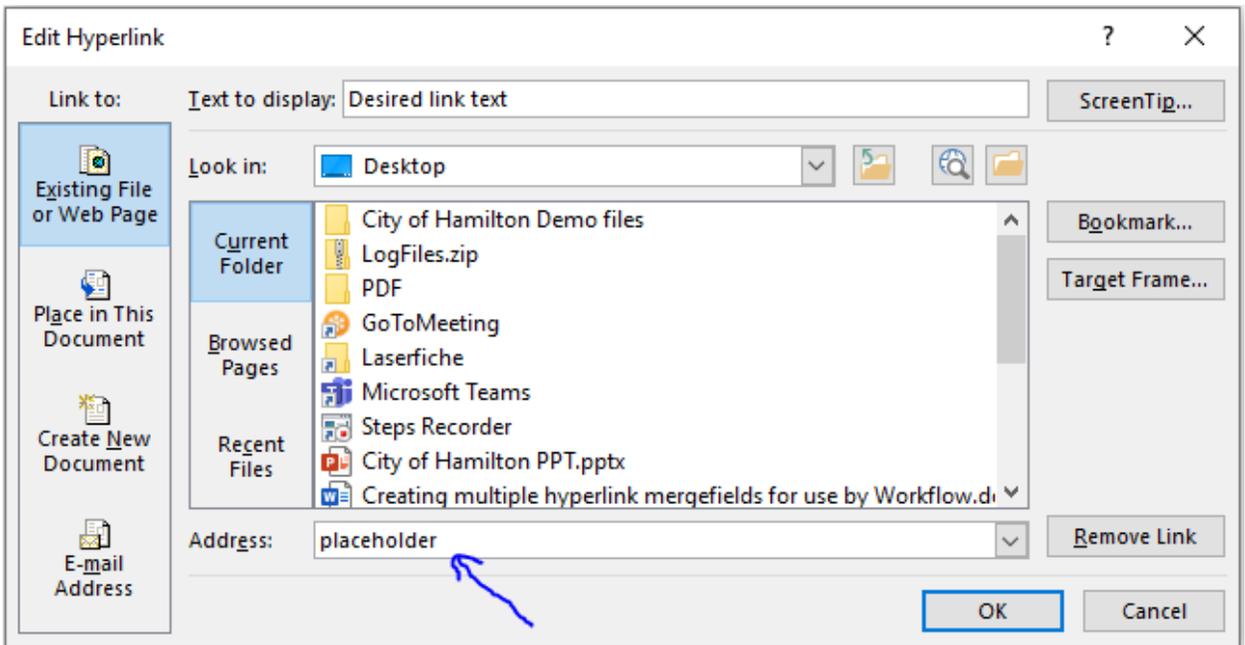Fig. 2e: Enter some placeholder text in Address field
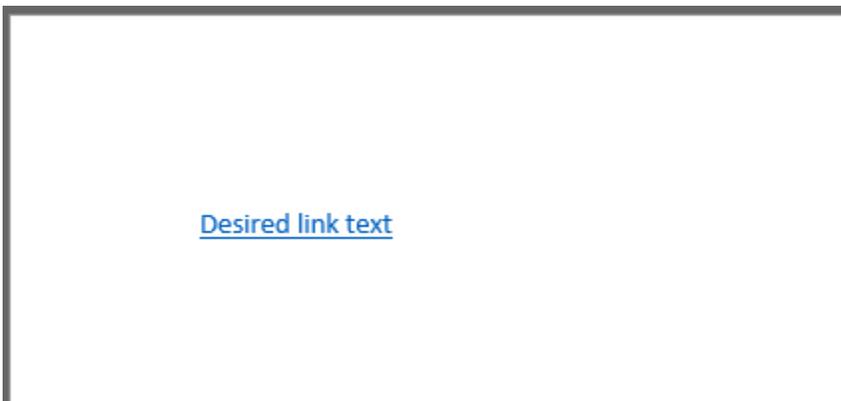
Fig. 2f: Click OK to see the result

Desired link text
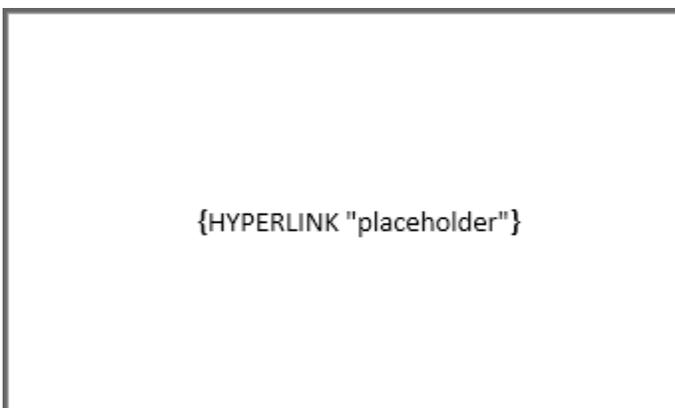
Fig. 2g: ALT-F9 to toggle field codes on

{HYPERLINK "placeholder"}

Fig. 2h: Delete the placeholder text leaving the quotation marks

Fig. 2i: Place the cursor in between the quotation marks
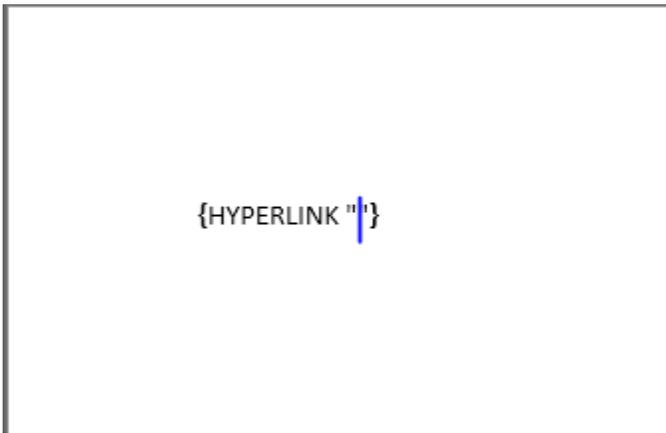
{HYPERLINK "|"}

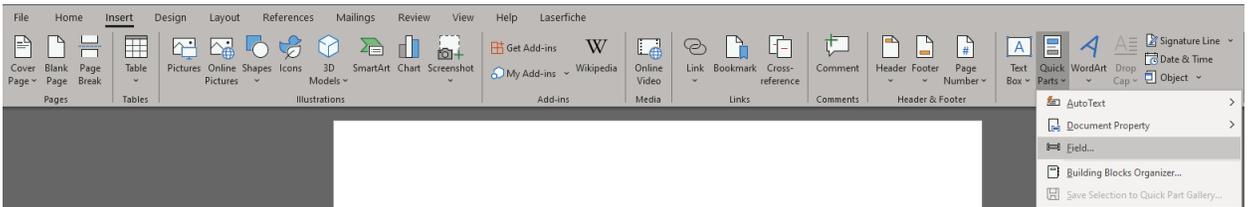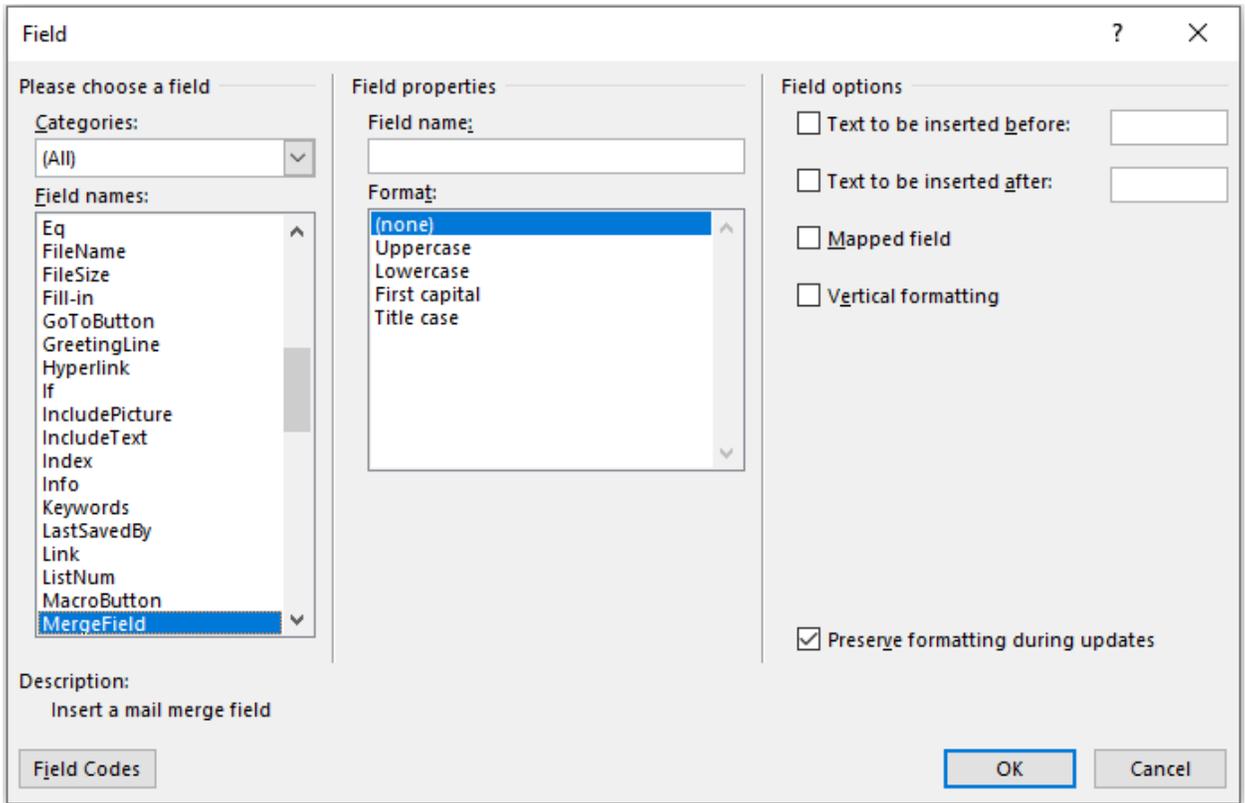Fig. 2j: Insert > Quick Parts > Field

Fig. 2k: Select MergeField

Fig. 2l: Provide the desired MergeField name

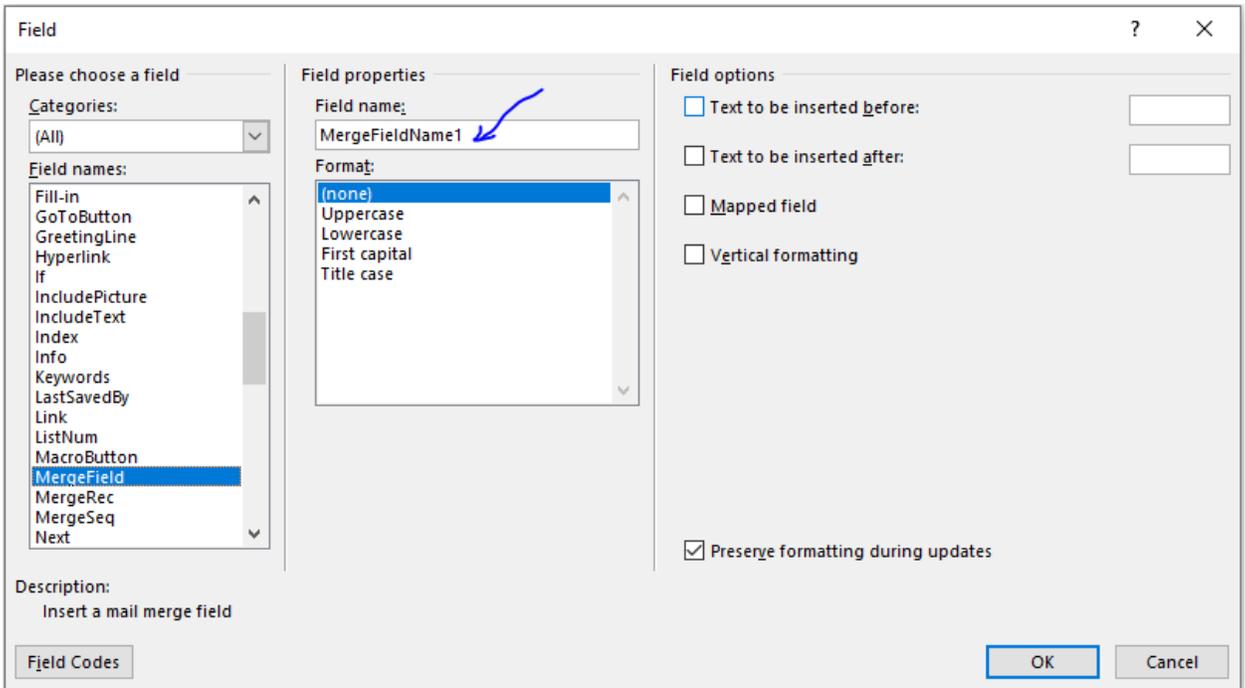

Fig. 2m: Click OK to see the result

{HYPERLINK "{ MERGEFIELD MergeFieldName1 * MERGEFORMAT }"}

Fig. 3a: Repeat step #2 to add one or more hyperlink mergefields (field codes toggled off)

Desired link text

Desired link text 2

Desired link text 3

Fig. 3b: Repeat step #2 to add one or more hyperlink mergefields (field codes toggled on)

{HYPERLINK "{ MERGEFIELD MergeFieldName1 * MERGEFORMAT }" }

{ HYPERLINK "{ MERGEFIELD MergeFieldName2 * MERGEFORMAT }" }

{ HYPERLINK "{ MERGEFIELD MergeFieldName3 * MERGEFORMAT }" }
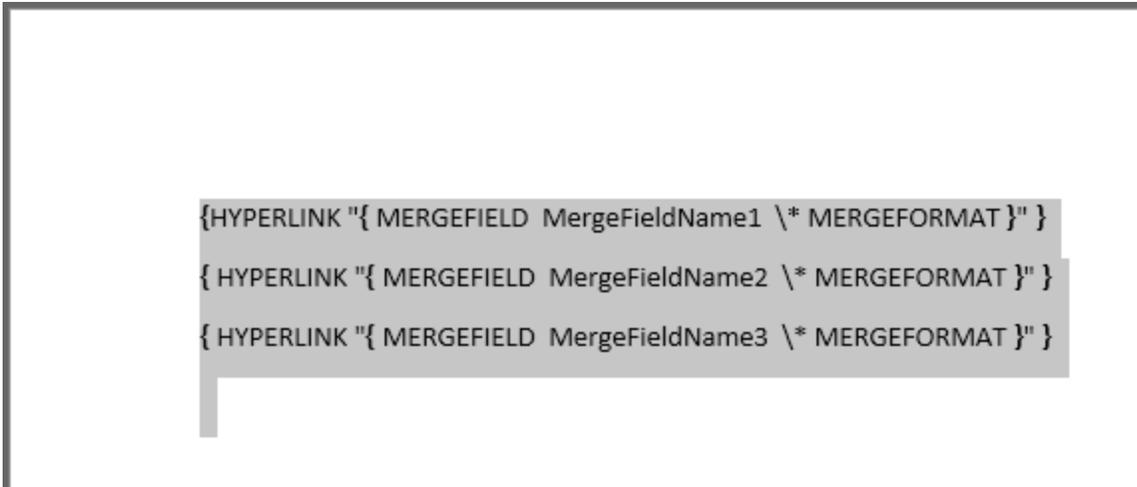
Fig. 4: CTRL-A to select everything in the document

{HYPERLINK "{ MERGEFIELD MergeFieldName1 * MERGEFORMAT }" }

{ HYPERLINK "{ MERGEFIELD MergeFieldName2 * MERGEFORMAT }" }

{ HYPERLINK "{ MERGEFIELD MergeFieldName3 * MERGEFORMAT }" }

Fig. 5: F9 to update all selected mergefields

{HYPERLINK "{ MERGEFIELD MergeFieldName1 * MERGEFORMAT }" }

{ HYPERLINK "{ MERGEFIELD MergeFieldName2 * MERGEFORMAT }" }

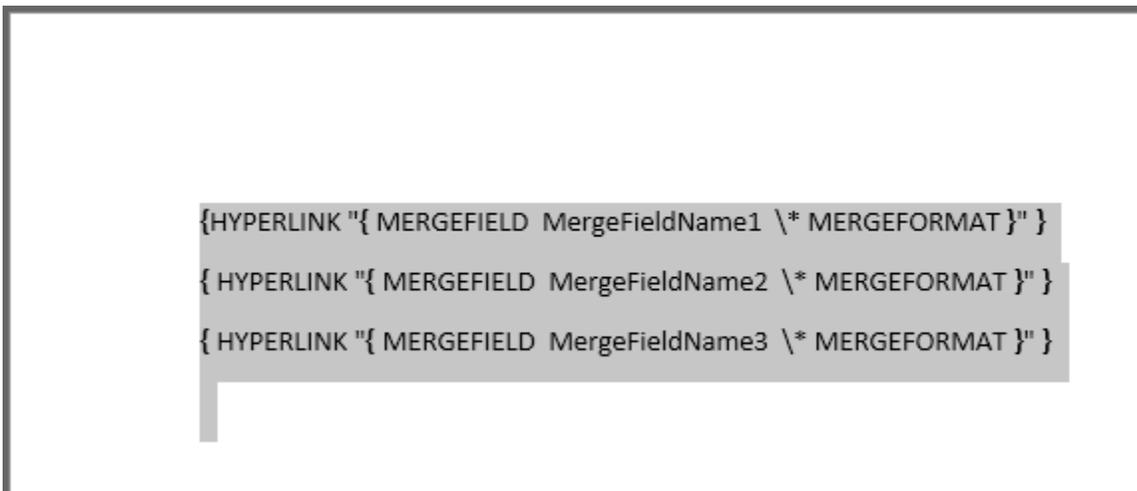{ HYPERLINK "{ MERGEFIELD MergeFieldName3 * MERGEFORMAT }" }

Fig. 6: Save the document

AutoSave ● Off

Fig. 7: Close the document

Fig. 8a: Re-Open the document (field codes toggled off)

Desired link text

Desired link text 2

Desired link text 3

Fig. 8b: Re-Open the document (field codes toggled on)

{HYPERLINK "{ MERGEFIELD MergeFieldName1 * MERGEFORMAT }" }

{ HYPERLINK "«MergeFieldName2»" }

{ HYPERLINK "«MergeFieldName3»" }

Appendix B: Solution screenshots

Fig. 2n: Place the cursor behind the newly added mergefield but inside the quotations of the hyperlink field

{HYPERLINK "{ MERGEFIELD MergeFieldName1 * MERGEFORMAT }" }

{ HYPERLINK "{ MERGEFIELD MergeFieldName2 * MERGEFORMAT }" }

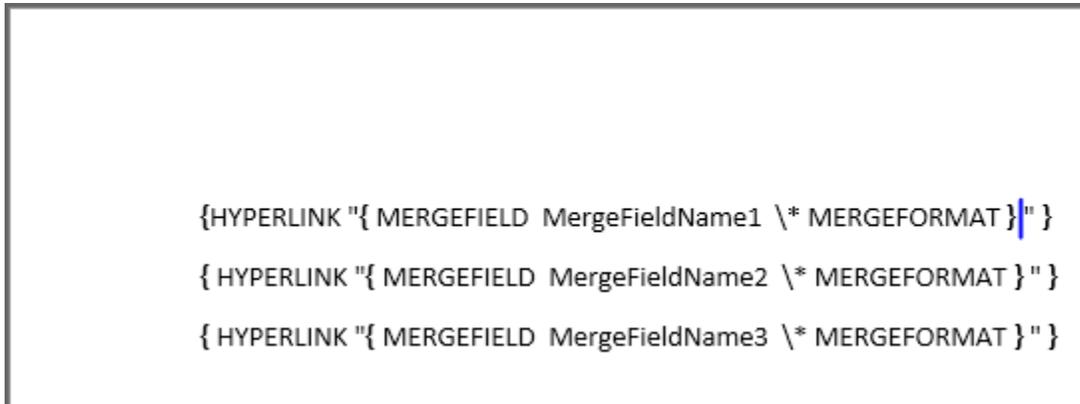{ HYPERLINK "{ MERGEFIELD MergeFieldName3 * MERGEFORMAT }" }
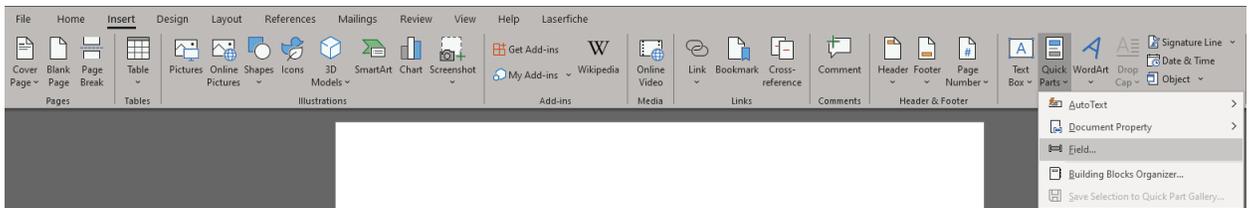
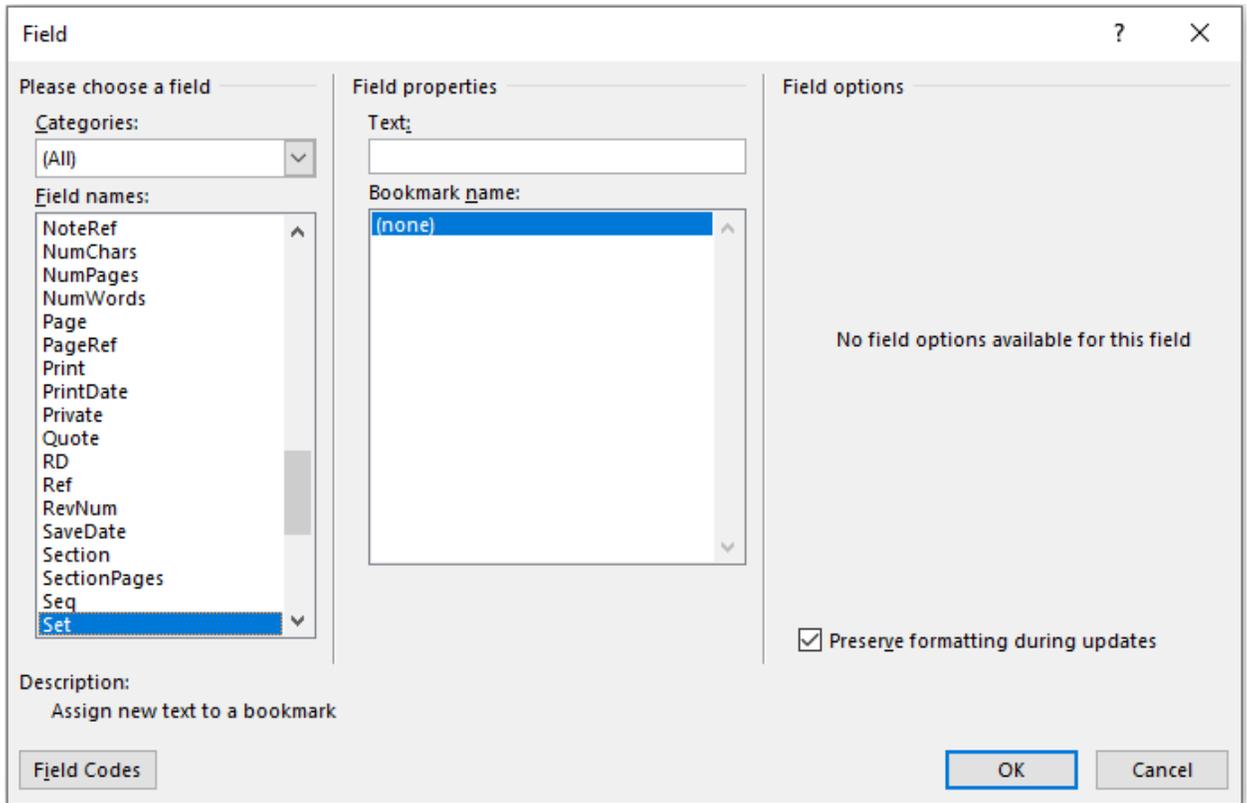Fig. 2o: Insert > Quick Parts > Field

Fig. 2p: Select SET

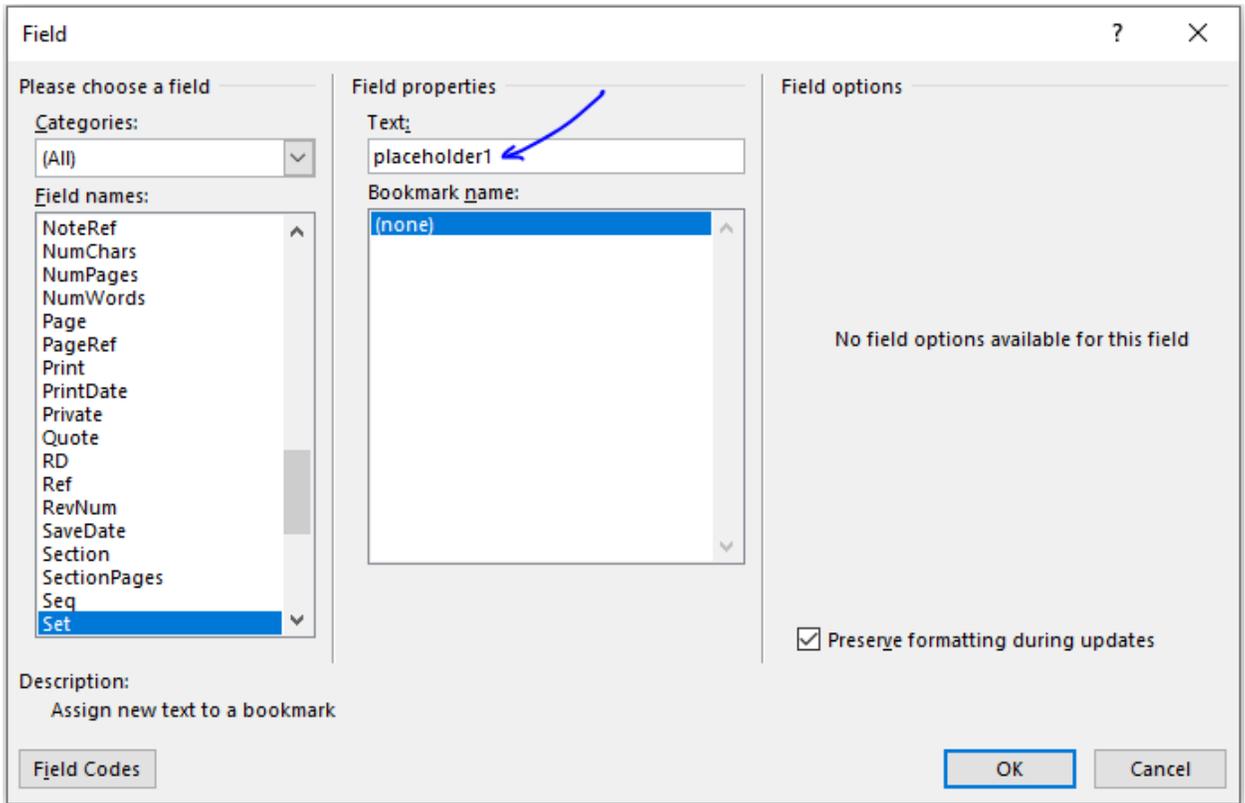Fig. 2q: Enter some unique placeholder text in the Bookmark text field

Fig. 2r: Click OK to see the result

{HYPERLINK "{ MERGEFIELD MergeFieldName1 * MERGEFORMAT }{ SET placeholder1 * MERGEFORMAT } " }

{ HYPERLINK "{ MERGEFIELD MergeFieldName2 * MERGEFORMAT } " }

{ HYPERLINK "{ MERGEFIELD MergeFieldName3 * MERGEFORMAT } " }

Fig. 2s: Place the cursor behind the placeholder text you added in the Bookmark text field

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{HYPERLINK "{ MERGEFIELD MergeFieldName1 \* MERGEFORMAT }{ SET placeholder1 \* MERGEFORMAT } " }
{ HYPERLINK "{ MERGEFIELD MergeFieldName2 \* MERGEFORMAT } " }
{ HYPERLINK "{ MERGEFIELD MergeFieldName3 \* MERGEFORMAT } " }
```

Fig. 2t: Add a space and the number 1 (we are using number for the "Text" value, so we do not need to enclose it in quotations)

```
{HYPERLINK "{ MERGEFIELD MergeFieldName1 \* MERGEFORMAT }{ SET placeholder1 1 \* MERGEFORMAT } " }
{ HYPERLINK "{ MERGEFIELD MergeFieldName2 \* MERGEFORMAT } " }
{ HYPERLINK "{ MERGEFIELD MergeFieldName3 \* MERGEFORMAT } " }
```

Fig. 2u: Repeat for each hyperlink mergefield

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{HYPERLINK "{ MERGEFIELD MergeFieldName1 \* MERGEFORMAT }{ SET placeholder1 1 \* MERGEFORMAT } " }
{ HYPERLINK "{ MERGEFIELD MergeFieldName2 \* MERGEFORMAT }{ SET placeholder2 1 \* MERGEFORMAT } " }
{ HYPERLINK "{ MERGEFIELD MergeFieldName3 \* MERGEFORMAT }{ SET placeholder3 1 \* MERGEFORMAT } " }
```