

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
 - I. 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.

<u>Correcting the issue:</u> (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

Field		?	×
Please choose a field <u>Categories:</u> (All) <u>Field names:</u> Bibliography	Field properties Click the button below to set advanced field options <u>H</u> yperlink		
BidiOutline Gitation Comments Compare CreateDate Database Date DocProperty DocVariable EditTime Eq FileName FileSize Eillein			
GoToButton GreetingLine Hyperlink	Preser <u>v</u> e formatting during	updates	
Open and jump to the specifier	ОК	Can	cel

Fig. 2c: Click the Hyperlink button

Field		?	×
Please choose a field <u>Categories:</u> (All) <u>Field names:</u> Bibliography BidiOutline Citation Comments Compare CreateDate Database Date DocProperty DocVariable EditTime Eq FilleName FileSize Fill-in GoToButton GreetingLine <u>Hyperlink</u>	Field properties Click the button below to set advanced field options <u>Hyperlink</u> Preserve formatting during up	odates	
Field Codes	ОК	Canc	el

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

Insert Hyperlin	k		? ×
Link to:	<u>T</u> ext to disp	lay: Desired link text	ScreenTi <u>p</u>
Existing File	Look in:	📃 Desktop 🖂 🖾 🖆	
or Web Page	Current	City of Hamilton Demo files	B <u>o</u> okmark
	Folder	PDF	Target Frame
Pl <u>a</u> ce in This Document	Browsed	B GoToMeeting	
w-5	Pages	Microsoft Teams	
Create <u>N</u> ew	Recent	Steps Recorder	
Document	Files	City of Hamilton PPT.pptx	
E- <u>m</u> ail	Addr <u>e</u> ss:		
Address		ОК	Cancel

Fig. 2e: Enter some placeholder text in Address field

Edit Hyperlink			?	×
Link to:	<u>T</u> ext to disp	lay: Desired link text	ScreenT	ï <u>p</u>
Existing File	Look in:	📃 Desktop 🕥 🎽 🚳		
or Web Page	Current	City of Hamilton Demo files	B <u>o</u> okma	rk
	Folder	PDF	Tar <u>q</u> et Fra	ame
Place in This Document	Browcad	🔊 GoToMeeting		
bocanicit	Pages	Laserfiche		
1		Microsoft Teams		
Create <u>N</u> ew	Re <u>c</u> ent	Steps Recorder		
Document	Files	City of Hamilton PP1.pptx		
B	Address	niaceholder	Remove	Link
E- <u>m</u> ail	Addi <u>c</u> on	R C		
Address		ОК	Car	ncel

Fig. 2f: Click OK to see the result



{HYPERLINK "placeholder"}

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

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Fig. 2i: Place the cursor in between the quotation marks



Fig. 2j: Insert > Quick Parts > Field



Fig. 2k: Select MergeField

Field			?	×
Field Please choose a field <u>Categories:</u> (All) <u>Field names:</u> Eq FileName FileSize Fill-in GoToButton GreetingLine Hyperlink If IncludePicture IncludeText Info Keywords LastSavedBy Link ListNum MacroButton MergeField	Field properties Field name: Format: Image:	Field options □ Text to be inserted <u>b</u> efore: □ Text to be inserted <u>a</u> fter: □ Mapped field □ V <u>e</u> rtical formatting	f 	
Field Codes		ОК	Cano	el 🛛

Fig. 2I: Provide the desired MergeField name

Field			?	×
Please choose a field <u>Categories:</u> (All) <u>Field names:</u> Fill-in GoroButton GreetingLine Hyperlink If IncludePicture IncludePicture IncludeText Index Info Keywords LastSavedBy Link ListNum MacroButton <u>MergeField</u>	Field properties Field name: MergeFieldName1 Format: (none) Uppercase Lowercase First capital Title case	Field options Text to be inserted before: Text to be inserted after: Mapped field Vertical formatting		
MergeRec MergeSeq Next ✓ Description: Insert a mail merge field		Preserve formatting during updates	Ca	ncel

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







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

Field		? ×
Please choose a field	Field properties	Field options
<u>C</u> ategories:	Text <u>:</u>	
(All)		
Field names:	Bookmark <u>n</u> ame:	
NoteRef NumChars NumPages NumWords Page PageRef Print PrintDate Private Quote RD Ref RevNum SaveDate Section SectionPages	(none)	No field options available for this field
Set Y		Preserve formatting during updates
Description:		1
Assign new text to a bookmark		
F <u>i</u> eld Codes		OK Cancel

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

Field		? ×
Please choose a field <u>Categories:</u> (All) <u>Field names:</u> NoteRef NumChars NumPages NumWords Page	Field properties Text: placeholder1 Bookmark name: (none)	Field options
PageRef Print PrintDate Private Quote RD Ref RevNum SaveDate Section SectionPages Seq	~	No field options available for this field
Set Description: Assign new text to a bookmark		✓ Preserve formatting during updates
Field Codes		OK Cancel

Fig. 2r: Click OK to see the result



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

{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

{HYPERLINK "{ MERGEFIELD MergeFieldName1 * MERGEFORMAT }{ SET placeholder11 * MERGEFORMAT }" }
{ HYPERLINK "{ MERGEFIELD MergeFieldName2 * MERGEFORMAT }{ SET placeholder21 * MERGEFORMAT }" }
{ HYPERLINK "{ MERGEFIELD MergeFieldName3 * MERGEFORMAT }{ SET placeholder31 * MERGEFORMAT }" }