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Presales Place: E-mailing Search Results from Workflow

In Workflow 8.3, there are a number of activities that deal with collections: working with a set of entries, users, lookup values or field values. Recently, we've received a number of questions about how to send an e-mail that includes each entry returned from a search.
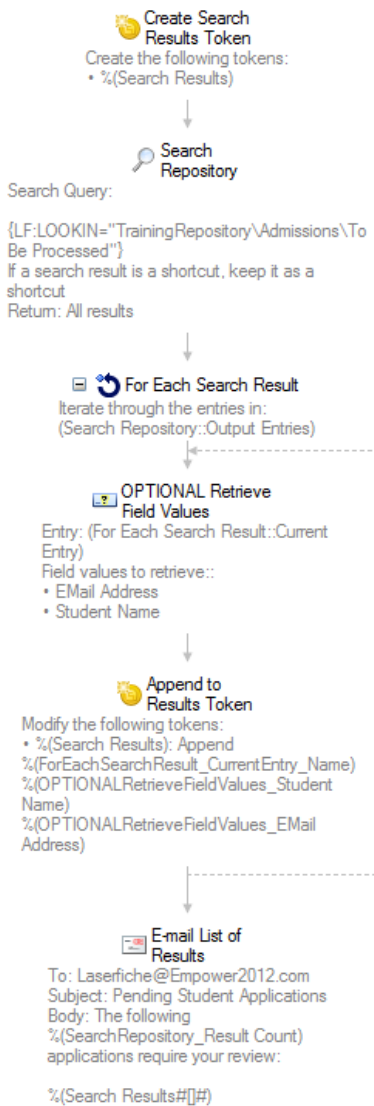
Leave a response! | Katie Oberthaler

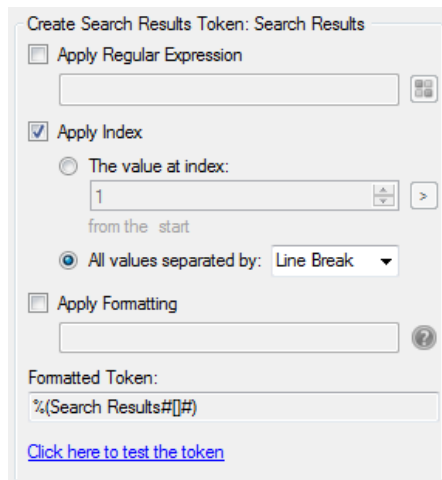By Pieter Nauta
Manager of Training

In Workflow 8.3, there are a number of activities that deal with collections: working with a set of entries, users, lookup values or field values. Recently, we've received a number of questions about how to send an e-mail that includes each entry returned from a search. Confusion comes from the fact that if you put an e-mail activity inside a For Each Entry activity, the system outputs a single e-mail for each entry returned in the search, which is not always ideal. Instead, a multi-value token should be used to gather information about each entry, and then that token can be inserted into the e-mail.

The key to this kind of logic is the Assign Token Values activity, which is used to both create and populate a multi-value token that can store information about each search result. As you can see in the screenshot below, this activity will be used once at the beginning of the search to create the multi-value token. Then, within the loop activity for each search result, values can be appended to the token. The values can come straight from the search activity, such as document name and path, or you can add more information by including field values. If you are using Web Access, you can include a hyperlink to the resulting document. After the loop activity, an e-mail will include this new token.

Create Search
Results Token
Create the following tokens:
• %(Search Results)

Search
Repository
Search Query:

{LF:LOOKIN="TrainingRepository\Admissions\To
Be Processed"}
If a search result is a shortcut, keep it as a
shortcut
Return: All results

For Each Search Result
Iterate through the entries in:
(Search Repository::Output Entries)

OPTIONAL Retrieve
Field Values
Entry: (For Each Search Result::Current
Entry)
Field values to retrieve::
• EMail Address
• Student Name

Append to
Results Token
Modify the following tokens:
• %(Search Results): Append
%(ForEachSearchResult_CurrentEntry_Name)
%(OPTIONALRetrieveFieldValues_Student
Name)
%(OPTIONALRetrieveFieldValues_EMail
Address)

E-mail List of
Results
To: Laserfiche@Empower2012.com
Subject: Pending Student Applications
Body: The following
%(SearchRepository_Result Count)
applications require your review:

%(Search Results#[]#)

Here are a few tips to keep in mind:

The token that you create should be multi-value, and each time it is updated it should have a value appended to it.
Within the For Each Entry loop, be sure that the fields you retrieve and values you work with are coming from the current entry,
not just from the first entry in the list of search results.
When configuring the e-mail, the token dialog will be used to format the search results token that you created. Be sure to set the
token to include all of the values separated in a logical way. As you can see in the following screenshot, this e-mail will send the in-
formation about each search result on its own line.

Create Search Results Token: Search Results
☐ Apply Regular Expression

☑ Apply Index
    ○ The value at index:
        1
        from the start
    ● All values separated by: Line Break ▼

☐ Apply Formatting

Formatted Token:
%(Search Results#[]#)

Click here to test the token

Comment: *

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