



# Designing Reports in ZooEasy Online

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# 1. Introduction

You can develop your own reports for ZooEasy and make them available to the users of your administration. This report functionality merges data from your administration with text from the template file. By including field names in the template, the report functionality replaces these field names with data from your records. This manual explains how to do this and how to use the available report templates.

We recommend you carefully to read Chapters 3, 4 and 5 before you start uploading to ZooEasy (Chapter 2).

For your convenience we have already developed a number of report templates that you can use and adjust. With these templates it is possible to develop your own reports by referring to fields from your own administration. This makes it possible to develop reports such as pedigrees and certificates in your own house style. When you generate the report, the fields in the template are replaced with the content from your administration. If no value is found for a field, no value is shown on the report and the field will remain empty. The layout from the template is copied into the generated report. Think fonts, images, headers & footers and possibly a watermark.

## 2. Roadmap

Creating a report follows these steps:

1. Define
2. Authorize
3. Upload
4. Merge

### 2.1 Define

First, the report template must be defined in ZooEasy:

1. Click the menu Management
2. Click the tab Base tables
3. Select option Report templates from the drop down box
4. Click Add
5. Enter a Description for the template
6. Choose the Type, is the template meant for a single Animal, a Breeding pair or a Contact
7. Choose the Position in your list of reports and add a Description if necessary
8. Click Save

Each template on the Reports tab is displayed in the menu Reports, on the sub-tab Animal details, Breeding pair details or Contact details at its own tab and at the position you specified above in step 7. Reports that are generated from the Reports menu will be delivered as a .docx file after merging.

In the menus Animals, Breeding pairs and Contacts, the templates are displayed on the screens with Animal details, Breeding pair details, respectively Contact details, and are listed on the Reports tab, if authorized. Reports generated from the Animal details, Breeding pair details or Contact details menu are generated as .pdf-file.

In addition, the templates, if authorized, can also be selected and generated from the (trial) pedigree.

## 2.2 Authorize

Report templates must be made visible within the roles in which they may be used. Reports can be generated in two formats: as .pdf or as .docx

As generated .docx reports still can be edited in Word, this is usually granted to managers only. End users can be authorized to be able to access .pdf versions only.

### **DocX version:**

1. Click the menu Management
2. Click the tab Base tables and select Roles from the drop down box
3. Click the role for which you want to grant access to the report
4. Click the tab Reports
5. Check the option Display menu Reports
6. Click the sub-tab Reports
  - a. In case the report concerns an animal:
    - i. Check the option Display tab Animal details
    - ii. Check the option Display sub-tab Animal details
    - iii. Check the option Display sub-sub-tab Animal details
  - b. In case the report concerns a Breeding pair:
    - i. Check the option Display tab Breeding pair details
    - ii. Check the option Display sub-tab Breeding pair details
    - iii. Check the option Display sub-sub-tab Breeding pair
  - c. In case the report concerns a Contact:
    - i. Check the option Display tab Contact details
    - ii. Check the option Display sub-tab Contact details
    - iii. Check the option Display sub-sub-tab Contact details
7. Click Save

### **PDF-version:**

1. Click the menu Management
2. Click the tab Base tables and select Roles from the drop down box
3. Select the role for which you want to grant access to the report
  - a. In case you want to grant access to an Animal report:
    - i. Click in the 1st row on the tab Animals
    - ii. Check the option Reports
    - iii. Click in the 2nd row on the tab on sub-tab Reports
    - iv. Check the option Display tab Reports
    - v. Click in the 3rd row on the tab on sub-sub-tab Animal details
    - vi. Check the option Display tab Reports
    - vii. Check each report you want to grant access to this role

- viii. Click Save
- b. In case the report concerns a Breeding pair:
  - i. Click in the 1st row on the tab Breeding pairs
  - ii. Click in the 2nd row on the tab on sub-tab Reports
  - iii. Check the option Display tab Reports
  - iv. Check on the sub-sub-tab Breeding pair details the option Display tab Breeding pair details
  - v. Check each report you want to grant access to this role
  - vi. Click Save
- c. In case the report concerns a Contacts:
  - i. Click in the 1st row on the tab Contacts
  - ii. Click in the 2nd row on the tab on sub-tab Reports
  - iii. Check the option Display tab Reports
  - iv. Check on the sub-sub-tab Contact details the option Display tab Contact details
  - v. Check each report you want to grant access to this role
  - vi. Click Save

## 2.3 Upload

To be able to work with a report template, now a template file created in MS Word 2007 or higher must be uploaded. For this you can develop a new template based on a blank document. But you can also start with the templates supplied by us, which you can change and format according to your preferences (see Chapter 4).

This goes as follows:

1. Click the menu Reports
2. Click the tab Reports
3. Click the sub-tab Animal details, Breeding pair details or Contact details, depending on the type of the report template
4. Click the sub-sub-tab of the desired report
5. Click the button Browse...
6. Search and select the template (.docx)
7. Click the button Open, the window closes and the name of the template file is now shown below File name
8. Click Save settings

The name of the selected template now appears underneath File name1,

You follow the same steps for any other templates.

## 2.4 Merge

Now we are ready to merge the report template with data. As we said before, this is possible in three ways:

As a .docx document:

1. Click the menu Reports
2. Click the tab Reports
3. Click the sub-tab Animal details or Breeding pair details
4. Click the sub-sub-tab of the desired report
5. Click the button with 3 dots to the right of Animal or Breeding pair
6. Search for and select the animal or breeding pair for which you want to generate the report
7. Click Generate report

The report is now generated as a .docx file. You can choose to open or save it.

As a PDF document:

1. Click the menu Animals or Breeding pairs depending on the type of report
2. Search for and select the animal or breeding pair for which you want to generate the report
3. Scroll to the right in the row of tabs and click on the Reports tab
4. Click on the 2nd row on the tab Animal or Breeding pair details
5. Select the desired report

The report is now generated as a PDF and will be placed in your Downloads folder.

The PDF report can also be generated from the Animal data and Breeding pair data screens with the (Trial) Pedigree links:

1. In case of the link from the Animal menu:
  - a. Click the menu Animals
  - b. Search for and select the animal for which you want to generate the report
  - c. Click on Pedigree in Animal details
  - d. Click on drop down box Reports
  - e. Select the desired Report
2. In case of the link on the menu Breeding pairs list - Trial Breeding pair:
  - a. Click the menu Breeding pairs
  - b. Click on Trial Breeding Pair
  - c. Select a father and a mother
  - d. Click on button Trial pedigree
  - e. Click on drop down box Reports
  - f. Select the desired report
3. In case of the link on the Breeding pair Index data - Trial pedigree
  - a. Click the menu Breeding pairs
  - b. Select a breeding pair
  - c. Click on Trial pedigree
  - d. Click the button Trial Pedigree on the pop up
  - e. Click on the drop down box Reports
  - g. Select the desired report

The report is now generated as a PDF and will be placed in your Downloads folder..

## 3. Points of attention

The following points of attention are important while creating reports and using templates:

### 3.1 General

- A template has to be made with MSWord version 2007 (or later) and has to be saved in the .docx format.
- References to field names are placed between \$ characters, like for instance \$RegistrationNumber\$
- Lists with all field names that can be used in a template can be found in chapter 5. Appendices.
- Field names must match exactly as defined in the administration. Field names (and with extra fields also the names of the extra field categories) are case sensitive. Punctuation, such as periods, spaces and commas, also count. When the field name in the template does not exactly matches the field name in ZooEasy, it shows between \$-characters on the generated report. E.g. \$Registrationnumber\$ will not be replaced by the actual value because it does not match with the defined field name \$RegistrationNumber\$.
- When a typing error is made while typing a field name in MSWord, it will not work to correct this with the backspace key or to correct it between the \$-characters. MSWord deals with this in a very sloppy way, due to the fact that invisible bytes are left between the \$ signs. You need to delete the field name including the \$-characters and enter it again. That is why we recommend you type all required field names first into a Notepad document and place them with copy and paste at the desired location in the report template.
- Fields for which a user is not authorized, but are placed on the report template, will not be visible to the user. The authorization as defined in the roles therefore also affects the reports. The label for the field will be shown, but the data will not be merged.
- A watermark or logo can be added to the template. For example, if the template is animal dependent and the photo of each animal is to be displayed as a watermark or logo, the value \$Picture\$ can be used. But it won't work if this field name is put in the document like the other labels. See how to under 3.3 Inserting Pictures.
- **Please note!**  
When the report is merged, the template is scanned for field value labels. Whenever a \$ character is found, all characters up to the next \$ sign are interpreted as a field value label. This is then replaced by the corresponding field value from the database. If a \$-character appears in such a field value - for instance: US \$ 400.00 - then things go wrong. PHPDocX will interpret this \$ sign as the start of a new data field. From this \$ character, everything from 400 to the next \$ character, which belongs to the next field name, will be interpreted as "field name" and all subsequent real field names will no longer be filled correctly. **Therefore, the \$ sign should not be used in data values when these could be included in report templates.**

## 3.2 Defining field names

The fields that can be used in templates are listed below in Appendix 5.1 for Animals, Appendix 5.2 for Breeding pairs and 5.3 for Contacts

Defining field names on the template works as follows:

- Name of the animal: \$Name\$ will show the name of the animal.
- Content of an extra field: \$<name extra field category>##<extra field name>\$. For example, \$General##Veterinarian\$ refers to the contents of the extra field Veterinarian in the extra field category General.
- Showing field values of ancestors is possible by placing the addition X\_ in front of the field name, where the X\_ is replaced by M\_, F\_, MMMF\_, depending on which ancestor should be looked for. F\_ stands for father and M\_ stands for mother, FM\_ stands for father of the mother, etc. In this way, data can be shown from a maximum of 10 generations of ancestors (See chapter 4 for the list of available templates).

For example:

- \$F\_Name\$ refers to the father's name.
- \$MF\_Name\$ refers to the name of the mother of the father.
- \$MMMM\_Name\$ refers to the name of the great-great-grandmother in the maternal line.
- When showing the content of an extra field of an ancestor, place the X\_ before the name of the extra field category, where X\_ stands for the ancestor. For example, \$M\_General##Veterinarian\$ refers to the mother's veterinarian.
- For the details of a breeding pair, place the addition BP\_ for breeding pair in front of the field name. For example:
  - \$BP\_LitterDate\$ gives the birth date of the breeding pair.

Note: The field names from Appendix 5.2 can only be used in templates for breeding pairs.

- With a breeding pair you can of course also provide information about the father, mother, and ancestors. You then add characters after BP: F for father, M for mother, and MM, FMF etc. for ancestors.

For example:

- \$BPF\_RegistrationNumber\$ for the registration number of the father
- \$BPMF\_Name\$ for the name of the fathers mother
- \$BPMM\_Color\$ for the color of a grandmother
- Data from offspring can also be included in reports. In a report for an animal the addition is O\_ and a for a breeding pair BPO\_. This only works if it is placed in a table on the template. The desired field names must be placed in a single row on the table. See example:

Name	Reg.nr.	Color	Gender	Born
\$BPO_Name\$	\$BPO_RegistrationNumber\$	\$BPO_Color\$	\$BPO_Gender\$	\$BPO_Born\$

In the merged report, this results in:



Name	Reg.nr.	Color	Gender	Born
Minny	RNr 12345678	Brown	Female	16-01-2017
Fjodor	RNr 12345679	Brown and white	Male	16-01-2017
Bella	RNr 12345680	Black	Female	23-08-2015
Rascal	RNr 12345681	White	Male	23-08-2015

When using tables in reports, several field names can be placed in a single cell and Table properties can be used to configure the table as required, for example if you do not want to see borders around the cells.

Contact data can also be used in Animal reports and in Breeding pair reports. The prefixes Owner and Breeder for animal reports and FemaleOwner for breeding pair reports have been defined for this.

For example:

- \$OwnerCity\$ and \$BreederHomepage\$ on Animal reports
  - \$BP\_FemaleOwnerBusinessName\$ on Breeding pair reports
- Extra field values of Contacts can also be included in the reports of animals and breeding pairs. The format for extra field values in reports is  
\$<prefix><extrafieldcategory>##<extrafieldvalue>\$

For example:

- \$OwnerGeneral##Member since\$, \$BreederGeneral##Member since\$ on Animal reports
  - \$FemaleOwnerGeneral##Member since\$ on Breeding pair reports breeding pairs.

Please note: the latter differs (still) from the past \$BP\_<fieldName>\$ format. For breeding pair reports, \$BP\_FemaleOwnerGeneral##Member since\$ will not work and vice versa \$FemaleOwnerNumber\$ will not work either.

### 3.3 Inserting pictures

When pictures are included in reports, a few points are important:

- To define a picture in the report template you must first place a dummy image in the template as a placeholder. This dummy image determines the aspect ratio with which the merged picture will be displayed. This means that a photo with a different aspect ratio (in this example, 1 x 1) will be adjusted in the report to the aspect ratio of the dummy, 4x5, which will look as shown below:



original (h x w = 1 x 1)



displayed by:  
dummy image (h x w =4 x 5)

- If no picture is available for an animal or breeding pair, the dummy image will be included in the merged report instead. The dummy must therefore be neutral: blank (with or without a border) or with a message, like:



- When the dummy image is put in its place in the report template, it still has to be configured to show the picture. This is done as follows in MSWord Office 365:
  - Right-click on the dummy image and select Edit Alt Text ... The following appears on the right:

Alt Text

How would you describe this object and its context to someone who is blind?  
*(1-2 sentences recommended)*

Generate a description for me

☐ Mark as decorative ⓘ

- If there is still text in the text box above Generate a description for me, it must first be removed (MSWord sometimes suggests text for the visually

handicapped based on image recognition). In the text box, only put the field name \$Picture\$ for an animal or contact report, or \$BP\_Picture\$ for a Breeding pair report.

- This also works for ancestors: \$F\_Picture\$ for the father of an animal, \$BPMM\_Picture\$ for the maternal grandmother of a breeding pair.
- Close this dialog by clicking on the cross in the top right corner.

This screen may differ for different versions of MSWord (2007, 2010, 2013, 2016). Searching for Edit Alt Text ... in online help from MSWord or in Google should help you find the location for your version.

## 4. Available templates

We have made the following sample templates available for download, which you can use as such or can take as basis for your own reports. You can adjust these yourself to your liking by using the standard field names and / or extra fields from your administration referred to in Appendix 5.1 and thus incorporating more and/or other information to the report.

Template	Explanation
6 generation pedigree	This pedigree shows 6 generations of animals, with a couple of field values as an example.
Breeding card empty	For breeders of birds, pigeons, etc., an empty breeding card is available that can be used during the breeding season to enter the youngsters' details.
Breeding pair with offspring	This template lists the offspring of a breeding pair, preceded by data from the parents and the breeding pair.
4 generation pedigree with pictures	It contains the picture of each animal and, as an example, a number of fields included in a 4-generation pedigree.
Pedigree card with picture	This contains all the basic data of an animal with the picture.
Declaration of transfer	Proof of sale of an animal.

## 5. Appendices

You can use the following field names in report templates:

### 5.1 Field names in Animal reports

Field name	Description
\$RegistrationNumber\$	Registration number
\$Gender\$	Gender
\$Name\$	Name
\$GivenName\$	Given name
\$TitleInFrontOfName\$	Title in front of name
\$TitleBehindName\$	Title behind name
\$Color\$	Color
\$Breed\$	Breed
\$BreederNumber\$	Breeder code
\$BreederName\$	Breeder name (concatenated)
\$BreederBusinessName\$	Business name of the breeder
\$BreederAddress\$	Address line 1 of the breeder
\$BreederAddress2\$	Address line 2 of the breeder
\$BreederPostalCode\$	Postal code of the breeder
\$BreederState\$	State/Province of the breeder
\$BreederCity\$	Breeders Residence
\$BreederCountry\$	Breeders Country of residence
\$BreederTelephone1\$	Main phone nr of the breeder
\$BreederTelephone2\$	Additional phone nr of the breeder
\$BreederCellPhoneNumber\$	Cell phone nr of the breeder
\$BreederEMail\$	Email address of the breeder
\$BreederHomepage\$	Breeders' homepage
\$OwnerNumber\$	Owners code
\$OwnerName\$	Owner name (concatenated)
\$OwnerBusinessName\$	Business name of the owner
\$OwnerAddress\$	Address line 1 of the owner
\$OwnerAddress2\$	Address line 2 of the owner
\$OwnerPostalCode\$	Postal code of the owner
\$OwnerState\$	State/Province of the owner
\$OwnerCity\$	Owners' Residence
\$OwnerCountry\$	Owners' Country of residence
\$OwnerTelephone1\$	Main phone nr of the owner
\$OwnerTelephone2\$	Additional phone nr of the owner
\$OwnerCellPhoneNumber\$	Cell phone nr of the owner
\$OwnerEMail\$	Email address of the owner
\$OwnerHomepage\$	Owners' homepage
\$Born\$	Date of birth of the animal
\$Deceased\$	Date of death o.t animal
\$Age\$	Age
\$InbreedingCoefficient\$	Inbreeding coefficient
\$AVKValue\$	AVK value
\$BreedPercentage\$	Breed percentage
\$Registered\$	Registered
\$Remarks\$	Remarks
\$Picture\$	Picture

\$MeanKinship\$	Mean kinship
\$AverageMeanKinship\$	Average Mean kinship
\$ECG\$	ECG (Equivalent Complete Generations)
\$CompleteGenerations\$	Complete generations
\$AncestorGenerations\$	Ancestor generations

## 5.2 Field names in Breeding pair reports

Field name	Description
\$BP_FemaleOwnerNumber\$	Code of the owner <sup>*)</sup>
\$BP_FemaleOwnerName\$	Owners' name (concatenated)
\$BP_FemaleOwnerBusinessName\$	Business name of the owner
\$BP_FemaleOwnerAddress\$	Address line 1 of the owner
\$BP_FemaleOwnerAddress2\$	Address line 2 of the owner
\$BP_FemaleOwnerPostalCode\$	Postal code of the owner
\$BP_FemaleOwnerState\$	State/Province of the owner
\$BP_FemaleOwnerCity\$	Owners' Residence
\$BP_FemaleOwnerCountry\$	Owners' Country of residence
\$BP_FemaleOwnerTelephone1\$	Main phone nr of the owner
\$BP_FemaleOwnerTelephone2\$	Additional phone nr of the owner
\$BP_FemaleOwnerCellPhoneNumber\$	Cell phone nr of the owner
\$BP_FemaleOwnerEMail\$	Email address of the owner
\$BP_FemaleOwnerHomepage\$	Owners' homepage
\$BP_Picture\$	Picture of the breeding pair
\$BP_PairingDate\$	Pairing date
\$BP_LitterDate\$	Birthdate
\$BP_RelationshipPercentage\$	Relationship percentage
\$BP_Remarks\$	Remarks
\$BP_Registered\$	Registered
\$BP_Picture\$	Picture

<sup>\*)</sup> Owner refers to the owner of the female of the breeding pair.

## 5.3 Field names in Contact reports

\$Number\$	Code of the owner
\$Initials\$	Initials of the contact
\$FirstName\$	First name of the contact
\$PrefixLastName\$	Prefix last name of the contact
\$LastName\$	Last name of the contact
\$Name\$	Name <sup>1)</sup>
\$PrefixBusinessName\$	Prefix Business name of the contact
\$ShortBusinessName\$	Business name of the contact (without prefix)
\$BusinessName\$	Business name <sup>2)</sup>
\$Address\$	Main address line of the contact
\$Address2\$	Second address line of the contact
\$PostalCode\$	Postal code of the contact
\$State\$	State of residence of the contact
\$City\$	City of residence of the contact
\$Country\$	Country of residence of the contact
\$Telephone1\$	Main telephone nr of the contact
\$Telephone2\$	Second telephone nr of the contact
\$CellPhoneNumber\$	Cellphone nr of the contact
\$Fax\$	Fax nr of the contact
\$EMail\$	E-mail address of contact
\$Homepage\$	Homepage of the contact
\$Picture\$	Picture of the contact

1) Concatenated: Initials + Prefix last name + Last name of contact

2) Concatenated: Prefix Business name + Business name

## 5.4 Structure of pedigree codes

Parents	Grand-parents	Great-grandparents	Great-great-grandparents
F	FF	FFF	FFFF
			MFFF
		MFF	FMFF
			MMFF
	MF	FMF	FFMF
			MFMF
		MMF	FMMF
			MMMF
M	FM	FFM	FFFM
			MFFM
		MFM	FMFM
			MMFM
	MM	MMF	FMMF
			MMMF
		MMM	FMMM
			MMMM

MMF = mother of the mother of the father of the animal

FMFM = father of the mother of the father of the mother (Great-great-grandmother) of the animal

You can extend this to 10 generations by adding an F (father) or M (mother) in front of the code of an ancestor:  
 F + MMMM = FMMMM = great-great-greatgrandfather (5th generation) of the animal along the maternal line.