
Building with Entity Documents

Shawn Ross
Assistant IT Manager
The Crossing
@shawnross
shawnr@thecrossing.church

EXPERT



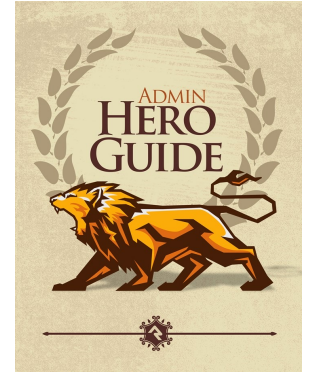
What are Entities?

Entities are specific types of data. A person is a *type of entity*. So is a group, an email communication and a financial transaction ... most entities have a corresponding table in the database

- Chip

Documentation Specialist

Spark Development Network



—

There are **200+**
entity types
included with Rock

Plugins and Rock updates add *even more*
entities

—

If it's an entity, you can
configure an Entity

Document for it. **USE**
THE MODEL MAP
FOR ENTITY
TYPE HINTS, such
as Person, Group, etc.

— *Almost all* of the things listed in the model
map are entity types

Model Map

[Home](#) > [Power Tools](#) > [Model Map](#)

Model Map



CMS



Communication



Core



CRM



Engagement



Event



Finance



Group



Meta



Prayer



Reporting



Web Farm



Workflow

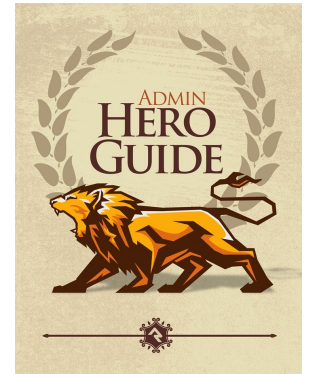
What are Entity Documents?

Entity Documents let you add documents to just about anywhere in Rock

- Chip

Documentation Specialist

Spark Development Network



—

**How many documents
can be associated with
one entity?**

—

As many as you want!

(The limit is probably dependent on your server size)

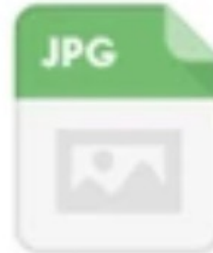
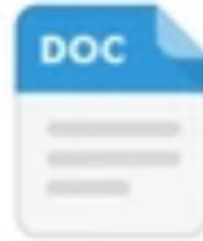


ENTITY LINKING

What do you do when you need to associate a PDF, JPG, DOCX, or another document with an entity?

ENTITIES LINKING

What do you do when you need to associate 10, 20, 50, 100+ documents with an entity?



FILE ATTRIBUTE OR ENTITY DOCUMENT?

FILE ATTRIBUTE

- Simple
- One file/document
- Opens in browser

ENTITY DOCUMENT

- File with metadata
- Multiple files or documents for the same entity
- Download the file

—

When a **single file**
attribute *is not*
sufficient try Entity
Documents

PERSON

Uses a *Documents* block, with the Entity Type *Person*

- Included with Rock

Cindy Decker (Cynthia)
Member Protection Profile: Extreme
add tag

41 yrs old (3/10/1981)
Female
Married 21 yrs (1/4)

(623) 555-3323 Mobile
(623) 555-3323 Home
cindy@fakeinbox.com

21 yr 0 /16

Decker Family

Ted 42 Noah 14 Alex 11

Home Address
11624 N 31st Dr
Phoenix, AZ 85029-3202

Person Profile Extended Attributes Steps Groups **Documents** Contributions More ▾

Documents All Document Types ▾

Name	Type	Created By	Created On	Test Description
Test Person Document	General Person Document	Alisha Admin	1 Second Ago	

GROUPS

Uses a *Documents* block, with the Entity Type *Group*

The screenshot displays a user interface for a 'General Group'. At the top, there is a header bar with a group icon and the text 'General Group', a 'General Group' label, and a star icon. Below this is a section titled 'Example General Group'. Underneath, there are two buttons: 'Edit' (orange) and 'Delete' (blue). To the right of these buttons are two icons: a location pin and a lock. Below this section is a 'Group Documents' section with a dropdown menu set to 'All Document Types'. This section contains a table with the following data:

Name	Type	Created By	Created On	
Test Group Document	Group Document	Alisha Admin	12 Minutes Ago	

A tooltip labeled 'Test Description' is positioned over the document icon in the table row. At the bottom of the 'Group Documents' section is a plus sign icon. Below this is a section titled 'Group Members'.

WHAT IS NEXT?

Questions I have:

- Entity Document *Qualifiers & Name Templates?*
- How do Entity Docs work with...
Pages, Financials, Lava?
- *Creating recipes with my findings!*
- *Suggesting documentation additions*

General Person Document

Name •
General Person Document

File Type •
Person Document

Entity Type •
Person

Manually Selectable ⓘ

Max Documents Per Entity ⓘ

Entity Qualifier Column ⓘ

Entity Qualifier Value ⓘ

Icon CSS Class
fa fa-file-alt

[Hide Advanced Settings](#)

Default Document Name Template

```
1 Person Id is the entity id?
```

```
2 {% assign varId = Person.Id %}
```

```
3 {% document where:'EntityId == "varId"' %}
```

```
4 |   {% for document in documentItems %}
```

```
5 |     {{ document.Name }}<br>
```

```
6 |   {% endfor %}
```

```
7 {% enddocument %}
```

```
8
```

TIPS, ETC.

Security Tips

Think through the *layers* of security

Storage provider, file type, document type, page, entity type

Sensitive Data?

Consider using the *Database* storage provider.
Talk to your Rock and IT Admin folks

All Users have *View* permissions for *Person* entity documents

You can change this default

Security

[View](#)[Edit](#)[Administrate](#)

Item Permissions

No role/users Found

[Add Role](#)[Add User](#)

Inherited Permissions

Role / User	Action	From
All Users	Allow	(Global Default)

—

DEFAULT PERSON VIEW SECURITY

DEFAULT PERSON EDIT SECURITY

Security

View

Edit

Administrate

Item Permissions

No role/users Found

Add Role

Add User

Inherited Permissions

Role / User	Action	From
RSR - Staff Workers (Role)	Allow	(Person)
RSR - Staff Like Workers (Role)	Allow	(Person)
RSR - Rock Administration (Role)	Allow	(Global Default)
All Users	Deny	(Global Default)

DEFAULT PERSON ADMINISTRATE SECURITY

Security

View

Edit

Administrate

Item Permissions

No role/users Found

Add Role

Add User

Inherited Permissions

Role / User	Action	From
RSR - Rock Administration (Role)	Allow	(Global Default)
All Users	Deny	(Global Default)

Basic Settings

Display Settings

Advanced Settings

- Force SSL
- Enable ViewState
- Allow Configuration
- Allow Indexing

Body CSS Class [i](#)

Page Routes [i](#)

Context Parameters

There are one or more blocks on this page that can load content based on a 'context' parameter. Please enter the route parameter name or query string parameter name that will contain the id for each of the objects below.

Page Route Parameter Name [i](#)

CONTEXT

When adding a *Documents* block to a page, **CONTEXT** is critical

(many pages already have context)

LIVE DEMO

—

Questions?