EDA Readiness - Self Certification - EDA Ready

What does it mean to be "EDA Ready"?
An "EDA Ready" AppExchange application meets the requirements for the EDA Ready designation as ***self-certified*** by the ISV partner if:

- Its Data Model is compatible with EDA
- It successfully installs in an org with EDA
- It is API Compatible with EDA
- It is publicly listed on the AppExchange and Lightning Ready (see Lightning Ready self-certification process)

Partners with apps that have successfully gone through the EDA Ready self-certification can use this designation in their app's marketing materials. Once a partner has gone through their own Compatibility Self Assessment they will log a case to self-certify.

The rest of this document outlines in some more detail the criteria the ISV needs to meet to be EDA Ready.

Compatibility Self Assessment

What do we mean by "self assessment"?
Partners wishing to be part of the EDA Readiness initiative shall complete a self-assessment questionnaire that covers topics such as the ISV partner's integration/adoption approach for Salesforce.org products, data model compatibility, business process alignment and development life cycle. The self assessment questionnaire shall be provided by ISV to prospective customers on request. The self-assessment needs to be updated with every major update in the ISV application and EDA. ISVs can use a copy of the template provided to self-assess a solution for EDA compatibility. The self-assessment will change periodically, according to EDA's major release schedule and documentation, partners are encouraged to review their self-assessment periodically as their product and EDA evolve.

Data Model Compatibility

The goal of the self assessment is to allow an ISV to self certify that their solution does not introduce functional duplication to the EDA Objects or where it does introduce duplication it is properly documented and that it abides by conventions outlined for the following key Objects:

- Account
- Contact
- Affiliation
- Relationship

SCENARIOS

Scenario 1 : The ISV application has Objects that are duplicative in function and/or in contrast with the architecture of EDA.

When an application has Objects that are duplicative in function and/or architecture to EDA outlined here, ISVs may take one or more of the following actions, eliminating this duplication for customers:

- ISV-provided documentation of duplicated Object architecture for customer and implementation partner use
- ISV-provided guidelines for aligning the duplicated architecture elements and any associated automation in concurrence with the EDA architecture and automation
- Supply a scalable and repeatable means by which data in duplicate Objects can be aligned to their counterparts in EDA so that the customer can both:
    - Achieve aligned data for reporting within the EDA Object architecture.
    - Utilize the “EDA Account Model”.

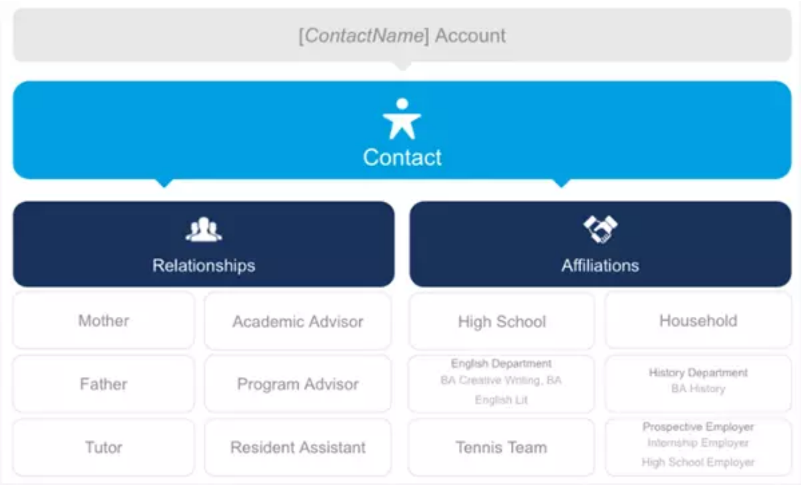
Scenario 2 : The ISV application does NOT have Objects and Fields that are duplicative in function and/or in contrast with the architecture of EDA.

When an application does not have objects that are duplicative in function or architecture, that means they are adhering to the following guidelines for building compatible ISV applications.

a. ISV application can defer to EDA Administrative Account (or Household Account) for B2C Model, does not introduce a competing Account Model or Account/Contact Object customizations that inhibit the correct operation of the EDA Account model for customers, so as to interfere with its correct operation.
b. ISV application respects the EDA requirement that no private contacts be created.
c. ISV application respects the EDA requirement that allows contact creation without prior creation of the account.
d. ISV application respects the EDA requirement that allows a user to configure the record type.
e. If an Account record type is not configured as specified here, the ISV application will create an Account of the default record type configured for the profile of the user creating the Contact.
f. EDA does not support person accounts as documented here. The ISV application does not require Person Accounts.
g. Nothing in the ISV application prohibits the correct operation of EDA's Affiliation object.
h. Nothing in the ISV application prohibits the correct operation of EDA's Relationship object.
i. Additionally, the ISV application does not functionally duplicate the purpose of any EDA object, and it does not prevent reporting, data, and business process alignment to any EDA object.

REFERENCES

The Account, Contact, Affiliation and Relationship objects are the main objects in EDA. The EDA Administrative Account Model allows the standard Salesforce account object to act as a container account, referred to as the “**administrative account**.” An administrative account has a single contact, which is often a student but could be a faculty member, alumni or other person related to the educational institution, associated with it. The relationship between the account and contact is one to one. So for each contact that you create in EDA, you also have a unique administrative account.



Account Object:

- The ISV application does not introduce a competing Account Model or Account/Contact Object customizations that inhibit the correct operation of the EDA Account model for customers.
- Further guidance on the use of the Account Object is specified in the EDA Product Documentation:
  - https://powerofus.force.com/s/article/EDA-Config-Account-Model-Record-Types

Contact Object:

- Any Contact Record Types introduced must abide by the Administrative Account Model and recommendations for Account/Contact modeling in the EDA Product Documentation: https://powerofus.force.com/s/article/EDA-SF-Acct-Models-and-EDA-Acct-Model
- Further guidance on the use of the Contact Object is specified in the EDA Product Documentation:
  - https://powerofus.force.com/s/article/EDA-Create-a-New-Contact
  - https://powerofus.force.com/s/article/EDA-and-Person-Accounts

Affiliation Object:

- Employs Affiliations Object as specified in the EDA Product Documentation: https://powerofus.force.com/s/article/EDA-Create-Accounts-and-Affiliations

Relationship Object:

- Employs Relationships Object as specified in the EDA Product Documentation: https://powerofus.force.com/s/article/EDA-Create-Relationships-between-Contacts

The Application may or may not utilize additional EDA Objects, however, its architectural framework should not replicate the designated function of these Objects as specified in the **EDA Data Dictionary** sections noted by each Object in a manner that prevents reporting, data, and business process alignment on these Objects**.**

Guidance on the use of some of the Objects is offered in the EDA Product Documentation and in the "**Manage Your Higher Ed Data with EDA**" Trailhead trail which you can find here.

Application installs successfully

The scenarios below outline the expected installation behavior when an ISV installs their application and EDA.

SCENARIOS

Scenario 1 : The ISV application can be installed on top of EDA.
You already have an org with EDA installed. Now you wish to install an ISV application into that environment.

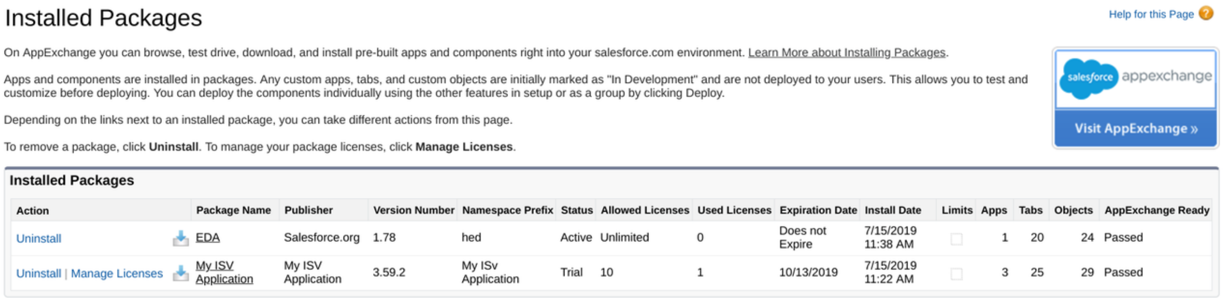
You know the installation was successful if :

- The ISV package appears in installed packages section of the org setup.

Scenario 2 : EDA can be installed on top of the ISV application.
You already have an org with an ISV application installed. Now you wish to install EDA into that environment.

You know the installation was successful if :

- The EDA package appears in installed packages section of the org setup.



Installed Packages

Help for this Page

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. Learn More about Installing Packages.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

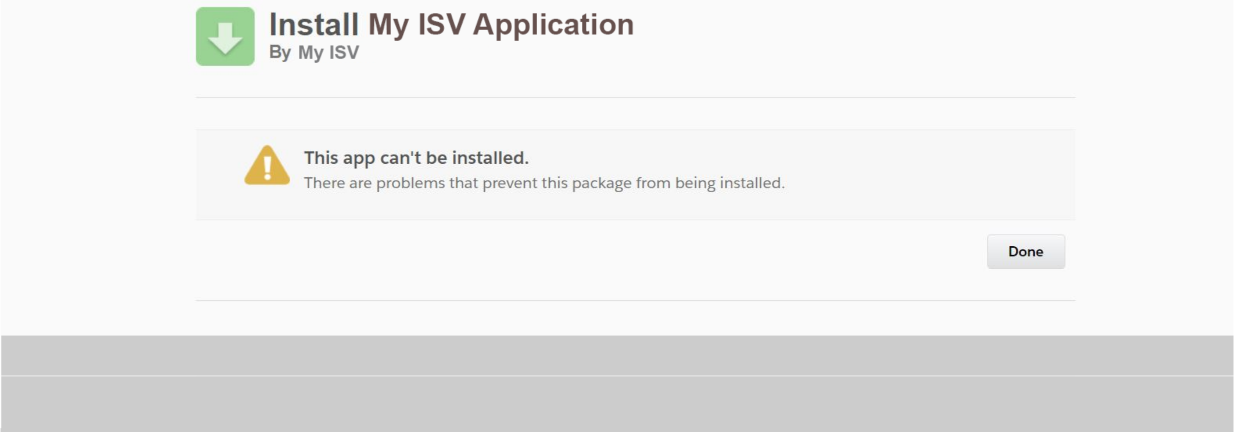
To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	EDA	Salesforce.org	1.78	hed	Active	Unlimited	0	Does not Expire	7/15/2019 11:38 AM	□	1	20	24	Passed
Uninstall | Manage Licenses	My ISV Application	My ISV Application	3.59.2	My ISv Application	Trial	10	1	10/13/2019	7/15/2019 11:22 AM	□	3	25	29	Passed

If for some reason the ISV application or EDA might not install, here is a non-exhaustive list of why, to help you determine the issue :

- The package has not passed security review and therefore its objects, tabs and apps count against an org's limits. Only packages that pass security review can be publicly listed on the AppExchange and benefit from this limit exemption (see Installed Packages screenshot above).
  - If you install a package from the AppExchange, its custom objects, tabs, and apps don't count against the limits of your Salesforce edition.
  - These rules apply only to managed packages that are listed on the AppExchange. If you install an unmanaged package or a managed package that's not publicly listed on the AppExchange (because it's not passed security review), its custom objects, tabs, and apps count against the limits of your Salesforce edition.
- The application does not function properly in conjunction with a Salesforce.org product, for instance person accounts are not supported by EDA as discussed here.
- The solution has dependencies on certain features, editions or licenses that will cause the installation to fail and you may see an installation error message like below.



Install My ISV Application

By My ISV

This app can't be installed.

There are problems that prevent this package from being installed.

For more info on installation issues consult the ISVForce Guide FAQ.

REFERENCES

There are 3 different ways of obtaining EDA :

- The creation of an Enterprise Edition org with EDA installed (a trial org that will expire in 30 days)
- The creation of a trial org that can be managed via Environment Hub
- The installation of EDA in an existing test org or scratch org

Education Data Architecture (EDA) Trial

For an example of orgs provided by Salesforce, please click here to review.

- The org provided in this trial form contains the latest build of EDA.
- EDA can also be built directly from the source code found in the github repository here. Salesforce.org builds their products using the open source Portable Automation Framework called CumulusCI.
- CumulusCI can be used by an ISV to build their own product and to specify dependent packages (like EDA) in their build process.
- An explanation on how to build a managed package and install EDA in the same org can be found here.
- Review this Trailhead trail for more info on how to build applications with CumulusCI.

Using Environment Hub to create an EDA Trial

- A trial org can be generated via Environment Hub using the template ID found in the same repository in the releases page.
- For information on Environment Hub review http://p.force.com/hub.

Using the EDA Installer

- EDA can also be installed into any existing org via the official EDA Installer (recommended approach) or by using Installation URL provided in the releases page.

API Compatible with EDA

What does “API Compatible” mean? For applications that are not built on top of EDA, but wish to interact with EDA, they must do so via the API only. If the ISV solution connects via API to EDA, the integration needs to follow Salesforce.org’s recommended guidelines and requirements. For example, before importing or syncing any data, an ISV needs to understand the automation that affects imported data and our recommended import sequence.

EDA has a number of automation features available thanks to Table-Driven Trigger Management (TDTM). Care must be taken to prevent unnecessary data from being created automatically. Typically, an ISV integrates data into EDA from their Student Information System, course catalog, and other external systems using common data integration tools such as Salesforce APIs.

SCENARIOS

Scenario 1 : The ISV application connects via API to EDA, creating/updating/deleting records
In this scenario the ISV application makes inbound calls into the EDA environment creating/updating/deleting records. The ISV application does not create any new objects or duplicate any EDA functionality.

Scenario 2 : The ISV application connects via API to EDA, for the purpose of bulk data migration / data syncing
In certain circumstances ISV applications will need to connect to EDA for the purpose of bulk data migration / data syncing. In this scenario the temporary disabling of trigger handlers may be required. The ISV should provide documentation and implementation best practices about this to the customer.

REFERENCES

Further integration guidance is offered to Application designers with regard to recommendations for Data Import Sequence in the EDA Product Documentation, Integration, the new Education Data Architecture and its roadmap:

- https://powerofus.force.com/s/article/EDA-Data-Import-Sequence
- EDA Integration (power of us hub topic, login required)
- Understanding our new EDA
- Education Data Architecture: Introduction & Roadmap
- Integration considerations