

This document provides basic information on HEDA, what it is and how Babson uses HEDA components and features.

For more information on the functionality HEDA provides, see the Salesforce Trailhead trainings:
https://trailhead.salesforce.com/en/modules/highered_heda_basics

What is HEDA

Higher Education Data Architecture (HEDA) provides the foundation to empower institutions of all sizes to connect with students, alumni, faculty, and staff in new ways. As an open data architecture, the HEDA framework is built on top of the Salesforce Platform allowing Salesforce users to add applications and custom functionality as needed to support your business processes.

HEDA is designed to be extensively focused on relationship data across the student lifecycle and provides a data model to support student relationships from prospect to alumni. HEDA utilizes the Affiliation and Relationship to represent and track these relationships. (More about Affiliations and Relationships below.)

HEDA's focus on representing relationships leaves transactional functions, such as Admissions, Student Group Management, Advising, Learning Management, Fundraising, Financial Aid, Housing/Facilities and many other functions, to other products available in the Salesforce ecosystem and/or custom development.

Accounts

HEDA utilizes the Accounts object to represents several different types of data.

- **Business Organizations** – A Business Organization; this is the system default when creating new Accounts
- **Academic Program** - An Academic Program offered at the University
- **Administrative** – Used for behind-the-scenes Administrative purposes only
- **Educational Institution** - An Educational Institution
- **Sports Organization** - A Sports Organization
- **University Department** - A Department in the University

One point to note: When creating a reporting off the Accounts object, you will likely need selection criteria to only pull the applicable type(s) of Accounts.

A little more about Administrative Accounts....

In Salesforce, every Contact must have a related Account record. HEDA meets this requirement using the Administrative Account. For Babson, the lightweight Administrative Account does not contain any useful data about the Contact; it is simply the solution to the Salesforce requirement which represent the 1:1 relationship between the Babson contact and an account. Administrative Accounts are created automatically so you will never have to worry about creating them.

Affiliations

Prospects, Students, Alumni, business organization contacts and other types of contacts may have relationships with the the different types of Accounts. For example, a student is enrolled in an Academic program and also part of a Sports team. Another example, Babson staff is cultivating a relationship with a Business Organization contact for future engagement.

The relationships between the Contacts and those Accounts are represented using Affiliations. As such, Affiliations tracks the relationship history between the Contact and the different Accounts.

Relationships

Contacts (in Salesforce) may have relationships with other Contacts such as co-workers, faculty/student, relationship managers, etc.) . The relationships between the Contacts are represented using Relationships.

