# **Alation Preparation Guide for Bots**

This document lists the steps customers can take to set up their environment for FDE to deploy Bots.

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## Required Alation Features

The following are prerequisites for setting up and running Alation Bots.

### **Alation Analytics**

AAv2 is required to run Bots. Please make sure you have this service installed and running correctly. A link to setting up AAv2 can be found <a href="here">here</a>. If you have questions or are running into issues, please contact support.

### Data Governance App

Bots use the DG App's policy functionality, so the DG App must be enabled within your Alation instance.

More details can be found within our support documentation <u>here</u>.

## **Prepare Alation Analytics Access**

Bots will require access to Alation Analytics. Depending on your Alation installation, how you access this data will vary.

#### **Alation Cloud Services**

Customers using ACS must have their Alation Analytics data ported to Snowflake. More details on this can be found at this <u>link</u> and this <u>link</u>.

### Customer Hosted Install (on-prem)

Customers using a self-hosted installation of Alation will need all Bots to access Alation Analytics on Postgres. More details can be found <u>here</u>.

#### Create a service account.

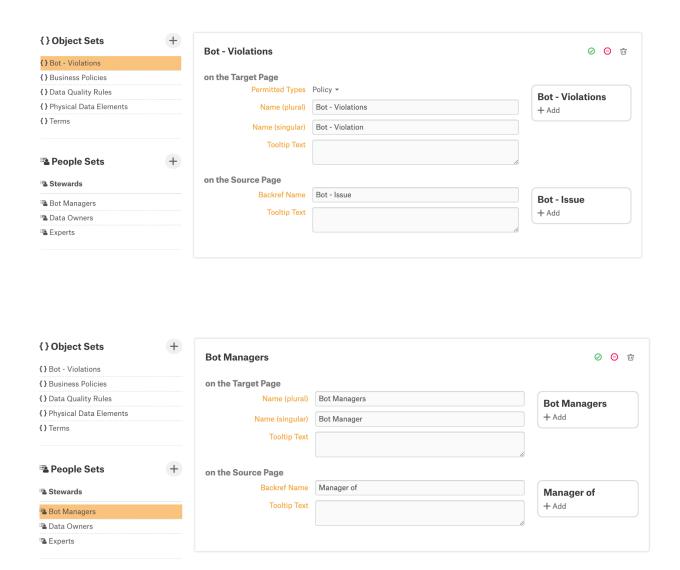
Bots will need an account to access Alation Analytics data and Alation itself (mainly to perform API calls).

- Create a new user using basic authentication (for SAML customers, follow the <u>linked process</u>)
- Grant this user Catalog Admin access rights
- Grant this user view rights to the Alation Analytics data source

## **Prepare Alation Instance**

Create the following custom fields.

Field Type	Field Name
Object Set	Bot - Violations
People Set	Bot Managers

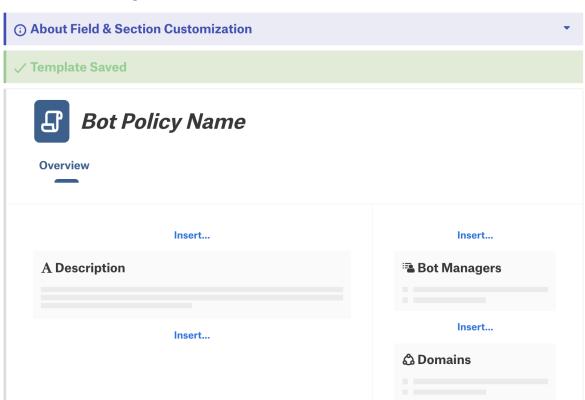


## Create a Custom Policy Template with the name "Bot Policy."

Add the Bot Managers custom field to this template.



#### **Field & Section Arrangement**



Add custom field Bot Violations to all otypes you intend to have Bots work against. Here is an example of adding the Bot Violations custom field to the table template



