

# 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 [here](#). 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 [here](#).

## 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 [link](#) and this [link](#).

## 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 [here](#).

## 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 [linked process](#))
- 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

Object Sets

Bot - Violations

Business Policies

Data Quality Rules

Physical Data Elements

Terms

People Sets

Stewards

Bot Managers

Data Owners

Experts

Bot - Violations

on the Target Page

Permitted Types

Policy

Name (plural)

Bot - Violations

Name (singular)

Bot - Violation

Tooltip Text

on the Source Page

Backref Name

Bot - Issue

Tooltip Text

Bot - Violations

+ Add

Bot - Issue

+ Add

Object Sets

Bot - Violations

Business Policies

Data Quality Rules

Physical Data Elements

Terms

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Stewards

Bot Managers

Data Owners

Experts

Bot Managers

on the Target Page

Name (plural)

Bot Managers

Name (singular)

Bot Manager

Tooltip Text

on the Source Page

Backref Name

Manager of

Tooltip Text

Bot Managers

+ Add

Manager of

+ Add

Create a Custom Policy Template with the name “Bot Policy.”

Add the Bot Managers custom field to this template.



## Bot Policy

### Field & Section Arrangement

ⓘ About Field & Section Customization

✓ Template Saved



## Bot Policy Name

Overview

Insert...

A Description

Insert...

Insert...

Bot Managers

Insert...

Domains

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



# Customize Catalog

Custom Fields **Custom Templates** Custom Field Permissions Branding Homepages Alerts Search Filters Lineage

## Data Object Templates

- Data Source
- Schema
- Table**
- Column
- NoSQL Database
- NoSQL Collection
- NoSQL Attribute
- Domain
- FileSystem
- File
- Directory
- BI Server
- BI Folder
- BI Report
- BI DataSource
- BI Report Column
- BI DataSource Column
- DataFlow



## Table

### Field & Section Arrangement

About Field & Section Customization

Template Has Unsaved Changes [Save](#)

Name

Overview

Insert...

A DQ Processor

Insert...

{ } Bot - Violations