

Row Level Security (RLS) Configuration Guide in Incorta

Introduction

This document provides a comprehensive guide to configuring Row Level Security (RLS) in Incorta, ensuring data privacy and access control tailored to individual user criteria. It covers two principal approaches to RLS setup, each suited to different scenarios based on the volume of values needing filtration.

Configuration Approaches

Option 1: Table and Session Variable Configuration

Table Configuration:

- Create a table linking user logins (typically via email) to specific filter values. Note: The first column must contain the user login identifier.
- Utilize the provided Excel template or a similar structure for setup.

Incorta Login	Values We Want The User To See
trenton.coomes@hollandparker.com	Ecuador
adam.hendrik@hollandparker.com	Puyo
jake.skrobot@hollandparker.com	Puyo
trenton.coomes@hollandparker.com	Puyo
adam.hendrik@hollandparker.com	Manta
jake.skrobot@hollandparker.com	Libertad
trenton.coomes@hollandparker.com	Libertad



rls%20template.xlsx

Internal Session Variable:

- Establish an internal session variable to fetch pertinent values from the user-reference table during user sessions. The variable's naming should reflect your instance's naming conventions for clarity.

Formula Example:

```
```sql
query(
 RLS_Template.rls_template.Values_we_want_the_user_to_see
```

```
RLS_Template.rls_template.Incorta_Login = $user
)
...
```

#### Internal Variable

Name

rls\_template

Description

row level security variable that returns the value we want to filter a table on

Query

```
query(
 Row_Level_Security_Template.rls_template.Values_we_want_the_user_to_see,
 Row_Level_Security_Template.rls_template.Incorta_Login = $user
)
```

Test As

Current User ▾

Save

Cancel

## Option 2: Group Creation and Session Variable Setup

### Group Creation:

- Formulate a group in Incorta named after the filtering value and add relevant users to this group.




✕ Edit Group - Vision Operations

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Info **Users** Roles

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🔍 Search users + 3 Items

<input type="checkbox"/>	Name ↑	Email
<input type="checkbox"/>	 Adam Hendrik	adam.hendrik@hollandparker.com
<input type="checkbox"/>	 Jake Skrobot	jake.skrobot@hollandparker.com
<input type="checkbox"/>	 Trenton Coomes	trenton.coomes@hollandparker.com

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### Internal Session Variables:

- Two session variables are needed to link to Incorta's metadata and the newly created group, aiming to return the group name for the logged-in user.

### Formula Examples:

```
```sql
query(
  _IncortaMetadata.GROUP_USER.GROUPID
  _IncortaMetadata.USER.LOGINNAME = $user
)
query(
  _IncortaMetadata.GROUP.NAME
  _IncortaMetadata.GROUP.ID = $rls_group_query
)
```
```

## Internal Variable

Name

rls\_group\_query

Description

Query

```
query(_IncertaMetadata.GROUP.NAME, _IncertaMetadata.USER.LOGINNAME = $user)
```

Test As

Current User 

Save

Cancel

## Internal Variable

Name

rls\_security\_group\_names

Description

Query

```
query(_IncertaMetadata.GROUP.NAME,
_IncertaMetadata.GROUP.ID = $rls_group_query)
```

## Implementing Table Runtime Security Filters

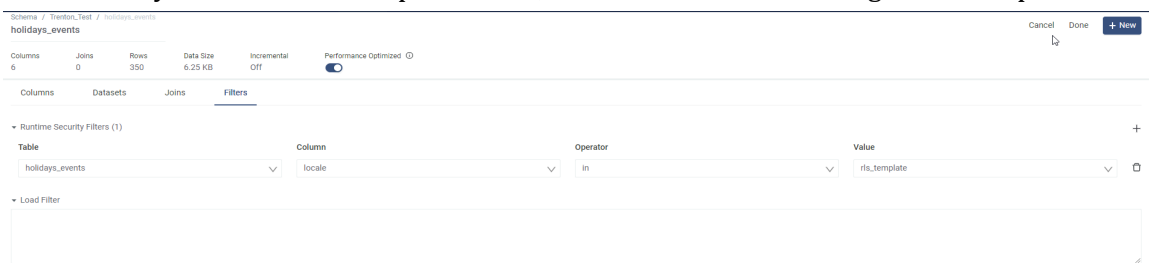
1. Select the table to be secured with RLS.
2. Apply a 'Runtime Security Filter' that dynamically adjusts data visibility based on user sessions.
3. Configure the filter to reference the user-specific table and employ the internal session variable to filter data.

### Filter Formula Example:

```
```sql  
or(  
  inList(Trenton_Test.holidays_events.locale_name, $rls_template),  
  inList($user, $super_admin)  
)  
```
```

### Example Illustration

An example provided demonstrates the application of runtime security filters, showing how data visibility is tailored to the specific user, based on the earlier configuration steps.



### Testing and Considerations

- **Testing:** Confirm the RLS setup's effectiveness through different user logins to observe the appropriate data filtration.
- **Considerations:** Maintain consistency in naming conventions and periodically update the user-reference table to ensure precise filtering.