### Lab 01 DATA VIRTUALIZATION AND DATA PROTECTION

#### 1.1 Lab overview

Organizations are faced with 2 realities today:

- a. They have data spread all over the place multiple clouds, a plethora of onsite applications, data warehouses, spreadsheets, email systems, etc
- b. Regulatory and confidentiality pressures are making it necessary for organizations to think of better, easier and more effective ways to protect that data, while at the same time getting the most value out of that data.

In this lab, we will be showing you how the capabilities of **Watson Query** and **Watson Knowledge Catalog**, when used together in Cloud Pak for Data, can solve these 2 vexing problems.

## 1.2 Personas represented in this lab

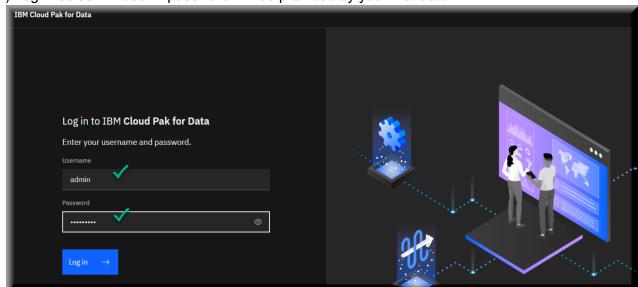
Persona (Role)	Capabilities
Data Steward	Data Stewards integrate and transform data as well as provide governance, lineage and classification of the data.

Persona (Role)	Capabilities
Business Analyst	Business Analysts deliver value by taking data, using it to answer questions, and communicating the results to help make better business decisions.

Persona (Role	Capabilities
Data Engineer	Data Engineers build and optimize the systems to allow data scientists and business analysts to perform their work. The Data Engineer ensures that any data is properly received, transformed, stored, and made accessible to other users.

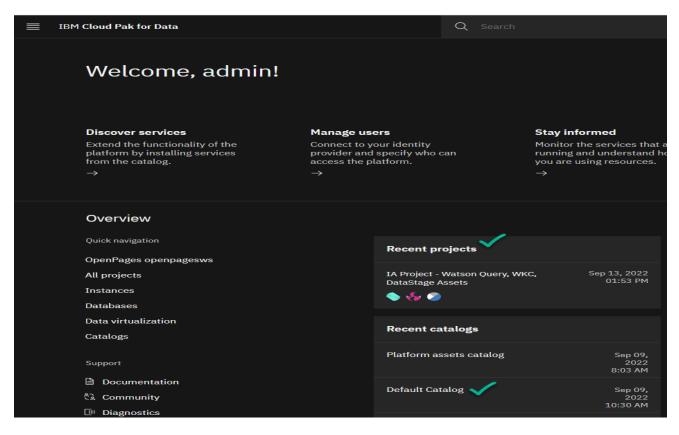
# 1.3 Log into Cloud Pak for Data, Learn about Projects, Catalogs, and Governance Artifacts

\_\_1) Open a browser and go to the URL given by your instructor



2) Log in as admin user – password will be provided by your instructor

This will place you in the home screen for Cloud Pak for Data. This screen is completely customizable, allowing you to brand according to your organization, add and delete any of the tiles, etc. In addition, this screens' content will change based on the role of the user logging in.



Note the 'Recent Projects' and 'Recent Catalogs' areas – these are 2 important components of Cloud Pak for Data.

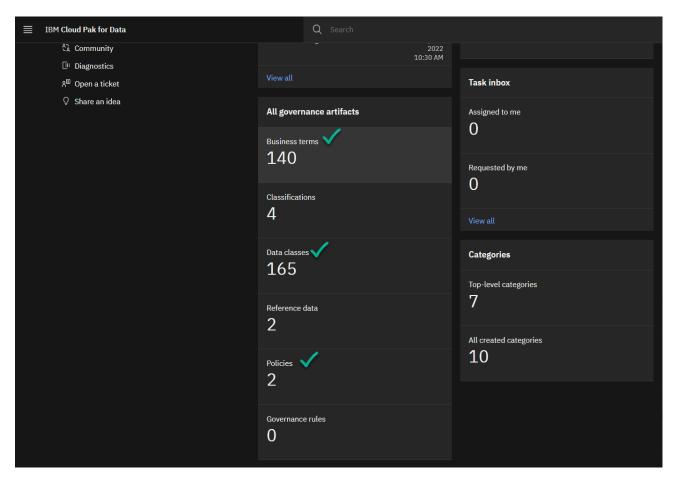
**Projects** are where the user develops assets – DataStage Jobs, Data Enrichment processes, Jupyter Notebooks, SPSS Modeler flows, and on and on are all housed within a project during development.

**Catalogs** are where users go to find assets that are 'in production'. These are assets that have been published through a workflow process and are governed to allow the right users to see the right data. For instance, a user can search for any data asset, business term, data connection, etc. from the search bar along the top of any Cloud Pak for Data screen.

Moving further down the home screen, we come across 'Governance Artifacts' – these are the components of Cloud Pak for Data that provide all the Data Governance capabilities of the platform.

You'll see we have 140 **Business terms** – these are English descriptions of data objects such as tables, columns, object storage files, and any related data assets or other governance artifacts. For example, a Business Term called 'Taxpayer ID' might be related to columns and tables that contain data on Taxpayer IDs, such as Social Security Number.

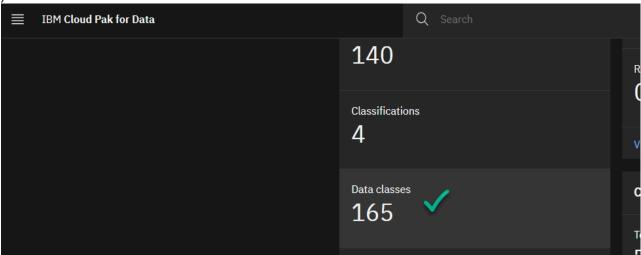
We also have 165 **Data Classes** – this is an incredibly powerful set of objects that are used to classify data, so continuing with our Taxpayer example, a column containing Social Security numbers can be automatically 'stamped' with the data class 'US Social Security Number', Any subsequent access to that column (or any column stamped with that data class) can then be governed by the platform, automatically.



Lastly, **Policies** – these are actual organization policies around the use and handling of data, in software form. These policies allow organizations to actually codify their policies and use them as part of an active data governance practice, as opposed to just having them in paper form with no actual capabilities or enforcement mechanisms, beyond manual intervention.

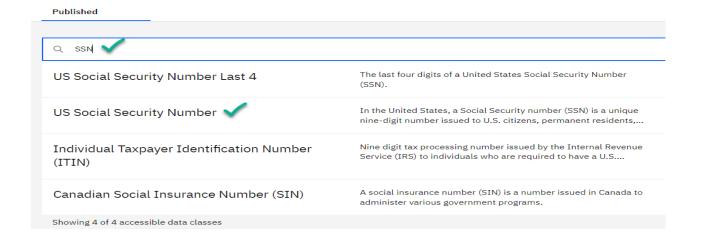
Now, let's take a closer look at Data Classes

3) Click on the area marked 'Data Classes'



\_\_4) This will take you to a list of all published data classes in our environment. Click into the search bar on this page and type in 'SSN'.

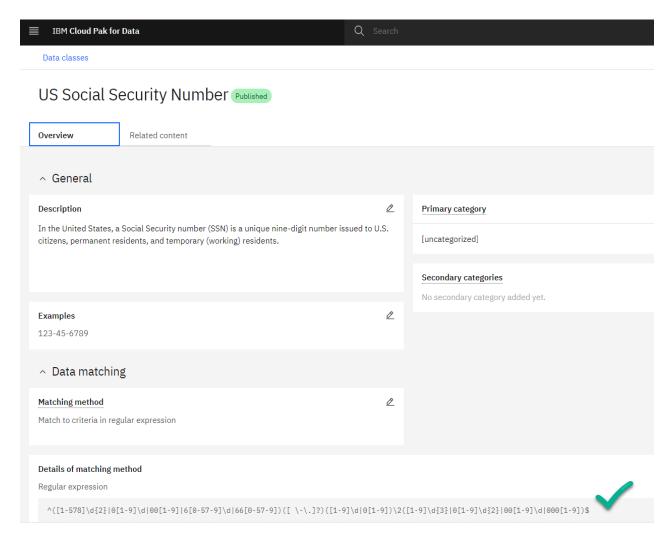
Data classes



Now you see all data classes related to Social Security Number

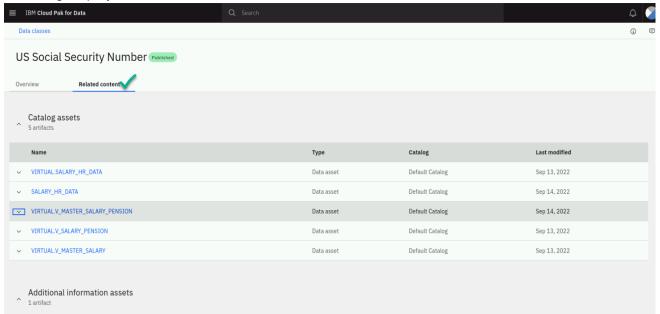
5) Click on 'US Social Security Number'

This will bring you to a details screen showing everything about this data class. Notice the area called 'Details of Matching Method' – this shows a regular expression (a type of sophisticated pattern matching) – that will validate not just whether the pattern of a string is in a valid SSN format, but also whether the SSN is a valid SSN, as there are many constraints on the data in an SSN field. The reason this matching is so important, is because this is how the platform automatically determines if a particular field holds data for a particular data class.

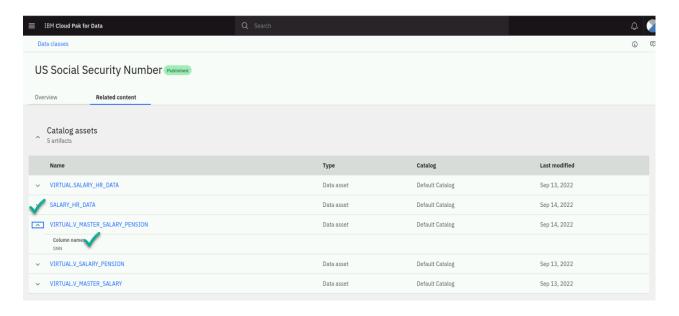


\_\_6) Click on the 'Related content' tab. This will show you a list of data assets (tables, etc) in the catalog that have this data class on at least one column. You will see that 5 items per page

are being displayed.



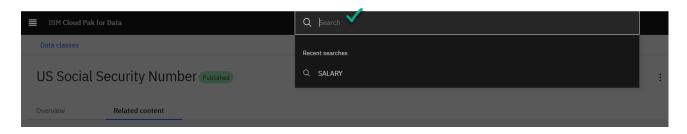
\_\_7) Now click the dropdown next to VIRTUAL.V\_MASTER\_SALARY\_PENSION you'll see a column name 'SNN'. This column has the data class of 'US Social Security number' stamped on it, even though the column name is incorrect.



## 1.4 A look at Searching and the Data Catalog

Now that we've learned a bit about some of the governance artifacts and how they work, we will next delve into the Data Catalog. The Data Catalog is at the heart of everything that happens in Cloud Pak for Data. It's the centralized repository for all the data assets and data connections within your organization.

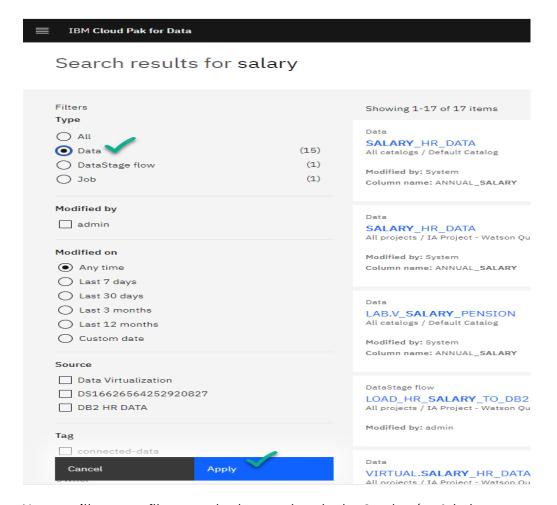
\_\_8) Position your cursor in the Search Bar at the very top of the screen you're on.



\_\_\_9) Type in 'salary', and then press 'enter'

This will bring you to a screen that shows all assets across the platform that have 'salary' somewhere in the name or description or tag.

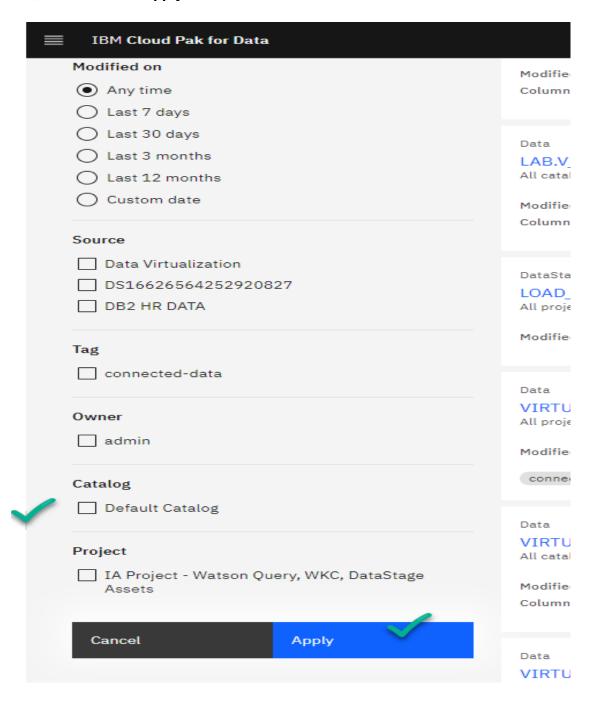
\_\_\_10) You'll see a amazon.com style search on the left side of the screen. Click the checkbox next to 'Data' and then click apply.



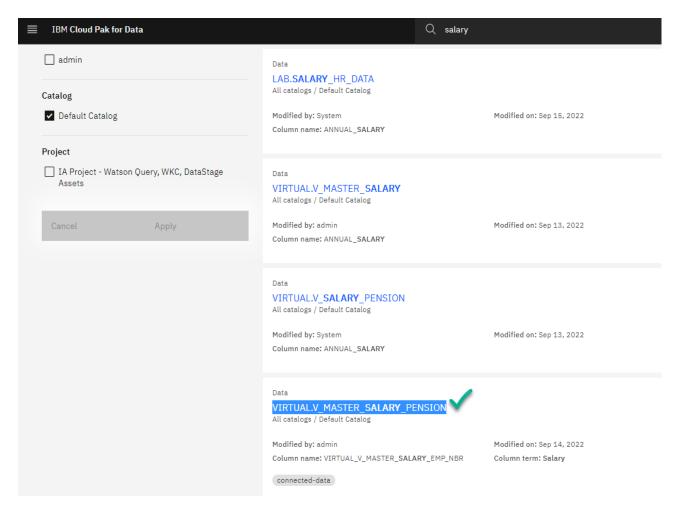
Next, we'll want to filter to only show options in the Catalog (as Admin we can see all assets, in reality you would be logging in as a user with less authority and therefore, would

not see all assets.)

\_\_\_11) Scroll the window down until you see a checkbox for '**Default Catalog'**. Click that, and then click '**Apply'**.

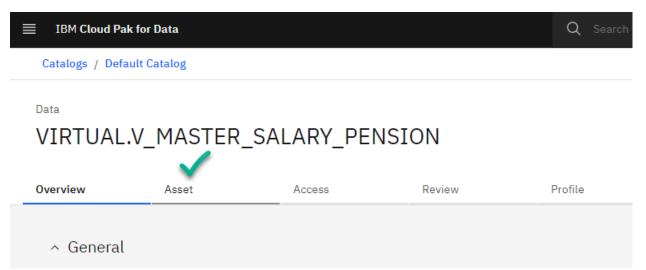


\_\_12) Now, find VIRTUAL.V\_MASTER\_SALARY\_PENSION in the list, and click on it.



This will bring you into the asset within the catalog.

13) Click on the 'Asset' tab

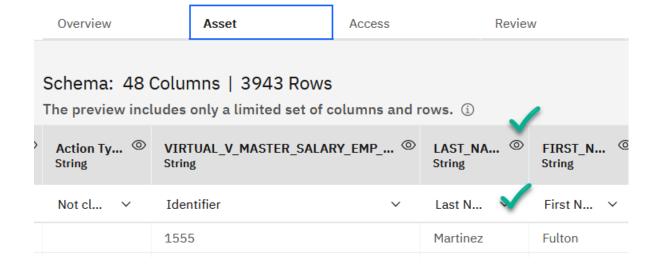


This will bring you into the data preview screen. Here you'll see the first use of the data classes. If you look at the row of dropdowns below the column names, you'll see various data classes. These were automatically stamped onto this asset through the 'Automated Data Enrichment' process. Recall earlier, we looked at data classes and their related assets and VIRTUAL.V\_MASTER\_SALARY\_PENSION was in that list of related assets for the US Social Security Number class.

Scroll all the way over until you see the 'LAST\_NA...' column. Click the pop up a window showing that there is a Business Term associated with this column – not surprisingly, it is 'LAST NAME'. This was also automatically stamped to this asset using 'Automated Data Enrichment'. No need to click on it, but if you want it will open up a new tab with the details of the 'LAST NAME' glossary term.

Data

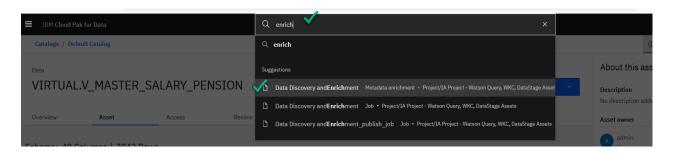
# VIRTUAL.V\_MASTER\_SALARY\_PENSION \( \alpha \)



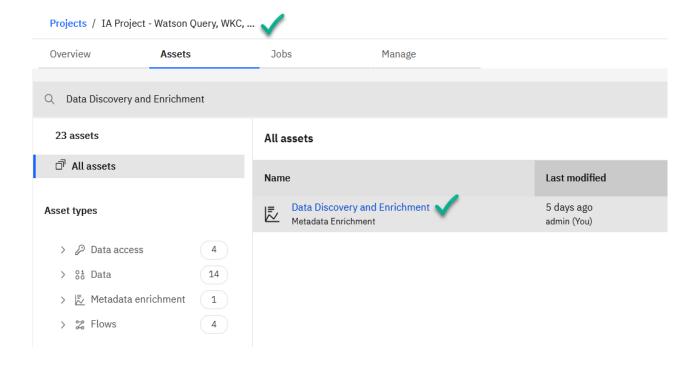
## 1.5 Automated Data Discovery and Enrichment

Now let's explore the process that automatically 'stamps' those Data Classes and Business Terms onto our Data Assets

\_\_14) Position the cursor back on the search bar at the top of the page, and type 'enrich', then click on the 1<sup>st</sup> entry in the dropdown.

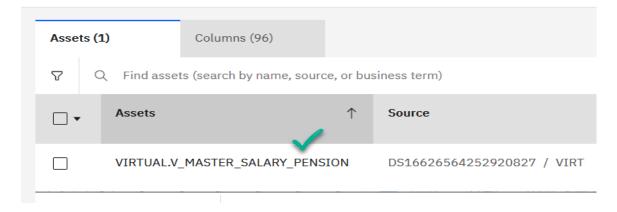


\_\_\_\_15) This will take you to the metadata enrichment job. Note that we are now inside a project called **'IA Watson Query, WKC...**' Click on the **'Data Discovery and Enrichment'** link in the middle of the screen.



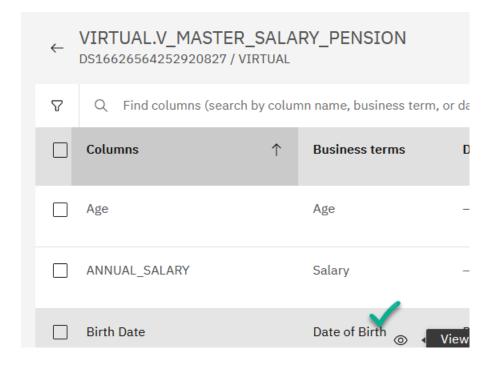
\_\_\_16) Here, you'll see any assets that are in this Data Discovery job. You can do discovery on schemas, databases, object storage, and tables – here we've done it on a single table - VIRTUAL.V\_MASTER\_SALARY\_PENSION. Click on the link.

## Data Discovery and Enrichment



Here we see a lot of information about our data. There is a column that indicates if any **Business Term** have been auto-assigned, as well as whether and **Data Classes** have been assigned.

\_\_\_17) Click on the <sup>©</sup> symbol next to the '**Date of Birth**' business term.



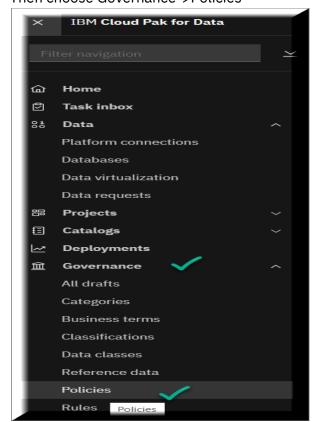
This will open up a side panel that shows more details about the Term and the Class, and allows you to modify, add or delete terms and data classes. This is at the heart of the ML/AI capabilities built into Cloud Pak – if I change these to terms or classes that are more accurate for my organization, that will update the machine learning algorithms that decide what data should be matched with what terms and categories, which will make the algorithm more tuned to my organizations' naming conventions, business practices, etc.

#### 1.6 Data Policies and Data Protection Rules – The Enforcers

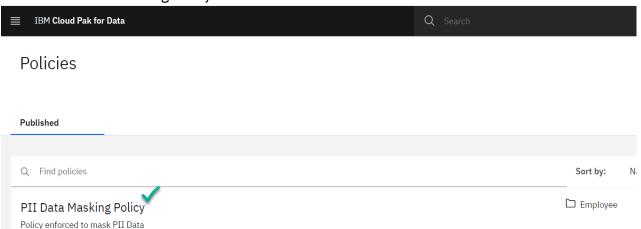
OK so now that we've covered governance artifacts like Business Terms, etc, the Data Catalog, and Data Discovery and Enrichment, we now get to the step where we will actually enforce data privacy, by user group, to ensure that only the correct users will have access to the PII data embedded in our data sources.

\_\_\_18) Start by clicking the hamburger menu icon in the upper left corner of the screen.

Then choose Governance->Policies



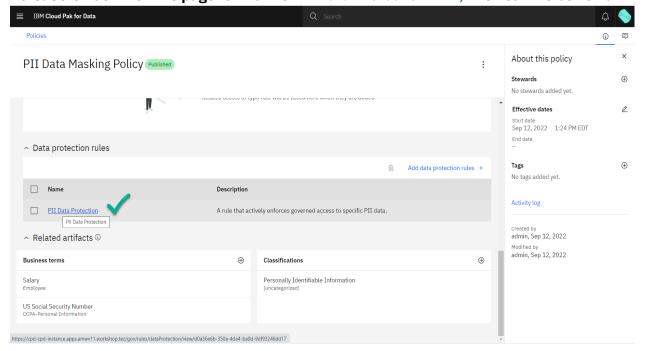
\_\_\_19) This will bring you into a list of policies that have been developed for our organization. Choose 'PII Data Masking Policy'



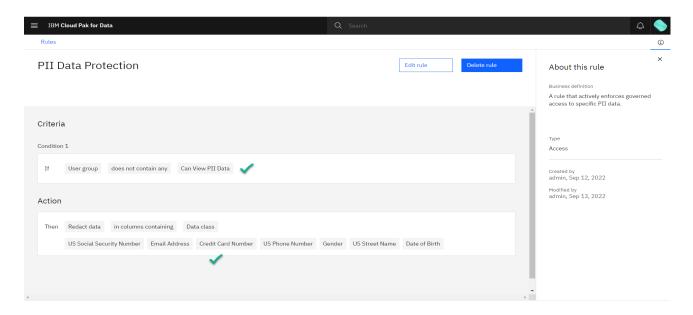
When you open the policy, you will see a brief description, and if you scroll down you will see an entry in the 'Data Protection Rules' section for **PII Data Protection**. This is the rule that actively enforces data protection. You'll also notice that there are Business Terms associated with this policy; that is to aid in searching for the Policy, and understanding what the policy relates to. Now we'll take a look at the rule.

\_20) Click on the PII Data Protection link –

Note: Scroll down on the page to find the PII Data Protection Link; it is near the bottom.

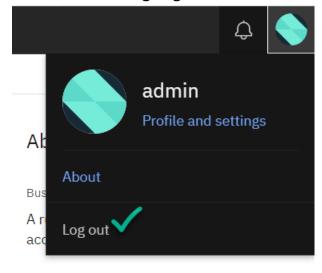


Here you'll see an if-then rule that defines in what cases this rule needs to be enforced, and what are the actions to enforce. This rule will enforce redaction of any data that has the listed data classes, IF the user does not belong to the listed user group.

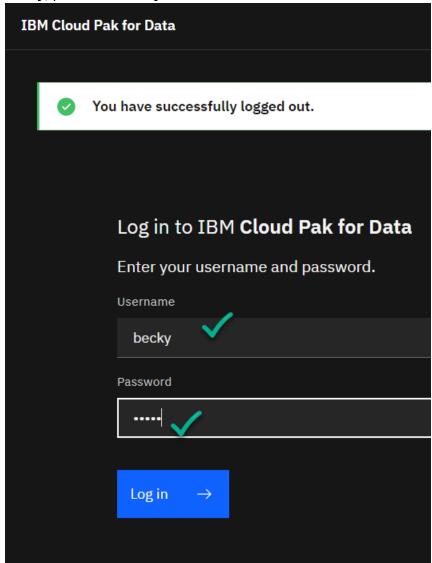


Remember our exercise around looking at data classes on the data in our table named VIRTUAL.V\_MASTER\_SALARY\_PENSION? There were classes for US Social Security Number, Phone Number, etc. Now those classes stamped on that data will be automatically checked, and if necessary for a given user that data will be redacted. Let's take a look.

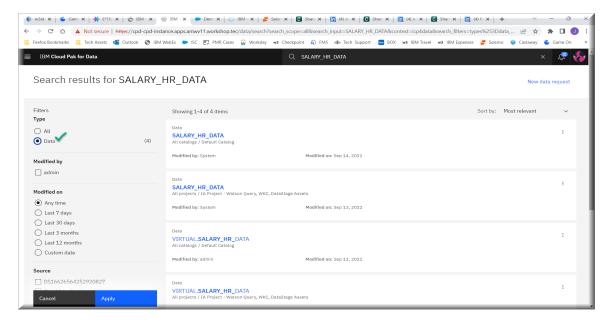
\_\_21) Log out of the Admin user by clicking on the icon in the upper right hand corner of the screen, and choosing 'Log Out'.

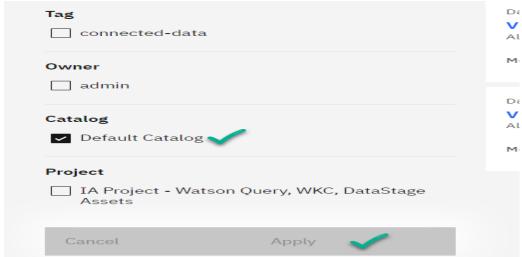


\_\_\_22) We will be logging back in as a different user, one who does not belong to the **Can View PII Data** user group. You will find yourself back at the login screen. Login as user **becky,** password **becky.** 



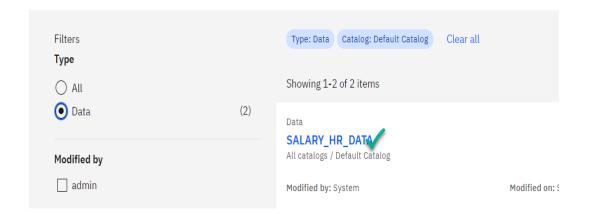
- \_\_23) Now, let's go find **SALARY\_HR\_DATA**. Go to your search bar, and type in or copy paste '**SALARY\_HR\_DATA**'. Then press the enter key.
- \_\_24) You'll see a list of objects that satisfy our search. Let's filter down to just data in our catalog. So click the radio button next to 'Data' on the left hand filters area, then scroll down and click 'Default Catalog'. Then click 'Apply'.





25) Now click the entry named SALARY\_HR\_DATA

Search results for SALARY\_HR\_DATA



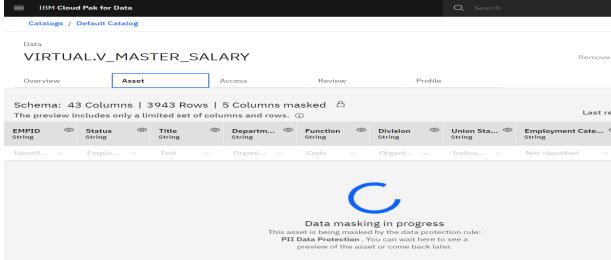
\_\_26) This will bring up the table in our catalog. Click on the 'Asset' tab to get to the data.

SALARY\_HR\_DATA

Data

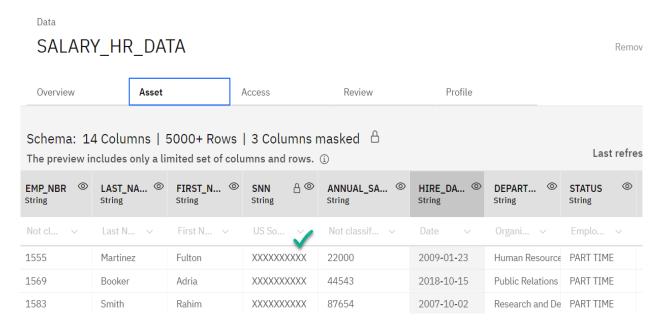


\_\_27) At this time, you may get a screen indicating that the data is being masked, wait a few moments and that will finish. That only happens the first time a new user accesses a new catalog data set.



If the data does not come back after the 'Data Masking' message disappears, just refresh the page.

When the data comes back, you'll notice right away that the 'SNN' column is all X's. This is the redaction, because user becky doesn't have access to PII data, because of our Data Protection rule. Feel free to scroll right, you'll notice the Phone Number and Street Address fields are similarly redacted.



Now, let's move on to see how we can distribute this clean, protected, governed data to our end users, quickly and easily...

NOTE: The grid view showing the data above may not populate immediately; it won't affect any of the next steps. If you want to return to this step later, you will see the results shown.

## 1.7 Data Virtualization with Watson Query

Now we have a little confession to make. Throughout this lab we've been working with a 'table' called **VIRTUAL.V\_MASTER\_SALARY\_PENSION.** Truth is, this object isn't a table at all. It's a view. But the really cool part is this – it's a view that's joining data from DB2 and Postgres without moving or copying data from either of those sources. This process is known as 'Data Virtualization'. The product name is Watson Query.

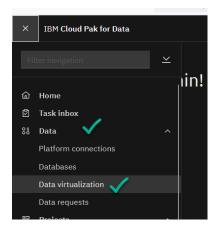
Here's what's really unique about Watson Query: It works in conjunction with Watson Knowledge Catalog. It allows you to bring the power of WKC's data governance capabilities - Data Discovery and Enrichment, Business Terms, and Data Classes – that we've been working with in this lab - to any virtualized data source you've created in Watson Query *from any tool*. As

long as the product (reporting tools, ETL tools, data visualization, etc) can make a jdbc connection, you can have enforced data governance within that tool. This is a game changer: most governance solutions require you to use tools provided by the vendor, and specific, often proprietary, access mechanisms to the data, in order to get the enforcement and governance capabilities of their solution. And even then it usually is not granular to the row and column level. With Watson Query and Watson Knowledge Catalog, you can use the tools you're already comfortable with in your organization.

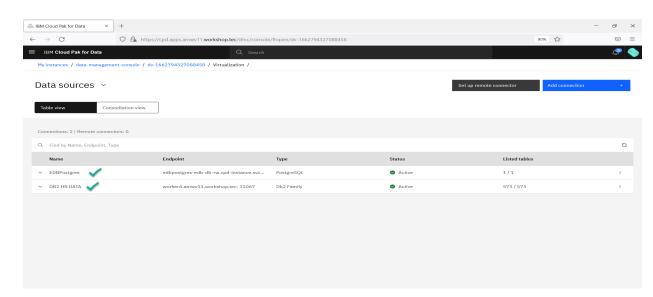
Now let's see how easy it is to virtualize some data.

\_\_28) If you are logged in as Becky, logoff and log in as Admin.

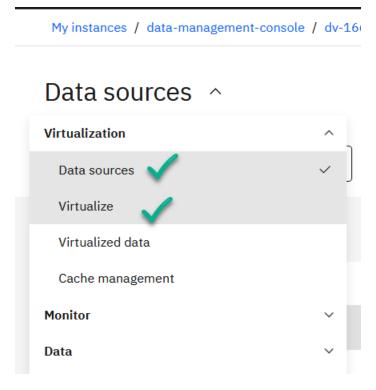
Click on the hamburger icon in the upper left corner of your screen, then choose **Data->Data Virtualization** 



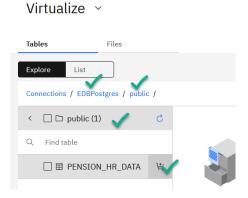
This will open a screen showing you the Data Sources that are currently defined in Watson Query (AKA Data Virtualization). Notice we have 2 – one for DB2 and one for Postgres. Our data will be a join from these 2 separate sources



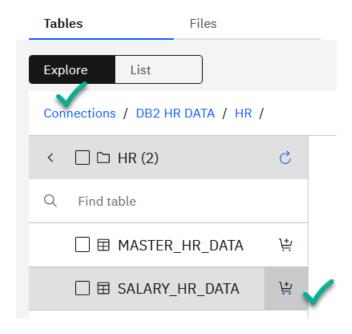
\_\_29) Next we'll navigate to where we define our virtualized data, using these sources. Drop down he 'Data Sources' and choose 'Virtualize'



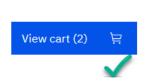
\_\_30) Next, click on the **EDB Postgres**, then the **public schema**, and then click the shopping cart icon next to **PENSION\_HR\_DATA**. This will add our first table to the shopping cart.



\_\_31) Now, repeat the process – click the link for 'Connections', then choose **DB2 HR Data**, then the **HR** schema, and then click the shopping cart next to **SALARY\_HR\_DATA**.



\_\_32) We now have added 2 tables to our shopping cart. Click on the shopping cart in the upper left corner of your screen.

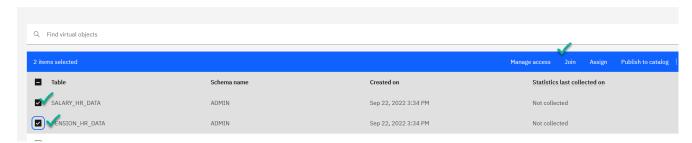


- \_\_33) Next, choose the radio button next to 'Virtualized Data', and then click 'Virtualize'.
- \_\_34) This will virtualize those 2 tables, meaning pointers are created within the Watson Query layer to those 2 tables, and then it will publish those assets to the Catalog. When that is finished, click 'Go to Virtualized Data'.

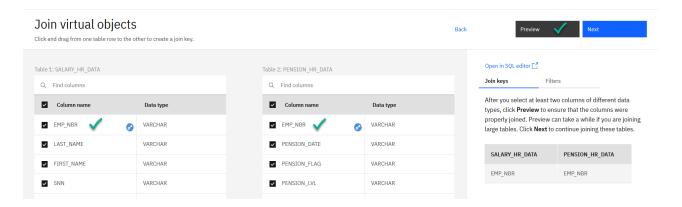


\_\_35) This will bring you to a screen with all the tables and views that have been set up. The 2 you just virtualized are at the top. Click the check box next to each of those tables, and then click the **Join** link at the top of the grid.

#### Virtualized data ~



\_\_36) Now you'll define the join criteria. Click and hold the mouse button over **EMP\_NBR** on the left table, and drag and drop the link onto **EMP\_NBR** on the right table. Then click **PREVIEW.** 



This will then show our resulting join, validate that all the columns have data.



If we published this, it would then be available to any users who are given access, and the data protection rules would be enforced automatically.



#### 1.8 Lab Conclusion

You've learned a lot today. Good job. Cloud Pak for Data has a *lot* more capabilities, which you will see if you continue working through the labs in this workshop. This lab is just the beginning!

Speaking of which, if you are continuing on to the next lab, you will see that the business analyst using Cognos to gain some insights into the business will be using the same virtualized tables we used here, and you'll be able to see the automated masking and data privacy up close in a real world situation, using Cognos Reporting.