## **Hortonworks Data Platform**

**Data Governance** 

(June 1, 2017)

docs.cloudera.com

#### Hortonworks Data Platform: Data Governance

Copyright © 2012-2017 Hortonworks, Inc. Some rights reserved.

The Hortonworks Data Platform, powered by Apache Hadoop, is a massively scalable and 100% open source platform for storing, processing and analyzing large volumes of data. It is designed to deal with data from many sources and formats in a very quick, easy and cost-effective manner. The Hortonworks Data Platform consists of the essential set of Apache Hadoop projects including MapReduce, Hadoop Distributed File System (HDFS), HCatalog, Pig, Hive, HBase, ZooKeeper and Ambari. Hortonworks is the major contributor of code and patches to many of these projects. These projects have been integrated and tested as part of the Hortonworks Data Platform release process and installation and configuration tools have also been included.

Unlike other providers of platforms built using Apache Hadoop, Hortonworks contributes 100% of our code back to the Apache Software Foundation. The Hortonworks Data Platform is Apache-licensed and completely open source. We sell only expert technical support, training and partner-enablement services. All of our technology is, and will remain, free and open source.

Please visit the Hortonworks Data Platform page for more information on Hortonworks technology. For more information on Hortonworks services, please visit either the Support or Training page. Feel free to contact us directly to discuss your specific needs.



Except where otherwise noted, this document is licensed under Creative Commons Attribution ShareAlike 4.0 License. http://creativecommons.org/licenses/by-sa/4.0/legalcode

## **Table of Contents**

1.	HDP Data Governance	1
	1.1. Apache Atlas Features	. 1
	1.2. Atlas-Ranger Integration	2
2.	Installing and Configuring Apache Atlas Using Ambari	4
	2.1. Apache Atlas Prerequisites	4
	2.2. Atlas Installation	4
	2.2.1. Start the Installation	. 4
	2.2.2. Customize Services	
	2.2.3. Dependent Configurations	13
	2.2.4. Configure Identities	
	2.2.5. Complete the Atlas Installation	15
	2.3. Enable the Ranger Plugin	18
	2.4. Configure Atlas Tagsync in Ranger	18
	2.5. Configure Atlas High Availability	18
	2.6. Configuring Atlas Security	18
	2.6.1. Additional Requirements for Atlas with Ranger and Kerberos	18
	2.6.2. Enable Atlas HTTPS	21
	2.6.3. Hive CLI Security	21
	2.7. Installing Sample Atlas Metadata	21
	2.8. Updating the Atlas Ambari Configuration	22
3.	Searching and Viewing Entities	23
	3.1. Using Basic and Advanced Search	23
	3.1.1. Using Basic Search	
	3.1.2. Using Advanced Search	24
	3.2. Viewing Entity Data Lineage & Impact	26
	3.3. Viewing Entity Details	28
	3.4. Manually Creating Entities	32
4.	Working with Atlas Tags	35
	4.1. Creating Atlas Tags	35
	4.2. Associating Tags with Entities	36
	4.3. Searching for Entities Associated with Tags	39
5.	Managing the Atlas Business Taxonomy (Technical Preview)	41
	5.1. Enabling the Atlas Taxonomy Technical Preview	41
	5.2. Creating Taxonomy Terms	
	5.3. Associating Taxonomy Terms with Entities	53
	5.4. Navigating the Atlas Taxonomy	56
	5.4.1. Navigation Arrows	56
	5.4.2. Breadcrumb Trail	57
	5.4.3. Search Terms	58
	5.4.4. Back Button	58
	5.5. Searching for Entities Associated with Taxonomy Terms	59
6	Anache Atlas REST API	

## **List of Figures**

1 1 1	_
1.1. Atlas Overview	 2

## **List of Tables**

2.1. Apache Atlas LDAP Configuration Settings	10
2.2. Apache Atlas AD Configuration Settings	
2.3. Apache Atlas Simple Authorization	12
2.4. Ranger Atlas Service Kerberos Properties	19

## 1. HDP Data Governance

Apache Atlas provides governance capabilities for Hadoop that use both prescriptive and forensic models enriched by business taxonomical metadata. Atlas is designed to exchange metadata with other tools and processes within and outside of the Hadoop stack, thereby enabling platform-agnostic governance controls that effectively address compliance requirements.

Apache Atlas enables enterprises to effectively and efficiently address their compliance requirements through a scalable set of core governance services. These services include:

- Search and Proscriptive Lineage facilitates pre-defined and ad hoc exploration of data and metadata, while maintaining a history of data sources and how specific data was generated.
- Metadata-driven data access control.
- Flexible modeling of both business and operational data.
- Data Classification helps you to understand the nature of the data within Hadoop and classify it based on external and internal sources.
- Metadata interchange with other metadata tools.

## 1.1. Apache Atlas Features

Apache Atlas is a low-level service in the Hadoop stack that provides core metadata services. Atlas currently provides metadata services for the following components:

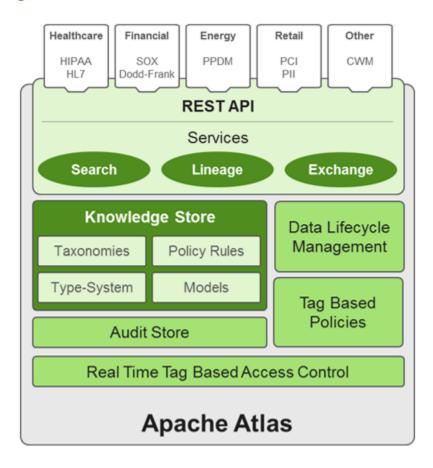
- Hive
- Ranger
- Sqoop
- Storm/Kafka (limited support)
- Falcon (limited support)

Apache Atlas provides the following features:

- Knowledge store that leverages existing Hadoop metastores: Categorized into
  a business-oriented taxonomy of data sets, objects, tables, and columns. Supports
  the exchange of metadata between HDP foundation components and third-party
  applications or governance tools.
- **Data lifecycle management:** Leverages existing investment in Apache Falcon with a focus on provenance, multi-cluster replication, data set retention and eviction, late data handling, and automation.
- Audit store: Historical repository for all governance events, including security events (access, grant, deny), operational events related to data provenance and metrics. The Atlas audit store is indexed and searchable for access to governance events.

- **Security:** Integration with HDP security that enables you to establish global security policies based on data classifications and that leverages Apache Ranger plug-in architecture for security policy enforcement.
- **Policy engine:** Fully extensible policy engine that supports metadata-based, geo-based, and time-based rules that rationalize at runtime.
- RESTful interface: Supports extensibility by way of REST APIs to third-party applications so you can use your existing tools to view and manipulate metadata in the HDP foundation components.

Figure 1.1. Atlas Overview



## 1.2. Atlas-Ranger Integration

Atlas provides data governance capabilities and serves as a common metadata store that is designed to exchange metadata both within and outside of the Hadoop stack. Ranger provides a centralized user interface that can be used to define, administer and manage security policies consistently across all the components of the Hadoop stack. The Atlas-Ranger unites the data classification and metadata store capabilities of Atlas with security enforcement in Ranger.

You can use Atlas and Ranger to implement dynamic classification-based security policies, in addition to role-based security policies. Ranger's centralized platform empowers data

administrators to define security policy based on Atlas metadata tags or attributes and apply this policy in real-time to the entire hierarchy of entities including databases, tables, and columns, thereby preventing security violations.

#### **Ranger-Atlas Access Policies**

- Classification-based access controls: A data entity such as a table or column can be marked with the metadata tag related to compliance or business taxonomy (such as "PCI"). This tag is then used to assign permissions to a user or group. This represents an evolution from role-based entitlements, which require discrete and static one-to-one mapping between user/group and resources such as tables or files. As an example, a data steward can create a classification tag "PII" (Personally Identifiable Information) and assign certain Hive table or columns to the tag "PII". By doing this, the data steward is denoting that any data stored in the column or the table has to be treated as "PII". The data steward now has the ability to build a security policy in Ranger for this classification and allow certain groups or users to access the data associated with this classification, while denying access to other groups or users. Users accessing any data classified as "PII" by Atlas would be automatically enforced by the Ranger policy already defined.
- Data Expiry-based access policy: For certain business use cases, data can be toxic and have an expiration date for business usage. This use case can be achieved with Atlas and Ranger. Apache Atlas can assign expiration dates to a data tag. Ranger inherits the expiration date and automatically denies access to the tagged data after the expiration date.
- Location-specific access policies: Similar to time-based access policies, administrators can now customize entitlements based on geography. For example, a US-based user might be granted access to data while she is in a domestic office, but not while she is in Europe. Although the same user may be trying to access the same data, the different geographical context would apply, triggering a different set of privacy rules to be evaluated.
- Prohibition against dataset combinations: With Atlas-Ranger integration, it is now
  possible to define a security policy that restricts combining two data sets. For example,
  consider a scenario in which one column consists of customer account numbers, and
  another column contains customer names. These columns may be in compliance
  individually, but pose a violation if combined as part of a query. Administrators can now
  apply a metadata tag to both data sets to prevent them from being combined.

#### **Cross Component Lineage**

Apache Atlas now provides the ability to visualize cross-component lineage, delivering a complete view of data movement across a number of analytic engines such as Apache Storm, Kafka, Falcon, and Hive.

This functionality offers important benefits to data stewards and auditors. For example, data that starts as event data through a Kafka bolt or Storm Topology is also analyzed as an aggregated dataset through Hive, and then combined with reference data from a RDBMS via Sqoop, can be governed by Atlas at every stage of its lifecycle. Data stewards, Operations, and Compliance now have the ability to visualize a data set's lineage, and then drill down into operational, security, and provenance-related details. As this tracking is done at the platform level, any application that uses these engines will be natively tracked. This allows for extended visibility beyond a single application view.

# 2. Installing and Configuring Apache Atlas Using Ambari

## 2.1. Apache Atlas Prerequisites

Apache Atlas requires the following components:

- Ambari Infra (which includes an internal HDP Solr Cloud instance) or an externally managed Solr Cloud instance.
- HBase (used as the Atlas Metastore).
- Kafka (provides a durable messaging bus).

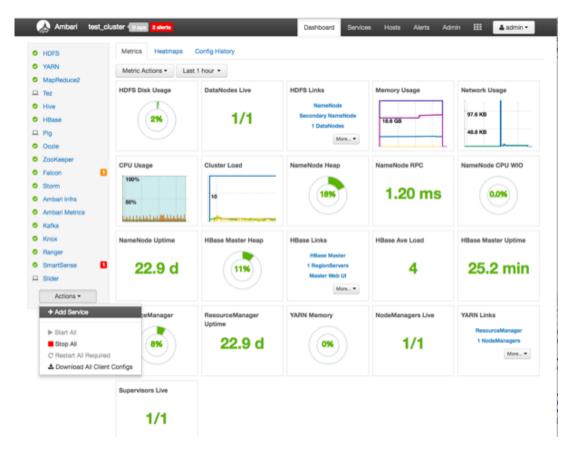
### 2.2. Atlas Installation

#### To install Atlas using Ambari:

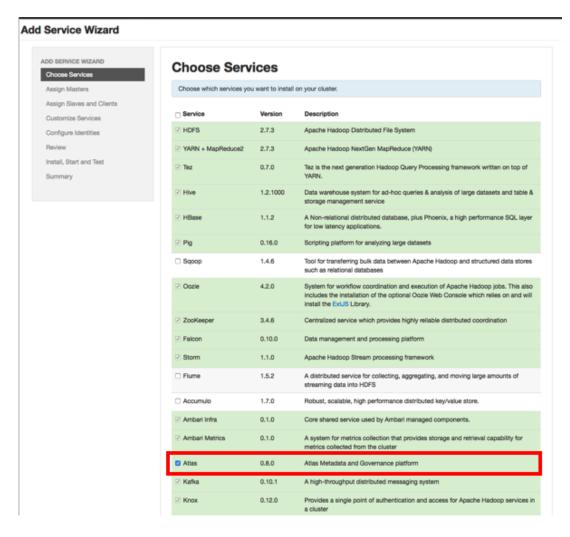
- 1. Start the Installation [4]
- 2. Customize Services [8]
- 3. Complete the Atlas Installation [15]

#### 2.2.1. Start the Installation

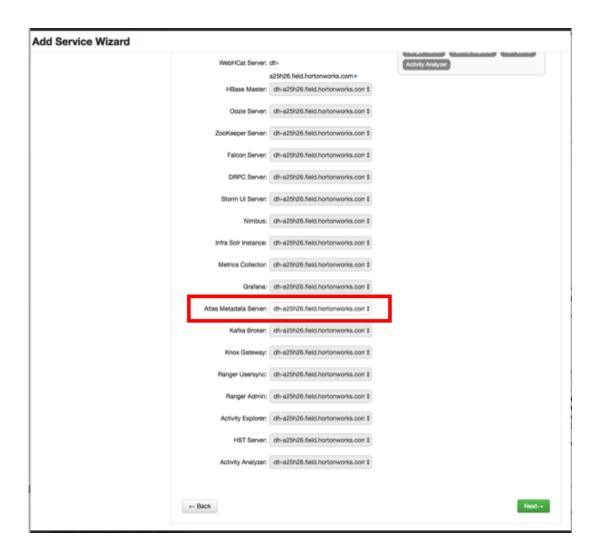
1. On the Ambari Dashboard, click Actions, then select Add Service.



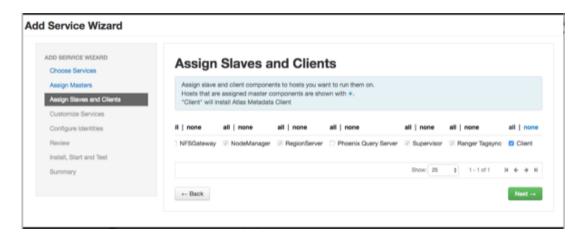
2. On the Choose Services page, select Atlas, then click Next.



3. The Assign Master page appears. Specify a host for the Atlas Metadata Server, then click **Next**.



4. The Assign Slaves and Clients page appears with Client (the Atlas Metadata Client) selected. Click **Next** to continue.



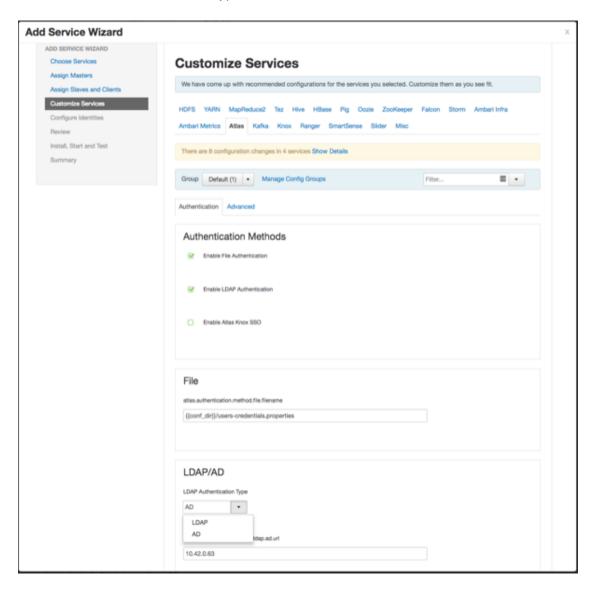
5. The Customize Services page appears. These settings are described in the next section.

#### 2.2.2. Customize Services

The next step in the installation process is to specify Atlas settings on the Customize Services page.

#### 2.2.2.1. Authentication Settings

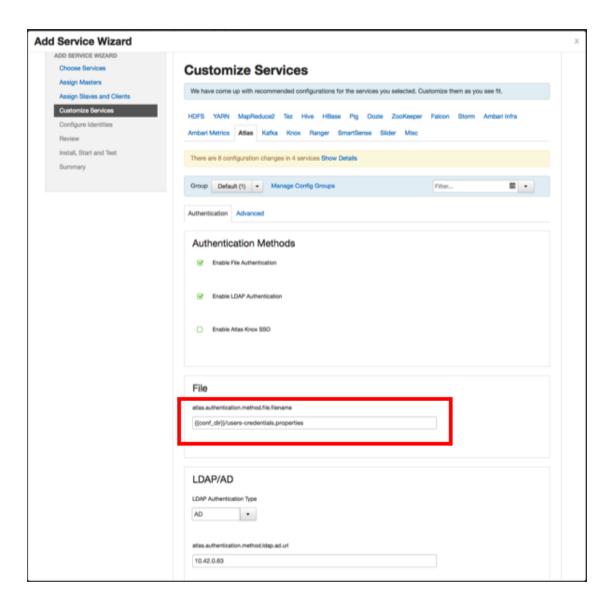
You can set the Authentication Type to File, LDAP, or AD.



#### 2.2.2.1.1. File-based Authentication

#### When file-based authentication is selected, the

atlas.authentication.method.file.filename property is automtically set to  $\{\{conf\_dir\}\}\$ /users-credentials.properties.



The users-credentials.properties file should have the following format:

```
username=group::sha256password
admin=ADMIN::e7cf3ef4f17c3999a94f2c6f612e8a888e5b1026878e4e19398b23bd38ec221a
```

The user group can be ADMIN, DATA\_STEWARD, or DATA\_SCIENTIST.

The password is encoded with the sha256 encoding method and can be generated using the UNIX tool:

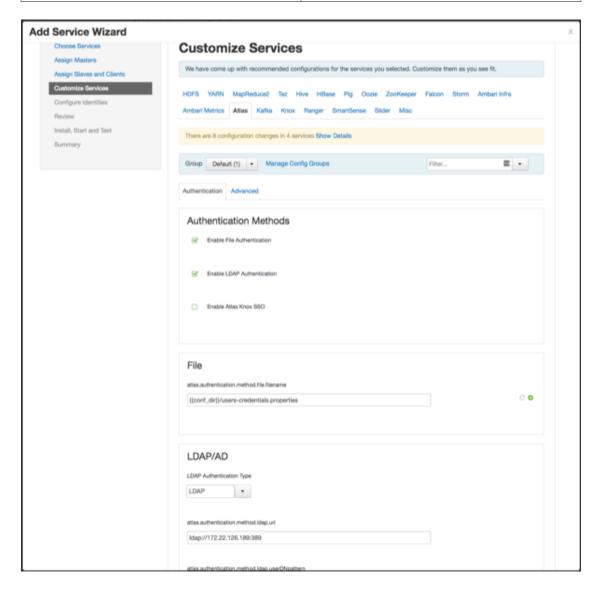
```
echo -n "Password" | sha256sum
e7cf3ef4f17c3999a94f2c6f612e8a888e5b1026878e4e19398b23bd38ec221a -
```

#### 2.2.2.1.2. LDAP Authentication

To enable LDAP authentication, select **LDAP**, then set the following configuration properties.

**Table 2.1. Apache Atlas LDAP Configuration Settings** 

Property	Sample Values
atlas.authentication.method.ldap.url	ldap://127.0.0.1:389
atlas.authentication.method.ldap.user DN pattern	uid={0],ou=users,dc=example,dc=com
atlas.authentication.method.ldap.groupSearchBase	dc=example,dc=com
atlas.authentication.method.ldap.groupSearchFilter	(member=cn={0},ou=users,dc=example,dc=com
atlas.authentication.method.ldap.groupRoleAttribute	cn
atlas.authentication.method.ldap.base.dn	dc=example,dc=com
atlas.authentication.method.ldap.bind.dn	cn=Manager,dc=example,dc=com
atlas.authentication.method.ldap.bind.password	PassW0rd
atlas.authentication.method.ldap.referral	ignore
atlas.authentication.method.ldap.user.searchfilter	(uid={0})
atlas.authentication.method.ldap.default.role	ROLE_USER

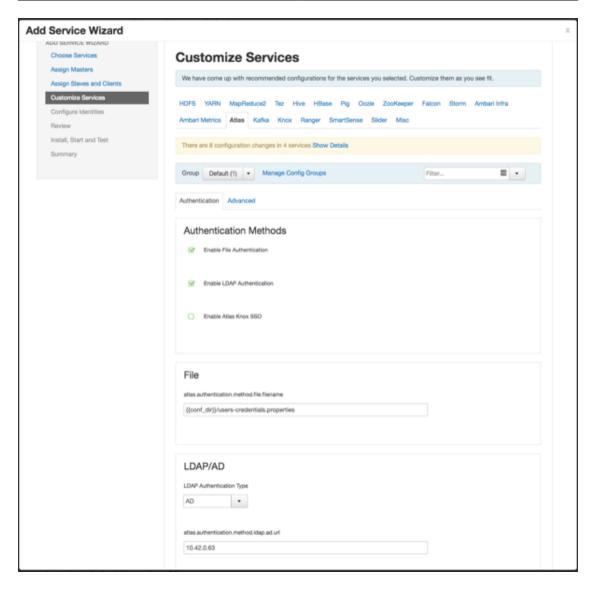


#### 2.2.2.1.3. AD Authentication

To enable AD authentication, select AD, then set the following configuration properties.

**Table 2.2. Apache Atlas AD Configuration Settings** 

Property	Sample Values
atlas.authentication.method.ldap.ad.url	ldap://127.0.0.1:389
Domain Name (Only for AD)	example.com
atlas.authentication.method.ldap.ad.base.dn	DC=example,DC=com
atlas.authentication.method.ldap.ad.bind.dn	CN=Administrator, CN=Users, DC=example, DC=com
atlas.authentication.method.ldap.ad.bind.password	PassW0rd
atlas.authentication.method.ldap.ad.referral	ignore
atlas.authentication.method.ldap.ad.user.searchfilter	(sAMAccountName={0})
atlas.authentication.method.ldap.ad.default.role	ROLE_USER



### 2.2.2.2. Authorization Settings

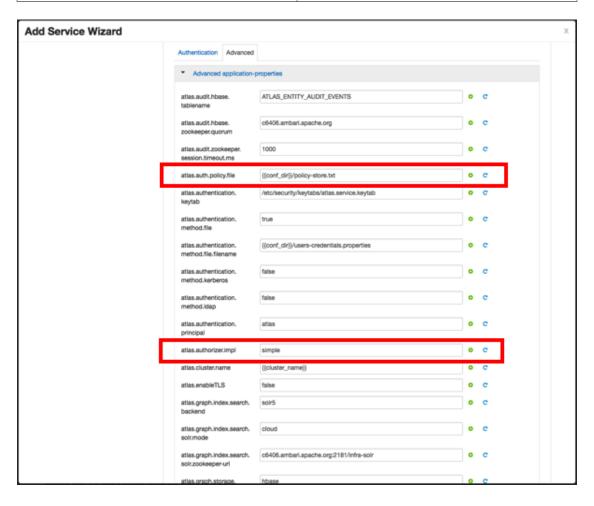
Two authorization methods are available for Atlas: Simple and Ranger.

#### 2.2.2.1. Simple Authorization

The default setting is Simple, and the following properties are automatically set under **Advanced application-properties** on the Advanced tab.

**Table 2.3. Apache Atlas Simple Authorization** 

Property	Value
atlas.authorizer.impl	simple
atlas.auth.policy.file	{{conf_dir}}/policy-store.txt



The policy-store.txt file has the following format:

Policy\_Name;;User\_Name:Operations\_Allowed;;Group\_Name:Operations\_Allowed;;Resource\_Type:Resource\_Type

For example:

```
adminPolicy;;admin:rwud;;ROLE_ADMIN:rwud;;type:*,entity:*,operation:*,
taxonomy:*,term:*
userReadPolicy;;readUser1:r,readUser2:r;;DATA_SCIENTIST:r;;type:*,entity:*,
operation:*,taxonomy:*,term:*
userWritePolicy;;writeUser1:rwu,writeUser2:rwu;;BUSINESS_GROUP:rwu,
DATA_STEWARD:rwud;;type:*,entity:*,operation:*,taxonomy:*,term:*
```

In this example readUser1, readUser2, writeUser1 and writeUser2 are the user IDs, each with its corresponding access rights. The User\_Name, Group\_Name and Operations\_Allowed are comma-separated lists.

#### **Authorizer Resource Types:**

- Operation
- Type
- Entity
- Taxonomy
- Term
- Unknown

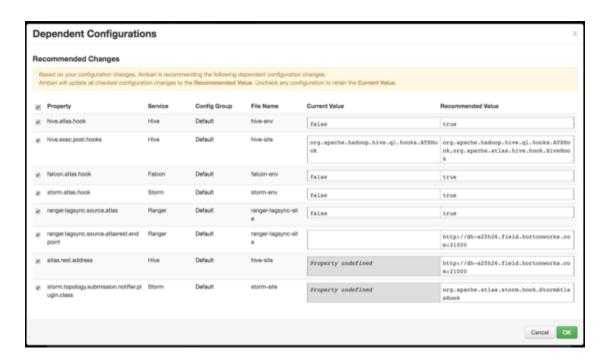
Operations\_Allowed are r = read, w = write, u = update, d = delete

#### 2.2.2.2. Ranger Authorization

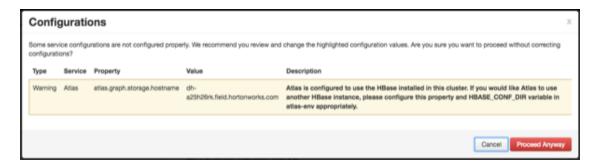
Ranger Authorization is activated by enabling the Ranger Atlas plug-in in Ambari.

## 2.2.3. Dependent Configurations

After you customize Atlas services and click **Next**, the Dependent Configurations page displayes recommended settings for dependent configurations. Clear the checkbox next to a property to retain the current value. Click **OK** to set the selected recommended property values.

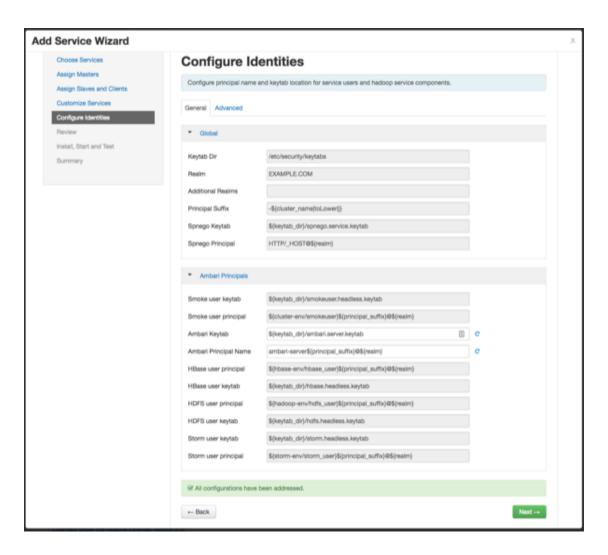


If Ambari detects other configuration issues, they will be displayed on a Configurations pop-up. Click **Cancel** to go back and change these settings, or click **Proceed Anyway** to continue the installation without changing the configurations.



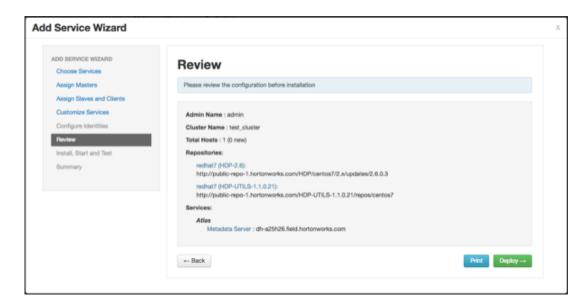
## 2.2.4. Configure Identities

If Kerberos is enabled, the Configure Identities page appears. Click **Next** to continue with the installation.

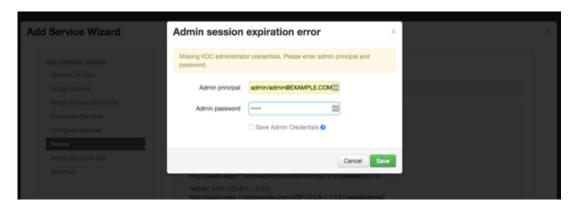


## 2.2.5. Complete the Atlas Installation

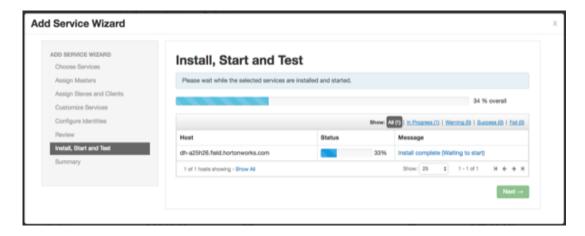
1. On the Review page, carefully review all of your settings and configurations. If everything looks good, click **Deploy** to install Atlas on the Ambari server.



If Kerberos is enabled, you are prompted to enter your KDC administrator credentials. Type in your KDC Admin principal and password, then click **Save**.



2. When you click **Deploy**, Atlas is installed on the specified host on your Ambari server. A progress bar displays the installation progress.



3. When the installation is complete, a Summary page displays the installation details. Click **Complete** to finish the installation.

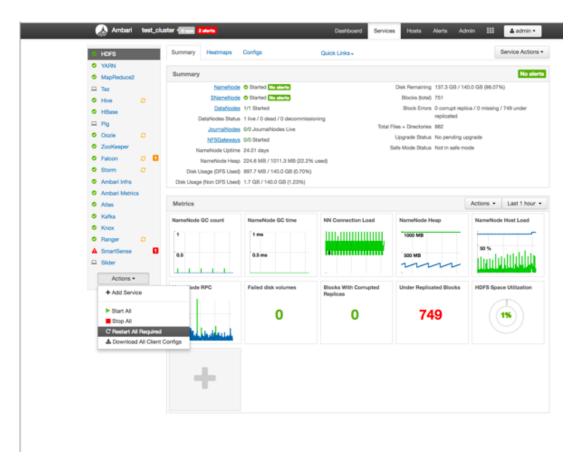


#### **Note**

The Atlas user name and password are set to admin/admin by default.



4. Select **Actions > Restart All Required** to restart all cluster components that require a restart.



## 2.3. Enable the Ranger Plugin

The Ranger Atlas plugin enables you to establish and enforce global security policies based on data classifications. For more information, see enabling the Ranger Atlas plugin in Ambari.

## 2.4. Configure Atlas Tagsync in Ranger



#### Note

Before configuring Atlas Tagsync in Ranger, you must enable Ranger Authorization in Atlas by enabling the Ranger Atlas plug-in in Ambari.

For information about configuring Atlas Tagsync in Ranger, see Configure Ranger Tagsync.

## 2.5. Configure Atlas High Availability

For information about configuring High Availability (HA) for Apache Atlas, see Apache Atlas High Availability.

## 2.6. Configuring Atlas Security

## 2.6.1. Additional Requirements for Atlas with Ranger and Kerberos

Currently additional configuration steps are required for Atlas with Ranger and in Kerberized environments.

#### 2.6.1.1. Additional Requirements for Atlas with Ranger

When Atlas is used with Ranger, perform the following additional configuration steps:



#### **Important**

These steps are not required for Ambari-2.4.x and higher versions. For Ambari-2.4.x and higher, these steps will be performed automatically when Atlas is restarted.

- Create the following HBase policy:
  - table: atlas\_titan, ATLAS\_ENTITY\_AUDIT\_EVENTS

user: atlas

permission: Read, Write, Create, Admin

Create following Kafka policies:

• topic=ATLAS\_HOOK

permission=publish, create; group=public

permission=consume, create; user=atlas (for non-kerberized environments, set group=public)

• topic=ATLAS\_ENTITIES

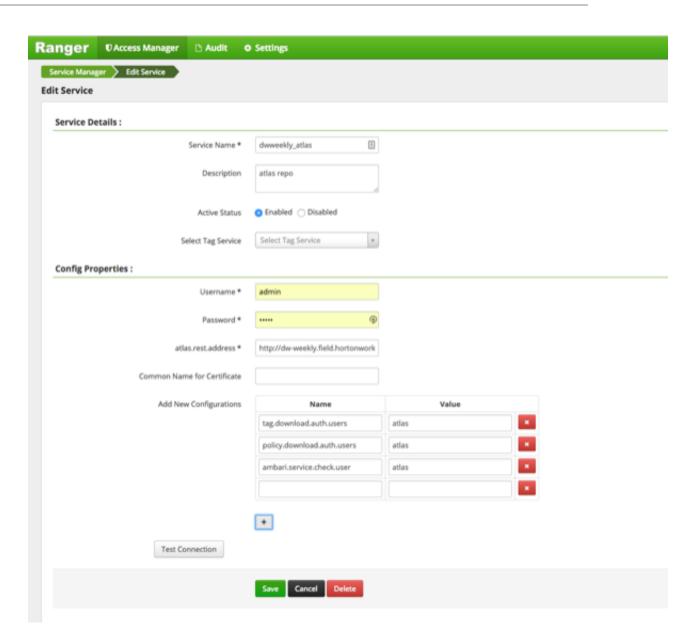
permission=publish, create; user=atlas (for non-kerberized environments, set group=public)

permission=consume, create; group=public

You should also ensure that an Atlas service is created in Ranger, and that the Atlas service includes the following configuration properties:

**Table 2.4. Ranger Atlas Service Kerberos Properties** 

Property	Value
tag.download.auth.users	atlas
policy.download.auth.users	atlas
ambari.service.check.user	atlas





#### **Note**

If the Ranger Atlas service is not created after enabling the plugin and restarting Atlas, that indicates that either there is already a policy JSON on the Atlas host (in the /etc/ranger/<service\_name>/policycache/directory), or Ambari was unable to connect to Ranger Admin during the Atlas restart. The solution for the first issue is to delete or move the policycache file, then restart Atlas.

- You can click the **Test Connection** button on the Ranger Atlas Service Details page to verify the configuration settings.
- You can also select **Audit > Plugins** in the Ranger Admin UI to check for the latest Atlas service entry.



## 2.6.1.2. Additional Requirements for Atlas with Kerberos without Ranger

When Atlas is used in a Kerberized environment without Ranger, perform the following additional configuration steps:

- Start the HBase shell with the user identity of the HBase admin user ('hbase')
- Execute the following command in HBase shell, to enable Atlas to create necessary HBase tables:
  - grant 'atlas', 'RWXCA'
- Start (or restart) Atlas, so that Atlas would create above HBase tables
- Execute the following commands in HBase shell, to enable Atlas to access necessary HBase tables:
  - grant 'atlas', 'RWXCA', 'atlas\_titan'
  - grant 'atlas', 'RWXCA', 'ATLAS\_ENTITY\_AUDIT\_EVENTS'
- Kafka To grant permissions to a Kafka topic, run the following commands as the Kafka user:

```
/usr/hdp/current/kafka-broker/bin/kafka-acls.sh --topic ATLAS_HOOK --allow-principals * --operations All --authorizer-properties "zookeeper.connect=hostname:2181"
/usr/hdp/current/kafka-broker/bin/kafka-acls.sh --topic ATLAS_ENTITIES --allow-principals * --operations All --authorizer-properties "zookeeper.connect=hostname:2181"
```

#### 2.6.2. Enable Atlas HTTPS

For information about enabling HTTPS for Apache Atlas, see Enable SSL for Apache Atlas.

## 2.6.3. Hive CLI Security

If you have Oozie, Storm, or Sqoop Atlas hooks enabled, the Hive CLI can be used with these components. You should be aware that the Hive CLI may not be secure without taking additional measures.

## 2.7. Installing Sample Atlas Metadata

You can use the quick\_start.py Python script to install sample metadata to view in the Atlas web UI. Use the following steps to install the sample metadata:

- 1. Log in to the Atlas host server using a command prompt.
- 2. Run the following command as the Atlas user:

su atlas -c '/usr/hdp/current/atlas-server/bin/quick\_start.py'



#### Note

In an SSL-enabled environment, run this command as:

su atlas -c '/usr/hdp/current/atlas-server/bin/quick\_start.py
https://<fqdn\_atlas\_host>:21443'

When prompted, type in the Atlas user name and password. When the script finishes running, the following confirmation message appears:

Example data added to Apache Atlas Server!!!

If Kerberos is enabled, kinit is required to execute the quick\_start.py script.

After you have installed the sample metadata, you can explore the Atlas web UI.



#### Note

If you are using the HDP Sandbox, you do not need to run the Python script to populate Atlas with sample metadata.

## 2.8. Updating the Atlas Ambari Configuration

When you update the Atlas configuration settings in Ambari, Ambari marks the services that require restart, and you can select **Actions > Restart All Required** to restart all services that require a restart.



#### **Important**

Apache Oozie requires a restart after an Atlas configuration update, but may not be included in the services marked as requiring restart in Ambari. Select **Oozie > Service Actions > Restart All** to restart Oozie along with the other services.

## 3. Searching and Viewing Entities

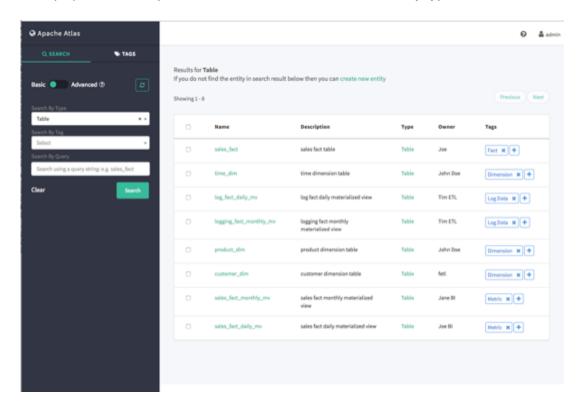
## 3.1. Using Basic and Advanced Search

### 3.1.1. Using Basic Search

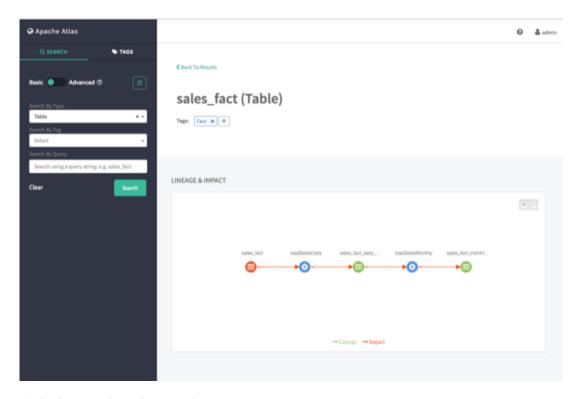
You can search for entities using three basic search modes:

- Search by Type search based on a selected Entity type.
- Search by Tag search based on a selected Atlas tag.
- Search by Query full-text search.
- 1. To search for entities, click **SEARCH** on the Atlas web UI. Select an entity type, an Atlas tag, or enter a text string, then click **Search** to display a list of the entities associated with the specified search criteria.

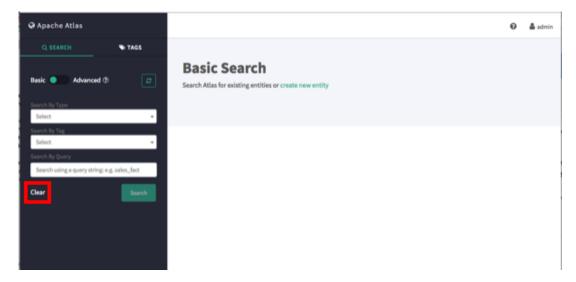
You can also combine search criteria (search for a type with a specific name, for example). In the example below, we searched for the Table entity type.



2. To view detailed information about an entity, click the entity in the search results list. In the example below, we selected the "sales\_fact" table from the list of search results.



3. Click **Clear** to clear the search settings.



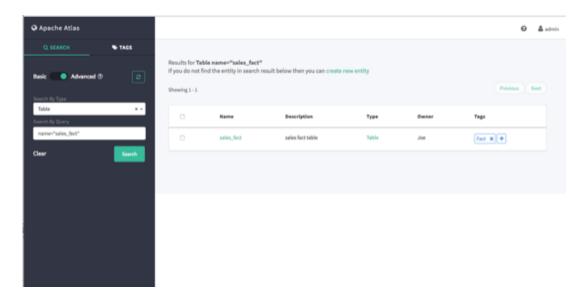
## 3.1.2. Using Advanced Search

To switch to Advanced search mode, slide the green toggle button from **Basic** to **Advanced**. You can search for entities using two advanced search modes:

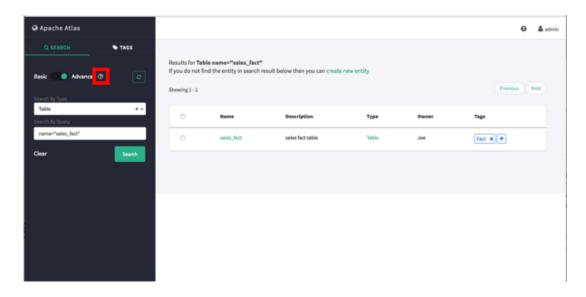
- Search by Type search based on a selected Entity type.
- Search by Query search using an Apache Atlas DSL query. Atlas DSL (Domain-Specific Language) is a SQL-like query language that enables you to search metadata using complex queries.

1. To search for entities, select an entity type or enter an Atlas DSL search query, then click **Search** to display a list of the entities associated with the specified search criteria.

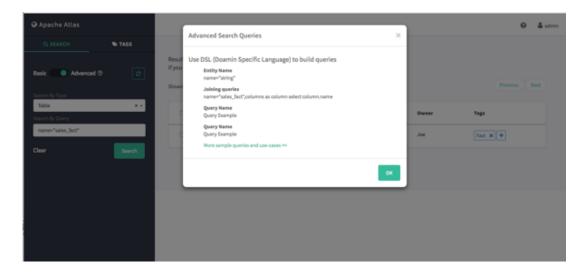
You can also combine search criteria. In the example below, we searched for Table entity types named "sales\_fact".



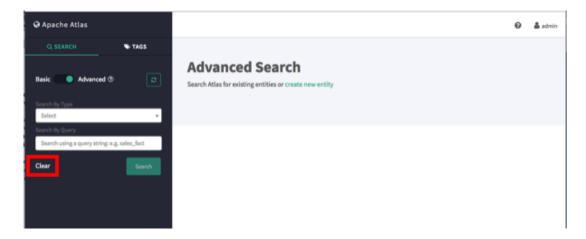
To display more information about Atlas DSL queries, click the question mark symbol next to the **Advanced** label above the search boxes.



The Advanced Search Queries lists example queries, along with a link to the Apache Atlas DSL query documentation:

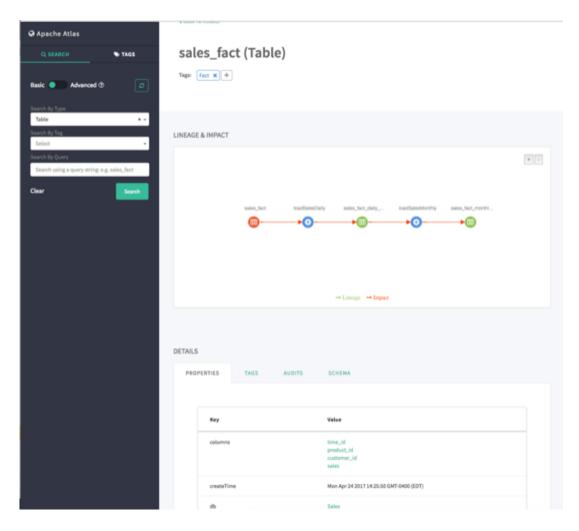


2. Click Clear to clear the search settings.

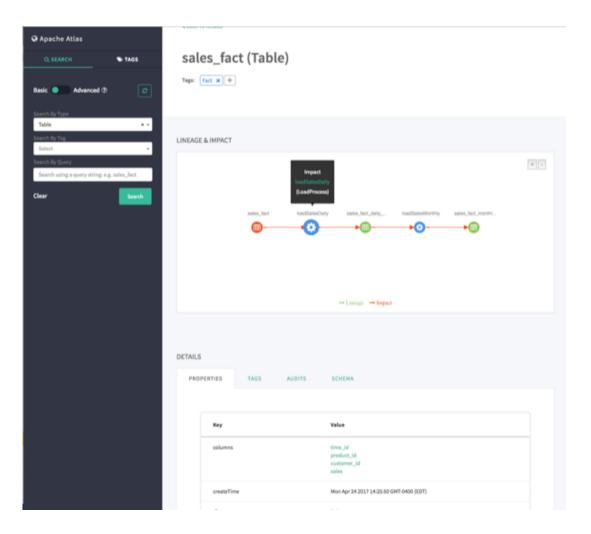


## 3.2. Viewing Entity Data Lineage & Impact

1. Data lineage and impact is displayed when you select an entity. In the following example, we ran a Type search for Table, and then selected the "sales\_fact" entity. Data lineage and impact is displayed graphically, with each icon representing an action. You can use the + and - buttons to zoom in and out, and you can also click and drag to move the image.



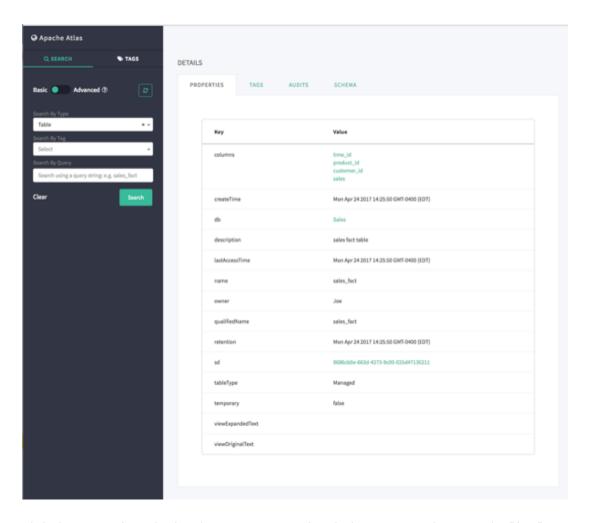
2. Moving the cursor over an icon displays a pop-up with more information about the action that was performed. In the following example, we can see that a query was used to create the "loadSalesDaily" table from the "sales\_fact" table.



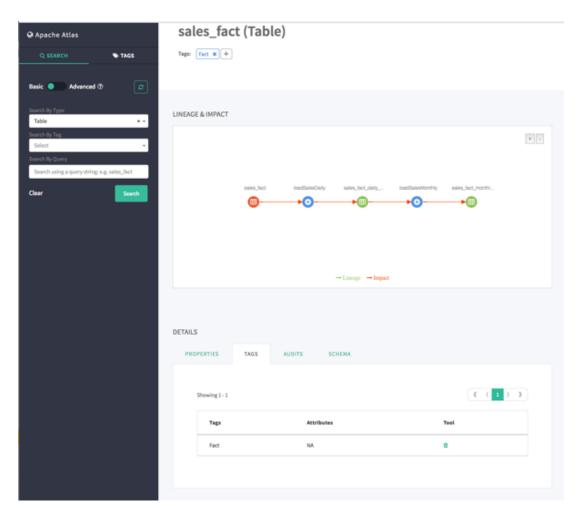
## 3.3. Viewing Entity Details

When you select an entity, detailed information about the entity is displayed under DETAILS.

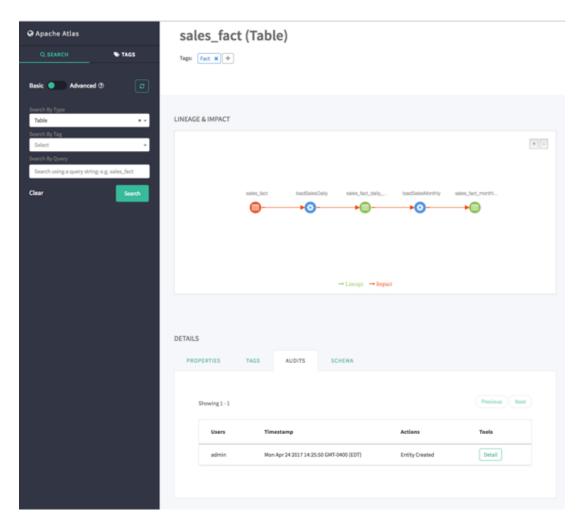
• The Properties tab displays all of the entity properties.



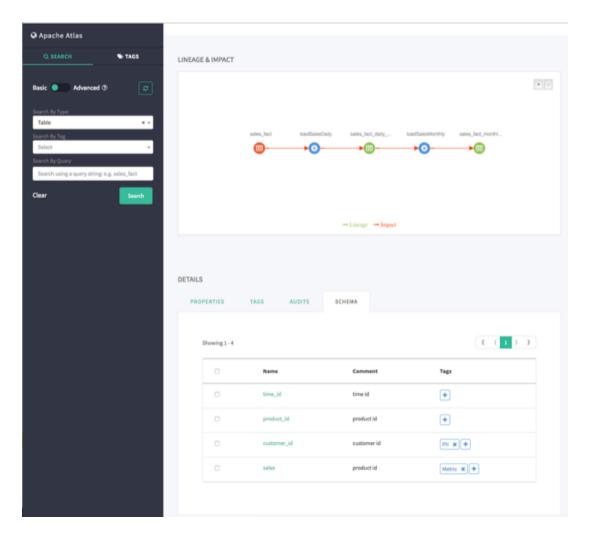
• Click the Tags tab to display the tags associated with the entity. In this case, the "fact" tag has been associated with the "sales\_fact" table.



- If the Atlas Taxonomy has been enabled, the Terms tab lists the taxonomy terms that have been associated with the entity. The Terms tab is not displayed if the Taxonomy has not been enabled.
- The Audits tab provides a complete audit trail of all events in the entity history. You can use the Detail button next to each action to view more details about the event.



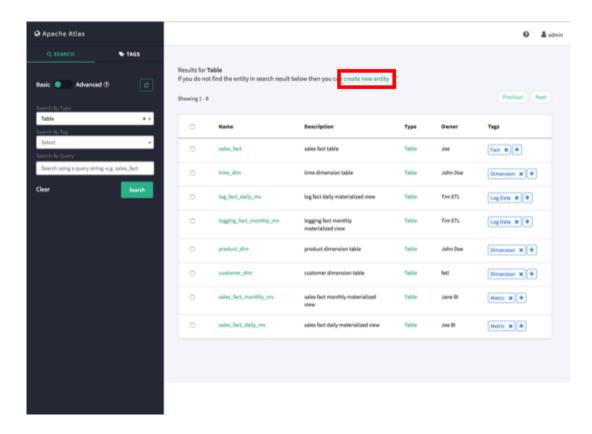
• The Schema tab shows schema information, in this case the columns for the table. We can also see that a PII tag has been associated with the "customer\_id" column.



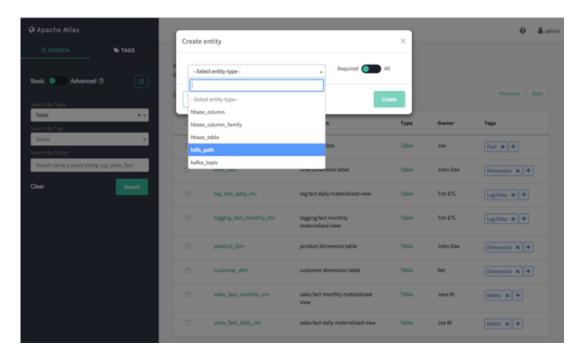
## 3.4. Manually Creating Entities

Currently there is no Atlas hook for HBase, HDFS, or Kafka. For these components, you must manually create entities in Atlas. You can then associate tags with these entities and control access using Ranger tag-based policies.

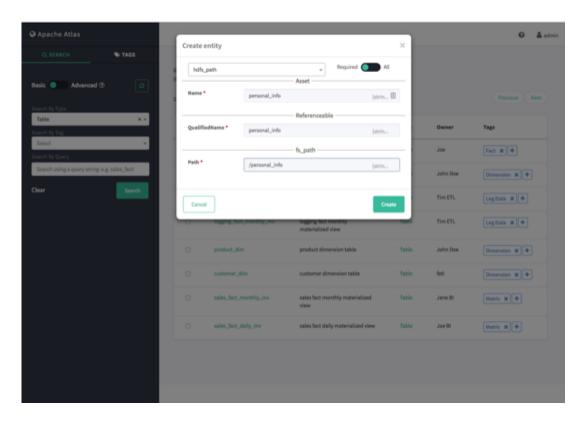
1. On the Atlas web UI Search page, click the create new entity link at the top of the page.



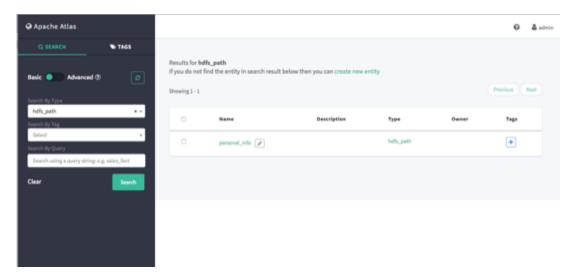
2. On the Create Entity pop-up, select an entity type.



3. Enter the required information for the new entity. Click **All** to display both required and non-required information. Click **Create** to create the new entity.



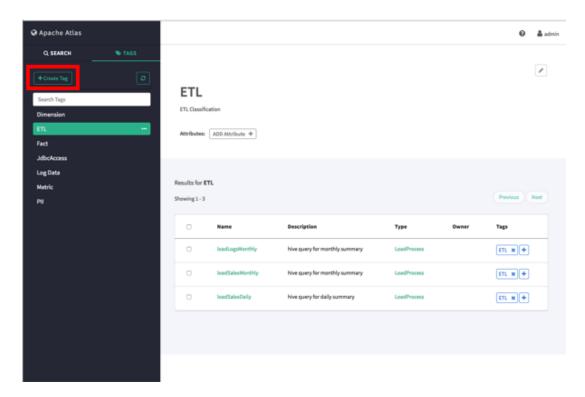
4. The entity is created and returned in search results for the applicable entity type. You can now associate tags with the new entity and control access to the entity with Ranger tag-based policies.



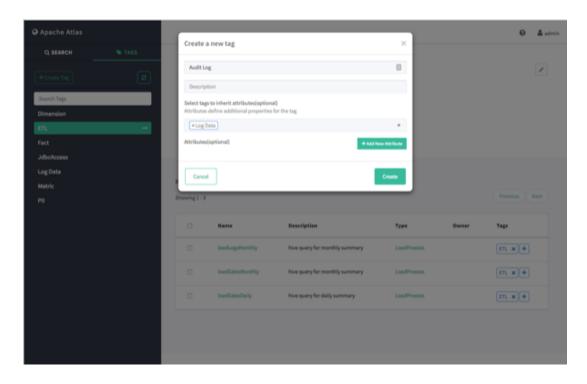
## 4. Working with Atlas Tags

## 4.1. Creating Atlas Tags

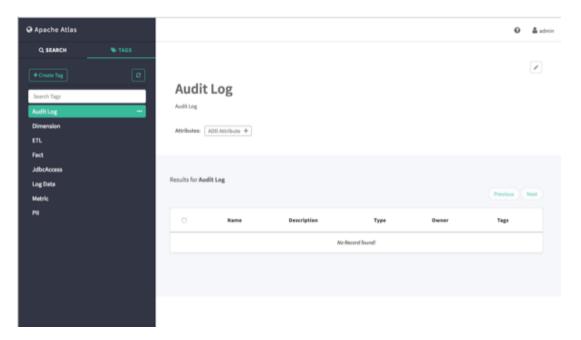
1. On the Atlas web UI, click TAGS, then click Create Tag.



2. On the Create a New Tag pop-up, type in a name and an optional description for the tag. You can use the Select tags to inherit attributes box to inherit attributes from other tags. Click Add New Attribute to add one or more new attributes to the tag. Click Create to create the new Tag.

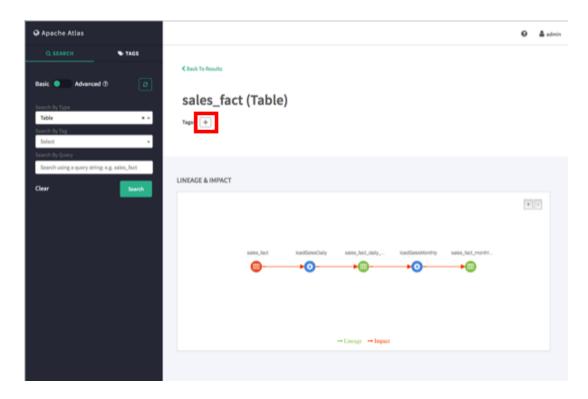


3. The new tag appears in the Tags list.

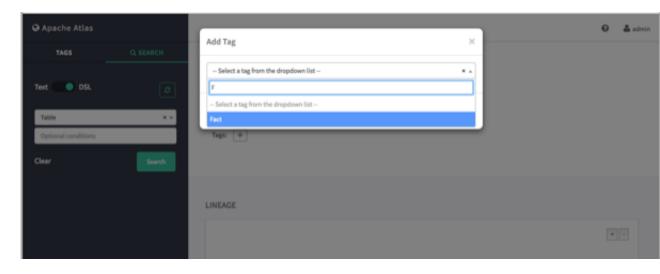


## 4.2. Associating Tags with Entities

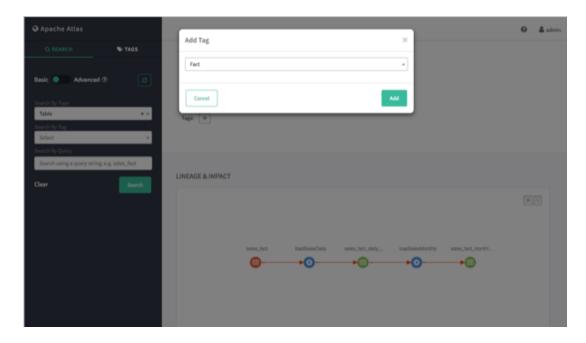
1. Select an asset. In the example below, we searched for all Table entities, and then selected the "sales\_fact" table from the list of search results. To associate a tag with an asset, click the + icon next to the **Tags**: label.



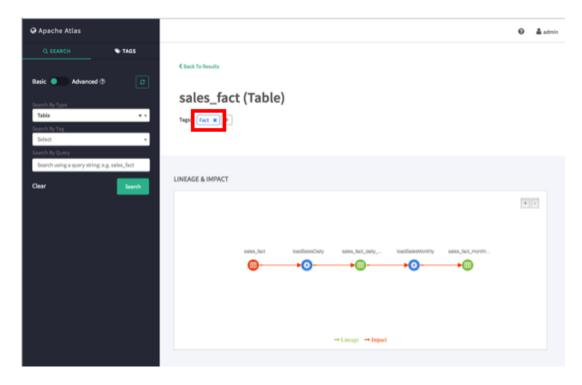
2. On the Add Tag pop-up, click **Select Tag**, then select the tag you would like to associate with the asset. You can filter the list of tags by typing text in the Select Tag box.



3. After you select a tag, the Add Tag pop-up is redisplayed with the selected tag. Click **Add** to associate the tag with the asset.

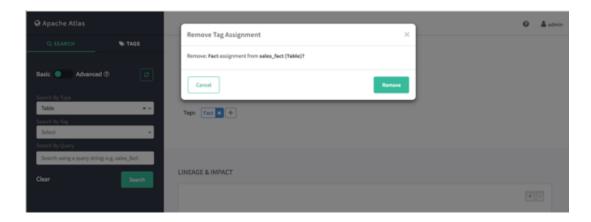


4. The new tag is displayed next to the **Tags**: label on the asset page.



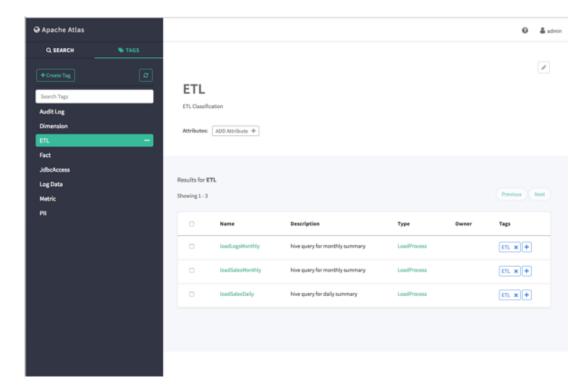
5. You can view details about a tag by clicking the tag name on the tag label.

To remove a tag from an asset, click the **x** symbol on the tag label, then click **Remove** on the confirmation pop-up. This removes the tag association with the asset, but does not delete the tag itself.

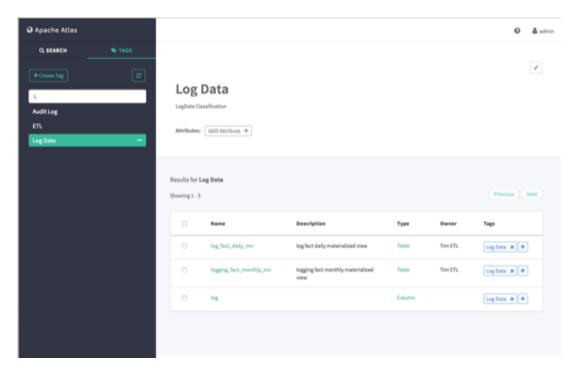


## 4.3. Searching for Entities Associated with Tags

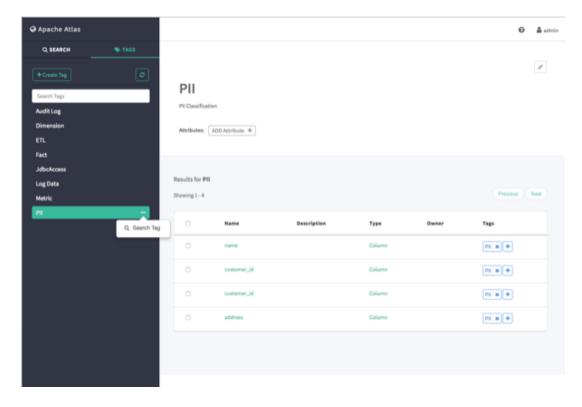
1. To display a list of all of the entities associated with a tag, click the tag name in the Atlas Tags list.



2. To filter the Tags list based on a text string, type the text in the Search Tags box. The list is filtered dynamically as you type to display the tags that contain that text string. You can then click a tag in the filtered list to display the entities associated with that tag.



3. You can also search for entities associated with a tag by clicking the ellipsis symbol for the tag and selecting **Search Tag**. This launches a DSL search query that returns a list of all entities associated with the tag.



# 5. Managing the Atlas Business Taxonomy (Technical Preview)

The taxonomy feature in Apache Atlas enables you to define a hierarchical set of business terms that represents your business domain. You can then associate these taxonomy terms with the metadata entities that Atlas manages. This hierarchical business catalog makes it easier to organize and discover data stored in Hadoop.



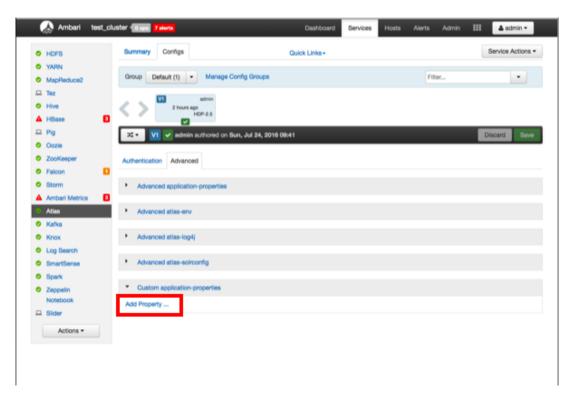
#### Note

The Apache Atlas Taxonomy feature is a Technical Preview and is considered under development. Do not use this feature in your production systems. If you have questions regarding this feature, contact Support by logging a case on our Hortonworks Support Portal at https://support.hortonworks.com.

## 5.1. Enabling the Atlas Taxonomy Technical Preview

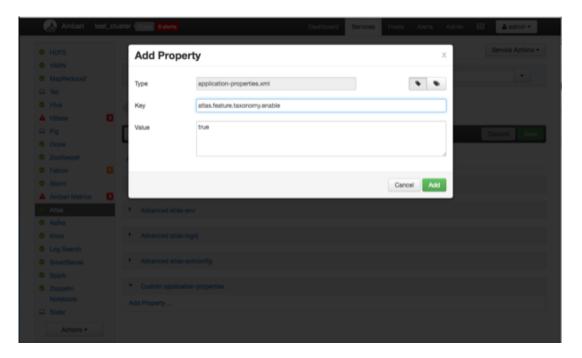
Because the Atlas Taxonomy feature is a Technical Preview, it is not enabled by default and does not appear on the Atlas web UI. Use the following steps to enable the Atlas Taxonomy feature.

 Select Atlas > Configs > Advanced > Custom application-properties, then click Add Property.

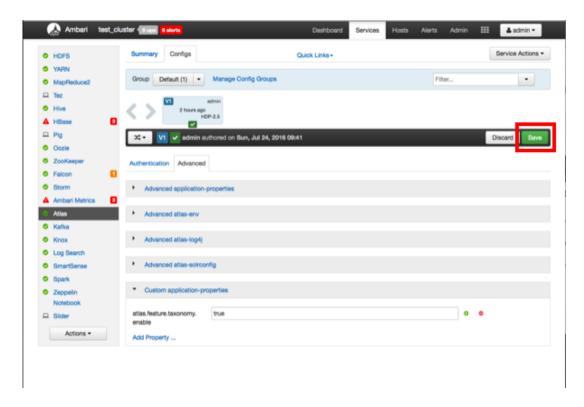


- 2. On the Add Property pop-up, add the following properties:
  - **Key** atlas.feature.taxonomy.enable
  - Value true

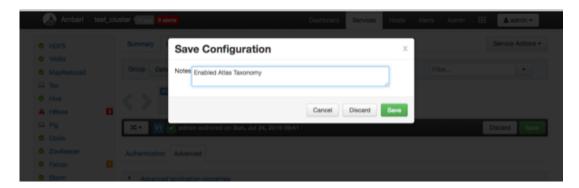
Click **Add** to add the new property.



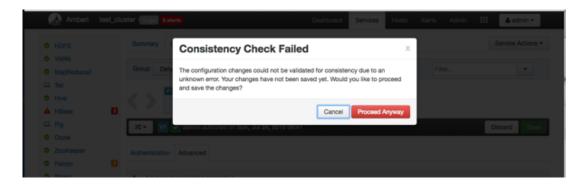
3. The Advanced tab is redisplayed with the new property. Click **Save** to save the new configuration.



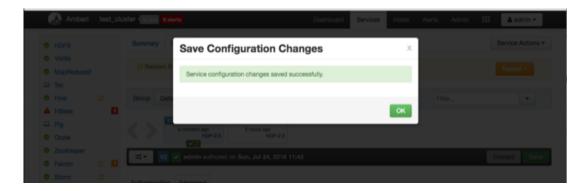
4. A Save Configuration pop-up appears. Type in a note describing the changes you just made, then click **Save**.



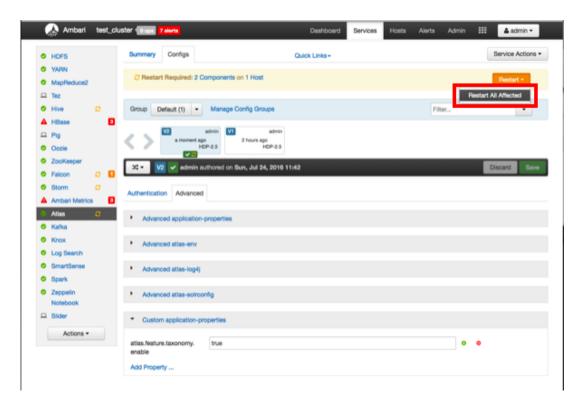
5. If a Consistency Check Failed pop-up appears, click **Proceed Anyway**.



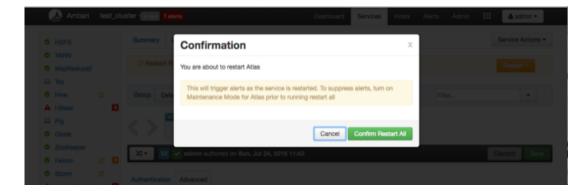
6. Click **OK** on the Save Configuration Changes pop-up.



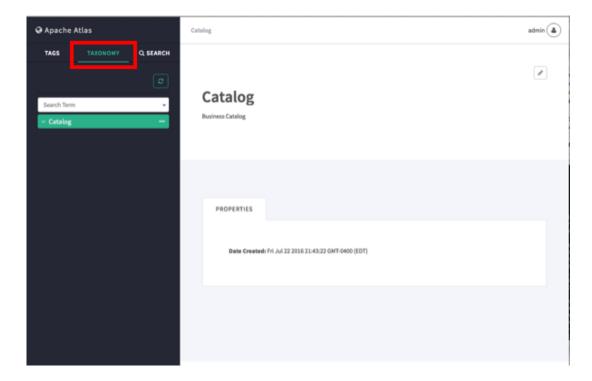
7. Select **Restart > Restart All Affected** to restart the Atlas service and load the new configuration.



8. Click Confirm Restart All on the confirmation pop-up to confirm the Atlas restart.

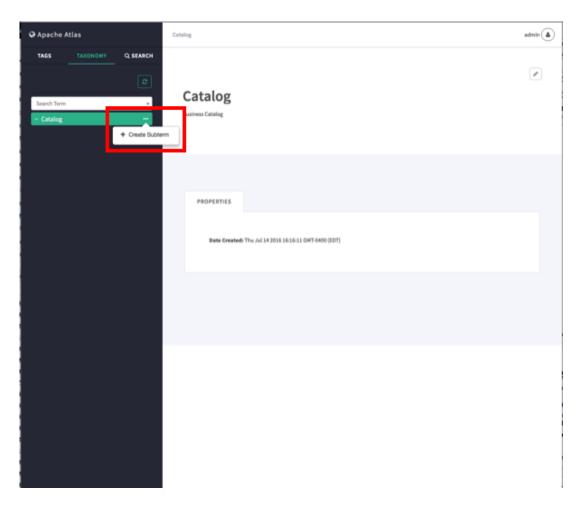


 After Atlas restarts, the Taxonomy feature is enabled. Other components may also require a restart. To access the Atlas web UI, select Atlas > Quick Links > Atlas Dashboard.

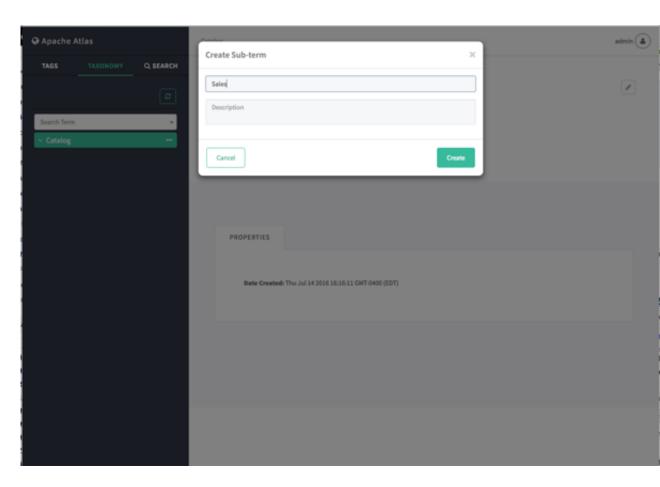


## **5.2. Creating Taxonomy Terms**

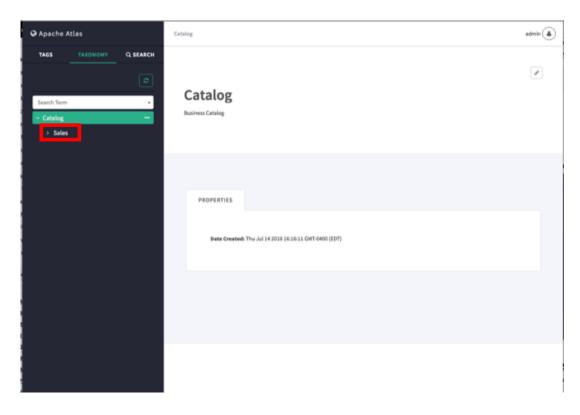
1. On the Atlas web UI, click **Taxonomy**. To create a new sub-term, click the ellipsis symbol at the top level of the Taxonomy, then click **Create Subterm**.



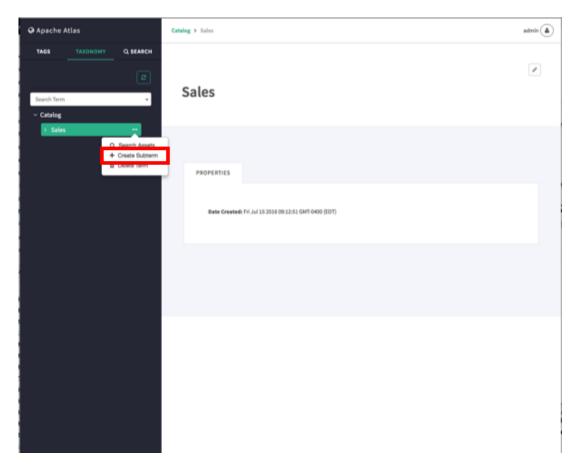
2. On the Create Sub-term pop-up, type in a name and an optional description for the sub-term, then click **Create**.



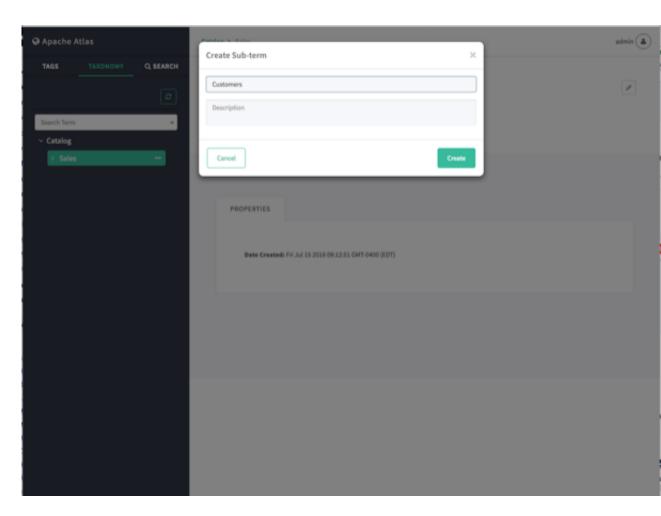
3. The new sub-term appears in the Taxonomy below the top level.



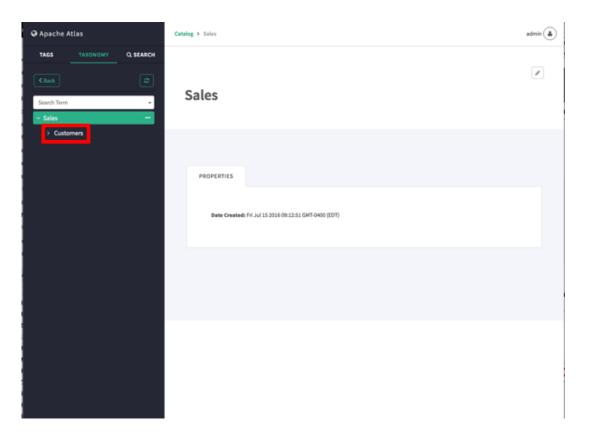
4. To create a new sub-term another level down in the taxonomy hierarchy, select the sub-term, click the ellipsis symbol, then click **Create Subterm**.



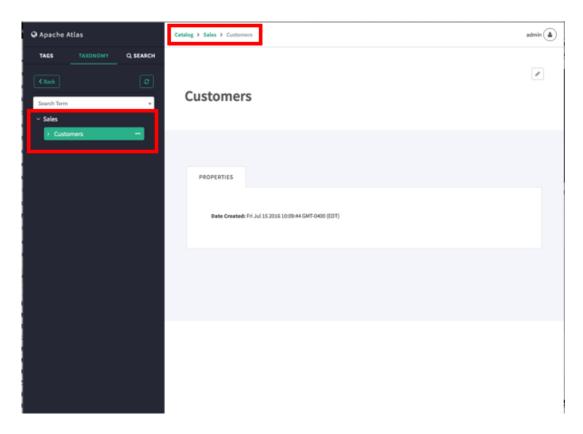
5. On the Create Sub-term pop-up, type in a name and an optional description for the new second-level sub-term, then click **Create**.



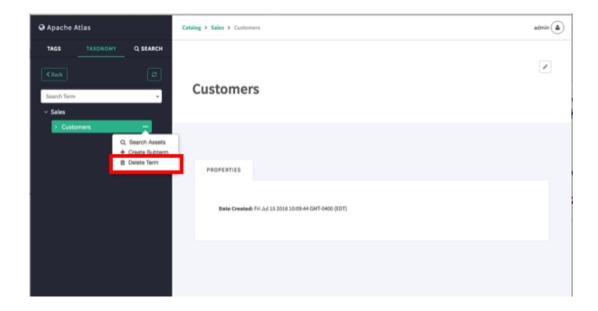
6. The new second-level sub-term appears in the Taxonomy.



7. You can repeat this process to create multiple taxonomy levels. Only two levels at a time are displayed in the navigation bar, but you can use the breadcrumb trail at the top of the page to navigate the taxonomy hierarchy, and you can use the Back button to return to the previously selected level. You can also use the Search Term box to search for taxonomy terms.

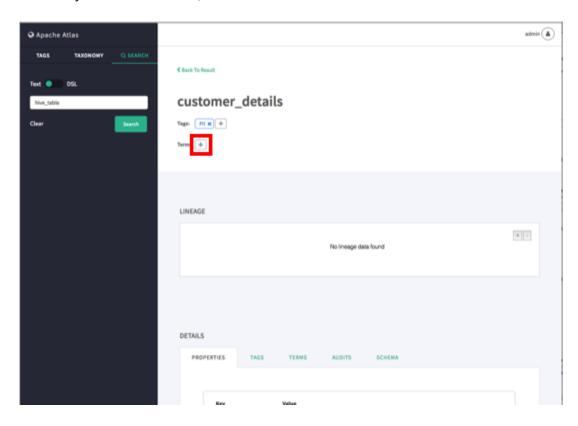


8. To delete a taxonomy term, click the ellipsis symbol for the term, then select **Delete Term**. When you delete a term it is also removed from all entities that are currently associated with the term.

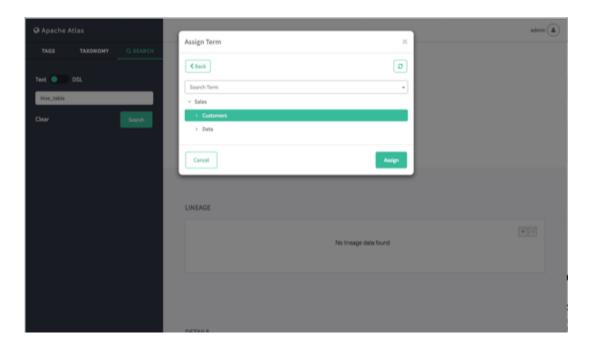


## 5.3. Associating Taxonomy Terms with Entities

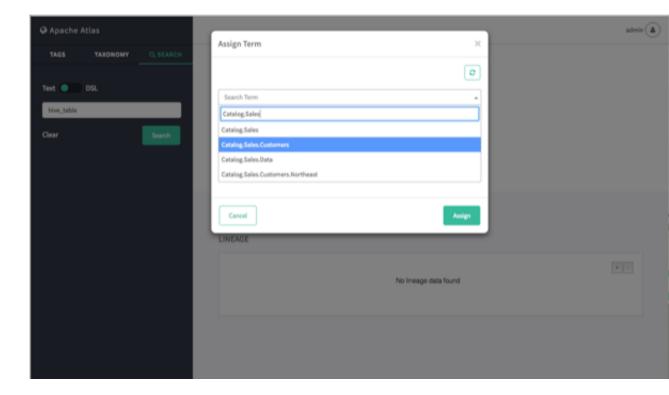
1. Select an entity. In the example below, we searched for all hive\_table entities, and then selected the "customer\_details" table from the list of search results. To associate a taxonomy term with an asset, click the + icon next to the **Terms**: label.



2. On the Assign Term pop-up, browse to select a taxonomy term. Here we have selected the term "Customers".



You can also filter the list of tags by typing text in the Search Term box, and then click to select a term.



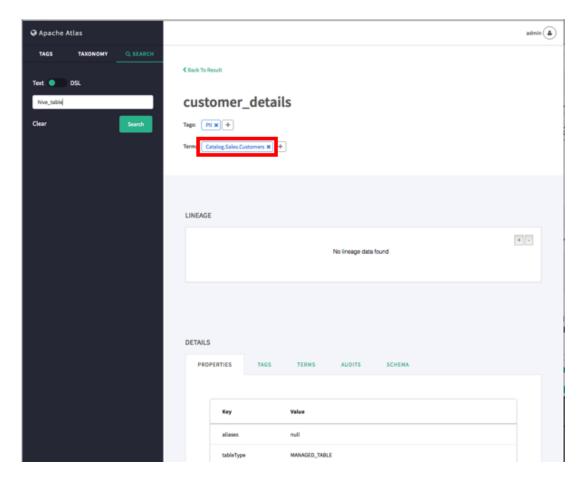


#### Note

In the Search Term list (and elsewhere in the UI), a period symbol is used as a separator to indicate taxonomy hierarchy levels. For example,

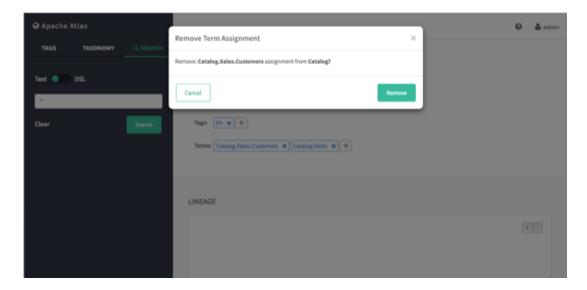
Catalog.Sales.Customers represents the Catalog > Sales > Customers taxonomy level.

3. After you select a term, click **Assign**. The new term is displayed next to the **Terms**: label on the asset page.



4. You can view details about a taxonomy term by clicking the term name on the term label.

To remove a term from an asset, click the **x** symbol on the term label, then click **Remove** on the confirmation pop-up. This removes the term association with the asset, but does not delete the term itself.

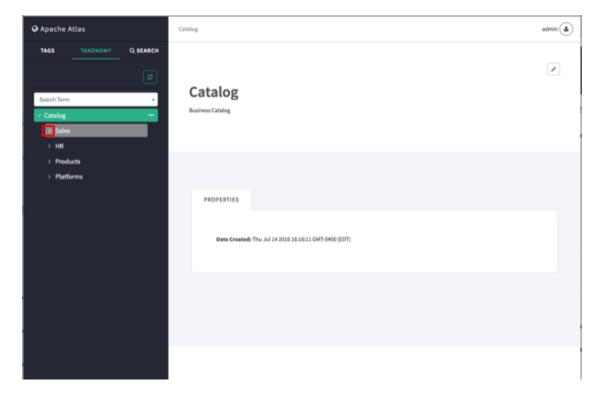


## 5.4. Navigating the Atlas Taxonomy

Only two levels at a time are displayed in the Taxonomy list, but you can use the following methods to navigate the Atlas Taxonomy.

#### **5.4.1. Navigation Arrows**

To display the child terms that belong to a taxonomy term, click the right-arrow symbol next to the term. For example, if we click the arrow for the Sales term in the following Taxonomy list:



PROPERTIES

Catalog > Sales

TAKONOMY Q SEARCH

Sales

Sales

PROPERTIES

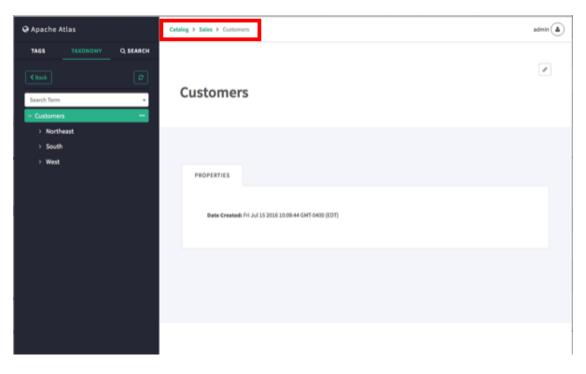
Bute Created: Fri Jul 15 2016 09:12:51 GMT-0409 (EDT)

The child terms for Sales (Customers and Data) are displayed:

To hide the child terms, click the down-arrow next to the Sales term.

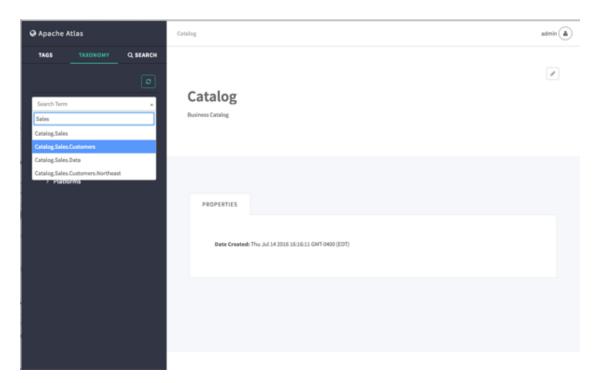
#### 5.4.2. Breadcrumb Trail

As you navigate through the taxonomy, a breadcrumb trail at the top of the page tracks your position in the taxonomy hierarchy. You can use the links in the breadcrumb trail to navigate back to a higher level.



#### 5.4.3. Search Terms

To filter the Taxonomy terms list based on a text string, type the text in the Search Term box. The list is filtered dynamically as you type to display the terms that contain that text string. You can then select a term from the filtered list.



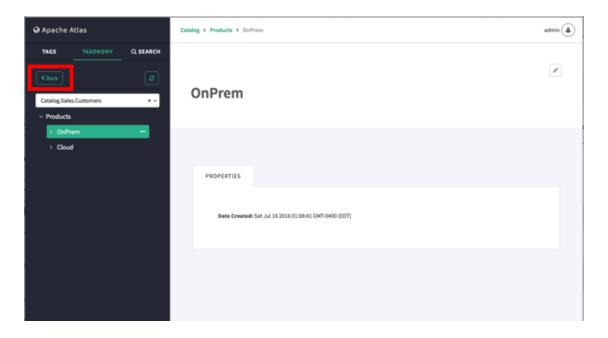


#### Note

In the Search Term list (and elsewhere in the UI), a period symbol is used as a separator to indicate taxonomy hierarchy levels. For example, Catalog.Sales.Customers represents the Catalog > Sales > Customers taxonomy level.

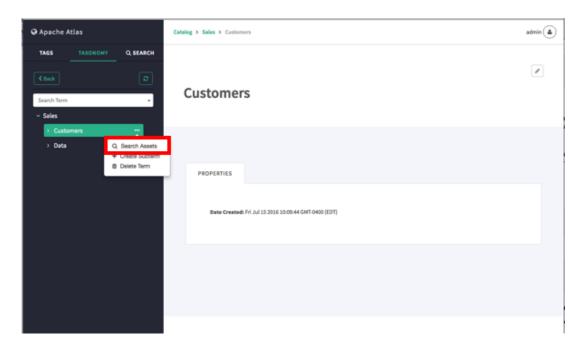
#### 5.4.4. Back Button

You can also use the **Back** button on the Atlas web UI (or your browser's Back button) to return to the previous taxonomy page.

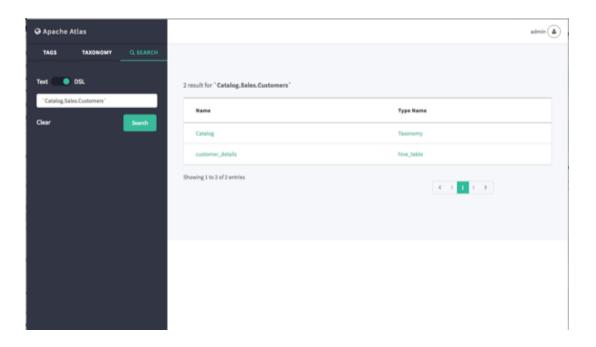


## **5.5. Searching for Entities Associated with Taxonomy Terms**

1. To search for entities associated with a taxonomy term, select the term, click the ellipsis symbol, and then select **Search Assets**.



2. This launches a DSL search query that returns a list of all entities associated with the term.



## 6. Apache Atlas REST API

Apache Atlas exposes a variety of REST endpoints that enable you to work with types, entities, lineage, and data discovery. The following resources provide detailed information about the Apache Atlas REST API:

- Apache Atlas REST API
- Apache Atlas Swagger interactive Atlas REST API interface