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Hands-on Lab Session 2334

Watson IoT Platform Risk and Security Management

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Introduction to this lab

The IBM Watson Internet of Things platform delivers advanced Risk and Security Management to enhance IBM Watson IoT Platform security by creating, enforcing, and reporting on device connection security.

Risk and Security Management adds support for certificates, TLS authentication, policies and a security dashboard for compliance reporting. Using the Risk and Security Management capabilities your organization will be able to perform the following actions:

- 1. Configure the platform to enable devices authenticating with certificates.
- 2. Import and activate either a new server certificate or generate a Certificate Signing Request (CSR) for messaging.
- 3. Configure the policy to specify the security level for device connection
- 4. Block access from specific IP addresses and/or countries by enforcing Blacklist or Whitelist policy.
- 5. Visualize critical IoT risks and security compliance through a security dashboard

The Risk and Security Management is included with parts in the Free Plan for fully available in the Advanced Security Plan.

In this lab you will be exploring hands-on the advanced Risk and Security Management features above in the IBM Watson IoT Platform.



Starting your Workstation

In this lab you will use an Ubuntu v14 virtual image as your Linux workstation. This workstation is only used in this lab to run your Firefox Web browser. All access to IBM Bluemix and IBM Watson Internet of Things Platform will be made using the Firefox Web browser.

At the start of this lab, all workstations should have been started and ready for you to use. If the workstation is locked, login as:

Username: "localuser"

Password: "passw0rd" - Note the zero

If you fail to log into your workstation, ask your lab facilitators for help.



Logging into Bluemix and Watson IoT Platform

IBM Bluemix is a cloud platform as a service (PaaS) developed by IBM. It supports several programming languages and services as well as integrated DevOps to build, run, deploy and manage applications on the cloud. Bluemix is based on Cloud Foundry open technology and runs on SoftLayer infrastructure.

The IBM Watson Internet of Things Platform is a fully managed, cloud-hosted service available in IBM Bluemix, that makes it simple to derive value from Internet of Things (IoT) devices.

Devices can get connected and start sending data securely to the IBM Watson Internet of Things Platform cloud service using the open, lightweight MQTT messaging protocol. From there, you can setup and manage your devices using your online dashboard or our secure APIs, so that your apps can access live and historical data fast. With your devices connected to the IoT platform are now ready to start creating applications using your device data.

In this lab you will use the IBM Watson Internet of Things Platform service available in IBM Bluemix. To get access to the IoT platform you first have to log into IBM Bluemix and then browse to the IBM Watson Internet of Things Platform service.

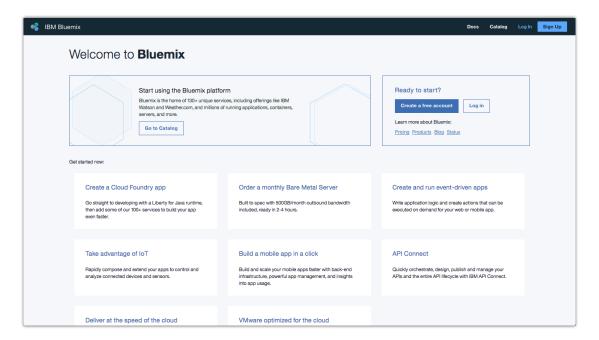
Follow the steps below to log into IBM Bluemix and browse the Internet of Things Platform service.

Open the Firefox browser

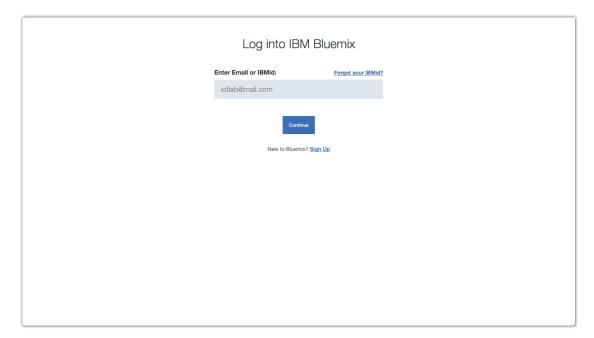




2. Enter https://bluemix.net
The Bluemix welcome page opens



- 3. Click on Login
- 4. Enter the IBM ID "iotlab@mail.com"

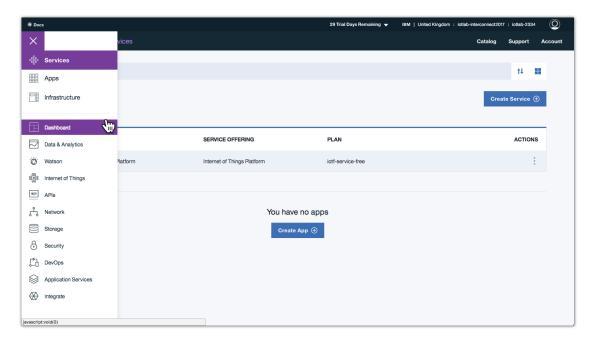


5. Enter the password "Interconnect2017!"



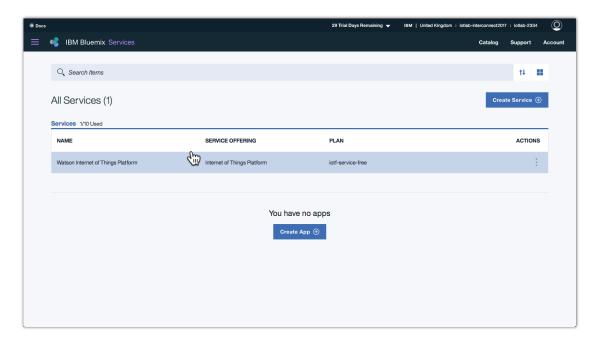


The IBM Bluemix Dashboard is loaded. From the menu bar, choose Services and Dashboard.

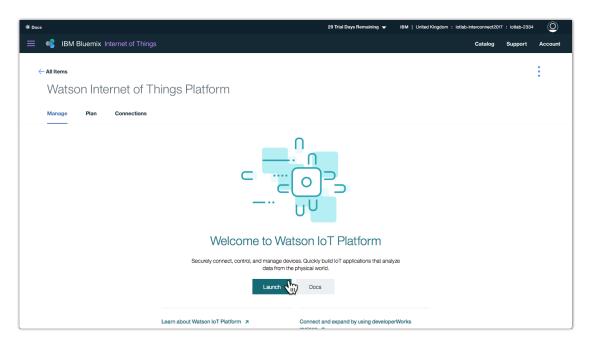


7. In the list of Services, choose the **Watson Internet of Things Platform** service. The Watson Internet of Things Platform service opens.



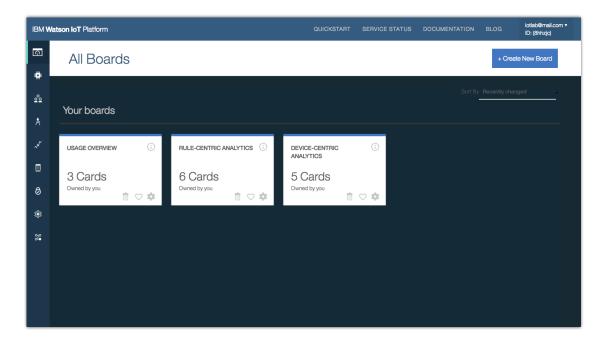


8. Click **Launch** to open the IoT platform web interface.



9. The Watson IoT Platform opens and shows the platform dashboard.





You have now successfully logged into IBM Bluemix and opened the IBM Watson IoT Platform service. You are now ready to switch to the IoT platform *organization* that you will use in this lab.

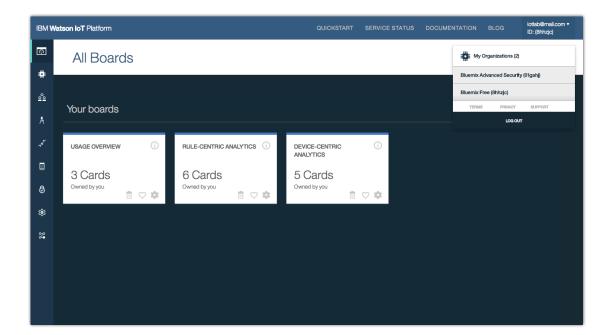
When you register with the Watson IoT Platform, you are given an organization ID. Your organization ID is a unique six-character identifier for your account. Organizations ensure that your data is organized and accessible by your devices and applications. An IoT platform organization is hence a workspace that independently of other organizations manages users, devices and device data.

For this lab we have registered and created one organization for each workstation. You will use an individually assigned IoT platform organization. By selecting your assigned organization, you will work in your own workspace and not make conflicting changes to other workstations.

Note: Look for the organization id that has been assigned to your workstation. Or ask one of the lab facilitators.

10. Click on the organization menu in the upper right hand corner of the application. In the list, choose the organization id that has been assigned to your workstation for this lab.





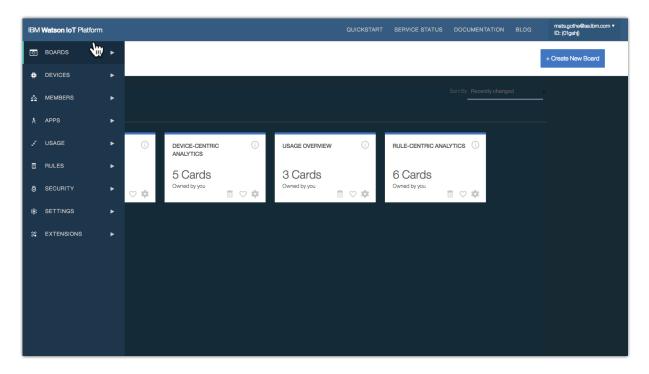


Overview of the Watson IoT Platform

IBM Watson IoT Platform provides powerful application access to IoT devices and device data to help you rapidly compose analytics applications, visualization dashboards, and mobile IoT apps.

In this first section you will familiarize yourself with the IBM Watson IoT Platform user interface. The navigation bar on the left hand side provides access to the capabilities of the platform

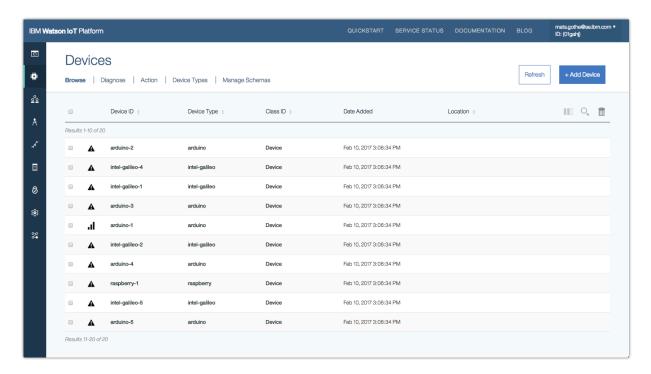
- Boards Opens the dashboard and shows the boards and cards
- Devices Opens a browser for registered devices and their device types
- Members User management
- Apps API Key management
- Usage Metrics of usage
- Rules Analytics rules and actions
- Security Risk and Security Policies. We will explore details later in this lab
- Settings Administration settings. For example, client and server certificates.
- Extensions Additional capabilities, optionally enabled



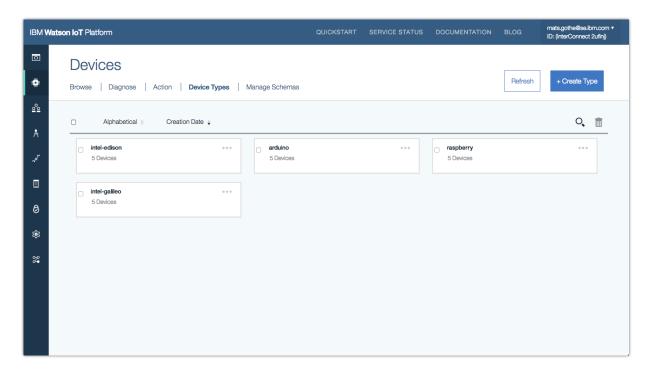
- 1. Move your mouse pointer to the left side navigation bar. The navigation menu slides out and shows the IoT platform capability sections.
- From the navigation menu, choose **Devices** The Devices page opens. This view shows all devices registered in this organization.



Note: You can sort the list of devices, e.g. by Device ID and Device Type. Try it!

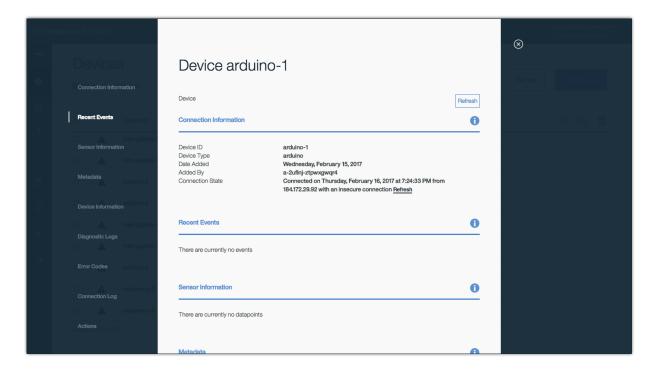


From the section tabs on the page, choose **Device Types** The Device Types page opens. This page shows all device types registered in this organization.



4. Return to the Devices page by clicking on **Browse**. Locate the device named "Arduino-1" in the list. Click on the device to open the Device Details page.





5. The IP address of the "Arduino-1" device is shown un the Connection Information section. Write down below the IP address the Arduino-1 device is connecting from. You will use this information later in this lab.

The IP address to the Arduino-1 device is: ______

6. Browse the other sections on the details page.

You have now explored the Devices and their Device Types currently registered in your IoT platform organization.

You will now proceed to the Risk and Security Management capability and explore connection policies, client and server certificates and reporting using the IoT platform dashboard.



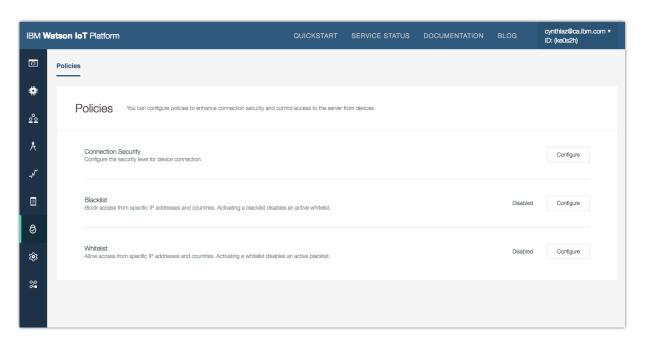
Configuring a Connection Security Policy

The Risk and Security Management capability enables organizations to enhance IoT platform security by creating, enforcing, and reporting on device connection security. Certificates and transport layer security (TLS) authentication are used, on top of the user IDs and tokens that are used by Watson IoT Platform to determine how and where devices connect with the platform.

The Connection Security policy enforces how devices connect to the platform. You can set up default connection policies for all device types, as well as custom settings for specific device types. The policy can be set to allow unencrypted connections, to enforce only transport layer security (TLS) connections, and to enable devices to authenticate with client-side certificates. When client-side certificates are being used, the security policy provides an additional option of using only the certificate for client authentication or using a combination of both a client certificate and client ID and authentication token pair.

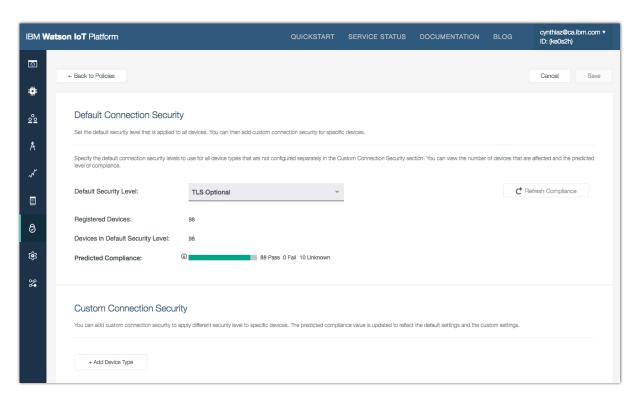
Using the connection security policy, you can set the default security level of the required authentication method that is applied to all devices. You can then add custom security settings for specific devices.

1. From the left menu, select **Security** to navigate to the policies page

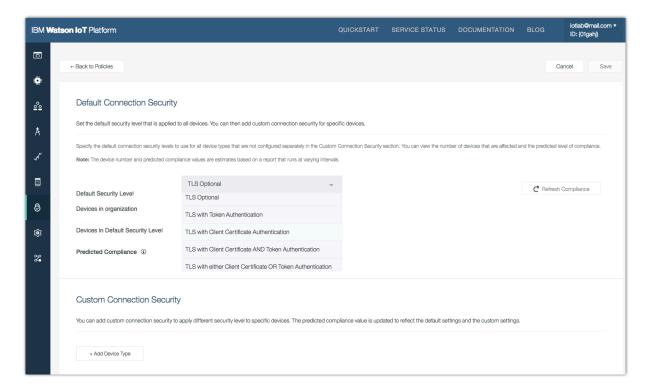




2. Click **Configure** on **Connection Security** policy. The Connection Security Policy page loads.



3. Click open the dropdown menu and browse all the security level options

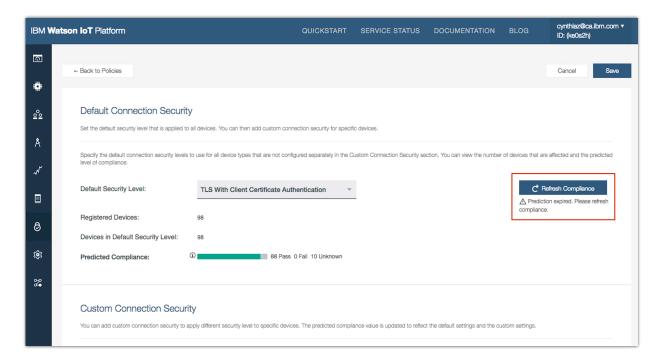




1. Try different Security Levels, like "TLS with Token Authentication" or "TLS with Client Certificate Authentication". After a new security level is selected, click **Refresh Compliance** button to preview the predicted compliance.

Note: The Predicted Compliance will be update and show the predicted numbers of devices that will Pass and Fail with the new setting.

2. After trying different settings, set the Default Security Level to "TLS with Token Authentication"

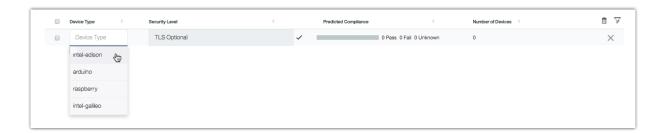




Applying Custom Connection Security

The custom connection security setting allows you to specify a different security level than the default setting to a specific device type. All devices of this type will be enforced by this setting. The predicted compliance value will be updated to reflect changes resulting from the custom security settings.

Under Custom Connection Security, click on Add Device Type.
 A new row is added.



2. Choose the "intel-edison" device type.

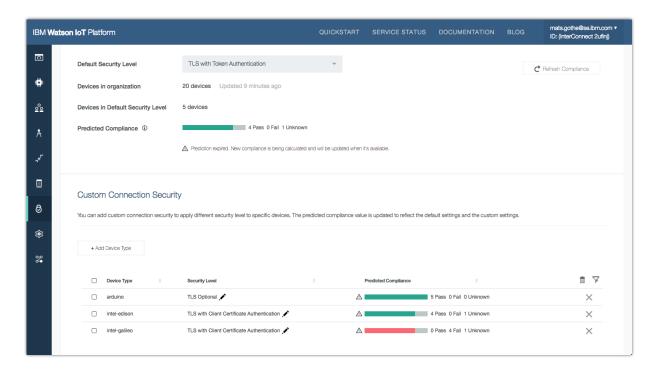
Note: The sample used in this lab has devices registered of the following types; 'raspberry', 'intel-galileo', 'arduino' and 'intel-edison'. In this step, add one or more of these types for your custom connection security settings.

- Choose the "TLS with Client Certificate Authentication" security level for the "intel-edison" device type. Click **Refresh Compliance** button to preview the predicted compliance.
- 4. Repeat the step and add a custom connection security for the "intel-galileo" device type. Set the security level to "TLS with Token Authentication".
- 5. Repeat the step and add a custom connection security for the "arduino" device type. Set the security level to "TLS optional".
- 6. Click **Refresh Compliance** button to preview the predicted compliance.

Note: With these settings we have achieved the following

- The "intel-edison" devices are now required to present a valid client certificate to be allowed to connect. The prediction is that all devices will pass.
- The "intel-galileo" devices do not yet have client certificates and will not be allowed to connect. All devices will fail.
- The "arduino" devices are not required to have a client token or certificate when connecting. All devices will pass.





- 7. Click **Refresh Compliance** to update the report.
- 8. Click **Save** to apply the changes.

Note: After policy is saved, all applicable devices need to reconnect in order to be evaluated against the new policy setting. New compliance will be updated and displayed when it's available (usually the evaluation takes up to 15 minutes depending on the organization's size).

You have now completed the steps to preview and update the connection security policy. While your IoT platform organization is updating the device connection information you will explore the Blacklist and Whitelist Policy.

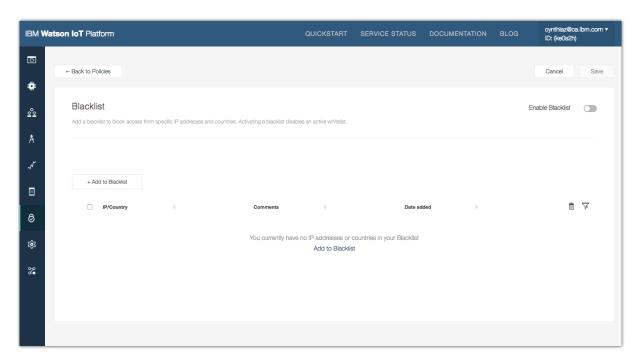


Configuring a Blacklist / Whitelist Policy

Your organization can restrict access to the server from certain devices by using a blacklist or a whitelist to grant server access to specific devices. A blacklist identifies all of the IP addresses, CIDRs, or countries that are to be denied server access, while a whitelist gives explicit access to specific IP addresses, CIDRs or countries. They cannot be used together. In this scenario, you will be setting up the Blacklist.

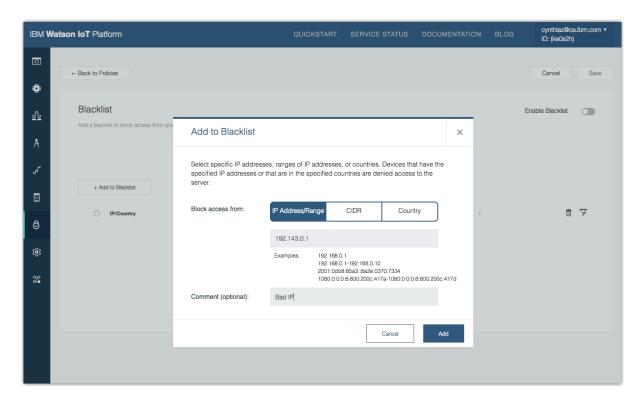
You will learn to use the Blacklist to block access from devices, and you can apply the same work flow to Whitelist.

1. Open Blacklist policy, and click **Add to Blacklist**.





2. Click Add to Blacklist. The Add to Blacklist dialog opens.



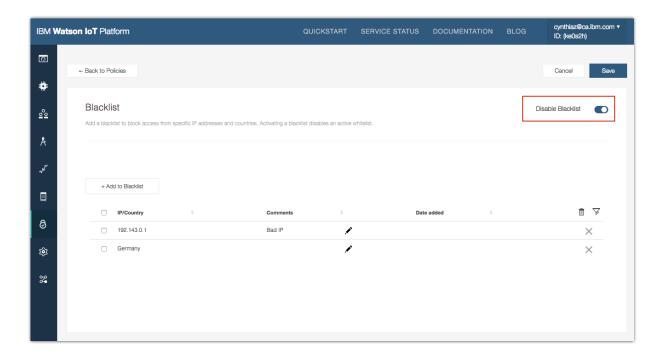
3. On the **IP Address/Range** tab, enter the IP address to the "arduino-1" device that you made a note of in an earlier section of the lab.

Note: There are options to block an IP rage or a Country.

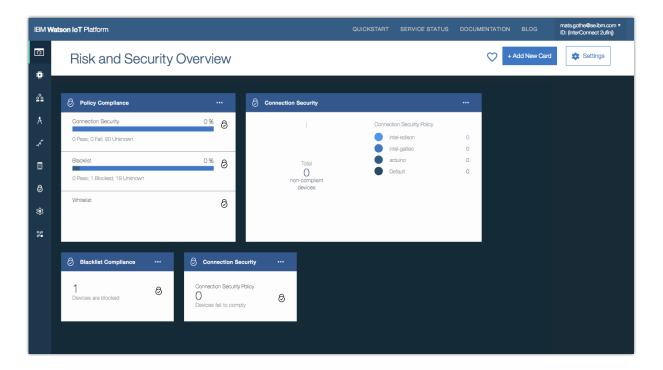
- Use the CIDR tab to enter a Classless Inter-Domain Routing (CIDR) notated block.
- Use the Country tab, enter or select countries from which you want to block all devices.
- 4. Once you have complete the blacklist settings, flip the **Enable Blacklist** switch to On. Click **Save**.

Tip: you can maintain your blacklist without enforcing it by keeping it disabled.





 When the device tries to reconnect from the same IP, the connection will be rejected. This information will also be reflected on the Blacklist Compliance card in the Risk and Security Overview board.



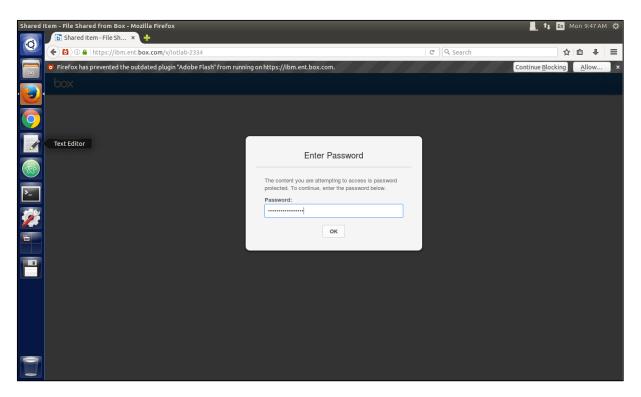


Downloading your Certificates

In the next sections of this lab you will work with client and server certificates. As certificates are ensuring secure access for your devices to your organization they are individually generated for each IoT platform organization in this lab.

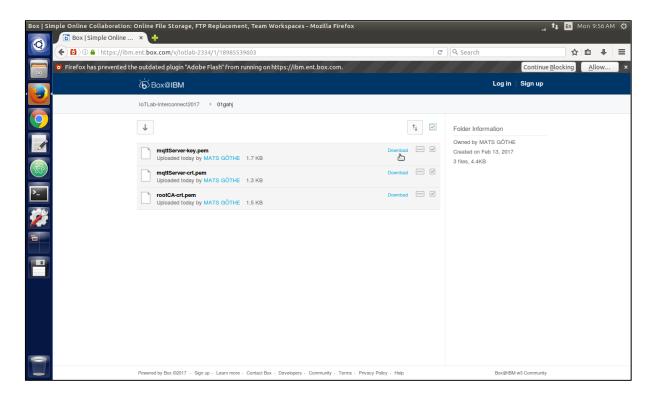
To access your certificates and keys you have to log into Box and download your certificates.

- 1. Open a new browser window in Firefox
- 2. Enter https://ibm.box.com/v/iotlab-2334
 The Box shared folder page opens and ask for a Password.
- 3. Enter password "Interconnect2017!"

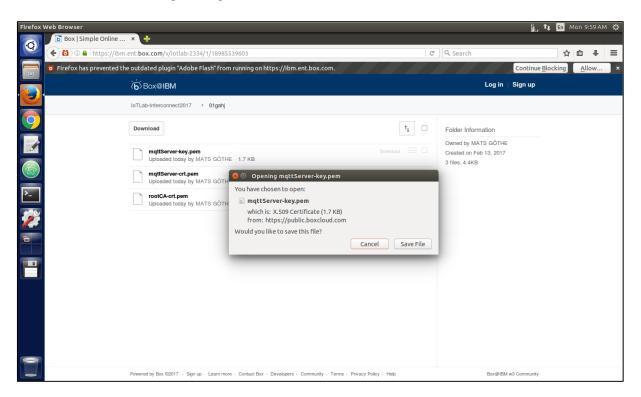


- 4. A folder has been created for each organization. Look for a folder with the organization id that has been assigned to your workstation.
- 5. Click on the folder have of your organization id.



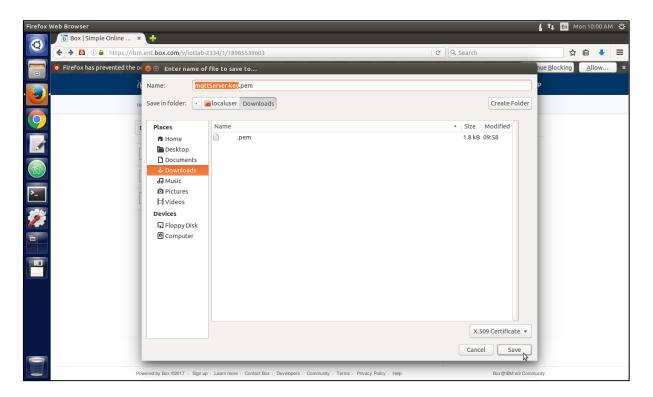


- 6. Click the **Download** link on the first file.
- 7. On the following dialog, choose **Save File**



8. Choose the **Download** directory





- 9. Choose the **Download** directory
- 10. Repeat the steps above to download all files in the shared directory



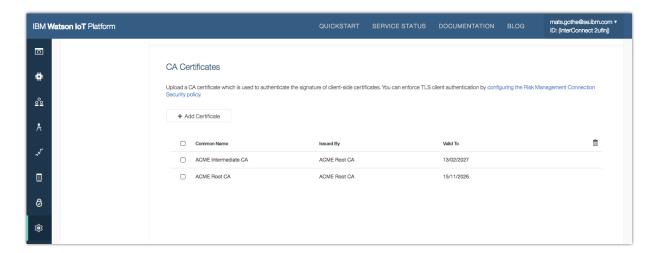
Client Certificate Management

Certificates are used for device authentication. Any devices that do not have valid signed certificates are denied access and cannot communicate with the server.

To configure certificates and server access for devices, you can register the associated certificate authority (CA) certificates into the Watson IoT Platform. CA certificates enable the organization to recognize the client certificates on devices as trusted so that devices can connect to the server.

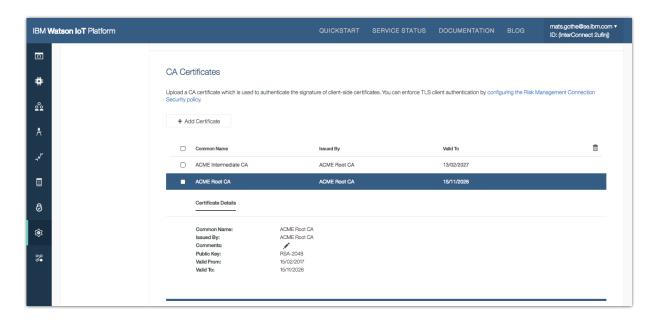
1. Navigate to **General Settings**, click **CA Certificates** in the Security section.

Note: There are two certificates installed in the organization. One Root certificate and one Intermediate Certificate.

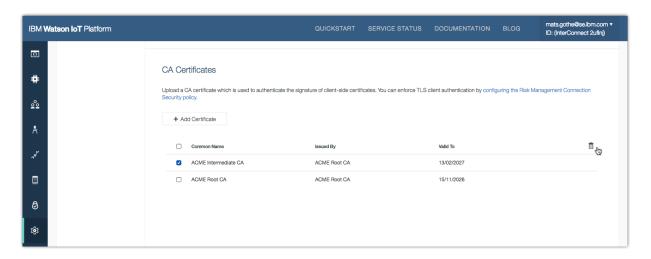




2. Click on one of the certificates. A detail view of the certificate is shown.



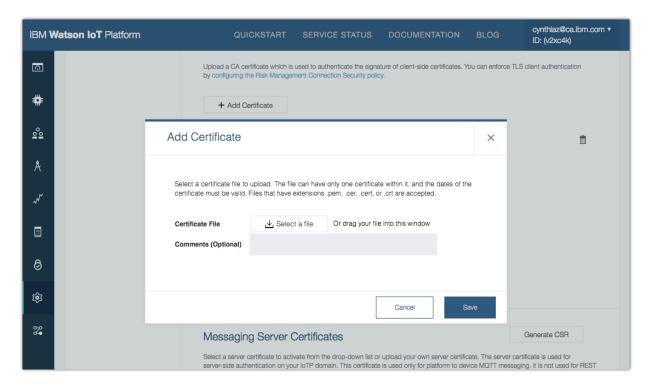
3. **Optionally**, Remove the "ACME Intermediate CA" certificate by checking the box on the certificate and click the trash can icon.



4. Browse to select a certificate file to upload, or drag and drop a file in the **Add Certificate** window.

Note: Upload the 'intermediateCA-crt.pem' certificate for your IoT platform organization that you downloaded from Box.

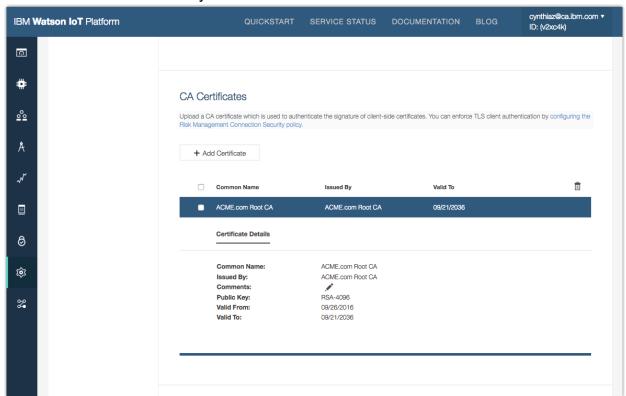




5. Enter an optional comment and click **Save**. The certificate is added to your IoT platform organization, activated and listed in the table.



6. Click on the new entry to view more information on the certificate.





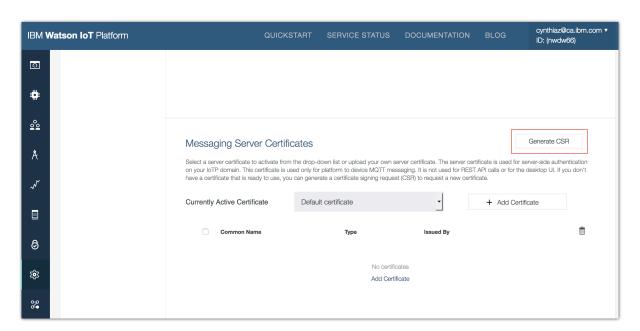
Requesting a new server certificate

Watson IoT Platform provides a default server. You can use the default certificate or request and upload a new server certificate for your organization. If you do not yet have a certificate to use, you can create a request for a new certificate. After you receive the new certificate, you must have it signed and then upload it to the platform.

In the case if your organization doesn't have a certificate that is ready to use, you can generate a certificate signing request (CSR) to request a new certificate. The platform will generate a pairing private key and it will remain in the platform and cannot be downloaded.

In this section of the lab you will make a Certificate Signing Request.

1. In the Security section of General Settings, under Messaging Server Certificates, click Generate CSR.



2. Enter the details to request a CSR for your server, and click **Generate**. You can use your own data or the information provided below.

Organization: **ACME Company**

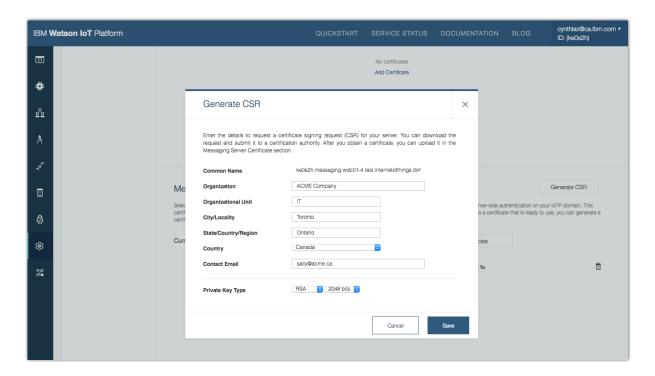
Organizational Unit: IT City / Locality: Toronto

State / Country / Region: Ontario

Country: Canada

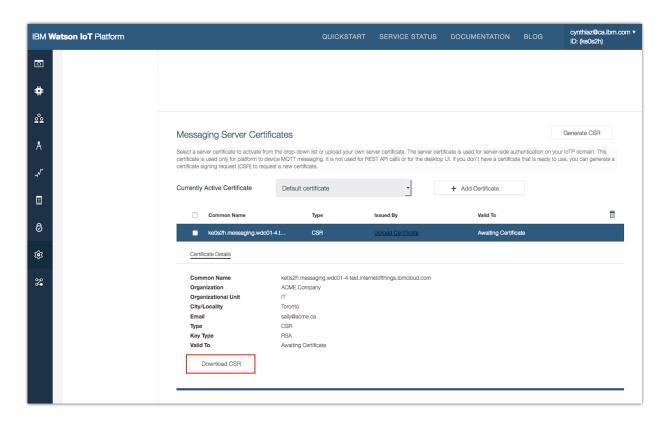
Contact Email: sally@acme.ca
Private Key Type: RSA 2048 bits





3. Click **Download CSR** to get the request.

Note: You would submit your CSR to a certification authority for signing. In this lab you will be given a server certificate and a key that has been generated for this lab.



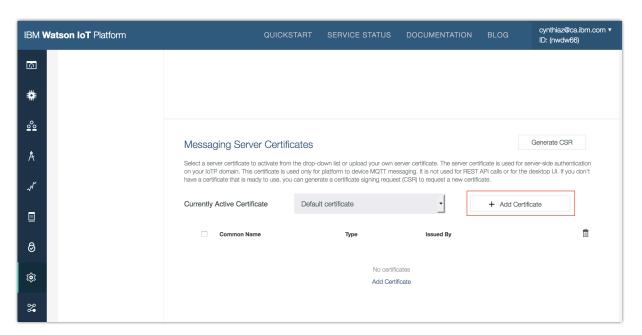


You have now completed the Certificate Service Request. In a real-life situation, you will obtain a certificate. In this lab we have generated certificates for you to upload into the platform as part of next lab section.

Server Certificate Management

As earlier mentioned, Watson IoT Platform provides a default server certificate. You can use this default certificate or upload one from your organization.

1. In the Security section of General Settings, under Messaging Server Certificates, click Add Certificate.



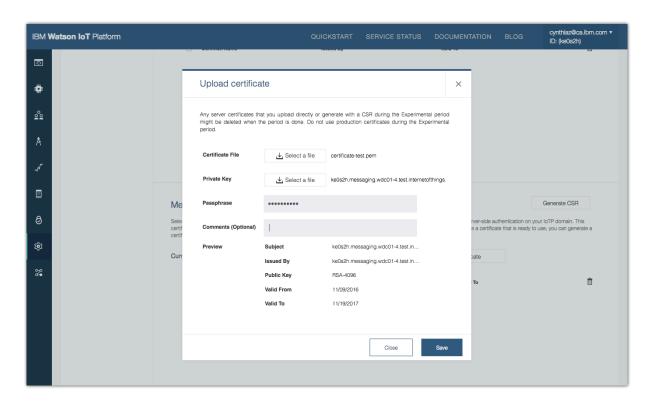
- 2. Browse to select a certificate file to upload, or drag and drop a file in the **Add Certificate** window.
- Browse to select the private key file to upload, or drag and drop a file in the Add Certificate window.

Note: Upload the 'mqttServer-crt.pem' certificate for your IoT platform organization that you downloaded from Box.

4. Enter the passphrase of the private key, if the private key was encrypted with a passphrase.

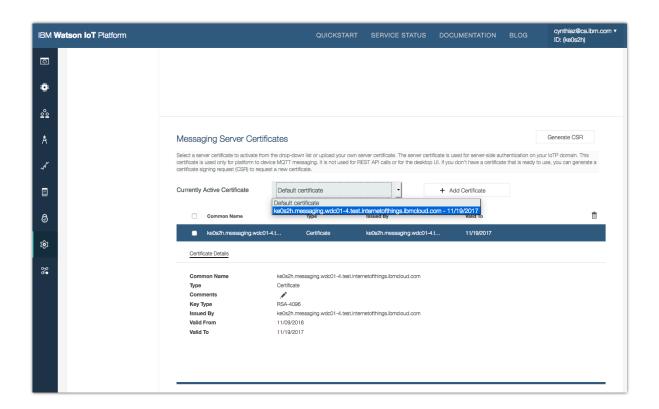
Note: Upload the 'mqttServer-key.pem' key for your IoT platform organization that you downloaded from Box.





5. Select the newly uploaded certificate from the **Default messaging server certificate** drop-down list. The selected certificate is listed in the table as the active certificate.



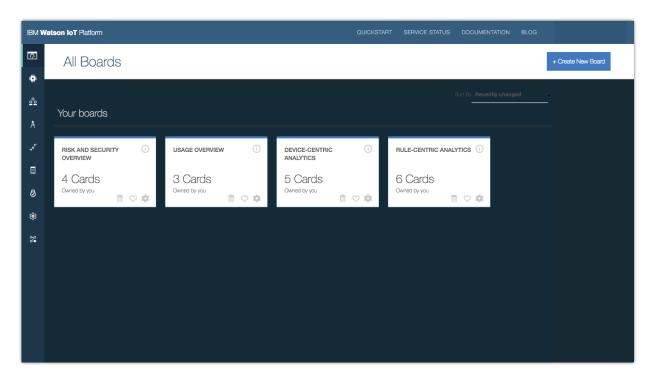




Monitoring the overall security posture and policy compliance

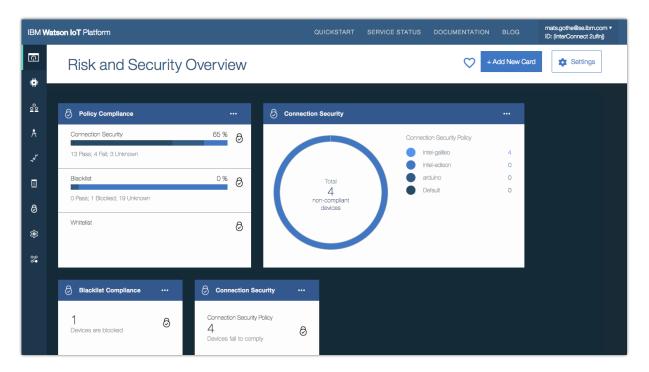
A new "Risk and Security Overview" board is already added on your dashboard with preconfigured cards. It provides an instant overview of the security state of your organization. As a security analyst, you can use the dashboard to visualize the policy compliance and any critical risks and be able to drill into the policy details for root- causes.

1. Go to Boards from the main menu, and open Risk and Security Overview board





2. Explore each individual card to understand the current risks and policy compliance, hover over the compliance bar to see the breakdown



Note: You can change the size of the card to promote or demote details.

3. Click on the card **settings icon** on the top right corner of the card. The card menu opens.

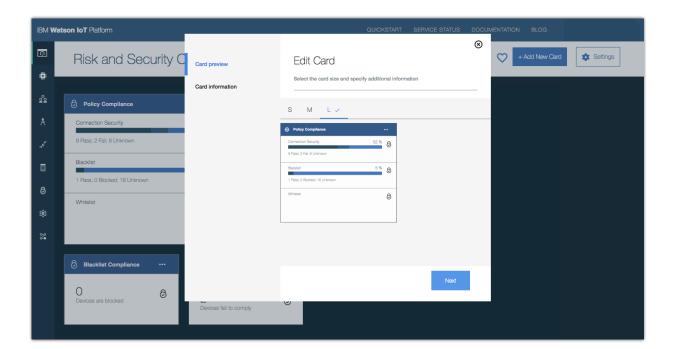


4. Click on the **setting icon**. The Edit Card dialog opens.



5. Preview different card sizes by clicking on **S**, **M**, **L** or **XL**. Click **Next** and conform changes







Summary of this lab

You have now completed the Watson IoT Platform Risk and Security Management lab.

In this lab you have deepened your understanding of the Risk and Security Management capabilities in the IoT platform.

- Configure the platform to enable devices authenticating with certificates.
- Import and activate either a new server certificate or generate a Certificate Signing Request (CSR) for messaging.
- Configure the policy to specify the security level for device connection
- Block access from specific IP addresses and/or countries by enforcing Blacklist or Whitelist policy.
- Visualize critical IoT risks and security compliance through a security dashboard

To further explore, sign up for a trial account on IBM Bluemix, create the IBM Watson IoT Platform service and start connecting your IoT devices.