Welcome to COMP 530

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Welcome!

• Today’s goals:
  – Give you a flavor of my teaching style with a mini-lecture
  – Cover course organization

• My high-level goals for the class:
  – Demystify how computers work (No magic)
  – Learn core principles: secure multiplexing, scheduling, concurrency, performance analysis
  – This is a class for everyone, not just gurus
  – Challenging, but supportive, environment
Waiting List

- If you are trying to get into the class (or the honors section), please fill out the form(s) on the course website:
  - http://www.cs.unc.edu/~porter/courses/comp530/f18
So what is an OS?
One view of an OS
Another simple view of an OS

- Hardware
- OS
- App
- App
- App
- App
A less happy view of an OS
So which one is right?

• They all are
An OS serves three masters

1. Give users a desktop environment
2. Give applications a more usable abstraction of the hardware
3. Give hardware manufacturers an abstraction of the applications
Why Study Operating Systems?

• Primary Goal: Demystify how computers work
  – Lots of abstractions and heuristics between your application and the hardware
  – A good computer scientist should understand what happens inside the system when one types a command

• Secondary: Learn how to write robust programs
  – OSes like Linux have many users and work on a wide range of hardware
  – Deal with subtle issues: concurrency, consistency, etc.
Background (1)

• CPUs have 2 modes: user and supervisor
  – Sometimes more, but whatevs

• Supervisor mode:
  – Issue commands to hardware devices
  – Power off, Reboot, Suspend
  – Launch missiles, Do awesome stuff

• User mode:
  – Run other code, hardware tattles if you try anything reserved for the supervisor
OS architecture
OS architecture
Master #2: Applications

- Application Programming Interface (API)
  - Win32 (Windows)
  - POSIX (Unix/Linux)
  - Cocoa/Cocoa Touch (Mac OS/iOS)

- Application-facing functions provided by libraries
  - Injected by the OS into each application
OS architecture
OS architecture

Win32 API

App
Libraries

App
Libraries

App
Libraries

Kernel

User

Supervisor

Hardware
Famous libraries, anyone?

• Windows: ntdll.dll, kernel32.dll, user32.dll, gdi32.dll
• Linux/Unix: libc.so, ld.so, libpthread.so, libm.so
Caveat 1

• Libraries include a lot of code for common functions
  – Why bother reimplementing sqrt?

• They also give high-level abstractions of hardware
  – Files, printer, dancing Homer Simpson USB doll

• How does this work?
System Call

• Special instruction to switch from user to supervisor mode
• Transfers CPU control to the kernel
  – One of a small-ish number of well-defined functions
• How many system calls does Windows or Linux have?
  – Windows ~1200
  – Linux ~350
Open file “hw1.txt”

Ok, here’s handle 4

System Call Table (350—1200)
Caveat 2

• Some libraries also call special apps provided by the OS, called a **daemon (or service)**
  – Communicate through kernel-provided API

• Example: Print spooler
  – App sends pdf to spooler
  – Spooler checks quotas, etc.
  – Turns pdf into printer-specific format
  – Sends reformatted document to device via OS kernel
OS architecture

- App
  - Libraries
- App
  - Libraries
- Daemon
  - Libraries

System Call Table (350—1200)

Kernel

Hardware

User

Supervisor
Master 3: Hardware

• OS kernels are programmed at a higher low level of abstraction
  – Disk blocks vs. specific types of disks

• For most types of hardware, the kernel has a “lowest common denominator” interface
  – E.g., Disks, video cards, network cards, keyboard
  – Think Java abstract class
  – Sometimes called a hardware abstraction layer (HAL)

• Each specific device (Nvidia GeForce 600) needs to implement the abstract class
  – Each implementation is called a device driver
OS architecture

- App
  - Libraries
- App
  - Libraries
-Daemon
  - Libraries

- System Call Table (350—1200)
- Kernel
- HAL
  - Driver
  - Driver
  - Driver

- Hardware
What about Master 1

• What is the desktop?
• Really just a special daemon that interacts closely with keyboard, mouse, and display drivers
  – Launches programs when you double click, etc.
  – Some program libraries call desktop daemon to render content, etc.
An OS serves three masters

1. Give users a desktop environment
   - Desktop, or window manager, or GUI

2. Give applications a more usable abstraction of the hardware
   - Libraries (+ system calls and daemons)

3. Give hardware manufacturers an abstraction of the applications
   - Device Driver API (or HAL)
Multiplexing Resources

• Many applications may need to share the hardware
• Different strategies based on the device:
  – Time sharing: CPUs, disk arm
    • Each app gets the resource for a while and passes it on
  – Space sharing: RAM, disk space
    • Each app gets part of the resource all the time
  – Exclusive use: mouse, keyboard, video card
    • One app has exclusive use for an indefinite period
So what is Linux?

• Really just an OS kernel
  – Including lots of device drivers

• Conflated with environment consisting of:
  – Linux kernel
  – Gnu libc
  – X window manager daemon
  – CUPS printer manager
  – Etc.
So what is Ubuntu? Centos?

• A **distribution**: bundles all of that stuff together
  – Pick versions that are tested to work together
  – Usually also includes a software update system
OSX vs iOS?

- Same basic kernel (a few different compile options)
- Different window manager and libraries
What is Unix?

• A very old OS (1970s), innovative, still in use

• Innovations:
  – Kernel written in C (first one not in assembly)
    • Co-designed C language with Unix
  – Several nice API abstractions
    • Fork, pipes, everything a file

• Several implementations: *BSDs, Solaris, etc.
  – Linux is a Unix-like kernel
What is POSIX?

- A standard for Unix compatibility
- Even Windows is POSIX compliant!
Administrative

- Syllabus, schedule, homework, etc. posted on course website
- [www.cs.unc.edu/~porter/courses/comp530/f18](http://www.cs.unc.edu/~porter/courses/comp530/f18)
Prerequisites

• COMP 410 – Data Structures
• COMP 411 – Computer Organization
• The background courses are necessary
• In some cases, industry experience is ok
• C programming
• Basic Unix command-line proficiency
C Programming

• You should have learned C in the prerequisite courses
  – Ok if you are not a C guru (you will be)

• A very good resource is “The C Programming Language” by Kernighan and Ritchie
  – Relatively short, and lots of useful exercises

• If you find yourself struggling with C, consider adding some work from this book to be able to complete this course on schedule
Labs: Learn by doing

• This course is **coding intensive**
  – You should know C, or be prepared to remediate quickly
  – You must learn on your own/with lab partner

• You will write several user-level utilities that exercise OS functionality
  – Challenging work, but a very marketable skill
530H – Honors Section

• There will be an Honors section of COMP 530
• Same lectures, exams, worksheets
• Extra meeting on Friday, same time, in SN 115
• Different Labs
  – 530 “Classic” – user-level programming
  – 530H – kernel-level programming
    • In a simpler OS but real enough to boot on your laptop!
    • More labs (7 vs 5), and cumulative

• How to get in:
  – Fill out survey (link on course page)
  – Come to first class
  – Complete lab 0H (note, Lab 0H may be used in lieu of Lab 0 for “classic” students, or for extra credit)
  – After course staff reviews, we will make a decision
Group Policy

• You may do assignments alone, or with as many teammates as you like

• You must list all teammates in code

• Caveat 1: Your points are divided by number of group members (e.g., 10 teammates on a 10-point assignment get 1 point each)

• Good news: You need 70 points, 120 possible (see syllabus)
  – Strategy: Consider doing first assignment or two alone, then pairing up

• Caveat 2: All teammates must understand code
  – I reserve right to ask you about the code; if you can’t explain it to my satisfaction, you will lose points
  – Also, there may be exam questions on programming assignments

• ”Classic Section” – you may change groups on each assignment

• Honors: You may change groups between 0H and 1H; after that, only with instructor consent, as labs are cumulative
  – Also, you need 80/120 points
Productive Frustration

• One of the “meta skills” that distinguishes an excellent programmer is the ability to get un-stuck
  – Fixing a “heisenbug” has this property

• How do you learn this skill?
  – Get stuck on a hard, but solvable problem
  – Learn which strategies will get you moving again

• If you take a quick cheat, you won’t learn the skills to solve truly hard problems
Academic Integrity

• I take cheating very seriously. It can end your career.
  – I check, and report to Honor Court
• In a gray area, it is your job to stay on right side of line
• Never show your code to anyone except your team and course staff
• Never look at anyone else’s code (incl. other universities or past sections)
• Do not discuss code; do not debug each other’s code
• Acknowledge students that give you good ideas
  – Note liberal group and lateness policies
Why do we care?

• Analogy: This is the programming dojo
  – If you don’t do your exercises, you will be unprepared for battle
  – You’ve wasted your money and both of our time
  – It brings dishonor on the dojo when you lose every battle

• Similarly, a lot of what I have to teach (and what will make you a valuable employee when you graduate) has no short cut
  – How do you learn to punch through a board?
  – You punch a board over and over until your fist goes through it
Integrity Homework

• Exercises applying course policies and ethics to several situations
• Due in class Tues 8/28, please send by email
• Note: no assignments will be graded for you until this is completed
Lateness

• Each student gets 72 late hours for programming hw
  – List how many you use in slack.txt
  – Each day after these are gone costs a full letter grade on the assignment
  – If you work in a team, each member loses 1 hour for each hour late

• It is your responsibility to use these to manage:
  – Holidays, weddings, research deadlines, conference travel, Buffy marathons, release of the next Zelda game, etc.

• 3 Exceptions: illness (need doctor’s note), death in immediate family, accommodation for disability
Challenge Problems

• Each lab may include challenge problems, which you may complete for bonus points (generally 5—10 points out of 100)
  – Unwise to turn in a lab late to do challenge problems
  – Can complete challenge problems at any point in the semester---even on old labs

• Indicate any challenge problems completed in challenge.txt file
Lectures

• Discuss and supplement reading material
• An important chance to clarify issues
  – Questions are encouraged!
• I expect you to arrive prepared to answer and ask questions about the reading material
• Everything in lectures may appear on the exams, even if not in the book

• I need you here: Digressions are common to fill in “gaps” and to integrate material from other classes
Recordings

• I usually record lectures for students to review later
  – I will share on youtube with cs.unc.edu accounts
  – All students in the course should be given youtube access, but you may need to reset your password

• Recordings are **best effort**
  – Recordings may fail, be unwatchable, or get deleted by accident
  – Or be discontinued if too many students stop attending
    • I need your facial expressions and questions to know if lectures make sense

• Do not use this as a substitute for class attendance
Textbook

- Free online at: http://pages.cs.wisc.edu/~remzi/OSTEP/

- You can buy a hard-copy or ebook format online if you want

- Other optional references, definitely not required
Readings

• My lectures aren’t perfect; some concepts are subtle
  – Reading other words can be helpful for reinforcement and clarification

• You will learn more in class if you read before class
  – Can’t ask the textbook questions

• 1—2 papers will be posted and discussed; these you should definitely read before class
Course email list

• We will use Piazza this semester. Link on course website
• Will help scale up to a large class
• This is the primary announcement medium
• And for discussions about course work
  – Do not post code here or other solutions
  – Goal: Everyone can learn from general questions
• Material discussed on the mailing list can be an exam question
Worksheets

• You will get worksheets throughout the semester
  – And randomly assigned teams
• These will not be graded, except for participation
• But are valuable practice for the exams

• Do not save these until right before the exam
  – A lot of work
  – The material is cumulative
Other administrative notes

• Read syllabus completely
• Subscribe to the class piazza forum
• 3 exams cover: lectures, labs, mailing list
• All staff email goes to comp530ta-f18@cs.unc.edu
  – Except private issues for instructor only
COMP 530: Operating Systems

Special Offer!

• You can write your own exam questions
  – Send them to me in advance of the test, if I like them, I will use them
  – Do NOT share with anyone else
Getting help

• TA’s will keep office hours (TBD)
• Instructor keeps office hours
  – Note that “by appointment” means more time available on demand
Github Classroom

• This semester: Experiment with github classroom
• Git/github are powerful and common industry tools

• Send me your github username ASAP
  – Create a github account if you don’t have one already

• Bear with us as we work out any issues
Questions?

• Remember:
  – Send the instructor your github user ID
  – Do academic honesty homework
  – Lab 0 and 0H out