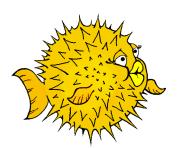
OpenBSD Kernel Internals

The Hitchhiker's Guide

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Why?

- Security paranoia makes me want to know what's happening inside
- Want to learn system programming on a good free example
- Want to be able to help the project some day (so why not start studying and tell everybody to make it easier for such subsequest tries?)
- I'm keen on OpenBSD and system programming

■ Chicks dig OpenBSD (-:

Introduction

Operating system kernel overview

■ Foundation component of the OS

Multitasking kernel responsibilities

- Managing the system resources:
 - cpu time
 - memory
 - peripherals
- Access mediation between user-level software and hardware as an abstraction layer
- Communication facilities
- Providing basic security and protection

OpenBSD Kernel

OpenBSD kernel

- Inherits 4.4BSD (and NetBSD) Unix kernel architecture
- Monolithic (big, fast, easy to maintain, everything is in one address space) (with LKM(4) support)
- Provides the interface to software via system calls
- Supports plenties of HW architectures by separating the code to MD and MI parts
- Has integrated strong crypto(9) framework which is used (almost) everywhere

Source tree layout

/sys/ (MACHINE_ARCH=i386)

```
kern
                main kernel subroutines (clock_, exec_, init_, kern_, sched_, subr_,
                sys_, syscalls.master, tty_, uipc_, vfs_, vnode_)
           sys
                kernel-wide include interfaces
           lib
                kernel libraries (libc (libkern), libsa, libz)
           dev
                device drivers
        dev/ic
                bus-independent device drivers code
{dev/$bus,arch/i386/$bus}
                $bus driver code
  {net*,altq}
                network stacks, pf code
           uvm
                UVM virtual memory subsystem
```

Source tree layout (continued)

/sys/ (MACHINE_ARCH=i386)

```
{isofs, miscfs/*, msdosfs, nfs, nnpfs, ntfs, ufs/{ext2fs, ffs, mfs, ufs}}
                filesystems
        crypto
                crypto framework implementation
           ddb
                kernel debugger
        compat
                other UNIXes compatibility interfaces
    arch/i386
                i386 MD kernel code
{arch/i386/stand.stand}
                bootloaders: mbr(8), biosboot(8), boot(8), depend on libsa
arch/i386/include
                MD include interfaces (referenced as #include <machine/$file.h>
{arch/i386/conf.conf}
                kernel configurations and params sources
```

Configuration

config(8)

- uses config(8)-syntax based kernel configuration
- uses files.conf(5)-based file lists for Makefile generation
- generates header files for kernel use
- generates device lists files (ioconf.c) for autoconf(9) framework

Files (MACHINE_ARCH=i386)

```
conf/files
arch/i386/conf/files.i386
dev/$bus/files.$bus
find /sys | egrep 'files.*'
```

more later

Kernel Organization

Kernel organization (system services)

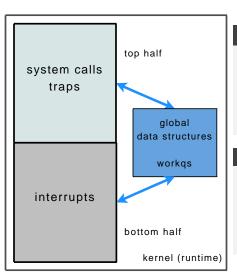
MD

- timer, system clock handling, process and descriptor management
- memory management
- descriptor operations
- filesystem
- terminal handling
- IPC (sockets)
- networking

ΜI

- low-level startup actions
- trap/fault handling
- low-level runtime context manipulation
- hardware configuration and initialization
- runtime support for I/O hardware

Kernel organization (runtime)



Top half

- works in a process context
- runs on a per-process kernel stack in process address space
- can block to wait for resources

Bottom half

- runs on kernel stack in kernel address space
- controls top half behaviour with clock interrupts

System entry points

Hardware interrupt

- arise from external events (devices)
- asynchonous, not related to process
- served by "bottom half" of the kernel
- i386: handlers are installed in and chosen by IDT, programmed into APIC or PIC

Hardware trap

- appear synchronous to process in the result of process actions (e.g.: division by zero, page fault)
- i386: trap handler is installed in IDT (first 20 entries) asm handlers are in locore.s, which perform initial handling and calling trap(struct trapframe)

System entry points (continued)

Software trap

- implemented either as hw-generated interrupt or flag (checked on each priviledge level drop)
- used by system to force the scheduling of events (deferred interrupts)
- special case of software trap a system call

All kernel entries require machine state saving before processing

System calls

- a way for process to perform privileged system actions
- served in kernel top half (using the per-process kernel stack)
- appear synchronous to process

Implementation (1386)

- called by pushing arguments onto the stack, syscall number to %eax and triggering int \$0x80
 (performed by libc routines, syscalls appear to user as libc functions)
- IDTVEC(syscall) routine (locore.s) saves machine state and passes to syscall(struct trapframe) function
- syscall() function performs checks, copies arguments to kernel space, picks a system call entry from sysent[] table and calls the handler if a syscall() gets interrupted by a signal/trap — it may result in syscall restart or exiting with EINTR
- on error: libc routine sets errno on error and returns -1
- on success: libc routine returns either 0 or return value, process continues execution

System calls implementation — kernel

sys/systm.h

example: creating a new syscall "call"

kern/syscalls.master

```
310 STD { int sys_call(int arg); }
```

■ kern/makesyscalls.sh regenerates header files by creating arguments structure, prototypes for libc and rebuilds system call table

System calls implementation — kernel (continued)

kern/init_sysent.c: primary syscall table

sys/syscallargs.h

syscall source code

```
int
sys_call(struct proc *p, void *v, register_t *retval)
{
    struct sys_call_args *uap = v;
    if (SCARG(uap, arg) == 0)
        return (EAGAIN);
    printf("sys_call(arg=%d): pid %u\n", SCARG(uap, arg), p->p_pid);
    return (0);
}
```

System calls implementation — libc

Hooking syscall into libc

install syscall headers regenerated by syscalls.master from /sys/sys to /usr/include/sys

```
or make includes
```

2 add stub syscall object filename to \${ASM} variable to src/lib/libc/sys/Makefile.inc

```
e.g. ASM+= call.o
```

Tebuild libc, the syscall symbols object file will be created and linked into libc:

```
${ASM}: ${LIBCSRCDIR}/arch/${MACHINE_ARCH}/SYS.h /usr/include/sys/syscall.h
printf '#include "SYS.h"\nRSYSCALL(${.PREFIX})\n' | \
${CPP} ${CFLAGS:M-ID*} ${AINC} | ${AS} -o ${.TARGET}.o
${LD} -x -r ${.TARGET}.o -o ${.TARGET}
rm -f ${.TARGET}.o
```

System calls implementation — libc (continued)

Syscall binding object

```
proger src/lib/libc 0 % nm obj/call.o
        U cerror
00000006 T _thread_sys_call
00000006 W call
proger src/lib/libc 0 % objdump -S obj/call.o
obi/call.o: file format elf32-i386
Disassembly of section .text:
00000000 <_thread_sys_call-0x6>:
      e9 fc ff ff ff
                                    1 < thread svs call-0x5>
  0:
                              jmp
  5.
     90
                              nop
00000006 < thread svs call>:
     b8 36 01 00 00
                              mov $0x136, %eax
  b: cd 80
                             int $0x80
  d: 72 f1
                              ib
                                     0 < thread svs call-0x6>
  f:
     c3
                              ret
```

debug: option SYSCALL_DEBUG
reference: syscall(9)

Clock handling

- clock is the most frequent hardware interrupt source
- tc_init(9) is the generic MI framework for MD timecounter handling
- the main system timecounter is handled via hardclock(9) which is interrupted hz * ncpu times per second hardclock(9) is used to update system time, control process timers and launch other timers if needed
- other clock handling functions are statclock(), softclock(), schedclock()
- softclock() is called as software interrupt, processes timeout(9) queue

Software interrupts

- used to handle deferred interrupt tasks in level queues
- three levels: softclock, softnet, softtty
- executed on each acceptable priviledge level drop

- application example: timeout_set(9)
- task deferring can be also achieved via workqs (workq_create(9)) which allows executing a task in process context (processed by a kernel thread)

Synchronisation

- Interrupt priority level: sp1(9)
- Process-context read/write locks: rwlock(9)
- Inter-CPU mutexes: mutex(9)
- Legacy locking interfaces: lockmgr(9)

Process Management

Process management

Definitions

process

a thread of control within it's own address space

thread

a thread of control sharing the address space with another control thread

process context

everything used by the kernel in providing services for the process (process data structues)

process control block

current execution state of a process, defined by machine architecture

context switch

switching among processes in an effort to share $\mathsf{CPU}(\mathsf{s})$ resources

task (i386)

a unit of work that a processor can dispatch, execute, and suspend, can be used to execute a program, a task or process, an operating-system service utility, an interrupt or exception handler, or a kernel or executive utility

Process data structures

```
/sys/sys/proc.h
/sys/arch/i386/include/proc.h
```

struct process

- threads (TAILQ of struct proc)
- owner credentials
- limits

struct proc

- pid / pgid / sid
- VM space (struct vmspace)
- FD table
- scheduling information
- process state
- signal state / actions
- MD state information (struct mdproc)
- user structure (struct user)

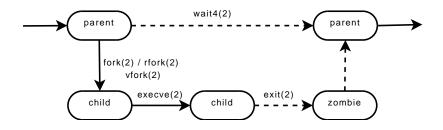
Process data structures (continued)

```
/sys/sys/user.h
/sys/arch/i386/include/pcb.h
```

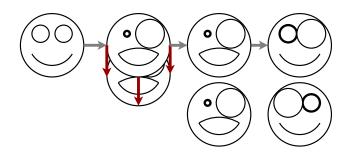
struct user

- process control block (struct pcb)
- resource accounting and statistics
- core dump information
- tracing information
- structure sharing is done with refrence counting

Essential process management-related syscalls



Process creation



- syscalls: fork(2) / vfork(2) / rfork(2) (implemented via fork1(9))
- achieved via copying parent process data structures, including address space
- new execution program image is loaded via execve(2) / exect(2) syscalls

fork1(9)

- check process count limits
- allocate process data structures
- zero/copy process data structures fields
- init process timeouts
- call uvm_fork(9) function to share/copy virtual address space
 - call cpu_fork() to create PCB and make child ready to run
- init process timers (virttimer/proftimer)
- update stats (uvmexp)
- pick PID for process
- hook new process into scheduler, pick a run queue and cpu
- initialize tracing if needed

Kernel threads

- special case of a process: runned in system with kernel privileges, linked into kernel executable
- always cloned from process 0 (swapper)
- share memory map, limits
- have a copy of FD table
- can not be swapped (kernel memory is wired)
- do not receive broadcast/group signals

- created using kthread_create(9)
 - implemented via fork1(9)

Process state

Process control block (PCB)

- represented by struct pcb in struct user
- contains MD process state data (i386):
 - TSS task state segment data, keeps track of segments of 3 PLs, GPRs, LDT, CRs
 - FPU status
 - I/O bitmap
 - VM86 mode flags, etc
- i.e. defines process context for switching

struct proc p_stat values

Scheduling

- relies on clock: hardclock():
 - statclock() gets called if no other timer for it
 - roundrobin() gets called every hz / 10 ticks (100 ms for now (hz = 1000)) to call need_resched() (which toggles AST for preempt())

statclock():

- p->p_cpticks get increased so are other process tick stats
- schedclock() gets called to adjust process priority active processes get higher priority
- process priority is calculated in resetpriority():

```
newpriority = PUSER + p->p_estcpu + NICE_WEIGHT * (p->p_nice - NZERO);
p->p_usrpri = min(newpriority, MAXPRI);
```

- priority affects the run queue the process is put into
- process may be either in sleep queue or in run queue according to its status (waiting for resources or ready to run respectively)

Scheduler queues

Run queues

- each CPU has SCHED_NQS (32) run queues
- the queue for the process is picked according to priority int queue = p->p_priority >> 2;
- defined as a TAILQ array for each struct schedstate_percpu

Sleep queue

- defined as a global TAILQ array (TABLESIZE = 128, used for hashing wait channel pointers to speed up the lookup)
- handled by tsleep(9)/wakeup(9)
- the process is put back on run queue on wakeup

Context switching

Context switch cases

- forced AST in user mode in result of spending the process time slice
- voluntary calling yield() (sched_yield() syscall)
- involuntary in result of getting into sleep queue after calling tsleep(9)

mi_switch()

- implements the machine-independent prelude to context switch
- counts resource usage stats
- chooses next process (sched_chooseproc())
- performs cpu_switchto()

cpu_switchto()

- MD function of context switch (implemented in locore.s on i386)
- saves old process PCB, loads new and starts rolling

Threading

pthreads

- user-level N:1 threding implementation
- POSIX standard
- uses user-level scheduler implemented on top of per-process timers
 (ITIMER_VIRTUAL/SIGVTALRM, ITIMER_PROF/SIGPROF, setitimer(2))
- makes no use of SMP for threads
- when one thread waits for resources others block

rthreads

- kernel-level 1:1 threading implementation
- based on rfork(RFTHREAD) system call
- system scheduler handles each thread
- removes all pthreads limitations
- librthread is binary compatible to libpthreads
- currently in development

Signals

- designed as hardware interrupts for software
- allow process to respond to asynchronous external events
- higher-level psignal(9) is used to post signals
- sent to process via MD routine sendsig()
 - immediately save process exec frame
 - run handler from signal table
 - process handles signal if possible and calls sigreturn(), which restores normal execution

Tracing and debugging

ktrace(2)

option KTRACE

- enables kernel trace logging for processes
- trace is written to a file, may be controlled via ktrace(1), kdump(1) tools

ptrace(2)

option PTRACE

- allows one process (the tracing process) to control another (the traced process)
- most of the time, the traced process runs normally, but when it receives a signal (sigaction(2)), it stops
- the **tracing** process is expected to notice this via wait(2) or the delivery of a SIGCHLD signal
- e.g. gdb(1) is implemented via ptrace(2)

Memory Management

Physical memory management (i386)

- the memory that the processor addresses on its bus is called physical memory
- physical memory is organized as a sequence of 8-bit bytes
- each byte is assigned a unique address, called a physical address

 OpenBSD kernel does not address physical memory directly, it uses segmented memory model with paging

Physical memory management (1386) — definitions

linear address space

processor's addressable memory space

segment

smaller protected address space; each program can be assigned its own set of segments

logical address (far pointer)

consists of a segment selector and an offset; used to locate a byte in a particular segment

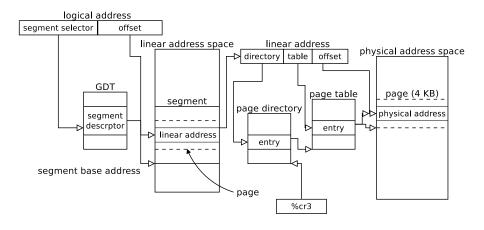
linear address space

segment base address plus the logical address offset

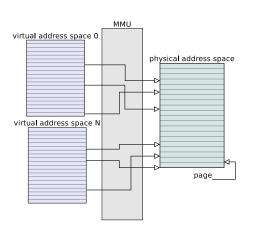
paging

technique used to store and retrieve data from secondary storage for use in main memory; used in implementing virtual memory; transparent to program execution

Physical memory management (i386) — scheme

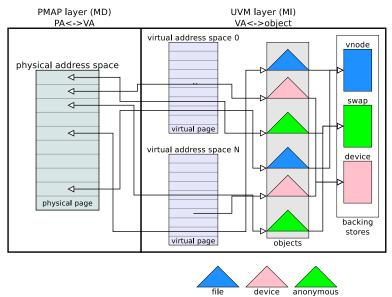


Virtual memory

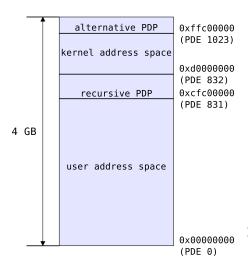


- each process gets its own address space (which in fact may be physically fragmented or even overflow on to disk storage)
- used to organize memory protection between processes
- allows mapping of either files or devices into virtual
- each virtual address is converted to physical in hardware (using Memory Management Unit)

Memory management in OpenBSD



PMAP (i386)



- the lower layer of VM system
- describes a process' 4GB virtual address space
- maintains VA<->PA mappings
- can be viewed as a big array of mapping entries that are indexed by virtual address to produce a physical address and flags (flags describe the page's protection, whether the page has been referenced or modified, etc)

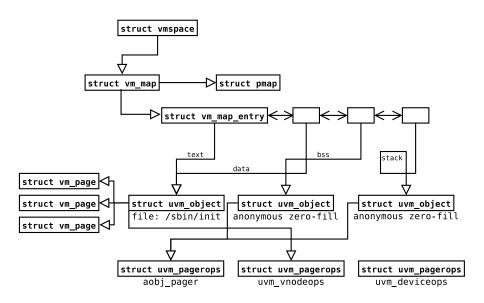
pmap(9)

PMAP data structures (i386)

UVM

- the upper level of VM system
- manages VA<->object mappings (object can be either anonymous mapping, file or device)
- handles page faults
- designed as an evolution of old BSD VM system to eliminate its limitations while retaining its positive design aspects:
 - MD-MI separation
 - copy-on-write technique
 - several data structures
- new data movement techniques:
 - page |oanout (process<->process)
 - page transfer (kernel<->process)
 - map entry passing (process<->process)
- implemented with fine-grained locking which is good for SMP systems

UVM data structures



Page faults

- hardware trap caused by MMU when no physical memory page is mapped at starting memory address
 - process accesses an unmapped/improperly mapped memory in its VA space
 - processor MMU generates #PF trap
 - MD routine asks MMU to provide VA, which triggered PF and access type
 - MI uvm_fault() routine gets called
 - VM system lookups mappings at that address
 - if the mapping is invalid/access control error -> send SIGSEGV
 - otherwise fault in the page into physical memory and continue process execution

uvm_fault()

Kernel memory management

- UVM routines: uvm_km_* (see uvm(9))
- malloc(9) generic memory allocator (like malloc(3)), implemented on top uvm_km_* functions, with statistics support

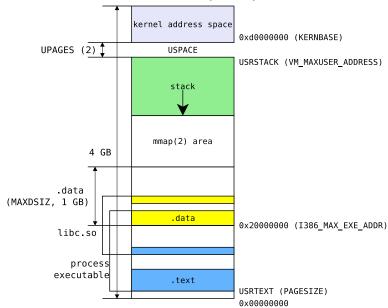
```
void *malloc(unsigned long size, int type, int flags);
```

- pool(9) resource pool manager; provides management of pools of fixed-sized areas of memory. Resource pools set aside an amount of memory for exclusive use by the resource pool owner.
- extent(9) provides management of areas of memory or other enumerable spaces (such as I/O ports) (implemented on top of pool(9))
- mbuf(9) buffer management for networking

Debugging tricks

```
option UVMHIST
option UVMHIST_PRINT
```

Process VM space layout (i386)



Memory management interfaces in userspace

System calls

```
void *mmap(void *addr, size_t len, int prot, int flags, int fd, off_t offset);
int
     msvnc(void *addr. size t len. int flags);
int
     munmap(void *addr, size_t len);
    mprotect(void *addr, size t len, int prot);
int
    madvise(void *addr, size_t len, int behav);
int
     mlock(void *addr, size_t len); /* mlockall(int flags) */
int
    munlock(void *addr, size t len):/* munlockall(void) */
int.
     minherit(void *addr, size_t len, int inherit);
int
     mincore(void *addr, size t len, char *vec);
int.
void *mquerv(void *addr. size t len. int prot. int flags. int fd. off t offset);
```

■ libc malloc(3) is implemented via mmap(2)

Kernel Bootstrap (i386)

mbr(8)

- locates in first 512 bytes of hard disk
- gets loaded by BIOS at 0000:7C00
- relocates to 07A0:0000 (chainloading)
- scans partition table for the first active one
- reads PBR (OpenBSD: biosboot(8)) to memory
- ljmp
- written in assembler
- relies on BIOS routines
- works in real addressing mode

/sys/arch/i386/stand/mbr/mbr.S

biosboot(8)

- written in assembler
- relies on BIOS routines
- works in real addressing mode
- capable of reading ELF boot(8) binary from FFS partition while aware of its position (patched by installboot(8))

/sys/arch/i386/stand/biosboot/biosboot.S /sys/arch/i386/stand/installboot/installboot.c

Vladimir Kirillov

boot(8)

- responsible of setuping protected mode environment
- does basic devices probing and memory detection, a20 gate activation
- supports interactive configuration + boot.conf(8)
- uncompresses kernel image and copies it into memory
- passes device probing information and arguments to the kernel
- ljmp!

```
/sys/lib/libsa/
/sys/stand/boot/
/sys/arch/i386/stand/libsa/
/sys/arch/i386/stand/boot/
```

In kernel: locore.s

- processor detection
- creating bootstrap kernel virtual address space, initializing initial paging support
 (kernel should be relocated to KERNBASE (0xd00000000), so it is mapped twice first)
- setup new stack for process 0 and future kernel startup
- wire 386 chip for unix operation: init386()
- call main()

/sys/arch/i386/i386/locore.s

```
machdep.c: init386()
```

- enumerate processor address spaces with extent(9): ioport_ex, iomem_ex
- create new bootstrap GDT
- create IDT and hook trap handlers
- if system has isa(4) call isa_defaultirq() to program PIC (i8259)
- initialize console
- bootstrap pmap / count physical memory
- init ddb / kgdb; throw into ddb if asked
- init soft interrupts

/sys/arch/i386/i386/machdep.c

init_main.c: main()

- initialize timeouts
- init autoconf structures
- init UVM
- init disk
- init tty
- cpu_startup(): init dmesg buffer, fill cpu0 data structures, start first rt clock
 drop into UKC if requested in boot(8)
- init IPC goo: sockets, pipes, mbufs
- init filedescriptors
- fill in process 0 ("swapper") context and data structures
- init scheduler
- init workqs
- cpu_configure(): run devices autoconfiguration
- init nfs/vfs
- init clocks
- init SysV features (shm, msg queues, semaphores)
- configure/attach pseudo devices (like pf or crypto)

init_main.c: main() (continued)

- init networking
- init exec feature
- start scheduler
- fork init(8) process (call start_init() which will tsleep(9) until everything else is configured
- create deferred kthreads
- wait until autoconfiguration finished
- mount root
- start other generic kernel threads (pagedaemon, reaper, etc)
- boot application processors
- wakeup init thread
- enter uvm_scheduler as main swapper (proc0) job

```
/sys/kern/init_main.c
```

Driver architecture autoconf(9): driver framework

autoconf(9) by example

mainbus(4)

definition: /sys/arch/i386/conf/files.i386
define mainbus {apid = -1}

define mainbus {apid = -1} device mainbus: isabus, eisabus, pcibus, mainbus attach mainbus at root file arch/i386/i386/mainbus.c mainbus

configuration:/sys/arch/i386/conf/GENERIC
mainbus0 at root

Autoconfiguration data structures: /sys/sys/device.h Autoconfiguration subroutines: /sys/kern/subr_autoconf.c

autoconf(9) by example (continued)

mainbus(4)

driver structures: /sys/arch/i386/i386/mainbus.c

struct cfattach mainbus_ca = {
 sizeof(struct device), mainbus_match, mainbus_attach
};

struct cfdriver mainbus_cd = {
 NULL, "mainbus", DV_DULL
};

■ attach rountine should scan for children devices and install interrupt handlers/etc jobs

Kernel frameworks (subsystems)

- buses: PCI/USB/SBUS/ISA/SDMMC/I2C/GPIO/...
- device classes: SCSI/ATA
- networking layers: net/netinet/netinet6/net80211/netbt/netatalk/netnatm/netmpls
- highlevel driver-hooking frameworks:
 - wscons(4): input and display abstracting/multiplexing
 - drm(4): direct rendering management
 - bio(4): kernel block I/O storage abstraction
 - tty(4): terminal handling
 - sensors (sensor_attach(9): device status sensors
 - audio(9): framework for audio drivers
 - radio(9): sound/video tuners
 - ifmedia(4): handling network interface options
- interfacing to a kernel subsystem normally takes the form of filling out a few structures and perhaps callbacks in attach code then using provided functions.

Exploring and debugging

- man -k
- *DEBUG macros / hidden compile options (like UVMHIST, BIOS_DEBUG etc)
- ddb / kgdb
- serial console
- *stat userland tools
- cool text editor (vim) + ctags (cd /sys/arch/i386; make tags)
- grep / ack
- Google
- OpenBSD mailing lists
- while true; do cd /usr/src; cvs up; done

Thanks to:

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Future work: practice

Thank You