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Highly Reliable Upgrading of Software Containers
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1 Abstract

2 Introduction

Reliable software is important in many sectors such as E-commerce, healthcare, banking, air traffic control and nuclear control.

In safety critical industries such as air traffic control or healthcare reliable software is essential for ensuring that lives are not put at risk due to software errors or crashes. In E-commerce reliable software is critical for maximizing the return on investment of software development and deployment. Unreliable software has many damaging impacts such as loss of profit due to unavailability of revenue generating services, damaging reputation of the service provider often with long-term impact, risk of incorrect transactions for example in financial sectors, risk of security vulnerability and costs to fix and monitor errors.

All companies and organizations use software applications to run their business, deliver services or manufacture products. Therefore, software upgrade plays a key role to maintain reliable applications that are free from errors and security vulnerabilities. However, software upgrade itself may cause unreliability by introducing new errors, and security vulnerabilities. Many different systems and techniques have been proposed to support reliable software upgrade. Currently, these systems are either specific for particular programming languages or are complex, heavyweight and expensive. In addition, no existing system or technique is considered robust enough to be used widely for fully automated continuous delivery of upgrades into production.

This report summarizes different approaches and techniques used for the past few decades to overcome software reliability. In addition, a simple lightweight system is proposed to support reliable dynamic software update via a fully automated process suitable for continuous delivery of applications written in any programming language.

3 Overview

Software reliability is compromised of the following main activities:

- Error prevention
- Fault detection and removal
- Fault resilience

The Institute of Electrical and Electronics Engineers (IEEE) defines reliability as "the ability of a system or component to perform its required functions under stated conditions for a specified period of time". This section of the report will describe different approaches and technologies used to achieve and maintain software reliability, specifically to support the activities mentioned above.

3.1 Software High Availability

System availability is the percentage of time the system is available to users. A highly available application is fault tolerant and reliable. A reliable system ensures that failure of a single component in the system does not cause failure of the entire application. In a reliable system data updates are not lost and the most recent data is available within acceptable tolerances.

3.2 Software Update

Once faults, such as bugs and security vulnerabilities, have been detected software must be updated to remove these faults. Internet facing applications are continuously exposed to an ever increasing set of security threats as listed by the Open Web Application Security Project foundation (OWASP)¹. These threats include injection attacks, broken authentication and session management, cross-site scripting or cross-site request forgery. To avoid such attacks software must be appropriately patched against vulnerabilities. Once a software security patch has been released, the vulnerability is in the public domain and can therefore be used maliciously by attackers. It is therefore important that software is updated to remove these vulnerabilities.

Furthermore, software is updated to enable new services or functionality to be provided to users. Such updates are often important for companies to ensure they are providing the most reliable, competitive and profitable services to their customers. However, updating or patching software is not risk free as stated by Fred Brooks in The Mythical Man-Month.

"The fundamental problem with program maintenance is that fixing a defect has a substantial (20-50%) chance of introducing another. So the whole process is two steps forward and one step back"

Fred Brooks, Turing Award Winner (1999) – The Mythical Man-Month

Software update typically requires restarting of the system that is to be updated. This can happen in two ways either the system is stopped, the update is applied and the system is restarted. Alternatively the update is applied while the system is still running and then the application is restarted. In the second scenario the system's binary code on persistent storage (*e.g.* disk) is updated while the system is running in memory before it is restarted and the new binary code is loaded into memory [1].

In both cases performing the code update requires the system to be restarted resulting in a period of unavailability. Many applications are performing critical life saving functions and cannot be interrupted, for example, nuclear control systems, air-traffic controllers or hospital life-support software. In addition, other applications have an extremely high downtime cost such as E-commerce, telecommunications and banking systems [2]. It is therefore extremely important to support seamless upgrade where the system stays fully available during the upgrade.

Dynamic software update also known as live software update is the process of updating parts of a program without having to interrupt its execution. Dynamic system updates can be performed at

¹https://www.owasp.org/index.php/Top_10_2013-Top_10

either a hardware level or a software level. Hardware based dynamic updating are based on hardware redundancy. Systems such as Tandem Nonstop [3] used in the healthcare and banking industries support dynamic hardware updating and resilience to hardware failure. Detailed techniques and approaches that support dynamic software update are described in section 4.1.

3.3 Reliable Software Architectures

There are multiple architectures that increase high availability and support dynamic software update. These include application clustering, active-passive architectures, data replication and clustered databases.

3.3.1 Application Clustering

A common practice to increase availability and fault tolerance is using a cluster of multiple application (or component) instances [4]. Most commonly a load balancer is used to distribute the load between nodes in the cluster by pushing requests to each node [10]. For example, a load balancer can receive requests for a web application and distribute the requests between different web services so that the load is distributed across all web services. Alternatively, the nodes within the cluster can pull requests as each node becomes available. For instance, a request queue on a Message Oriented Middleware (MOM) or a message broker such as ActiveMQ ² or RabbitMQ ³ can be used to allow nodes to pull requests (Section 5.3).

When application requests are balancing across multiple nodes, if a single application (or component) instance fails, other nodes in the cluster will still be available to process requests. This clustering approach therefore improves overall application availability. In addition, a clustering approach provides an increased ability to handle spikes in load. Spikes in load are spread across multiple nodes reducing their impacts on any given server. Moreover, an application that is deployed as a cluster is typically easy to scale horizontally by adding additional nodes because it has been designed to run as a cluster [4].

One common approach widely used in industry to support dynamic software update is a content switching load balancer (*e.g.* F5 ⁴, Citrix NetScaler ⁵) in front of an application cluster [10]. To perform such an upgrade the cluster is typically split into two halves called A and B. First all load is drained from A by preventing any new requests (*e.g.* business transactions) from being processed. Once A has completed processing all existing requests, it is upgraded and restarted. Now A can start to accept new requests and B is drained and subsequently upgraded. However, this approach is slow and not free from risk as it requires manual interaction with the load balancer to split the cluster and re-route traffic between each step.

3.3.2 Active-Passive Architecture

In addition to clustering another common approach to increase software reliability is to have an active-passive architecture where there are two application instances (or two application clusters). One of the application instances (or application clusters) is actively receiving requests while the other is passive and it is not processing any load [5]. This arrangement improves reliability because if the active instance starts to behave incorrectly or crashes, all requests can be immediately routed to the passive instance, resulting in the passive instance becoming active. A content switching router can be used to automate the routing of requests to the passive instance as soon as it detects the active instance is no longer correctly processing requests. This architecture can also be used to support reliable dynamic software updates. The passive instance can be updated first and requests can slowly start to be routed to the passive instance. During this period if the software update applied to the passive instance fails or causes it to crash, all requests can be immediately routed back to the active instance. However, this approach is wasteful since a complete backup application

² <http://activemq.apache.org/>

³ <http://www.rabbitmq.com/>

⁴ <https://f5.com/>

⁵ <http://www.citrix.com/products/netScaler-application-delivery-controller/overview.html>

instance or backup application cluster is required. In addition, this approach is slow and it is not free from risk as it requires manual interaction with the load balancer to re-route traffic.

3.3.3 Data Replication

Data replication can also be used to increase software reliability. Conventional SQL Relation Database Management Systems (RDBMS) typically do not operate in a cluster [6]. This is because managing ACID transactions and locking across multiple nodes in a cluster requires commit and rollback to be coordinated across multiple nodes. In addition, consistencies, such as foreign key relationships, must be managed across multiple nodes where the parent and child of the foreign key relationship may be on separate nodes. Although clustered RDBMS do exist, it is expensive, complex and can be error prone. Alternatively, to improve software reliability data can be replicated to a backup database. This works in a similar way to the active-passive architecture where one database is used to process active requests and a second database is only receiving replicated changes and not directly responding to requests. If the active database fails or crashes the passive database can immediately start processing requests and becomes the new active database [6].

To support dynamic updating of databases, data replication can be used where a backup database receives a replicated copy of the changes made to the primary database. This supports dynamic update in a similar way to the active-passive architecture where software updates can be initially applied to the replicated database; once this is completed, the passive database can replace the active database (and the replication direction is reversed). If the software update fails or causes the database to crash, the non-updated database is still available and can immediately start processing requests again.

3.3.4 Clustered Databases

As the requirements for high availability and high scalability have increased, there has been a shift from using conventional SQL RDBMS to clustered NoSQL databases. In addition, shared database integration is no longer a common technique as it is now widely recognized to break encapsulation and introduce high-coupling. Hence, it is no longer as important for databases to provide strong data integrity. NoSQL databases are designed with clustering and high availability as a priority over strong data integrity and locking [7]. Therefore, NoSQL databases run in large clusters and replicate data between multiple nodes making them very resilient to failure of one or more nodes. In addition, they are also able to handle rapid increases in load by spreading the load across multiple nodes in the cluster. As NoSQL databases do not provide strong data integrity, it is typically much simpler to dynamically apply updates. For example a document database may store documents in the form of JavaScript Object Notation (JSON) ⁶. When the data model is updated by adding or removing fields, no changes to the database are required. Instead applications reading or writing documents are expected to handle different document formats in a flexible way. If such a change was required in a RDBMS, the table structure would need to be modified. The modification is a highly risky activity in a live database and would typically require application downtime and a full database backup.

3.4 Reliable Software Techniques

In addition to architectures that support software reliability, there are also techniques that are commonly used to increase reliability of applying software updates. These include automated deployment, configuration as code and continuous delivery.

3.4.1 Automated Deployment

Automated deployment is used to reduce the cost and the risk associated to installing or updating software. Such an approach is particularly important for cluster or active-passive architectures where

⁶<http://www.json.org/>

the same application must be installed or updated repeatedly. Automated deployment involves using fully scripting application installation or update processes including any operating system (OS) installation, package installation, application installation and configuration [8]. There are several tools that are commonly used for automated deployment such as Puppet ⁷, Chef ⁸, Ansible ⁹ and Salt ¹⁰.

3.4.2 Configuration As Code

Configuration as code is a technique used to ensure all environment configuration and settings for an application installation or update are written as code often in the form of an automated deployment script. Such an approach ensures that applications are deployed with the correct environment configuration and that the development team and infrastructure team can easily agree the required configuration [9]. This approach reduces the risk of deployment by ensuring configuration settings can be tested and reapplied identically every time. In addition, such an approach allows configuration changes to be versioned and changed in-line with the application code or any software updates guaranteeing that the correct configuration for a given update is applied.

3.4.3 Continuous Delivery

Continuous delivery is a software development approach that ensures application updates can be deployed to production at any point throughout the development life cycle. To support continuous delivery a pipeline is typically used to promote application updates automatically through several stages from initial development through to production [9]. Continuous delivery supports reliable software update by ensuring that each update has been applied to multiple stages prior to reaching production. In addition, continuous delivery promotes small incremental updates that are deployed on a regular bases reducing the risk from any given update. Continuous delivery also increases software reliability by reducing the cost of applying updates. If an update is extremely easy to deploy, then any defect that has been deployed into production can be more easily fixed by a subsequent deployment. However, continuous delivery from development all the way into production is rare with most companies only managing to promote application updates as far as pre-production. This is because performing automated deployment via continuous delivery into production is considered too risky. This fact reduces many of the benefit that continuous delivery provide.

⁷<https://puppetlabs.com/>

⁸<http://www.getchef.com/chef/>

⁹<http://www.ansible.com/home>

¹⁰<http://www.saltstack.com/enterprise/>

4 Related Work

Software updates are an important part of maintaining a long-lived system with new software enhancements, fixes and modifications being released on a continuous basis. This section summarizes different approaches that have been proposed over the past forty years for highly reliable dynamic software upgrade.

4.1 Dynamic Software Update Systems

In the past decades several systems have been developed to support dynamic software updates. Each of these systems uses different approaches to change the code and the data of a program from an old version to a new version.

4.1.1 Code Update

Systems such as Ksplice [11], OPUS [12], DynaMOS [13], and POLUS [14] replace the old code with a small piece of code, called trampoline. Trampoline executes the replaced instruction and then will jump to the function's new version. One of the main weaknesses of using this mechanism is that the trampoline requires a writable code segment, which makes the application vulnerable to code injection attack [11].

Ginseng [15] and K42 [16] systems use indirection instead of trampolines. Ginseng uses binary rewriting to direct function calls into calls via function pointers, while K42's OS uses indirection through an object translation table. In the aforementioned systems updates occur by redirecting indirection targets to the new version. However, using this technique can add overhead to normal execution process.

Dynamic software update systems mentioned above affect code updates at the granularity of individual functions or objects. However, those systems are not capable of updating functions that contain event-handling loops or functions like *main* that rarely end. Hence, systems such as Kitsune [19], UpStare [17], Ekiden [18], which focus on updating the whole program rather than individual functions have been developed. UpStare uses a stack reconstitution update mechanism. In this mechanism the running application automatically unrolls the call stack when an update occurs, while saving all stack frames. It then modifies the call back by replacing old functions with their new version, and at the same time mapping data structures in the old frames to their new versions. In contrast, Kitsune and Ekiden both use a manual approach by relying on the programmer to migrate control to the correct equivalent point in the new version of the program.

4.1.2 Data Update

Most dynamic software update systems handle the data update by using object replacement. The system or the developer allocates replacement objects and initialize them using data from the old version. Ginseng uses type-wrapping approach. In this approach the programs are compiled so that *structs* have an added version field and extra "space" to allow for future extensions. Transformation of old objects will be initiated by inserting calls to mediator functions which access updated objects. Ksplice and DynaMOS do not change the old objects but allocate shadow data structures containing only the new fields. Shadow data structures have the advantage of changing fewer functions by an update. When a new field is added to a *struct*, only the code using that field is affected but not all the code that uses the *struct*.

4.2 Dynamic Software Update Safety

Choosing when to safely apply updates has been one of the main concerns of the prior work on dynamic software updating. Some solutions rely on no updates to active code, *i.e.* no thread is running that code, and no thread's stack refers to it, ([20], [11], [16], [21]). This restriction reduces post-update errors but it does not eliminate them, and additionally imposes strong restrictions on the form of an update and how quickly it can be applied. Moreover, some researchers suggest that

no updated code should access data generated prior to the update being applied ([23], [22], [24]). This technique ensures that updates with type difference do not pose a threat to type safety. The final approach suggested by researchers is using transactions in a distributed or local context to enforce stronger timing constraints ([28], [27], [29]). However, it is currently been shown that update timing may not be a main concern and a few programmer-designed update points are typically sufficient to determine safe and timely update states ([23], [19], [25], [30]).

4.3 Software Update Using Multi-Version Framework

The idea of N-version programming, also known as multi-version programming, was originally introduced in 1970s. This method is defined as the independent generation of more than two functionally equivalent programs. Separate developers develop each version of the program all using the same initial specification. These versions will be run concurrently in the application environment. Each version will handle identical inputs and the output of all the versions will be collected and the voting scheme are used to decide which version(s) of the program behave correctly [36]. N-version programming technique was originally proposed as a method of providing reliable and fault tolerance software. This methodology has inspired many researchers to propose new techniques for development of reliable software applications

In 1999 Cook *et al.* introduced a multi-version framework called Hercules for the highly reliable upgrading of software components [31]. In this framework instead of removing the old version of a component, multiple versions of the same component are kept running in parallel and the behavior of each version is utilized. This approach allows the system integrity to be maintained in the presence of bugs introduced due to the new version of the component. Therefore, Hercules ensures reliability by keeping existing versions of the component running and the old version is only fully removed when the new version has satisfied all its rules. Additionally, Berger and Zorn proposed a replica framework each with a different randomized layout of objects within the heap to provide probabilistic memory safety [32]. Furthermore Veeraraghavan et al. suggested running multiple replicas with complementary thread schedules to avoid errors in multi-threaded programs [33].

More recently, Hosek *et al.* proposed a novel framework called Mx, which takes advantage of the idle resources made available by multi-core platforms, and allows applications to survive crash errors introduced by incorrect software updates ([34], [35]). Similar to Hercules, Mx achieves reliability by running the old and new version of an application concurrently. The fundamental difference between the two frameworks is that Hercules requires the programmer to define the functionality of each component version, whilst Mx targets crash bugs and is fully automated. Additionally, in the latter system all versions are live at all times and when Mx detects that one of the versions is not behaving correctly or has crashed, the correctly behaving version is used to handle all software requests. This allows appropriate actions to be taken at a convenient moment; at this point, the incorrectly behaving version can be fixed or restarted.

5 Background

This section explains and justifies the technologies that will be used in the implementation of the dynamic software update system proposed in section 7.

5.1 Efficient Cluster Management

As described in section 3.3 clustering supports dynamic software update and software high availability; however, clustering increases the cost of managing and maintaining the application due to the multiple application instances within the cluster. Virtualization is a technique widely used to reduce the cost of hardware, management and risk associated to clustering.

5.1.1 Virtualization

Virtualization is the separation of a resource or service from the underlying physical delivery of that resource or service. Virtualization can occur on multiple different infrastructure layers such as network, storage, server hardware, operating systems or applications. Virtual memory, for example, simulates additional memory above the memory that is physically available by using a swap file on hard disk [37]. Filesystems are also virtualized; for example, a Logical Volume Manager (LVM) maps multiple physical disks to logical pools of storage (volume groups). A filesystem can then be created on top of the logical volume within a logical pool (volume group). The filesystem can therefore be spread across multiple physical disks, be re-sized and or moved from one physical disk to another while I/O is happening to the file system ¹¹.

The main advantage of virtualization is separation between the virtualized infrastructure and the physical infrastructure. This means that applications can continue to execute with no downtime even when physical hardware is replaced, fails or any other hardware maintenance is performed. In addition, physical resources can be pooled and combined then redistributed as required.

Hypervisor Virtualization

Operating system virtualization that is called hypervisor virtualization allows multiple guest operating systems to run on a single host system at the same time [38]. This type of virtualization can be either native based (type 1) or hosted based (type 2) [39]. Hosted based hypervisor virtualization uses an application that is installed on an OS such as VMware ¹² or VirtualBox ¹³. Native hypervisor based virtualization in contrast avoids the overhead of the host OS by running the virtualization layer directly on the host machine (bare-metal). The guest OS shares the hardware of the host computer such that each OS appears to have its own processor, memory and other hardware resources. Since hypervisor has direct access to the hardware resources, it is efficient and enables greater scalability, robustness and performance. In addition, a hypervisor can run the virtualization layer across multiple physical machines [39]. This allows new physical machines to be added or maintenance to be performed against existing physical machines transparently without affecting the host operating systems. (Figure 1).

Container Virtualization

Container virtualization is a lightweight operating system virtualization technique that instead of trying to run an entire guest OS, it isolates the guests, but does not virtualize the hardware [40] (Figure 2). Container virtualization is considerably more lightweight than hypervisor virtualization. It has been found to be as much as 40% less overhead using Docker based container virtualization compared to running full virtual machines on Amazon Elastic Compute Cloud (EC2) ¹⁴. Each container can be treated like a regular operating system; it can be shut down, booted or rebooted. Resources such as disk space, CPU and memory associated to each container when created can be dynamically increased or decreased while the container is running and applications and users see each container as a separate host. Container virtualization allows installation of several different

¹¹ <http://www.markus-gattol.name/ws/lvm.html>

¹² <http://www.vmware.com/>

¹³ <https://www.virtualbox.org/>

¹⁴ <https://www.appeagle.com/ecommerce-news/ecommerce-is-on-the-rise-in-2013/>

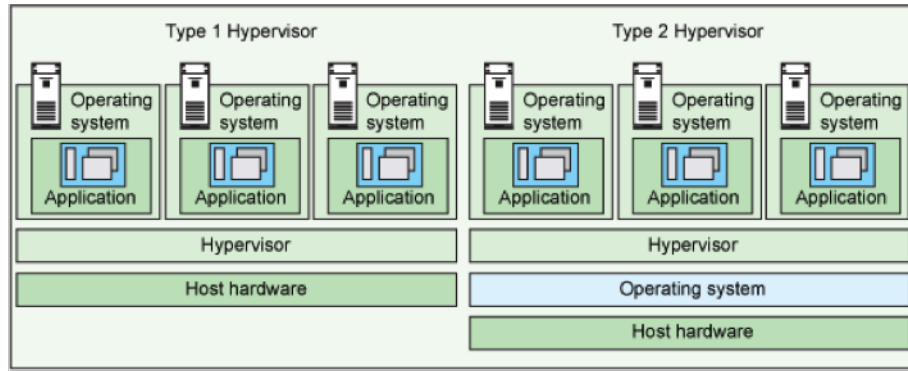
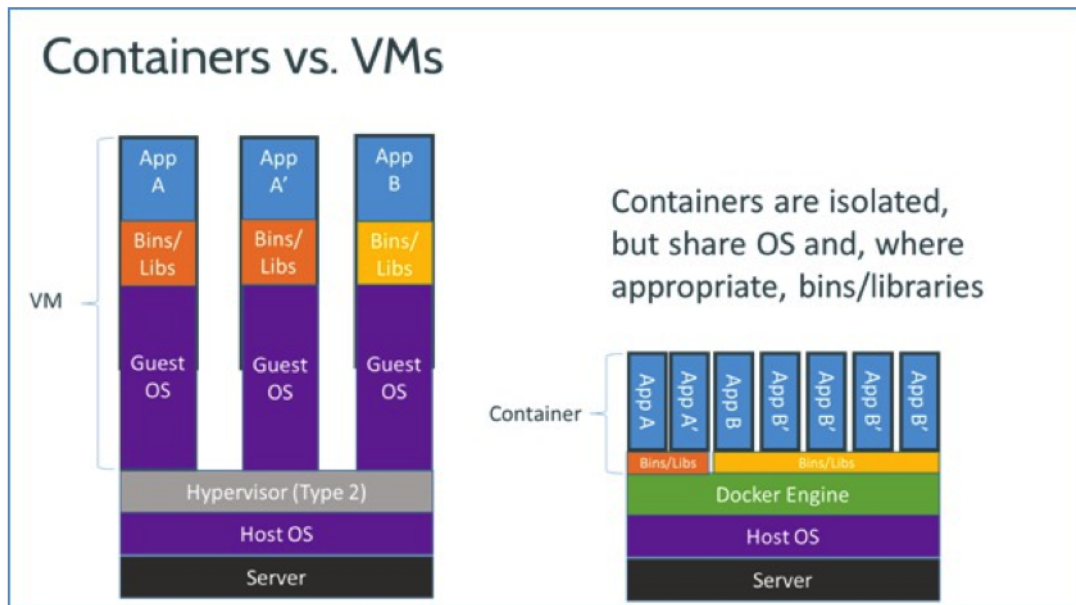


Figure 1: Hypervisor Type 1 vs. Type 2 [39]

operating systems on top of a single kernel. Although all the operating systems use the same kernel, they have their own filesystem, processes, memory and devices [40].

Figure 2: Containers vs. Traditional Virtual Machines ¹⁴

Linux Containers

Container virtualization has been developed independently for different operating systems such as Linux OpenVZ ¹⁵, Solaris Containers ¹⁶, FreeBSD Jails ¹⁷. A popular example is Linux Containers (LXC) ¹⁸ that allows a complete copy of the Linux OS to run in a container without the overhead of running a type-2 hypervisor. LXC uses kernel namespaces, AppArmor ¹⁹, SELinux ²⁰, chroots, and Control groups to provide container virtualization.

Kernel namespaces is used for virtualization of:

- Process identifiers
- Network interface controllers, firewall rules and routing tables

¹⁴ https://www.docker.io/the_whole_story/

¹⁵ http://openvz.org/Main_Page

¹⁶ <http://www.oracle.com/technetwork/server-storage/solaris/containers-169727.html>

¹⁷ <http://www.freebsd.org/cgi/man.cgi?jail>

¹⁸ <https://linuxcontainers.org/>

¹⁹ <https://wiki.ubuntu.com/AppArmor>

²⁰ http://selinuxproject.org/page/Main_Page

- Hostname
- Filesystem layouts
- Interprocess communication

Control groups is used to provide:

- Resource limiting to control use of resources such as memory
- Prioritization to control the share of the CPU being used
- Accounting to measure how much resources are being used

Chroots, also known as “jails”, are used to change the apparent root directory in the filesystem ensuring applications cannot view files and folders outside of the chroot.

AppArmor and SELinux are used to improve security and ensure that applications cannot break out of the LXC [41].

LXC provides user environments whose resources can be tightly controlled, without the need to virtualize the hardware resources. It also allows running many copies of application configurations on the same system ²¹. This has proven to be a significantly useful feature of these containers for seamless software upgrade (Section 4.3). Furthermore, since the LXC is sharing the kernel with the host system, its processes and filesystem are completely visible from the host; however, this means that the user is limited to the modules and drivers that the container has loaded.

Docker

Docker is an open source application (or framework) that extends and simplifies LXC to provide Linux Containers. Docker allows easy creation of lightweight, portable, self-sufficient containers. Docker extends LXC by providing many features that make it easier to develop, deploy, automate and share containers ²². Docker simplifies containerization supporting techniques such as Continuous Delivery by allowing a Docker container built and tested on a developer’s laptop to be run anywhere. Docker containers can run on bare metal servers, virtual machines, OpenStack ²³ clusters or on a service provider’s infrastructure such as Digital Ocean ²⁴.

Advanced Multi-Layered Unification Filesystem (AuFS) is used in Docker as their filesystem. AuFS is a layered filesystem that can transparently overlay one or more existing filesystems. A Docker AuFS consists of multiple read-only layers with a single read-write layer at the top merged together to form a single filesystem representation. When a file is modified in the container, the read-only version of the file is copied into the read-write layer using a process called copy-on-write [42]. The copy-on-write approach means that the read-write layer only contains the files that have been modified by the container. Docker supports behaviors similar to git ²⁵ where the read-write filesystem layer can be committed and turned into a new permanent read-only layer called an image. A new container can then be created based on this image or committed filesystem layer. A container created from the image will have a union filesystem that unifies a new copy-on-write read-write filesystem layer with the images’ read-only filesystem layer and the dependent image filesystem layers beneath it. A Docker image is therefore simply a diff of changes from the previous base layers, effectively keeping the size of image files to minimum. This also means that image creators have a complete audit trail of changes from one version of a container to another (Figure 3).

In addition, Docker provides a scripting language for creating containers and images based on other images. The script, called a Dockerfile, defines the differences between the new image and the previous base image. Dockerfiles allow the execution of shell commands, the configuration of processes to run when the container is started and control over the public interface of the container including exposed ports and directories.

²¹<https://linuxcontainers.org/>

²² https://www.docker.io/the_whole_story/

²³<https://www.openstack.org/>

²⁴<https://www.digitalocean.com/>

²⁵<http://git-scm.com/>

Docker also provides a registry of containers called the Docker Index. It allows containers to be publicly shared. The index contains images created by committing a filesystem layer and images created by the Docker Index build system using a Dockerfile [42].

With Docker, a new application on a host only needs its binaries or libraries but not a new guest OS. In addition, the same application binaries can be shared between multiple running copies of the application using a shared Docker image. If modifications are made between different versions of the application only the differences need to be maintained separately ²⁶.

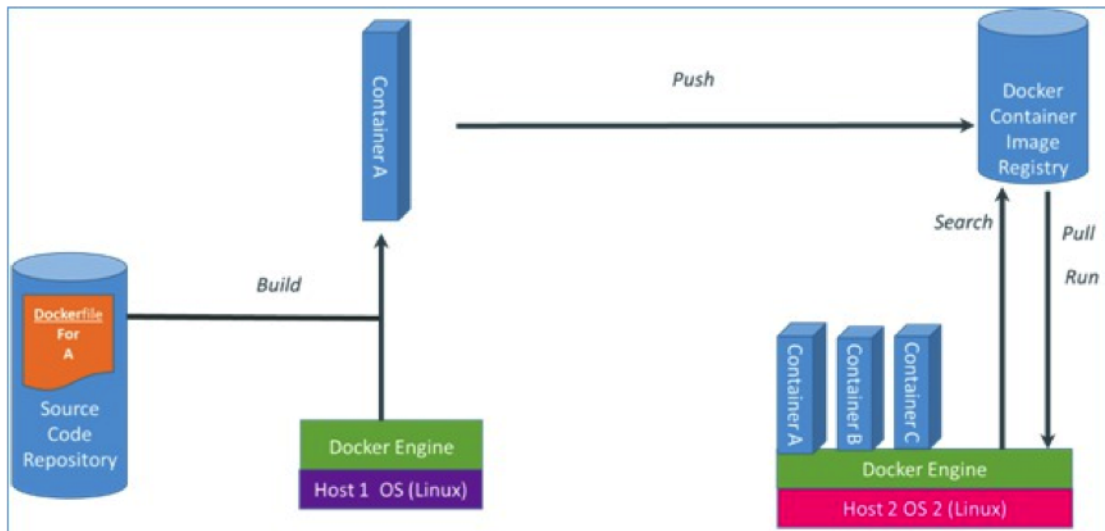


Figure 3: Basic Docker Function ²⁶

5.2 CoreOS

CoreOS is an open source lightweight operating system based on the Linux Kernel which is designed for security, consistency and reliability ²⁷. CoreOS does not support any package management tools such as apt ²⁸ or yum ²⁹ instead it is a base OS for Docker containers. Therefore, any application can run on CoreOS, using a Docker container. CoreOS has an active/passive dual-partition scheme, similar to ChromeOS ³⁰, which is used to update the OS as a single unit instead of package by package. Initially, the system is booted into an active partition, once a new update is detected it is downloaded and installed to the passive partition. To ensure the installation does not affect the running system, it is rate limited using Linux cgroups. The system will switch to the partition with the latest update once it is rebooted ³¹. CoreOS also has several tools to support simple cluster deployment including:

- etcd - An open source distributed key value store that handles distributed locking and master election
- fleet - A combination of systemd (a system management daemon for Linux kernel) and etcd to provide a distributed init system that supports the control of system services across a cluster. Fleet is a particularly effective method of querying and installing Docker container clusters across a CoreOS cluster.

²⁶ https://www.docker.io/the_whole_story/

²⁷ <https://coreos.com/using-coreos/>

²⁸ <https://help.ubuntu.com/12.04/serverguide/apt-get.html>

²⁹ <http://yum.baseurl.org/>

³⁰ <http://www.chromium.org/chromium-os>

³¹ <https://coreos.com/using-coreos/>

5.3 Messaging Systems

Messaging systems allow two or more applications to exchange information in the form of messaging. Advanced Message Queuing Protocol (AMQP) [43], Java Message Service (JMS) [44] and Zero Message Queuing (ZeroMQ) ³² are the most common messaging standards.

5.3.1 Broker-Based Messaging Systems

AMPQ and JMS are popular examples of broker-based messaging systems. A message broker (also called Message Oriented Middleware) is a physical component that handles the communications between different applications. Hence, in a broker-based messaging system instead of applications directly communicating with each other, they communicate with the message broker [45]. The advantage of using this architecture is that the applications do not need to know the location of other applications. They only need to be aware of the network address of the broker. The broker then routes the messages to the correct applications based on the business requirements using the message properties, queue name or routing key [43]. In addition, a broker-based messaging system is more resistant to the application failure. This is because if an application fails, messages that are already in the broker will be retained. However, broker-based messaging systems require excessive amount of network communication. Moreover, since all the messages have to be passed through the broker, the broker can turn out to be a bottleneck in the system. Therefore, the broker can be utilized to 100% while other components of the system are under-utilized or even idle. Finally, the broker has to be managed and maintained separately to the applications sending and receiving messages. This breaks encapsulation and separation of concerns because the broker contains application specific configuration and logic. Therefore, if the application requirements change, both the broker and the application must be updated in a coordinated way. In addition, one broker often contains logic and queues for several different applications.

5.3.2 Zero Broker Messaging Systems

In a broker-less messaging system each application directly talks to other applications without any middleware, hence, there are no bottlenecks associated with these systems. The application can manage and maintain its own messaging infrastructure and so encapsulation and separation of concerns are increased.

ZeroMQ is a broker-less, language agnostic, lightweight asynchronous messaging library. Asynchronous I/O model of ZeroMQ asynchronous message-processing required for scalable multi-core applications ³³.

ZeroMQ provide sockets that carry atomic messages across various transports such as Transmission Control Protocol (TCP) or User Datagram Protocol (UDP) and communication styles such as point-to-point or multicast. Unlike conventional sockets that only allow strict one-to-one, many-to-one, or in some cases one-to-many relationships, ZeroMQ sockets can be connected to multiple endpoints while simultaneously accepting incoming connections from multiple endpoints (many-to-many connection). ZeroMQ sockets support connection patterns such as request-reply (sending requests from a client to a web service or cluster of web services and receiving reply from each request sent), publish-subscribe (one-to-many distribution of data from a single publisher to multiple subscribers in a fan out manner), pipeline (distributing data to nodes arranged in a pipeline) and exclusive pair (connect one peer to exactly one other peer for inter-thread communications) patterns that is summarized in <http://api.zeromq.org/2-1:zmq-socket>.

More recently, a ZeroMQ alternative, called nanomsg, has been proposed by the same team who developed ZeroMQ ³⁴. Similar to ZeroMQ, nanomsg is aimed to make the networking layer fast, scalable, and easy to use; however, it has been reported to be more lightweight than ZerMQ. In addition, in ZeroMQ each individual object is managed exclusively by a single thread. This strategy can cause issues such as inability to implement request resending in REQ/REP protocol

³² <http://zeromq.org/>

³³ <http://zeromq.org/>

³⁴ <http://nanomsg.org/>

and PUB/SUB subscriptions not being applied while application is doing other work. However, in nanomsg the objects are not tightly bound to particular threads as a result the aforementioned issues do not exist.

5.4 Hypertext Transfer Protocol

The Hypertext Transfer Protocol (HTTP) is a generic, stateless application-level protocol for distributed hypermedia information systems. HTTP is the foundation protocol of the World Wide Web and it is widely used between a web browser and a web server. A feature of HTTP is the typing and negotiation of data representation, allowing systems to be built independently of the data being transferred. To provide reliability HTTP uses TCP. Since HTTP is stateless, a new TCP connection is created between client and server for each transaction and the TCP connection terminates immediately after the transaction is completed. HTTP functions as a request-response protocol in a client-server interaction.

5.5 HTTP Requests

The HTTP request sent to the server by client has the following format:

```
<Request> ::= <Request-Line>
               <general-headers>
               |<request-headers>
               | <entity-headers> CRLF
               CRLF
               <opt-message-body>
```

The Request-Line consists of a method token, Request-URI and the protocol version. Method token defines HTTP functions such as GET, POST, PUT, DELETE that is performed on the resources identified by Request-URI. General headers provide general control information and they can be included in both requests and responses. Transfer-Encoding is an example of general headers which defines what (if any) type of transformation has been applied to the message body for its safe transfer between the sender and the recipient. For example if Transfer-Encoding is defined as "chunked", the data will be sent to the recipient in a series of "chunks". The request-header fields allow the client to pass additional information about the request, and about the client itself, to the server. Entity-headers define optional and required metainformation about the request body and if the request has no body, provide information about the resource identified by the request. For example, Content-Length header is one of the entity-header fields indicating the size of the request body. CRLF refers to a carriage return ('\r') followed by a line feed ('\n'). CRLF is used to define the end of request line and headers and start of the request body.

5.6 HTTP Responses

Server send HTTP responses to the client after receiving and interpreting requests using the following format:

```
<Response> ::= <Status-Line>
                <general-headers>
                |<response-headers>
                | <entity-headers> CRLF
                CRLF
                <opt-message-body>
```

The Status-Line consists of the HTTP version followed by a numeric status code and its associated textual phrase. Status code indicates the action taken on the corresponding request such as 'Successful' (The request was successfully received, understood, and accepted), 'Client Error' (The request contains a syntax error or the request cannot be fulfilled) and 'Server Error' (The

server failed to fulfill an apparently valid request). Similar to requests, HTTP responses also have several type of headers which provides general or specific information about the response (Section 5.5). Additionally, CRLF is also used to define the end of response headers and start of the optional response body.

6 Design

To manage the ever-increasing size of E-commerce and web related services large-scale clusters are deployed to virtualized operating systems running on hypervisors. However, hypervisors have a significant overhead when all that is required is a simple way to run clustered instances of applications. Container virtualization is considerably more lightweight than hypervisor virtualization. It has been found to be as much as 40% less overhead using Docker based container virtualization compared to running full virtual machines on Amazon EC2 ³⁵.

In addition to the use of virtualization, continuous delivery and automated deployments are critical to reduce the cost of maintaining large clusters of software that require regular updates and feature releases. Although many companies use automated deployment tools, continuous delivery all the way into production is extremely rare due to the significant risk imposed by applying automated updates directly into production.

6.1 Proposed Dynamic Software Update System

This project proposes a simple lightweight system to support reliable dynamic software updates suitable for continuous delivery into production. In the proposed system the updated version will run concurrently with previous stable versions. The updated system will be monitored automatically and if the system behaves incorrectly, all requests will be seamlessly routed to the previous stable version with no downtime.

Four mechanisms will be supported to enable different reliable update strategies depending on the specific software requirements.

Rapid Update - In this mechanism the updated version of software will immediately process all requests. The non-updated version will however remain running and will be immediately available to process requests if the updated system does not behave correctly. This mechanism is useful when an update must be applied urgently, such as a critical security patch required to stop an in-progress security breach.

New Session Update - This update mechanism will only switch new sessions to the updated version. A new session will be identified by no requests being received from a client within a configured time period. As with Rapid Update, the non-updated version will however remain running and will be immediately available to process requests if the updated system does not behave correctly. This approach is useful when a low risk update is being made that provides features, which are important to make available to users as rapidly as possible. For example, a low risk update that is providing a new profit making service.

Long Term Update - This mechanism will switch new sessions gradually to the updated version over multiple days or weeks. This approach is particularly useful for risky or complex updates that have a high potential to introduce system instability. This technique is also less risky since the new software version will incrementally receive a greater percentage of requests.

Multi-Version Update - In this mechanism the updated and non-updated versions will run concurrently and process identical requests for new sessions. In this strategy, both the old and the new versions will handle all requests and the characteristics of each response will be compared to ensure the update is behaving correctly.

In all four mechanisms the behavior of the updated software will be automatically monitored to confirm the application is behaving correctly. The response size and delay will be compared with typical values for the non-updated version to verify the updated application behavior. Figure 4 (Figure 4) demonstrates the component interactions within the proposed dynamic software update system. The focus for the proposed solution will be on HTTP requests and responses. This focus allows the use of HTTP headers to identify user sessions. In addition, it allows efficient comparison between large responses without the need to buffer the entire response body.

³⁵<https://www.appeagle.com/ecommerce-news/ecommerce-is-on-the-rise-in-2013/>

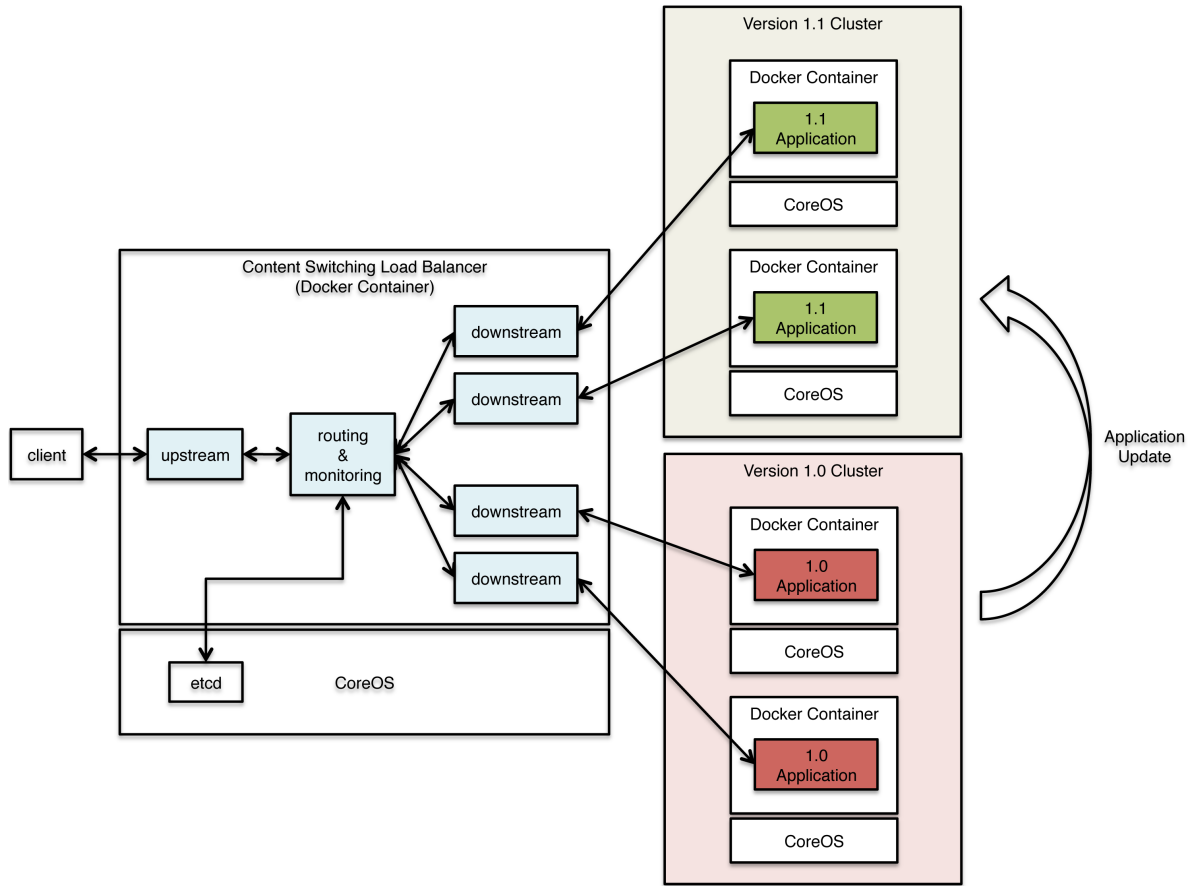


Figure 4: Component interactions within the proposed dynamic software update system

6.2 Proposed Technology Stack

The following technology stack has been chosen for the dynamic software update system:

- Docker as a container virtualization mechanism that runs containers for both the target application that is to be updated and the content switching load balancer
- CoreOS as a lightweight operating system to host Docker containers
- Etcd as a highly available distributed key value store used for shared configuration and as a software version registry
- Go ³⁶ programming language because of its simplicity, efficiency, scalability, highly concurrency and garbage collection. Go will be used to build the content switching load balancer. Other fast programming languages such as C++ and Java was considered to use. However, C++ was not chosen since it does not have garbage collection and requires manual memory management. Additionally, Java was not chosen since it is more heavyweight in comparison to Go and it does not give the programmer any control over the memory management.
- ZeroMQ or nanomsg as message frameworks that support highly efficient load balancing and routing of messages without the need for any middleware

³⁶<http://golang.org/>

7 Implementation

To produce an efficient and reliable dynamic software update system several versions of a proxy was implemented using GO programming language as described in this section.

7.1 Message Based Proxy Using ZeroMQ

The first proxy developed to support dynamic software update was a HTTP reverse proxy based on ZeroMQ messaging system. A custom Dockerfile was written that creates a Docker container running an example web service using Netty ³⁷. The ZeroMQ load balancing HTTP reverse proxy uses different types of ZeroMQ sockets such as STREAM, REQ, REP and it is arranged as shown in Figure 5. Each box is a separate thread, a separate process or a Docker container and performs the following responsibilities:

- **upstream** uses STREAM socket for receiving HTTP requests and replying with the HTTP response. Upstream also consists of REQ socket that forwards the requests to the router.
- **router** is responsible for distributing requests across four downstream threads using ROUTER and DEALER sockets. ROUTER socket adds the identity of the sender and receiver to responses and requests respectively. DEALER socket distributes the requests across downstream threads in a round-robin order.
- **downstream** is responsible for receiving the requests from the router using REP sockets and sending HTTP requests to the two Docker containers containing the Netty web services and receiving the responses using STREAM socket.

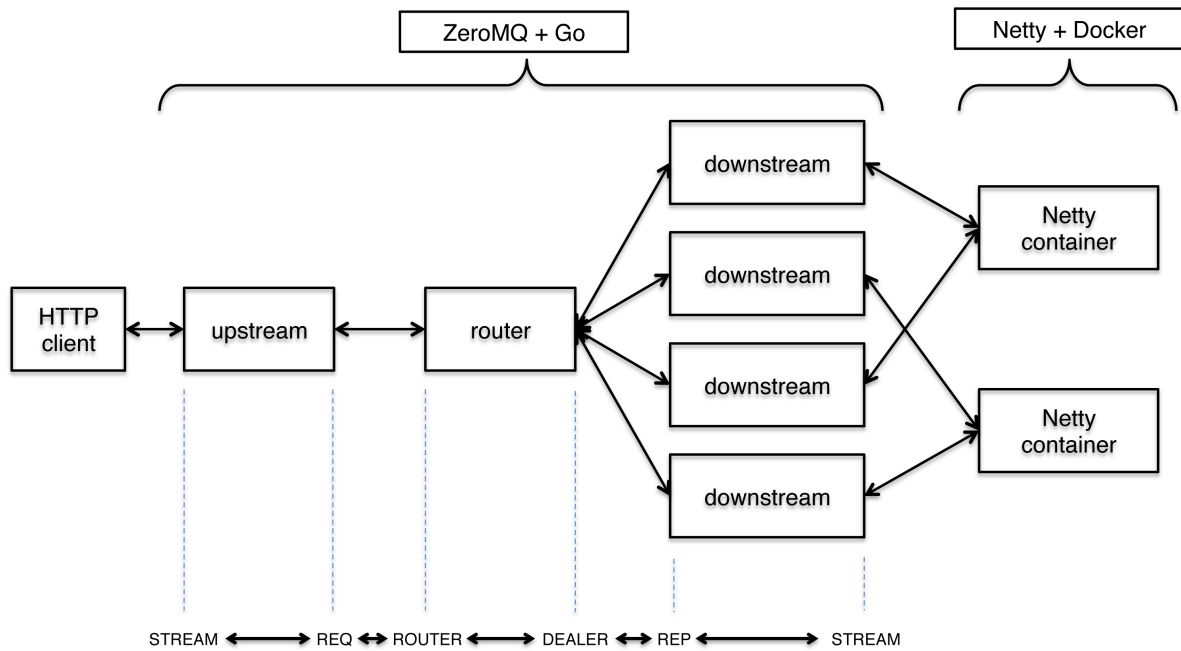


Figure 5: ZeroMQ, Go and Docker Prototype

Detailed analysis of the reverse HTTP proxy showed that when the HTTP requests or responses are chunked (Section 5.5), ZeroMQ DEALER socket in the router treats each chunk as a separate message and it distributes each chunk of the same request or response to different recipients. To prevent this major routing issue associated with ZeroMQ messaging system, the message chunks for each HTTP request and response were buffered before forwarding them to the servers and clients.

³⁷<http://netty.io/>

This approach allowed successful routing using ZeroMQ messaging system, however, quantitative analysis of the HTTP reverse proxy showed significant overhead associated with using the implemented proxy as the load balancer. Therefore, the aforementioned proxy was not advanced further to support dynamic software update and an alternative one was sought to be developed.

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7.2 Socket Based Proxies

As it was explained in the previous section, a messaging system-based proxy was not the correct choice to create a fast and efficient dynamic software update system. This section describes different approaches used to develop load balancing HTTP proxies using raw Go sockets with no messaging systems.

7.2.1 Socket Based Proxy With Content Counting

The first version of the socket based proxy was designed as demonstrated in figure xxx. In this design the proxy consists of a listener that listens in an *Accept* loop for new TCP connections (Figure xxx). In the case of a new connection, the listener creates a dedicated TCP connection between the client and the server. The new connection receives HTTP requests in a *Read* loop and distributes them across a cluster of HTTP services (Figure xx).

The content counting proxy uses HTTP request and response formats to detect the end of a message sent by client/server. Detecting the end of requests/responses is essential in order to stop reading from the senders and closing GO sockets for terminating each TCP connection. For HTTP requests, the method token in the Request-Line was used to detect what type of HTTP function is expected (Section 5.5). If the method is defined as GET, no message body in the request is expected and the *Read* loop ends after the first read. However, for other HTTP functions such as POST or PUT and for HTTP responses, headers such as Transfer-Encoding and Content-Length were used (Section 5.4). When the size of message body is defined by Content-Length header, proxy parses the HTTP requests/responses and when the first CRLF is detected (Section 5.4), then it is known that any data after the first CRLF is the message body. Hence, the data bytes received after first CRLF is counted and compared with the value obtained from Content-Length. When the two values are equal, the *Read* loop ends. In addition, when the Content-Length header is not set and the Transfer-Encoding header is defined as "chunked", then the message is sent to the recipient in a series of chunks. At the start of each new chunk, the chunk size is defined as a hexadecimal number followed by '\r\n' as a line separator, therefore, the format for the last chunk is always defined as '0\r\n\r\n'. Hence, to detect the end of HTTP messages with chunked Transfer-Encoding header, the implemented proxy screens each chunk and when the last chunk is spotted (*i.e.* '0\r\n\r\n'), the *Read* loop ends.

To evaluate the performance of the aforementioned proxy, a HTTP benchmarking tool called wrk³⁸ was used. wrk is capable of generating significant load when it runs on a single multi-core CPU by combining a multi-threaded design and scalable event notification systems such as epoll³⁹ and kqueue⁴⁰. Requests were sent to an example Go web service either directly or via the implemented socket based proxy and the round trip time (*i.e.* the time taken to send a request to the server and receive a response) was calculated. This analysis showed that sending requests and responses via the proxy increases the round trip time approximately xxxxx200%xxx. Detailed analysis of the proxy showed that one of the main reasons for the performance overhead was due to parsing and content counting that the proxy is doing to detect the end of messages. Furthermore,

³⁸ <https://github.com/wg/wrk>

³⁹ <http://man7.org/linux/man-pages/man7/epoll.7.html>

⁴⁰ <http://www.freebsd.org/cgi/man.cgi?query=kqueue&sektion=2>

when requests and responses went through the proxy, read errors were regularly occurring and the the Go sockets did not seem to be closed reliably. These errors can also have a big impact on the round trip time as well as effecting the reliability of the proxy. In conclusion, the significant overhead associated with the implemented proxy and the regular read and socket errors lead us think that a proxy with content counting is not be a good candidate for supporting a reliable and efficient dynamic software update. Therefore, another version of the socket based proxy was developed as described in the next section.

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7.2.2 Socket Based Proxy With End Of File

The final version of the socket based proxy was implemented using a Stage Based Design (SBD) as demonstrated in figure 6. The SBD approach was used to improve the code design, simplicity and to support good test coverage. Additionally, the SBD also promoted encapsulation, separation-of-concerns and allowed inversion-of-control and dependency-injection which resulted in the following benefits:

- **Encapsulation And Separation Of Concerns** - resulted in separating logic for each functional area into a single component. This creates a simple and isolated code that focuses on one topic, making it clear and easier to understand. Additionally, encapsulation and separation of concerns simplified testing by allowing each test to be focused on one specific area. For example, multiple tests could be done on reading from a socket and dealing with different errors and situation that can occur to insure a reliable reading process unlike the unreliable *Read* loop described in section 7.2.1.
- **Inversion-Of-Control And Dependency Injection** - allowed incremental development of the proxy where new components were plugged-in and configured one by one while existing components all worked together. For the HTTP load balancing proxy shown in figure 6 the *Read* and *write* stages were first developed. That was followed by development of the *Complete* and *Route* stages respectively and then the rest of proxy was implemented. Furthermore, This design also simplified testing for the following reasons:
 - allowing the code-under-test to be isolated by mocking all dependencies
 - allowing the mocking of different error situations that would be impossible to test without mocking dependencies

This version of HTTP load balancing proxy does not use content counting to detect the end of messages instead it uses the End-Of-File (EOF) signal. Different component and stages of the proxy is shown in figure 6 and their functionality is explained below.

Accept Loop

Accept loop accepts incoming HTTP connections on a listener and creates a *Forward pipe* for each request.

Forward Pipe

Forward pipe constructs the *ChunkContext Struct* for the received request and creates *Read*, *Route*, *Write* and *Complete* stages of the proxy for forwarding the request to the appropriate server. The *ChunkContext Struct* is responsible for identifying the HTTP connection by containing information such as the network addresses of the client and the server, and it defines if the received message is

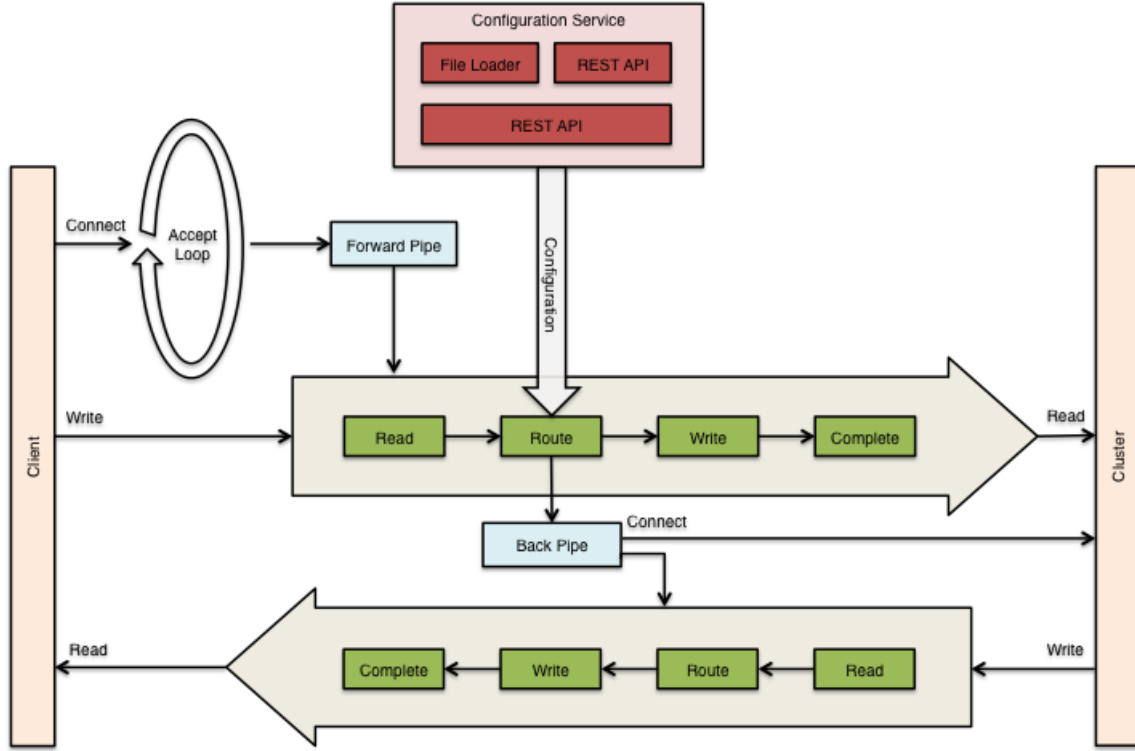


Figure 6: TCP Socket Based Proxy Design Supporting Dynamic Software Update

a request or response.

Read Stage

Read stage is responsible for reading input in a loop from the HTTP connection. The *Read* loop terminates when an error is encountered while reading from a socket. In the final version of the socket based proxy (Figure 6), when an EOF condition (*i.e.* when no more input is available) occurs, *Read* treats this condition as an error and it stops reading from the connection. This approach allows a graceful and efficient way of detecting the end of input and prevents the need for parsing requests/responses and the content counting mentioned in section 7.2.1, which is very inefficient and unreliable. The *Read* stage in *Forward pipe* reads requests from the client, while the *Read* stage in *Back pipe* reads responses from the server.

Route Stage

Route stage has different functionality in the *Forward Pipe* (*i.e.* processing requests) and *Back pipe* (*i.e.* processing responses).

according to the type of message (*i.e.* requests or responses) is processing.

Routing Requests - When the requests arrive in *Route* stage,

Routing Responses -

- - - load balancer and send the requests to the correct instance of the cluster
- - - create backward pipe
- - - set cookie headers
- - - parse the headers for metrics

Write Stage

Write stage writes received requests/responses to an underlying data stream. The writing process

stops if any errors such as *ErrShortWrite* encountered while writing to a socket. The *Write* stage in *Forward pipe* writes data to the server, while the *Write* stage in *Back pipe* writes data to the client.

Complete Stage

Complete stage is responsible for shutting down the writing and reading sides of the TCP connection when the *Read* and *Write* stages terminate. This is done to insure that a TCP connection is reliably closed when the client/server communication is ended. This proved to be essential for generating a fast and reliable dynamic software update system.

Back Pipe

Back pipe has the same responsibility as the *Forward Pipe*. It constructs the *ChunkContext Struct* for the received response and creates *Read*, *Route*, *Write* and *Complete* stages for forwarding the response to the client.

7.3 REST Configuration Service

A REST configuration service was developed and implemented into the proxy (Figure 6) to support different upgrade scenarios explained in section xxx. This REST service takes advantage of HTTP functions such as PUT, GET and DELETE to manage clusters and software updates. The user sends the updated version of the cluster to the REST server using a PUT request. A UUID will be generated for each new cluster and saved in a list. The user can query any of the clusters using the UUID associated with the desired cluster and the HTTP PUT function. Each cluster can also be deleted using the HTTP DELETE function.

As it was described in section xxx, the proxy supports different update strategies. Firstly, the proxy will be started on a default configuration defined in a JSON file. The JSON file has three different sections defined as "proxy", "configService" and "cluster". The proxy and configService sections define the Internet Protocol (IP) and the port addresses that the proxy and the REST configuration service will be running on. The cluster section defines the IP and port addresses of the servers in the cluster.

As well as defining the IP and port addresses of the running clusters, the cluster section has several optional sections as follow:

- **version:** The user can define the version of the cluster. If no version is defined, version 0.0 will be chosen as the default one.
- **upgradeTransition:** This configuration defines which of the upgrade scenarios (section xxx) will be applied to the updated cluster. If the user defines the session mode, it is necessary to define a time out for the session update.

7.4 Upgrade Strategies

Rapid Update - In this mechanism the updated version of software will immediately process all requests. To apply the Rapid Update, the "upgradeTransition" section of the configuration file will be defined as "Instant" and as soon as the updated version start running it will immediately process all requests. The non-updated version will however remain running. If the user decide to delete the updated version of the software or if the updated version does not behave correctly the non-updated version will be immediately available to process requests. Different versions of the software will be available in the version order and the newest version will always process the request and if the most updated one is not available the next most updated one will be available unless specified otherwise.

New Session Update - This update mechanism will be defined as "Session" in the "upgradeTransition" section of the configuration file and will only switch new sessions to the updated version. Each request sent to the system will be given a cookie and the cookie will have a session time defined by the user. A new session will be identified by no requests being received from a client within the user defined session time. As with Rapid Update, the non-updated version will however remain

running and will be immediately available to process requests if the updated system does not behave correctly or the updated system is deleted.

Multi-Version Update - This update mechanism is defined as "concurrent" "upgradeTransition" section of the configuration file. In this mechanism the most updated and the next most updated versions of the software run concurrently and process identical requests for new sessions. The requests will be sent to both the old and the new versions and the characteristics of the response from the new version will be compared to the old version. If the responses are identical, only the response from the new version will be sent to the client. Otherwise the response from the new version will be dropped and the old version's response will be used. xxxxxxxxxxxx If the response from both versions are incorrect, both of the responses from the older version will be used.... xxxxxxxxxxxxxxxxxxxx

Long Term Update - xxxxxxxxxxxxxxxxxxxxxxxxxxxx xx xxx x This mechanism will switch new sessions gradually to the updated version over multiple days or weeks. This approach is particularly useful for risky or complex updates that have a high potential to introduce system instability. This technique is also less risky since the new software version will incrementally receive a greater percentage of requests.

7.5 Testing

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7.6 Dockerising the proxy

Talk about how I dockerised the proxy why didn't use fleet system and coreOS?

7.7 How To Run Proxy?????

8 Evaluation

The system to support dynamic software update will be evaluated as described below.

8.1 Qualitative Analysis

Handling Incorrect Behavior - To ensure that the system is able to handle updates that cause incorrect behavior multiple scenarios will be tested. This test will cover situations where a single node, multiple nodes or all nodes in the updated application cluster behave incorrectly. Incorrect behavior will be modeled by either the application crashing or by the application taking too long to respond.

Automated Software Update - To prove the suitability of the proposed system for continuous delivery, application updates will be performed using both a bash script ⁴¹ and a puppet manifest ⁴². Puppet has been chosen since it is the most widely used automated deployment tool. In addition bash has been chosen since all automated deployment tools have the ability to run bash commands.

8.2 Quantitative Analysis

Load Test - A load test will be used to measure the performance as the number of requests increases. This test will demonstrate the delay incurred by the content switching load balancer and the maximum number of requests that the system can handle.

Saturation Test - This test will be performed to measure the performance of the system when it is has been exposed to a moderate number of requests over a prolonged period of time. This test will demonstrate that the system can run for a prolonged period of time without any degradation, such as memory leaks.

Update Speed -Rapid Updates will be performed to measure how quickly the requests will be transferred to the updated version of the software.

Software Recovery - Bugs will be introduced to the new version of the software to calculate the speed of switching to the non-updated version.

⁴¹<http://www.tldp.org/LDP/abs/html/>

⁴²<https://puppetlabs.com/>

9 Conclusions & Future Plans

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