How do We Rotate?

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How do we rotate things?

When you are coding with vPython or MATLAB, we often do three dimensional vector rotations via rotational matrices:

$$R(\theta) = egin{bmatrix} \cos \theta & -\sin \theta \\ \sin \theta & \cos \theta \end{bmatrix}$$
 and etc.

But is this the only way we can do rotations? Moreover, matrices are

- computationally costly,
- lacking of intuition,
- o computationally unstable.

We need better ways.

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Many important mathematical concepts are met along the way. Let us walk through the various descriptions of rotation, and discover a new tool called quaternions.

Table of Contents

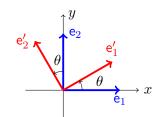
- Descriptions of Rotation
- 2 Rotational Matrices
- Quaternions
- 4 Geometric Algebra: understanding quaternions
- 5 Final Remarks

$$e_i' = Re_i$$

$$\mathbf{e}_{i}' = R\mathbf{e}_{i} = \begin{cases} \begin{bmatrix} a & b \\ c & d \end{bmatrix} \begin{bmatrix} 1 \\ 0 \end{bmatrix} = \begin{bmatrix} a \\ c \end{bmatrix} &, i = 1 \\ \begin{bmatrix} a & b \\ c & d \end{bmatrix} \begin{bmatrix} 0 \\ 1 \end{bmatrix} = \begin{bmatrix} b \\ d \end{bmatrix} &, i = 2 \end{cases}$$

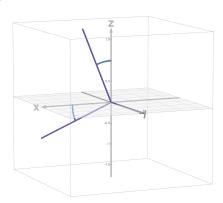
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$$R = \left[\begin{array}{c|c} \mathsf{e}_1' & \mathsf{e}_2' \end{array} \right] = \left[\begin{array}{c|c} \cos\theta & -\sin\theta \\ \sin\theta & \cos\theta \end{array} \right]$$



The same procedure is used to produce the previous rotational matrices R_x , R_y and R_z . Take R_y for example:

$$R_y(\theta) = \begin{bmatrix} \cos \theta & 0 & \sin \theta \\ 0 & 1 & 0 \\ -\sin \theta & 0 & \cos \theta \end{bmatrix}$$



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Hence, we have

$$R(\hat{\boldsymbol{n}}, \eta) = R_z(\phi) R_y(\theta) R_z(\eta) R_y(-\theta) R_z(-\phi). \tag{1}$$

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Rotate about
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For example, when we first rotate around fixed \hat{x} by θ_3 , then rotate around fixed \hat{z} by θ_2 , followed by a last rotation of θ_1 about \hat{x} , the system changes by

$$\boldsymbol{v} \mapsto R_x(\theta_1)R_z(\theta_2)R_x(\theta_3)\boldsymbol{v}.$$

See [desmos] for demo on $R_x(\theta_1)R_z(\theta_2)R_x(\theta_3)$.

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$$R_{\underbrace{R_{R_x(\theta_1)\hat{z}}(\theta_2)\ R_x(\theta_1)\ \hat{x}}_{\text{3rd axis}}(\theta_3) \cdot R_{\underbrace{R_x(\theta_1)\ \hat{z}}_{\text{2nd axis}}(\theta_2) \cdot R_x(\theta_1)}_{\text{2nd axis}}$$

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(I know this is some terrible notation, but that's how it goes for matrices.) We will prove this near the end of the presentation.

Rodrigue's Formula

Thm. (Rodrigue's Rotation Formula)

A simple formula used to describe rotation of vector \boldsymbol{v} by angle $\boldsymbol{\theta}$ around axis $\hat{\boldsymbol{n}}$ ($|\hat{\boldsymbol{n}}|=1$):

$$v_{\text{rot}} = v \cos \theta + (\hat{n} \times v) \sin \theta + \hat{n} (\hat{n} \cdot v) (1 - \cos \theta)$$
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[pf.]

$$\begin{aligned} \boldsymbol{v}_{\mathsf{rot}} &= \boldsymbol{v}_{\parallel} + \boldsymbol{v}_{\perp} \cos \theta + \hat{\boldsymbol{n}} \times \boldsymbol{v}_{\perp} \sin \theta \\ &= \hat{\boldsymbol{n}} (\hat{\boldsymbol{n}} \cdot \boldsymbol{v}) + \left(\boldsymbol{v} - \hat{\boldsymbol{n}} (\hat{\boldsymbol{n}} \cdot \boldsymbol{v}) \right) \cos \theta \\ &+ \hat{\boldsymbol{n}} \times \boldsymbol{v} \sin \theta \end{aligned}$$

Thus it is proven.

This equation is far easier to calculate.

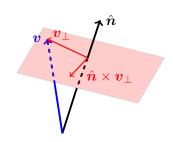


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Here we define a special operation on vectors and matrices:

Def. (Transpose)

Flip the matrix along its diagonal:

$$\begin{bmatrix} a_{11} & a_{12} & a_{13} \\ a_{21} & a_{22} & a_{23} \end{bmatrix}^{\mathsf{T}} = \begin{bmatrix} a_{11} & a_{21} \\ a_{12} & a_{22} \\ a_{13} & a_{23} \end{bmatrix}. \tag{6}$$

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$$\begin{bmatrix} 1 \\ 2 \\ 3 \end{bmatrix} \cdot \begin{bmatrix} 4 \\ 5 \\ 6 \end{bmatrix} = \begin{bmatrix} 1 & 2 & 3 \end{bmatrix} \begin{bmatrix} 4 \\ 5 \\ 6 \end{bmatrix} = 1 \cdot 4 + 2 \cdot 5 + 3 \cdot 6 = 32$$

Properties on Rotational Matrices

We can clearly observe that, under rotation, orthogonal vector remain orthogonal.

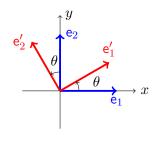
Orthogonal Matrices

A matrix is called orthogonal if:

$$A^{\mathsf{T}}A = AA^{\mathsf{T}} = 1.$$

A rotational matrix is orthogonal since

$$R^{\mathsf{T}}R = \begin{bmatrix} \mathbf{e}_{1}^{\mathsf{T}} \\ \vdots \\ \mathbf{e}_{n}^{\mathsf{T}} \end{bmatrix} \begin{bmatrix} \mathbf{e}_{1}^{\mathsf{T}} & \mathbf{e}_{n}^{\mathsf{T}} \end{bmatrix} = 1.$$



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We call rotational matrices an element of the special orthogonal group of order n:

$$\begin{split} \mathrm{SO}(n) &= \{ n \times n \text{ rotational matrices} \} \\ &= \left\{ M \in \mathbb{R}^{n \times n} \left| M^\mathsf{T} M = \mathbb{1}, \det(M) = 1 \right. \right\}. \end{split}$$

Let's go back to the case of 2D rotation. If we only rotated a small angle $d\theta$:

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 (7)

 $X\theta$ is coined the generator of the rotation $R(\theta)$.

Hence we have:

$$R(\theta) = e^{X\theta}, X = \begin{bmatrix} 0 & -1 \\ 1 & 0 \end{bmatrix}.$$

The converse can be easily checked.

$$e^{X\theta} = \sum_{n=0}^{\infty} \frac{(X\theta)^n}{n!}$$

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$$\mathrm{e}^{X\theta} = \sum_{n=0}^{\infty} \frac{(X\theta)^n}{n!} = \sum_{n \in \mathsf{even}} \frac{(X\theta)^n}{n!} + \sum_{n \in \mathsf{odd}} \frac{(X\theta)^n}{n!}$$

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For three dimensional rotations, we have:

$$L_{x} = \begin{bmatrix} 0 & 0 & 0 \\ 0 & 0 & -1 \\ 0 & 1 & 0 \end{bmatrix}, R_{x}(\theta) = e^{L_{x}\theta} = \begin{bmatrix} 1 & 0 & 0 \\ 0 & \cos\theta & -\sin\theta \\ 0 & \sin\theta & \cos\theta \end{bmatrix}$$

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Interestingly, all L_x , L_y and L_z are skew-symmetric matrices, they are the infinitesimal generators of special orthogonal matrices. We will also see later that these are very similar to quaternions.

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$$(column 1) \cdot (column 2) = 4.2 \times 10^{-10}$$

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• Hard to **interpolate** rotation: for animations, find a rotation R(t) s.t. $R(0) = R_0$ and $R(1) = R_1$.

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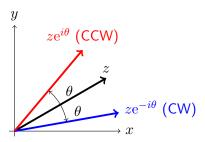
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Complex Numbers for Rotation

We often associate a unit complex number as a rotation operator:

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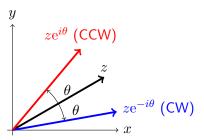
 $(\mathsf{CCW} = \mathsf{counterclockwise}; \, \mathsf{CW} = \mathsf{clockwise})$



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How can we extend the idea of "multiply by a unit complex number" to do rotations in **three dimensional space**?

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This fails as a good number system. We need a third complex number.

Quaternion

Def. (Quaternions)

The **quaternions**, denoted by \mathbb{H} , are spanned by 1, i, j and k, satisfying the multiplication relation of

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A general quaternion is expressed as

$$q = s + v_1 i + v_2 j + v_3 k = s + v, (10)$$

 $s=\text{Re}\{q\}$ is called the <u>real/scalar</u> part, $\boldsymbol{v}=\text{Im}\{q\}$ is called the imaginary/vector part.

Quaternion

From the defining relations

$$1^{2} = 1,$$

 $i^{2} = j^{2} = k^{2} = -1,$
 $ijk = -1,$

we can deduce the following multiplication relationships:

$$ij = k = -ii$$
, $jk = i = -kj$, $ki = j = -ik$.

Quaternion (some history)

Quaternions were conceived by the Irish mathematician Sir William Rowan Hamilton in 1843. It was on a bridge in Dublin when the defining relations of quaternions

$$i^2 = j^2 = k^2 = ijk = -1$$

dawned on him.

This algebraic system successfully extended complex numbers to three dimensions, explaining rotations elegantly. Though replaced by vector algebra not long after its invention, quaternions regained traction in fields of computer graphics nowadays.



Figure: W.Hamilton (Wiki)

e.g. Quaternion Multiplication:

$$(1+i)(2-ji+j) = ?$$

Let us introduce some more functions and terms regarding quaternions, leading up to its description of rotation.

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Conjugate: the conjugate of a quaternion is defined as

$$q^* = (a + bi + cj + dk)^* = a - bi - cj - dk.$$
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• Norm: the norm of a quaternion is defined as

$$|q| = \sqrt{qq^*} = \sqrt{a^2 + b^2 + c^2 + d^2}.$$
 (13)

Note that for vector components $v^2 \le 0$.

• **Inverse**: the inverse of q satisfying $qq^{-1} = q^{-1}q = 1$ is

$$q^{-1} = \frac{q^*}{qq^*} = \frac{q^*}{|q|^2} \quad (|q| \neq 0). \tag{14}$$

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• **Versor**: a versor is a unit quaternion, i.e. |q|=1. Any versor can be written as

$$q = e^{t\mathbf{r}} = \cos t + \mathbf{r}\sin t,\tag{16}$$

where r is a unit vector (expressed in quaternions: $r^2 = -1$).

So, how do we describe rotations with quaternions?

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Thm. (Quaternion rotation)

To rotate a vector p (in the sense of quaternionic vector) by an angle θ around the unit vector \hat{n} (right hand rotation), let us define the versor:

$$q = e^{\hat{\boldsymbol{n}}\theta/2} = \cos\frac{\theta}{2} + \hat{\boldsymbol{n}}\sin\frac{\theta}{2},$$

then the rotated vector will be:

$$p' = qpq^*$$
.

e.g. Rotate ${\pmb p}=1i$ by 120° around the axis $\hat{{\pmb n}}=\frac{1}{\sqrt{3}}(i+j+k).$ [sol.]

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e.g. Rotate ${\pmb p}=1i$ by 120° around the axis $\hat{{\pmb n}}=\frac{1}{\sqrt{3}}(i+j+k).$ [sol.]

$$\begin{aligned} \boldsymbol{p}' &= q\boldsymbol{p}q^* \\ &= \left(\frac{1}{2} + \frac{1}{2}(i+j+k)\right)(i)\left(\frac{1}{2} - \frac{1}{2}(i+j+k)\right) \\ &= j \end{aligned}$$

Note that both q and -q results in the same rotation.

Advantages of Quaternions

When compared with matrices, quaternions have many advantages that made them more useful in fields of computer graphics and much more.

- **1** Axis-angle rotation is super intuitive!
- 2 Only requires 4 floats to store.
- Computationally cheaper.
- Invulnerable to floating point errors, since it is easy to re-normalize:

$$\mathsf{versor} = \frac{q}{|q|}.$$

Easy to interpolate:

$$q(t) = \frac{(1-t)q_0 + tq_1}{|(1-t)q_0 + tq_1|}.$$

Disadvantage of Quaternions

Even though quaternions are really useful, its development were hindered by the fact that "it is not easy to understand quaternions"!

3Blue1Brown even made videos explaining it..., requiring a mapping of 4D objects into 3D space. It is not a good explanation.

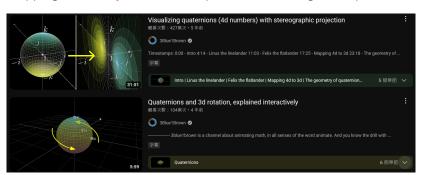


Table of Contents

- Descriptions of Rotation
- 2 Rotational Matrices
- Quaternions
- 4 Geometric Algebra: understanding quaternions
- 5 Final Remarks

Let us try to understand quaternions... in 3D!

$$p' = qpq^*$$

$$q = \cos\frac{\theta}{2} + \hat{n}\sin\frac{\theta}{2}$$

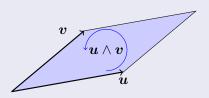
We can do this by introducing the idea of multivectors and rotors in the study of geometric algebra / Clifford algebra.

Between two vector, we can take their inner product and their cross product, now let us introduce a new kind of product:

Def. (Outer product)

The outer product (wedge product) of two vectors \boldsymbol{u} and \boldsymbol{v} is defined as the **oriented area** element B formed by the two vectors:

$$B = \boldsymbol{u} \wedge \boldsymbol{v}$$
.



The product is associative.

Some properties:

① Due to it having orientation, $\mathbf{u} \wedge \mathbf{v} = -\mathbf{v} \wedge \mathbf{u}$.

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5 The element $u \wedge v \wedge w$ is called a **trivector**, an oriented volume.

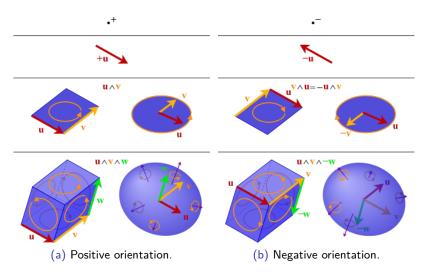


Figure: (Wiki)

Here we introduce a new term called **grade**.

Object	1	$oldsymbol{u}$	$oldsymbol{u}\wedgeoldsymbol{v}$	$oldsymbol{u}\wedgeoldsymbol{v}\wedgeoldsymbol{w}$		$oldsymbol{u}_1 \wedge \dots \wedge oldsymbol{u}_k$
				trivector	• • •	k-vector
Grade	0	1	2	3		\overline{k}

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Why not? It's just like complex numbers and quaternions. In fact, all objects of different grades can be added together, forming a general **multivector**, e.g.

$$M = 3 + 4\boldsymbol{u} \wedge \boldsymbol{v} + \boldsymbol{w}.$$

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If we have the canonical basis for \mathbb{R}^n as $\{e_i\}_{i=1}^n$, i.e. they satisfy

$$\begin{cases} \mathsf{e}_i^2 = \mathsf{e}_i \mathsf{e}_i = \mathsf{e}_i \cdot \mathsf{e}_i = 1 \\ \mathsf{e}_i \mathsf{e}_j = \mathsf{e}_i \wedge \mathsf{e}_j = -\mathsf{e}_j \wedge \mathsf{e}_i = -\mathsf{e}_j \mathsf{e}_i. \end{cases}$$

The relations can be concisely written as:

$$e_i^2 = 1,$$
 $e_i e_j = -e_j e_i.$ (18)

Let us calculate some examples: consider $\{\mathbf e_i\}_{i=1}^n$ the canonical basis for $\mathbb R^n$, e.g.(1)

$$uv = (u_1e_1 + u_2e_2)(v_1e_1 + v_2e_2)$$

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$$= u_1v_1\mathbf{1} + u_1v_2e_1e_2 - u_2v_1e_1e_2 + u_2v_2\mathbf{1}$$

$$= (u_1v_1 + u_2v_2) + (u_1v_2 - u_2v_1)e_1e_2$$

$$= u \cdot v + u \wedge v$$

$$(\mathsf{e}_1\mathsf{e}_2\mathsf{e}_3 + \mathsf{e}_1\mathsf{e}_2)(\mathsf{e}_2\mathsf{e}_1 + \mathsf{e}_1\mathsf{e}_3) =$$

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e.g.(3) We can define the inverse of a vector $oldsymbol{u}$ as $oldsymbol{u}^{-1}$, satisfying

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$$u := \frac{u}{|u|^2}.\tag{19}$$

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Hence.

$$\mathbf{u} \cdot \mathbf{v} = \frac{1}{2}(\mathbf{u}\mathbf{v} + \mathbf{v}\mathbf{u}), \tag{20}$$
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Given a canonical basis $\{e_i\}$ of \mathbb{R}^n , we cam create a set of **basis** multivectors via **geometric products** between them:

1 e_i e_ie_j $e_ie_je_k$ \cdots $e_1e_2\cdots e_n$

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Def. (n choose k)

The amount of choices of k objects from n objects is $\binom{n}{k} = C_k^n$.

We often call the highest grade element the **pseudoscalar**, and denote it by

$$I := e_1 e_2 \cdots e_n$$
.

Def. (Geometric Algebra)

For \mathbb{R}^n , we define the geometric algebra generated by it as a vector space spanned by the basis multivectors mentioned previously, i.e.

$$\mathcal{G}_n = \operatorname{span}\{1, \mathbf{e}_i, \mathbf{e}_i \mathbf{e}_j, \cdots, \mathbf{e}_1 \mathbf{e}_2 \cdots \mathbf{e}_n\}.$$

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An example:

$$\mathbb{R}^2 = \text{span}\{e_1, e_2\},$$
 $\mathcal{G}_2 = \text{span}\{1, e_1, e_2, e_1e_2\}.$

A general element (multivector) in \mathcal{G}_2 can be written as

$$M = \lambda + \alpha \mathbf{e}_1 + \beta \mathbf{e}_2 + \mu \mathbf{e}_1 \mathbf{e}_2.$$

$$\mathcal{G}_2=\mathsf{span}\{1,\mathsf{e}_1,\mathsf{e}_2,\mathsf{e}_1\mathsf{e}_2\}$$

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For \mathcal{G}_2 , let us first consider its highest grade element $e_1e_2=:I$,

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Immediately, we can see that

$$e_1 \boldsymbol{x} = Z, e_1 Z = \boldsymbol{x}.$$

$$\mathcal{G}_3 = \mathsf{span}\{1, \mathsf{e}_i, \mathsf{e}_i \mathsf{e}_j, \mathsf{e}_1 \mathsf{e}_2 \mathsf{e}_3\}$$

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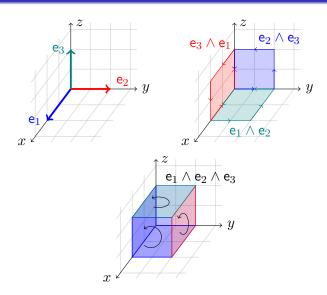
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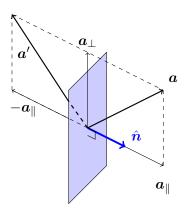
(this is just the same idea as orthogonal complements!), we can rewrite the basis multivectors as:

$$\mathcal{G}_3 = \mathsf{span}\{1, \mathsf{e}_i, I\mathsf{e}_i, I\}$$



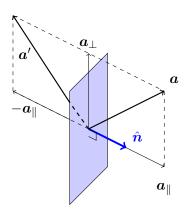
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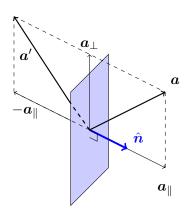


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$$egin{aligned} & oldsymbol{a}' = oldsymbol{a} - 2oldsymbol{a}_{\parallel} \ & = oldsymbol{a} - 2(oldsymbol{a} \cdot \hat{oldsymbol{n}})\hat{oldsymbol{n}} \ & = oldsymbol{a} - (oldsymbol{a}\hat{oldsymbol{n}} + \hat{oldsymbol{n}}oldsymbol{a})oldsymbol{n} \ & = oldsymbol{a} - oldsymbol{n}oldsymbol{a}\hat{oldsymbol{n}} \ & = -oldsymbol{n}oldsymbol{a}\hat{oldsymbol{n}} \end{aligned}$$

Let's see how geometric algebra describes **reflections**, this will in turn lead us to the beautiful formulation of rotation in geometric algebra, and in turn explain the quaternion rotations.



$$egin{aligned} a' &= a - 2a_{\parallel} \ &= a - 2(a \cdot \hat{n})\hat{n} \ &= a - (a\hat{n} + \hat{n}a)n \ &= a - a\hat{n}\hat{n} - \hat{n}a\hat{n} \ &= -\hat{n}a\hat{n}. \end{aligned}$$

Hence, mirroring across the \hat{n} direction will be

$$\mathbf{a}' = -\hat{\mathbf{n}}\mathbf{a}\hat{\mathbf{n}}.\tag{22}$$

Rotation

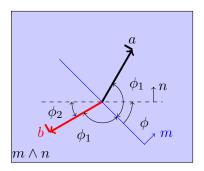
What's the relation between reflections and rotations?

Two reflections = a rotation.

Rotation

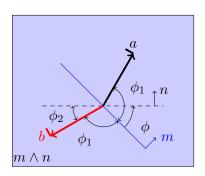
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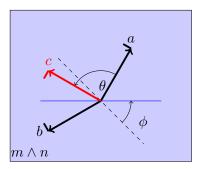
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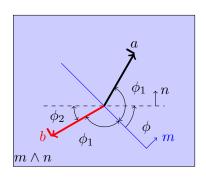
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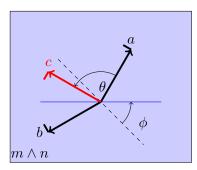




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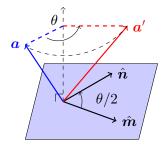
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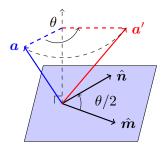




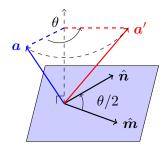
$$\theta = 2\phi$$

$$a' = -\hat{n}(-\hat{m}a\hat{m})\hat{n}$$



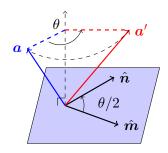


$$egin{aligned} oldsymbol{a}' &= -\hat{oldsymbol{n}}(-\hat{oldsymbol{m}}oldsymbol{a}\hat{oldsymbol{n}}) \ &= (\hat{oldsymbol{n}}\hat{oldsymbol{m}})oldsymbol{a}(\hat{oldsymbol{m}}\hat{oldsymbol{n}}) \end{aligned}$$



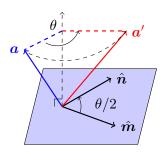
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We define the object

$$R = \hat{n}\hat{m}$$

as a rotor, used to describe rotations.

Note: $(\cdot)^{\sim}$ is called "reversion", it reverses the order of geometric product.

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We have $\hat{\pmb{n}}\cdot\hat{\pmb{m}}=\cos\frac{\theta}{2}$, and $\hat{\pmb{m}}\wedge\hat{\pmb{n}}=B\sin\frac{\theta}{2}$, where

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But since B is a bivector with unit area, $B^2 = -1$, we have

$$R = e^{-B\frac{\theta}{2}}. (23)$$

In the equation above, θ is the angle of rotation, and B is the plane in which objects rotate.

Quaternion Rotations

Rotor Rotation	$\boldsymbol{a}' = R \boldsymbol{a} R^{\sim}$	$R = e^{-B\frac{\theta}{2}}$
Quaternionic Rotation	$oldsymbol{p}=qoldsymbol{p}q^*$	$q = e^{\hat{\boldsymbol{n}}\frac{\theta}{2}}$

Quaternion Rotations

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The relation between quaternion and geometric algebra is now evident. Quaternions can be obtained by simply applying the following substitution:

$$i = -e_2e_3,$$
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We've finally understand quaternions: they are the bivectors describing rotational planes living in \mathbb{R}^3 , and the half angle is due to the fact that double-reflection equals a rotation.

Body-Axis Rotation proof

Let us proof the equation:

$$R_{\underbrace{R_{R_x(\theta_1)\hat{z}}(\theta_2)\ R_x(\theta_1)\ \hat{x}}_{\text{3rd axis}}(\theta_3) \cdot R_{\underbrace{R_x(\theta_1)\ \hat{z}}_{\text{2nd axis}}(\theta_2) \cdot R_x(\theta_1)}_{\text{2nd axis}}$$

Body-Axis Rotation proof

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$$\begin{split} R_{\underbrace{R_{R_x(\theta_1)\hat{z}}(\theta_2) \; R_x(\theta_1) \; \hat{x}}_{\text{3rd axis}} & (\theta_3) \cdot R_{\underbrace{R_x(\theta_1) \; \hat{z}}_{\text{2nd axis}} (\theta_2) \cdot R_x(\theta_1)}_{\text{2nd axis}} \\ & = R_x(\theta_1) R_z(\theta_2) R_x(\theta_3). \end{split}$$

Table of Contents

- Descriptions of Rotation
- 2 Rotational Matrices
- Quaternions
- 4 Geometric Algebra: understanding quaternions
- 5 Final Remarks

What more?

Rotations are important:

Using matrices to rotate vectors.

$$\mathbf{v}' = R_{\hat{\boldsymbol{n}}}(\theta)\mathbf{v}$$

Using quaternions to rotate vectors.

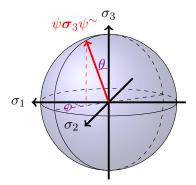
$$p' = qpq^*$$

3 Using geometric algebra to rotate vectors.

$$a' = RaR^{\sim}$$

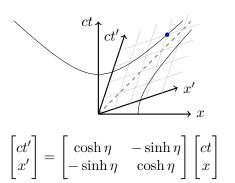
What more?

① In quantum mechanics: a quantum state $|\psi\rangle$ can **rotate** the $|0\rangle$ state to others on the Bloch sphere. In which case we call $|\psi\rangle$ a **spinor** instead of a rotor.



What more?

In special relativity: the Lorentz transformation is a hyperbolic rotation in spacetime.



How to Rotate Final Remarks

That's all folks.