Mechanical System

Actuators - IRO6

Prof. Dr.-Ing. Mercedes Herranz Gracia

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Why is the mechanical system relevant?

Robotics performs mechanical tasks

Mechanical system defines the requirements of the actuator

How are the requirements determined?

1. Analyze displacement / speed profile
2. Analyze forces (requirements, load forces, ...)
3. Link between 1 and 2 with force balancing equation ($\Sigma F = m \cdot a$)

And if transmission elements are placed between the load and the actuator?

Gears → planetary, harmonic drive

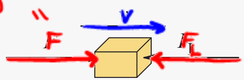
Wheels, pulleys, belts

Transmission elements must be considered in 1 to 3 → Gear ratio

Mechanical System

Translation

Driving force



Vectorial equation, for the general case.

$$\sum F = 0 : \qquad F - F_L - m \cdot a = 0$$

Figure Equation of motion for translational movement

Load forces?

→ Friction: $F_\mu = \mu \cdot F_g$

Friction coefficient (μ); Gravitational force (F_g)

→ Gravitational force: $F_g = m \cdot g$

→ Air resistance (friction) $\sim v^3$

Translation

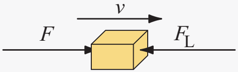


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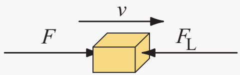
Figure Equation of motion for translational movement

Relevant variables:

Translation



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$v = \frac{\mathrm{d}s}{\mathrm{d}t}$	Speed	in	$\left[\frac{m}{s}\right]$

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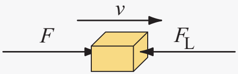

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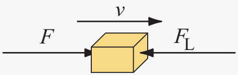

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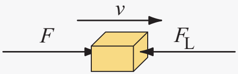
$j = \dfrac{\mathrm{d}a}{\mathrm{d}t} = \dfrac{\mathrm{d}^2 v}{\mathrm{d}t^2} = \dfrac{\mathrm{d}^3 s}{\mathrm{d}t^3}$	Jerk	in	$\left[\dfrac{m}{s^3}\right]$

Translation



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Jerk j: important quantity for mechanical stress

$\Rightarrow$ „smooth acceleration“ avoids „shocks“ in the process

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Mechanical System

Why rotation?
→ Less space
→ Easier construction

Rotation

$$\sum M = 0: \qquad \underbrace{M - M_L - J_{mech} \cdot \frac{d\Omega_m}{dt}}_{\text{Acceleration torque}} = 0$$

Figure Equation of motion for rotational movement

$M = F \cdot R$

$\downarrow$

$[M] = Nm$

J_{mech} = Moment of inertia

$\frac{d\Omega_m}{dt}$ = Angular acceleration.

Ω_m = Angular velocity $= 2\pi \cdot n$

$\downarrow$

in rad/s

Rotation

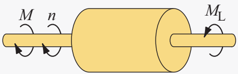

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Figure Equation of motion for rotational movement

Movement variables analogous to linear movement:

φ	angle	in	$[rad]$
$\Omega_m = \frac{d\varphi}{dt}$	angular velocity	in	$\left[\frac{rad}{s}\right]$
$\alpha_m = \frac{d\Omega_m}{dt} = \frac{d^2\varphi}{dt^2}$	angular acceleration	in	$\left[\frac{rad}{s^2}\right]$
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Mass m in linear movement corresponds to **moment of inertia** J_{mech}

Mechanical System

1. Mechanical balance equations
   - Translation
   - Rotation
   - Moment of inertia
   - Balance equation in relative values
2. Trasformed mass and transformed moment of inertia
3. Optimal gear ratio

Moment of inertia

Moment of inertia depends on the **geometry of the rotating body** and the **axis of rotation**: + density

Moment of inertia

Moment of inertia depends on the **geometry of the rotating body** and the **axis of rotation**:

⇒ For a point mass at a distance of r from the axis of rotation:

$$J_{\text{mech}} = m \cdot r^2$$

Moment of inertia

Moment of inertia depends on the **geometry of the rotating body** and the **axis of rotation**:

⇒ For a point mass at a distance of r from the axis of rotation:

$$J_{\text{mech}} = m \cdot r^2$$

$$m = \rho_{mech} \cdot V = \rho_{mech} \cdot \pi \cdot l \cdot \left(\frac{d_e}{2}\right)^2$$

⇒ For a solid cylinder with diameter d_{e} and length l:

$$J_{\text{mech}} \left(= \int_V r^2 \rho_{\text{mech}}(r)\,\mathrm{d}V \right) = \frac{\pi}{2}\rho_{\text{mech}}\, l \left(\frac{d_{\text{e}}}{2}\right)^4 = \frac{\pi}{32}\rho_{\text{mech}}\, l\, d_{\text{e}}^4 = \frac{1}{8} m\, d_{\text{e}}^2$$

$$\int r^2\, dm = \int r^2 \cdot \overbrace{\underbrace{\rho_{mech}}_{\text{density}} \cdot \underbrace{dV}_{r \cdot dr \cdot d\theta \cdot dz}} = 2\pi \cdot l \cdot \rho_{mech} \int r^3 \cdot dr =$$

$$= 2\pi \cdot l \cdot \rho_{mech} \cdot \frac{r^4}{4} = \frac{\pi}{2} \cdot l \cdot \rho_{mech} \cdot \left(\frac{d_e}{2}\right)^4 = \frac{\pi}{32}\, l \cdot \rho_{mech} \cdot d_e^4$$

Moment of inertia

Moment of inertia depends on the **geometry of the rotating body** and the **axis of rotation**:

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⇒ For a hollow cylinder with outside diameter d_{e}, inside diameter d_{i} and length l:

$$J_{\text{mech}} = \frac{\pi}{32} \rho_{\text{mech}} \, l \left(d_{\text{e}}^4 - d_{\text{i}}^4 \right) = \frac{1}{8} m \left(d_{\text{e}}^2 + d_{\text{i}}^2 \right)$$

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Why $\left(d_{\mathrm{e}}^2 + d_{\mathrm{i}}^2\right)$? (Help: $a^2 - b^2 = (a+b)(a-b)$)

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Relative values

Helpfull for dynamic processes (control technology!):

- Relate torques to nominal torque M_N
- Relate (angular) velocities to nominal (angular) velocities n_N, Ω_{mN}

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Relative values

Capital letters ≡ Absolute values
Small letters ≡ Relative values

Helpfull for dynamic processes (control technology!):

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- Relate (angular) velocities to nominal (angular) velocities

relative angular velocity

$$\frac{\Omega_m}{\Omega_{mN}} = \omega_m$$

$$M - M_\mathrm{L} - J_\mathrm{mech}\frac{\mathrm{d}\Omega_\mathrm{m}}{\mathrm{d}t} = 0 \quad | : M_\mathrm{N}$$

$$\frac{M}{M_N} \quad \frac{M_L}{M_N}$$

$$m - m_\mathrm{L} - \frac{J_\mathrm{mech}}{M_\mathrm{N}}\frac{\mathrm{d}\Omega_\mathrm{m}}{\mathrm{d}t}\cdot\frac{\Omega_\mathrm{m,N}}{\Omega_\mathrm{m,N}} = 0$$

Nominal or rated values
↳ Maximum (steady-state) values without thermal over load

$$m - m_\mathrm{L} - T_\mathrm{J}\cdot\frac{\mathrm{d}\omega_\mathrm{m}}{\mathrm{d}t} = 0$$

$$\text{mit } \omega_\mathrm{m} = \frac{\Omega_\mathrm{m}}{\Omega_\mathrm{m,N}} = \frac{n}{n_\mathrm{N}} \text{ bzw. } T_\mathrm{J} = 2\pi\cdot\frac{J_\mathrm{mech}}{M_\mathrm{N}}n_\mathrm{N} \qquad (1.1)$$

$$T_J = \frac{J_{mech}}{M_N}\cdot\Omega_{m,N} \rightarrow [T_J] = \frac{\cancel{kg}\cdot\cancel{m^2}}{\underbrace{\cancel{kg}\cdot\cancel{m}/s^2}_{N}\cdot\cancel{m}}\cdot rad/\cancel{s} = s$$

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- Relate torques to nominal torque
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$$M - M_\mathrm{L} - J_\mathrm{mech}\,\frac{\mathrm{d}\Omega_\mathrm{m}}{\mathrm{d}t} = 0 \quad | : M_\mathrm{N}$$

$$m - m_\mathrm{L} - \frac{J_\mathrm{mech}}{M_\mathrm{N}}\,\frac{\mathrm{d}\Omega_\mathrm{m}}{\mathrm{d}t} \cdot \frac{\Omega_\mathrm{m,N}}{\Omega_\mathrm{m,N}} = 0$$

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Ramp-up time T_J: Acceleration time (without load) with nominal torque from standstill to the nominal speed

25-03-2024

Mechanical System: from movement to motor requirement

Angular velocity

$$\underset{\text{Motor torque}}{M} - \underbrace{M_{Load}}_{\text{Load torque}} = J \cdot \underbrace{\frac{d\Omega_m}{dt}}_{\text{Movement}}$$

Drive requirements

Loads in the system
- Friction
- Air resistance
- Gravitation

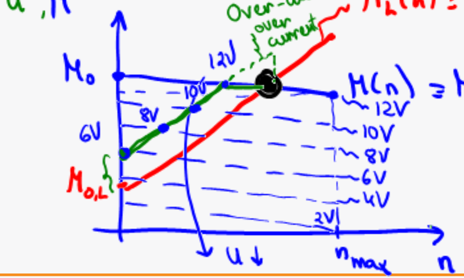
Moment of inertia
"resistance" against a change of speed

Example 1-1: Operating point drive/load

Given is a system consisting of an electric motor and a mechanical load, e.g. a robot arm. The speed-torque equation for the motor is $M = M_0 \cdot (1 - 0.1 \frac{n}{n_{max}})$ with $M_0 = 2\,Nm$ and $n_{max} = 3000\,\text{min}^{-1}$. The equation for the load torque acting on the motor shaft is $M_L = M_{0,L} \cdot (1 + 3 \frac{n}{n_{max}})$ with $M_{0,L} = 0.75\,Nm$.

a. What is the stationary operating point of the system?
b. Thanks to an inverter, M_0 for the motor can be varied as a function of the input voltage. The acceleration during startup should be as constant as possible. Draw qualitatively the operating points of the motor in the M-n characteristic.

$M_L(n)$: Load characteristic



$M(n)$ = Motor characteristic for $U = U_N$

Stationary ≡ steady-state
⇒ no change with the time → $\frac{dn}{dt} = 0$

$2\pi \cdot n$
$\frac{d\Omega_m}{dt}$

↳ $M - M_L = J_{mech} \cdot 2\pi \cdot \cancel{\frac{dn}{dt}} \to 0$

b) Acceleration $\sim$ constant $\rightarrow$ motor operating points to run up?

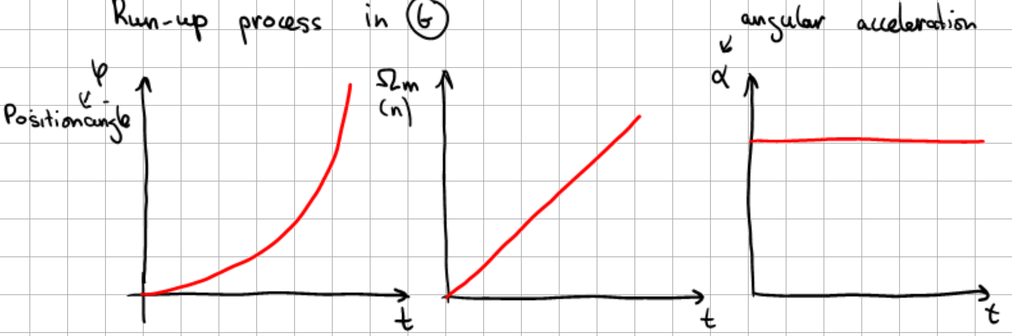
$\downarrow$

$$\frac{dn}{dt} = \frac{d\Omega_m}{dt} = \text{constant}$$

$$\underbrace{M - M_L = J \cdot \underbrace{\frac{d\Omega_m}{dt}}_{\text{constant}}}_{\text{constant}}$$

Run up: $0 \longrightarrow n_{steady} = 1500\,\text{min}^{-1}$

Run-up process in 6



$$\Omega_m = \frac{d\varphi}{dt}$$

$$\alpha = \frac{d\Omega_m}{dt}$$

$$\varphi = \int \Omega_m \cdot dt$$

Mechanical System

Mechanical transmission elements in the balance equation

- Direct coupling drive - load

⇒ Balance equation ⇒ Driving forces from the movement task

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$\Rightarrow$ Balance equation $\Rightarrow$ Driving forces from the movement task

- With mechanical transmission elements
  - Conversion between rotation and translation
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⇒ Moving masses with 2 or more speeds → Balance equation?

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Law of conservation of energy

Mass of the load as additional (transformed) moment of inertia on the motor shaft
OR
Motor inertia as additional (transformed) mass on the load

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- Case 1: Gear transmission
- Case 2: Converter from rotation to translation by wheels, rollers or drums (vehicles, cranes, elevators or conveyor belts)
- Case 3: Spindle

Transformed moment of inertia, case 1: „Gear drive“

For spur gear drives with 2 gears, n_1 & n_2 in opposite directions

Gearbox with the ratio i:

① = Drive shaft

M_{el}, n in the same direction

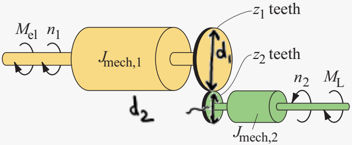


Figure Basic kinematics of a gear transmission

M_L, n_2 in different directions

Load shaft = ②

General definition for all kind of gears

for example for a spur gear drive gear with z_1, driven gear with z_2 teeth:

$$i_{12} = \frac{n_2}{n_1}$$

Specific only for spur gears.

$$i_{12} = \frac{z_1}{z_2} = \frac{d_1}{d_2} \Rightarrow \quad n_1 \cdot z_1 = n_2 \cdot z_2 \quad \Rightarrow \quad n_2 = \frac{z_1}{z_2} \cdot n_1 = i_{12} \cdot n_1 \tag{1.2}$$

Gear ratio

for "efficiency" reasons

$v_1 = v_2$ (in the point of contact)

R_1 R_2

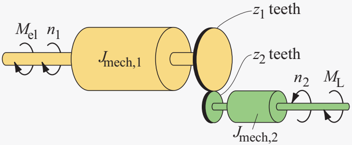
$$\Omega_{m,1} \cdot \frac{d_1}{2} = \Omega_{m,2} \cdot \frac{d_2}{2} \rightarrow \Omega_{m,1} \cdot z_1 = \Omega_{m2} \cdot z_2 \tag{1.3}$$

Transformed moment of inertia, case 1: „Gear drive“

Gearbox with the ratio i:

$$W_{kin} = \frac{1}{2} m v^2$$

$$W_{kin} = \frac{1}{2} J_{mech} \cdot \Omega_m^2$$



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Kinetic energy stored in the moment of inertia $J_{mech,2}$:

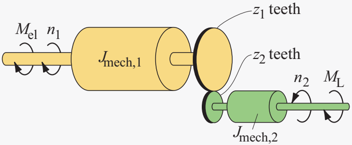
$$W_{kin} = \frac{1}{2} J_{mech,2}\, \Omega^2_{m,2} = \frac{1}{2} J_{mech,2} \cdot (i_{12} \cdot \Omega_{m,1})^2 = \frac{1}{2} \cdot \underbrace{i_{12}^2 \cdot J_{mech,2}}\cdot \Omega_{m,1}^2 \qquad (1.3)$$

$$\Omega_{m,2} = i_{12} \cdot \Omega_{m,1} \qquad J'_{mech,2} = i_{12}^2 \cdot J_{mech,2}$$

Moment of inertia of side 2 transformed to side 1

Transformed moment of inertia, case 1: „Gear drive“

Gearbox with the ratio i:



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Transformed moment of inertia, case 1: „Gear drive“

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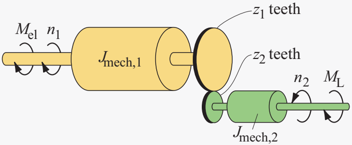

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$$= \frac{1}{2} \cdot J'_{mech,2} \cdot \Omega_{m,1}^2 \qquad \text{mit } J'_{mech,2} = i_{12}^2 \cdot J_{mech,2} \tag{1.3}$$

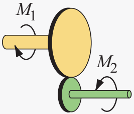
Case 1: Equation of Motion

The same tangential forces on both gears:

$$F_1 = F_2 \Rightarrow \frac{M_1}{d_1/2} = \frac{M_2}{d_2/2} \rightarrow \frac{M_1}{z_1} = \frac{M_2}{z_2}$$

$$\downarrow$$

$$\frac{M_1}{M_2} = \frac{z_1}{z_2} = i_{12}$$



$$\frac{M_1}{z_1} = \frac{M_2}{z_2} \quad \Rightarrow \quad M_1 = i_{12} \cdot M_2$$

Figure Equilibrium of forces in a gear transmission

$$i_{12} = \frac{z_1}{z_2} = \frac{n_2}{n_1} = \frac{M_1}{M_2}$$

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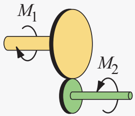


$$\frac{M_1}{z_1} = \frac{M_2}{z_2} \quad \Rightarrow \quad \boxed{M_1 = i_{12} \cdot M_2}$$

Explains the transformation of torques from side 2 to side 1

Figure Equilibrium of forces in a gear transmission

M_1

Equation of motion for shaft 1:

M_2

$$\Sigma M = 0: \quad M_{\mathrm{el}} - \underbrace{i_{12} \cdot \underbrace{M_{\mathrm{L}}}_{\text{acts in shaft 2}}}_{\text{load torque converted from shaft 2 to shaft 1}} - \left(J_{\mathrm{mech},1} + \underbrace{J'_{\mathrm{mech},2}}_{i_{12}^2 \cdot J_{\mathrm{mech},2}}\right) \cdot \frac{\mathrm{d}\Omega_{\mathrm{m},1}}{\mathrm{d}t} = 0 \qquad \left(i_{12} = \frac{z_1}{z_2}\right) \qquad (1.4)$$

Case 1: Equation of motion for side 2

It depends on which side you want to refer to:

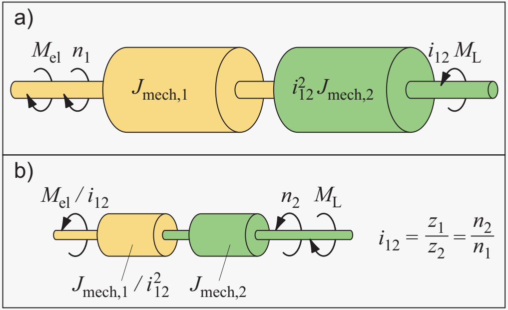


Figure kinematic replacement models

Case 1: Equation of motion for side 2

It depends on which side you want to refer to:

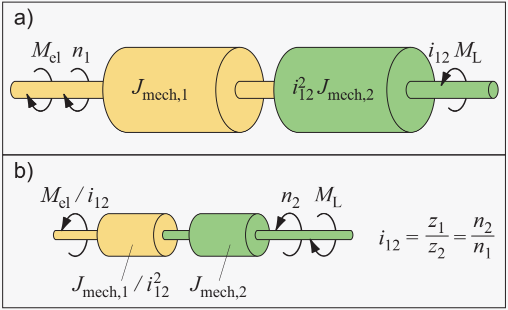


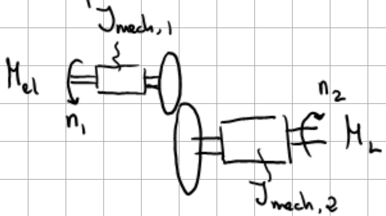
Figure kinematic replacement models

Equation of motion related to side 2:

$$\Sigma M = 0: \quad M_{el}/i_{12} - M_L - \left(J_{mech,1}/i_{12}^2 + J_{mech,2}\right) \cdot \frac{d\Omega_{m,2}}{dt} = 0$$

27.3.2024

- Balance equation : $\Sigma M = 0 \rightarrow M_{el} - M_L = J \cdot \frac{d\Omega_m}{dt}$



$$i_{12} = \frac{n_2}{n_1}$$

Eq on side 1 .

$$M_{el} - i_{12} \cdot M_L - \left(J_{mech,1} + \underbrace{i_{12}^2 \cdot J_{mech,2}}_{J'_{mech,2}} \right) \cdot \frac{d\Omega_{m,1}}{dt}$$

Eq on side 2

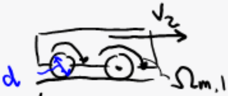
$$\frac{M_{el}}{i_{12}} - M_L - \left(\underbrace{\frac{J_{mech,1}}{i_{12}^2}}_{J'_{mech,1}} + J_{mech,2} \right) \cdot \frac{d\Omega_{m,2}}{dt}$$

Mechanical System

1. Mechanical balance equations
2. Trasformed mass and transformed moment of inertia
   - Case 1: Gear transmission
   - Case 2: Wheels or Drums
   - Case 3: Spindle
3. Optimal gear ratio

$$i_{12} = \frac{v_2}{\Omega_{m,1}} = \frac{d}{2}$$

$$[i_{12}] = m$$



Vehicle

$$v_2 = \Omega_{m,1} \cdot \frac{d}{2}$$

Elevators, Cranes, Pulleys

$$v_2 = \Omega_{m,1} \cdot \frac{d}{2}$$

Belt

$$v_2 = \Omega_{m,1} \frac{d}{2}$$

Transformed moment of inertia, case 2: „Drums“

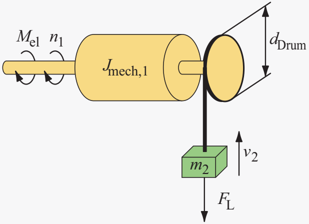
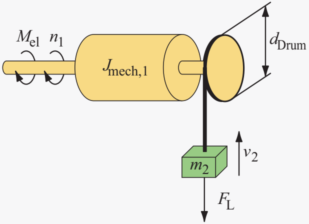


Figure Basic kinematics of an elevator

$$v_2 = \Omega_{m,1} \frac{d_{Drum}}{2} = i_{12} \cdot \Omega_{m,1}$$

$$\Rightarrow \quad \Omega_{m,1} = \frac{v_2}{i_{12}} = \frac{v_2}{d_{Drum}/2}$$

Transformed moment of inertia, case 2: „Drums“



$$v_2 = \Omega_{m,1} \frac{d_{Drum}}{2} = i_{12} \cdot \Omega_{m,1}$$

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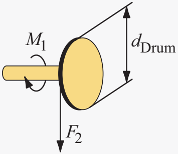
Figure Basic kinematics of an elevator



$$M_1 = F_2 \cdot \frac{d_{Drum}}{2} = i_{12} \cdot F_2$$

Figure Equilibrium of forces in an elevator mechanism

Case 2: Equation of motion for side 1 or 2

$$W_{\mathrm{kin}} = \frac{1}{2} m_2 \, v_2^2$$

(1.5)

Case 2: Equation of motion for side 1 or 2

Kinetic energy: $W_{kin} = \frac{1}{2} m \cdot v^2 \Leftrightarrow W_{kin} = \frac{1}{2} J \cdot \Omega_m^2$

$$W_{\mathrm{kin}} = \frac{1}{2} m_2\, v_2^2 = \frac{1}{2} m_2 \left(i_{12} \cdot \Omega_{\mathrm{m},1}\right)^2$$

$$= \frac{1}{2} \left(i_{12}^2 \cdot m_2\right) \cdot \Omega_{\mathrm{m},1}^2$$

$$= \frac{1}{2} \cdot J'_{\mathrm{mech},2} \cdot \Omega_{\mathrm{m},1}^2 \qquad \text{mit } J'_{\mathrm{mech},2} = i_{12}^2 \cdot m_2 \tag{1.5}$$

Additional moment of inertia on the motor side (side 1) due to the mass of the load (side 2)

=> Transformed moment of inertia

Case 2: Equation of motion for side 1 or 2

$$W_{\text{kin}} = \frac{1}{2} m_2 \, v_2^2 = \frac{1}{2} m_2 \left(i_{12} \cdot \Omega_{\text{m},1}\right)^2$$

$$= \frac{1}{2} \left(i_{12}^2 \cdot m_2\right) \cdot \Omega_{\text{m},1}^2$$

$$= \frac{1}{2} \cdot J'_{\text{mech},2} \cdot \Omega_{\text{m},1}^2 \qquad \text{mit } J'_{\text{mech},2} = i_{12}^2 \cdot m_2 \tag{1.5}$$

Equation of motion for side 1:

$i_{12}^2 \cdot m_2$

$$\Sigma M = 0: \quad M_{\text{el}} - i_{12} \cdot F_2 - \left(J_{\text{mech},1} + J'_{\text{mech},2}\right) \cdot \frac{\mathrm{d}\Omega_{\text{m},1}}{\mathrm{d}t} = 0 \qquad \left(i_{12} = \frac{d_{\text{Drum}}}{2}\right) \tag{1.6}$$

Case 2: Equation of motion for side 1 or 2

$$W_{\text{kin}} = \frac{1}{2} m_2\, v_2^2 = \frac{1}{2} m_2 \left(i_{12} \cdot \Omega_{\text{m},1}\right)^2$$
$$= \frac{1}{2}\left(i_{12}^2 \cdot m_2\right) \cdot \Omega_{\text{m},1}^2$$
$$= \frac{1}{2} \cdot J'_{\text{mech},2} \cdot \Omega_{\text{m},1}^2 \qquad \text{mit } J'_{\text{mech},2} = i_{12}^2 \cdot m_2 \tag{1.5}$$

Equation of motion for side 1:

$$\Sigma M = 0: \quad M_{\text{el}} - i_{12} \cdot F_2 - \left(J_{\text{mech},1} + J'_{\text{mech},2}\right) \cdot \frac{\mathrm{d}\Omega_{\text{m},1}}{\mathrm{d}t} = 0 \qquad \left(i_{12} = \frac{d_{\text{Drum}}}{2}\right) \tag{1.6}$$

or for the moving mass m_2:

Additional mass on side 2 (load) due to the inertia of the motor (side 1)

$m_1' =$

$$\Sigma F = 0: \quad M_{\text{el}}/i_{12} - F_2 - \left(\overbrace{J_{\text{mech},1}/i_{12}^2}^{m_1'} + m_2\right) \cdot \frac{\mathrm{d}v_2}{\mathrm{d}t} = 0 \qquad \left(i_{12} = \frac{d_{\text{Drum}}}{2}\right) \tag{1.7}$$

Mechanical System

Rotation → Translation

+ Higher Efficiency
+ Higher Accuracy
- Expensive
(- Noise)

Application in robots: tooling in industrial robots, portal robots, 3d-Printers

Transformed moment of inertia, case 3: „Spindle“

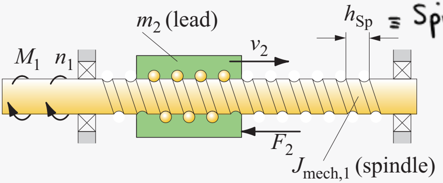


Figure Linear axis with ball roller spindle

h_{Sp} ≡ Spindle height ↓ Advance of the lead in one rotation of the spindle

Transformed moment of inertia, case 3: „Spindle“

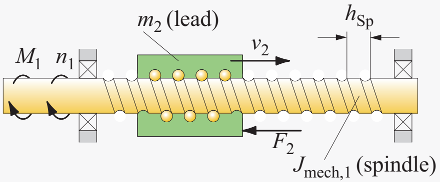


Figure Linear axis with ball roller spindle

The following applies:

Work: $M_1 \cdot 2\pi = F_2 \cdot h_{Sp} \quad \Rightarrow \quad \frac{F_2}{M_1} = \frac{2\pi}{h_{Sp}}$

Power: $M_1 \cdot \Omega_1 = F_2 \cdot v_2 \quad \Rightarrow \quad \frac{v_2}{\Omega_1} = \frac{M_1}{F_2} = \underbrace{\frac{h_{Sp}}{2\pi} = i_{12}}$ (1.8)

Transformed moment of inertia, case 3: „Spindle“

Consider again the kinetic energy stored in m_2:
m_2 acts as if $J_{\mathrm{mech},1}$ was enlarged by J'_{m}:

$$\frac{1}{2} m_2 v_2^2 = \frac{1}{2} J'_{\mathrm{m}} \Omega_1^2$$

$$\Rightarrow \qquad J'_{\mathrm{m}} = m_2 \left(\frac{v_2}{\Omega_1} \right)^2 = m_2 \cdot i_{12}^2 = m_2 \left(\frac{h_{\mathrm{Sp}}}{2\,\pi} \right)^2 \qquad (1.9)$$

Transformed moment of inertia, case 3: „Spindle“

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m_2 acts as if $J_{\mathrm{mech},1}$ was enlarged by J'_{m}:

$$\frac{1}{2} m_2 v_2^2 = \frac{1}{2} J'_{\mathrm{m}} \Omega_1^2$$

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...or $J_{\mathrm{mech},1}$ acts as if m_2 was enlarged by m'_1:

$$\frac{1}{2} m'_1 v_2^2 = \frac{1}{2} J_{\mathrm{mech},1} \Omega_1^2$$

$$\Rightarrow \qquad m'_1 = J_{\mathrm{mech},1} \left(\frac{\Omega_1}{v_2}\right)^2 = \overbrace{J_{\mathrm{mech},1} \cdot i_{12}^{-2}}^{\frac{J_{\mathrm{mech},1}}{i_{12}^2}} = J_{\mathrm{mech},1} \left(\frac{2\pi}{h_{\mathrm{Sp}}}\right)^2 \tag{1.10}$$

Equations are then the same as for case 2. Only difference $i_{12} = \frac{h_{sp}}{2\pi}$ (instead of $i_{12} = \frac{d}{2}$)

Transformed moment of inertia, case 3: „Spindle“

Consider again the kinetic energy stored in m_2:
m_2 acts as if $J_{\mathrm{mech},1}$ was enlarged by J'_{m}:

$$\frac{1}{2} m_2 v_2^2 = \frac{1}{2} J'_{\mathrm{m}} \Omega_1^2$$

$$\Rightarrow \qquad J'_{\mathrm{m}} = m_2 \left(\frac{v_2}{\Omega_1} \right)^2 = m_2 \cdot i_{12}^2 = m_2 \left(\frac{h_{\mathrm{Sp}}}{2\pi} \right)^2 \tag{1.9}$$

...or $J_{\mathrm{mech},1}$ acts as if m_2 was enlarged by m'_1:

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$$\Rightarrow \qquad m'_1 = J_{\mathrm{mech},1} \left(\frac{\Omega_1}{v_2} \right)^2 = J_{\mathrm{mech},1} \cdot i_{12}^{-2} = J_{\mathrm{mech},1} \left(\frac{2\pi}{h_{\mathrm{Sp}}} \right)^2 \tag{1.10}$$

Note: This consideration (refer everything to the side with m_2) is often done in machine tool construction!

Mechanical System

1. Mechanical balance equations
2. Trasformed mass and transformed moment of inertia
3. Optimal gear ratio

↳ Robotics → Minimum positioning time ← stationary applications

Robotics → Minimum energy ← mobile applications

Optimal gear ratio

The time for a positioning process depends from the gear ratio:

- gear ratio too high: speed too low on the output side
- gear ratio too small: effective moment of inertia too large

Optimal gear ratio

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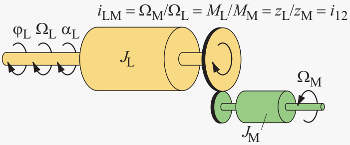

Figure Drive with gearbox

Optimal gear ratio

The time for a positioning process depends from the gear ratio:

- gear ratio too high: speed too low on the output side
- gear ratio too small: effective moment of inertia too large

$$i \cdot M_M - \overset{0}{\cancel{M_{Load}}} = (J_L + i^2 J_M) \cdot \alpha_L$$

$$\alpha_L = \frac{d\Omega_L}{dt}$$

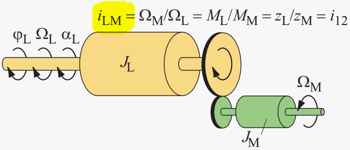

Figure Drive with gearbox

with no load or friction: $$\alpha_L = \frac{i \cdot M_M}{J_L + i^2 J_M} = \frac{M_M}{i \cdot J_M + J_L/i} \qquad (1.11)$$

Speed may be limited when accelerating!

Optimal gear ratio without speed limitation

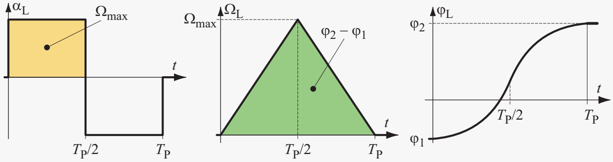

Figure Time-optimal positioning process without limitation

(1.12)

Optimal gear ratio without speed limitation

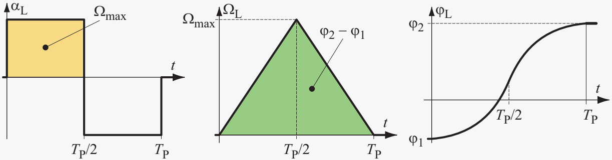

Figure Time-optimal positioning process without limitation

- Speed: two straight sections
- Displacement: two pieces of parabola

(1.12)

Optimal gear ratio without speed limitation

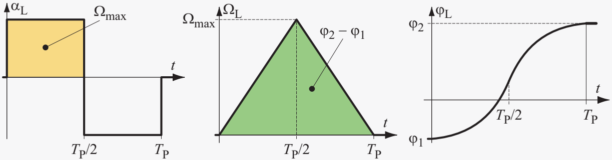

Figure Time-optimal positioning process without limitation

- Speed: two straight sections
- Displacement: two pieces of parabola

$$\alpha_L = \frac{d\Omega_L}{dt} = \frac{\Omega_{max}}{T_P/2} \quad \Rightarrow \quad \Omega_{max} = \alpha_L \cdot \frac{T_P}{2} \tag{1.12}$$

Optimal gear ratio without speed limitation

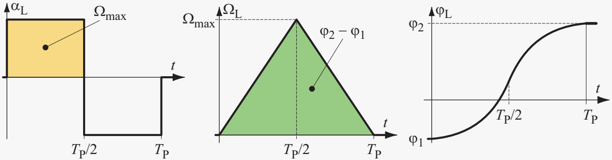

Figure Time-optimal positioning process without limitation

- Speed: two straight sections
- Displacement: two pieces of parabola

$$\alpha_L = \frac{d\Omega_L}{dt} = \frac{\Omega_{max}}{T_P/2} \quad \Rightarrow \quad \Omega_{max} = \alpha_L \cdot \frac{T_P}{2}$$

$$\Delta\varphi_L = \varphi_2 - \varphi_1 = \frac{T_P \cdot \Omega_{max}}{2} = \frac{\alpha_L}{4} \cdot T_P^2 \tag{1.12}$$

Optimal gear ratio without speed limitation

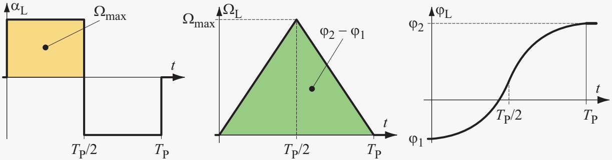

Figure Time-optimal positioning process without limitation

- Speed: two straight sections
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$$\alpha_L = \frac{d\Omega_L}{dt} = \frac{\Omega_{max}}{T_P/2} \quad \Rightarrow \quad \Omega_{max} = \alpha_L \cdot \frac{T_P}{2}$$

$$\Delta\varphi_L = \varphi_2 - \varphi_1 = \frac{T_P \cdot \Omega_{max}}{2} = \frac{\alpha_L}{4} \cdot T_P^2$$

$$\Rightarrow \quad T_P = \sqrt{\frac{4\Delta\varphi_L}{\alpha_L}} = \sqrt{\frac{4\Delta\varphi_L}{M_M} \cdot \left(i \cdot J_M + \frac{J_L}{i}\right)} \tag{1.12}$$

$$\frac{M_M}{i \cdot J_M + J_L/i}$$

Optimal gear ratio without speed limitation

Find optimum (minimum):

$$\frac{\partial T_P}{\partial i} = \frac{\partial}{\partial i}\sqrt{\frac{4\Delta\varphi_L}{M_M}\cdot\left(i\cdot J_M+\frac{J_L}{i}\right)} = \sqrt{\frac{4\Delta\varphi_L}{M_M}}\cdot\frac{\partial}{\partial i}\sqrt{i\cdot J_M+\frac{J_L}{i}}$$

$$= \sqrt{\frac{4\Delta\varphi_L}{M_M}}\cdot\frac{1}{2}\cdot\frac{1}{\sqrt{i\cdot J_M+\frac{J_L}{i}}}\cdot\left(J_M-\frac{J_L}{i^2}\right)\overset{!}{=}0$$

Optimal gear ratio without speed limitation

Find optimum (minimum):

$$\frac{\partial T_{\mathrm{P}}}{\partial i} = \frac{\partial}{\partial i}\sqrt{\frac{4\Delta\varphi_{\mathrm{L}}}{M_{\mathrm{M}}}\cdot\left(i\cdot J_{\mathrm{M}}+\frac{J_{\mathrm{L}}}{i}\right)} = \sqrt{\frac{4\Delta\varphi_{\mathrm{L}}}{M_{\mathrm{M}}}}\cdot\frac{\partial}{\partial i}\sqrt{i\cdot J_{\mathrm{M}}+\frac{J_{\mathrm{L}}}{i}}$$

$$= \sqrt{\frac{4\Delta\varphi_{\mathrm{L}}}{M_{\mathrm{M}}}}\cdot\frac{1}{2}\cdot\frac{1}{\sqrt{i\cdot J_{\mathrm{M}}+\frac{J_{\mathrm{L}}}{i}}}\cdot\left(J_{\mathrm{M}}-\frac{J_{\mathrm{L}}}{i^2}\right)\overset{!}{=}0$$

$$\Rightarrow\quad J_{\mathrm{M}}-\frac{J_{\mathrm{L}}}{i_{\mathrm{opt}}^2}=0\quad\Rightarrow\quad i_{\mathrm{opt}}=\sqrt{\frac{J_{\mathrm{L}}}{J_{\mathrm{M}}}} \tag{1.13}$$

Optimal gear ratio without speed limitation

Find optimum (minimum):

$$\frac{\partial T_\mathrm{P}}{\partial i} = \frac{\partial}{\partial i}\sqrt{\frac{4\Delta\varphi_\mathrm{L}}{M_\mathrm{M}}\cdot\left(i\cdot J_\mathrm{M}+\frac{J_\mathrm{L}}{i}\right)} = \sqrt{\frac{4\Delta\varphi_\mathrm{L}}{M_\mathrm{M}}}\cdot\frac{\partial}{\partial i}\sqrt{i\cdot J_\mathrm{M}+\frac{J_\mathrm{L}}{i}}$$

$$= \sqrt{\frac{4\Delta\varphi_\mathrm{L}}{M_\mathrm{M}}}\cdot\frac{1}{2}\cdot\frac{1}{\sqrt{i\cdot J_\mathrm{M}+\frac{J_\mathrm{L}}{i}}}\cdot\left(J_\mathrm{M}-\frac{J_\mathrm{L}}{i^2}\right)\overset{!}{=}0$$

$$\Rightarrow\quad J_\mathrm{M}-\frac{J_\mathrm{L}}{i_\mathrm{opt}^2}=0\quad\Rightarrow\quad \boxed{i_\mathrm{opt}=\sqrt{\frac{J_\mathrm{L}}{J_\mathrm{M}}}} \tag{1.13}$$

Positioning time:

$$T_\mathrm{P,opt}=\sqrt{\frac{4\Delta\varphi_\mathrm{L}}{M_\mathrm{M}}\cdot\left(\sqrt{\frac{J_\mathrm{L}}{J_\mathrm{M}}}\cdot J_\mathrm{M}+\sqrt{\frac{J_\mathrm{M}}{J_\mathrm{L}}}\cdot J_\mathrm{L}\right)}=\sqrt{\frac{4\Delta\varphi_\mathrm{L}}{M_\mathrm{M}}\cdot\left(\sqrt{J_\mathrm{L}\cdot J_\mathrm{M}}+\sqrt{J_\mathrm{M}\cdot J_\mathrm{L}}\right)}$$

$$\boxed{=\sqrt{\frac{8\Delta\varphi_\mathrm{L}}{M_\mathrm{M}}\cdot\sqrt{J_\mathrm{L}\cdot J_\mathrm{M}}}}$$

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Optimal gear ratio: sensitivity analysis

$$\frac{T_\mathrm{P}}{T_\mathrm{P,opt}} = \frac{\sqrt{\dfrac{4\Delta\varphi_\mathrm{L}}{M_\mathrm{M}} \cdot \left(i \cdot J_\mathrm{M} + \dfrac{J_\mathrm{L}}{i}\right)}}{\sqrt{\dfrac{8\Delta\varphi_\mathrm{L}}{M_\mathrm{M}} \cdot \sqrt{J_\mathrm{L} \cdot J_\mathrm{M}}}} \ldots = \sqrt{\frac{1}{2} \cdot \left(\frac{i}{i_\mathrm{opt}} + \frac{i_\mathrm{opt}}{i}\right)} \tag{1.14}$$

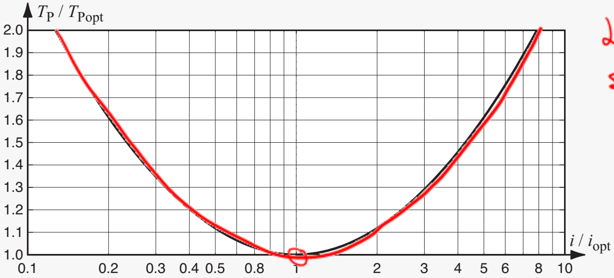

Figure Dependence of the adjustment time on the gear ratio

Low sensitivity!

Optimal gear ratio with limited load speed

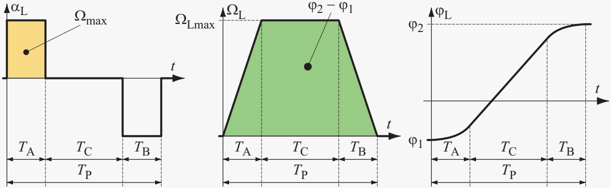

Figure Time-optimized positioning process with limited load speed

Optimal gear ratio with limited load speed

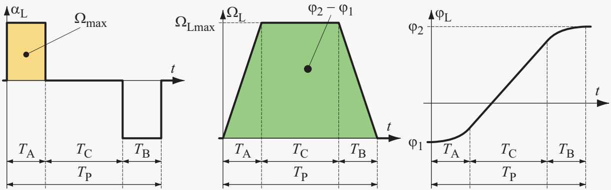

Figure Time-optimized positioning process with limited load speed

$$\alpha_\mathrm{L} = \frac{\mathrm{d}\Omega_\mathrm{L}}{\mathrm{d}t} = \frac{\Omega_\mathrm{Lmax}}{T_\mathrm{A}} = \frac{\Omega_\mathrm{Lmax}}{T_\mathrm{B}} = \frac{M_\mathrm{M}}{i \cdot J_\mathrm{M} + J_\mathrm{L}/i}$$

$$\Rightarrow \quad T_\mathrm{A} = T_\mathrm{B} = \frac{\Omega_\mathrm{Lmax}}{M_\mathrm{M}} \cdot \left(i \cdot J_\mathrm{M} + \frac{J_\mathrm{L}}{i} \right)$$

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Optimal gear ratio with limited load speed

Area under $\Omega_\mathrm{L}(t)$ is equal to the displacement angle covered $\Delta\varphi = \varphi_2 - \varphi_1$:

$$\Delta\varphi = \varphi_2 - \varphi_1 = \left(\frac{T_\mathrm{A} + T_\mathrm{B}}{2} + T_\mathrm{C}\right) \cdot \Omega_\mathrm{Lmax} \quad \Rightarrow \quad T_\mathrm{C} = \frac{\Delta\varphi}{\Omega_\mathrm{Lmax}} - T_\mathrm{A}$$

$$T_\mathrm{P} = T_\mathrm{A} + T_\mathrm{C} + T_\mathrm{B} = 2T_\mathrm{A} + T_\mathrm{C} = 2T_\mathrm{A} + \frac{\Delta\varphi}{\Omega_\mathrm{Lmax}} - T_\mathrm{A}$$

$$= \frac{\Delta\varphi}{\Omega_\mathrm{Lmax}} + \frac{\Omega_\mathrm{Lmax}}{M_\mathrm{M}} \cdot \left(i \cdot J_\mathrm{M} + \frac{J_\mathrm{L}}{i}\right)$$

Search minimum:

$$\frac{\partial T_\mathrm{P}}{\partial i} = \frac{\partial}{\partial i}\left[\frac{\Delta\varphi}{\Omega_\mathrm{Lmax}} + \frac{\Omega_\mathrm{Lmax}}{M_\mathrm{M}} \cdot \left(i \cdot J_\mathrm{M} + \frac{J_\mathrm{L}}{i}\right)\right] \ldots \stackrel{!}{=} 0$$

$$\Rightarrow \quad i_\mathrm{opt} = \sqrt{\frac{J_\mathrm{L}}{J_\mathrm{M}}}$$

⇒ The limitation of the load speed plays no role in selecting the optimal gear ratio.

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Optimal gear ratio with limited motor speed

Maximum output speed Ω_{Lmax} now dependent on gear ratio:

$$T_{\mathrm{P}} = \frac{\Delta\varphi}{\Omega_{\mathrm{Lmax}}} + \frac{\Omega_{\mathrm{Lmax}}}{M_{\mathrm{M}}} \cdot \left(i \cdot J_{\mathrm{M}} + \frac{J_{\mathrm{L}}}{i} \right) \qquad \text{here:} \quad \Omega_{\mathrm{Lmax}} = \frac{\Omega_{\mathrm{Mmax}}}{i}$$

$$= \frac{i \cdot \Delta\varphi}{\Omega_{\mathrm{Mmax}}} + \frac{\Omega_{\mathrm{Mmax}}}{M_{\mathrm{M}}} \cdot \left(J_{\mathrm{M}} + \frac{J_{\mathrm{L}}}{i^2} \right)$$

Determination of the optimal gear ratio:

$$\frac{\partial T_{\mathrm{P}}}{\partial i} = \frac{\Delta\varphi}{\Omega_{\mathrm{Mmax}}} + \frac{\Omega_{\mathrm{Mmax}}}{M_{\mathrm{M}}} \cdot \left(0 - 2\frac{J_{\mathrm{L}}}{i^3} \right) \stackrel{!}{=} 0$$

$$\Rightarrow \quad i_{\mathrm{opt}} = \sqrt[3]{\frac{2\,\Omega_{\mathrm{Mmax}}^2 \cdot J_{\mathrm{L}}}{\Delta\varphi \cdot M_{\mathrm{M}}}} \tag{1.15}$$

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Optimal gear ratio with limited motor speed

Maximum output speed Ω_{Lmax} now dependent on gear ratio:

$$T_\mathrm{P} = \frac{\Delta\varphi}{\Omega_{\mathrm{Lmax}}} + \frac{\Omega_{\mathrm{Lmax}}}{M_\mathrm{M}} \cdot \left(i \cdot J_\mathrm{M} + \frac{J_\mathrm{L}}{i} \right) \qquad \text{here:} \quad \Omega_{\mathrm{Lmax}} = \frac{\Omega_{\mathrm{Mmax}}}{i}$$

$$= \frac{i \cdot \Delta\varphi}{\Omega_{\mathrm{Mmax}}} + \frac{\Omega_{\mathrm{Mmax}}}{M_\mathrm{M}} \cdot \left(J_\mathrm{M} + \frac{J_\mathrm{L}}{i^2} \right)$$

Determination of the optimal gear ratio:

$$\frac{\partial T_\mathrm{P}}{\partial i} = \frac{\Delta\varphi}{\Omega_{\mathrm{Mmax}}} + \frac{\Omega_{\mathrm{Mmax}}}{M_\mathrm{M}} \cdot \left(0 - 2\frac{J_\mathrm{L}}{i^3} \right) \stackrel{!}{=} 0$$

$$\Rightarrow \quad i_{\mathrm{opt}} = \sqrt[3]{\frac{2\,\Omega_{\mathrm{Mmax}}^2 \cdot J_\mathrm{L}}{\Delta\varphi \cdot M_\mathrm{M}}} \tag{1.15}$$

⇒ Consideration almost purely academic ⇒

Always choose i, so that the motor ~~values~~ speed does not limit the system

(Energy) Optimal Movement

Example subway and S-Bahn:

- average distance between stops approximately 1000 m with travel time 70 s to 80 s
- energy-optimal: roll (sailing) for as long as possible

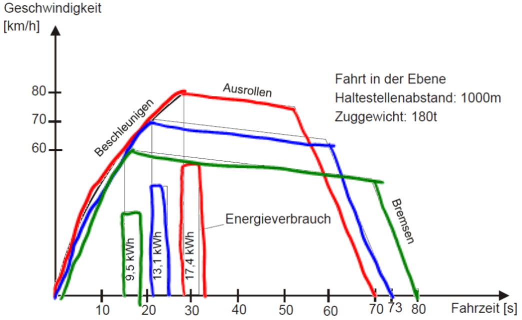

Figure Speed-time diagram of an S-Bahn, source: Hamburger Hochbahn
Geschwindigkeit = Speed
Fahrzeit = Travel time
Beschleunigen = Accelerating
Ausrollen = Rolling
Bremsen = Braking
Fahrt in der Ebene = Plain terrain
Haltestellenabstand = Distance between stations
Zuggewicht = Train weight

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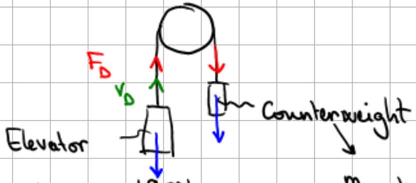
Example 1-2: Drives for a passenger elevator

A passenger elevator with a maximum payload of 650 kg (max. total mass of the elevator car 1900 kg, mass of the counterweight 1565 kg) should cover the distance from the basement (2nd basement floor) to the 20th floor in 30 s. Each floor has a height of 3.5 m

a. Estimate the necessary drive power and driving speed!
b. What values do you estimate for the acceleration, the acceleration time and the distance covered in the acceleration phase?
c. By what factor would the torque be greater during the acceleration phase than during the time at constant speed?
d. What would be the gear ratio with a cable drum diameter of 320 mm and a motor speed of 1500 min^{-1}? — revolutions per minute
e. Is this ratio time-optimal? How much can the travel time be shortened? Remember that it is very unlikely that an elevator can travel 22 floors without stopping! (The motor moment of inertia can be assumed to be 0.04 $kg\,m^2$)



$\Delta x = 22 \cdot 3.5\,m$

$\Delta t = 30\,s$

$m_{El,Tot} = 1900\,kg$

$m_{counter} = 1565\,kg$

a) v_D, P_D ?

Assumptions: no friction, acceleration time $\to 0$

$$P_D = F_D \cdot v_D = (m_{El,Tot} - m_{counter}) \cdot g \cdot v_D$$

$$\cancel{23} \qquad \cancel{2.68\,m/s}$$

$$v_D = \frac{\Delta x}{\Delta t} = \frac{22 \cdot 3.5\,m}{30\,s} = 2.577\,m/s$$

$$\cancel{2.68\,m/s} \qquad \cancel{8.8\,kW}$$

$$P_D = (1900\,kg - 1565\,kg) \cdot 9.81\,m/s^2 \cdot 2.577\,m/s = 8.5\,kW$$

(5) Acceleration : for comfort $a < g$

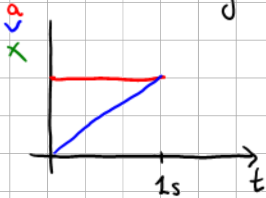
Assumption for the acceleration time $t_{acc} = 1s$
(Other assumptions are also possible : 2 or 3 s)

a? x_{acc}?

$$a = \frac{dv}{dt} = \frac{\Delta v}{\Delta t} = \frac{v - 0\,m/s}{1s} = \frac{2.577\,m/s}{1s} = 2.577\,m/s^2$$

$<< g$

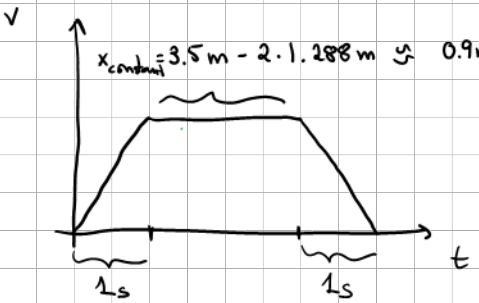
$$v = \frac{dx}{dt} \rightarrow dx = \underbrace{v(t)}_{v \cdot \frac{t}{1s}} \cdot dt$$



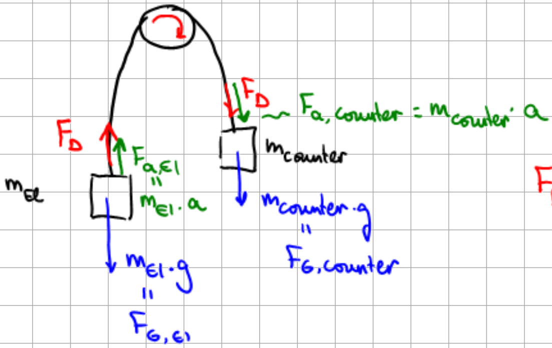
$$\int_0^{x_{acc}} dx = \int_0^{1s} \frac{v}{1s}\, t \cdot dt \rightarrow x_{acc} = \frac{v}{1s}\left[\frac{t^2}{2}\right]_0^{1s}$$

$$x_{acc} = \frac{2.577\,m/s}{2} \cdot \frac{(1s)^2}{1s} = \underline{\underline{1{,}288\,m}}$$

$$x_{constant} = 3.5\,m - 2 \cdot 1.288\,m \approx 0.9\,m$$



c) $\dfrac{M_{acc}}{M_{v=constant}}$?



$$F_D - \overbrace{\left(F_{G,El} - F_{G,counter}\right)}^{(m_{El} - m_{counter})\cdot g}$$

$$= \underbrace{F_{a,El} + F_{a,counter}}_{(m_{El} + m_{counter})\cdot a}$$

$$F_D = (m_{El} - m_{counter}) \cdot g + (m_{El} + m_{counter}) \cdot a$$

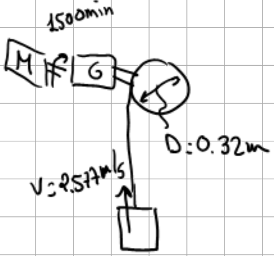
$$F_D = m_{El} \cdot (g + a) - m_{counter} \cdot (g - a)$$

$$\frac{M_{Acc}}{M_{v=ctant}} = \frac{F_{D,a}}{F_{D,a=0}} = \frac{m_{El} \cdot (g+a) - m_{counter}(g-a)}{(m_{El} - m_{counter}) \cdot g}$$

$$\frac{M_{Acc}}{M_{v,ctant}} = \frac{1900\,kg \cdot (9.81 + 2.577)\,m/s^2 - 1565\,kg \cdot (9.81 - 2.577)\,m/s^2}{(1900\,kg - 1565\,kg) \cdot 9.81\,m/s^2}$$

$$= \underline{\underline{3.7}} \leftarrow$$ Needed overload capability of the motor

e)



$$i = \frac{\overset{2\pi \cdot n}{\downarrow}\ \Omega_{mG}}{\Omega_{drum}} = \frac{n_{mG}}{n_{drum}} = \frac{1500\,min^{-1}}{2.577\,m/s \cdot \frac{1}{\pi \cdot 0.32\,m} \cdot \frac{60s}{min}}$$

$$v_{drum} = \Omega_{drum} \cdot \frac{D}{2}$$

$$\Omega_{drum} = \frac{2 \cdot v_{drum}}{D} = 2\pi \cdot n_{drum}$$

$$n_{drum} = \frac{\cancel{2} \cdot v_{drum}}{\cancel{2}\pi \cdot D} = \frac{v_{drum}}{\pi \cdot D}$$

$$i = 9.7\overline{5}$$