



COBEA Manual

Release 0.15

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Oct 02, 2017

CONTENTS

1	Quick start tutorial	3
1.1	Reading in data	3
1.2	Running the algorithm	4
1.3	Obtaining and plotting results	4
2	API	7
2.1	cobea (main namespace)	7
2.2	cobea.model: COBEA classes and objects	8
2.3	cobea.mcs: Monitor-Corrector Subspace algorithm	10
2.4	cobea.pproc: Standalone postprocessing functions	11
2.5	cobea.plotting: Routines for plotting results	13
	Python Module Index	15
	Index	17

The *cobea* module [1] is a Python implementation of Closed-Orbit Bilinear-Exponential Analysis [2], an algorithm for studying closed-orbit response matrices of storage rings (particle accelerators).

If you publish material using this software, please cite one or more of the references [1-2].

For more information, visit <https://bitbucket.org/b-riemann/cobea> .

(References)

[1] B. Riemann et al., “COBEA - Optical Parameters From Response Matrices Without Knowledge of Magnet Strengths”, in Proc. IPAC17, paper MOPIK066, 2017.

[2] B. Riemann, “[The Bilinear-Exponential Closed-Orbit Model and its Application to Storage Ring Beam Diagnostics](<http://dx.doi.org/10.17877/DE290R-17221>)”, Ph.D. Dissertation, TU Dortmund University, 2016. DOI [10.17877/DE290R-17221](<http://dx.doi.org/10.17877/DE290R-17221>).

QUICK START TUTORIAL

This is a brief introduction on how to use the `cobea` module.

1.1 Reading in data

COBEAs input consists of

- A set of corrector names corresponding to rows of your matrix
- A set of monitor names corresponding to columns of your matrix
- The response matrix itself
- The ordering information, given as a list of monitor and corrector names, ordered along the beampath (downstream)

You need to convert your response data into a standardized input for COBEA. This is handled by the *Response* class:

```
class cobea.model.Response(matrix, corr_names, mon_names, line, include_dispersion=True,  
                           unit='')
```

Representation of COBEA input, used as such for the function `cobea.cobea()`

During creation of the this object, `py:data:matrix` rows and columns, as well as the corresponding `py:data:corr_names` and `py:data:mon_names`, are resorted to their respective order in `py:data:line`.

Parameters

- **matrix** (*array*) – input response matrix of shape (correctors, monitors, directions). If only one direction is considered, the last dimension can be omitted.
- **corr_names** (*list*) – a list of corrector labels corresponding to each row of the matrix
- **mon_names** (*list*) – a list of monitor labels corresponding to each column of the matrix
- **line** (*list*) – a list of element names in ascending s order
- **include_dispersion** (*bool*) – whether to use a model with or without dispersion for fitting. default: True
- **unit** (*str*) – unit for the input values of the matrix (optional)

topology

object – A `Topology` object holding the re-ordered `py:data:'corr_names'`, `py:data:'mon_names'`, and `py:data:'line'` as attributes.

matrix

array – re-ordered input response matrix.

1.2 Running the algorithm

The COBEA algorithm is then applied using the function `cobea.cobea()` (click link, return back to 1.3 afterwards)

1.3 Obtaining and plotting results

The `cobea` function returns a *Result* object. This object contains all computed information.

class `cobea.model.Result` (*response*, *additional*={}, ***kwargs*)
COBEA Result.

Besides the attributes and methods contained in `BEModel`, the following information is included.

matrix

array – Original input response matrix

error

object – computed BE model errors, represented as `ErrorModel` object

additional

dict – may contain the following keywords

coretime [float] time used for computation in the start and optimization layer.

err [dict] dictionary with additional model parameter error estimates.

conv [dict] dictionary with L-BFGS convergence information (if `convergence_info` was True)

invariants [array] computed during normalization of monitor vectors if drift space is given. These are just returned for completeness and do not contain information about beam physics.

pca_singvals [array] custom info from MCS algorithm

pca_orbits [array] custom info from MCS algorithm

version [str] version of the object

cbeta_jmw

Ripken-Mais beta parameters * constant. If `self.R_jmw` is normalized, constant = 1.

cbeta_km

const*beta at correctors assuming decoupled optics and thin correctors

delphi_jmw

Ripken-Mais phase advances per element

delphi_km

Betatron phase advances per corrector assuming decoupled optics and thin correctors

flip_mu (*m*)

switch the sign of `mu_m` for given *m*, simultaneously changing the conjugation of `R_jmw` and `A_km` so that the response matrix remains unchanged

phase_integral (*m*)

integrated phase from first to last BPM (not one turn!), used for `tune()` computation

phi_jmw

Compute Ripken-Mais betatron phases in units of degrees

response_matrix ()

generate a ‘simulated’ response matrix from the present model parameters

Returns `rsim_kjw` – response array of shape (K, J, M)

Return type array

save (*filename*)

save the Result object as a pickle file with the given filename. The object can be reloaded using `cobea.load_result()` (which simply uses pickle)

tune (*m*)

compute tune including integer part for a given mode *m*

update_errors ()

compute errors in attribute `error` for given BE-Model parameters and input response, including errors for Ripken-Mais parameters

The module `cobea.plotting` includes many helper functions to view these results. A summary of results is created by the `cobea.plotting.plot_result()` function.

This page contains automatic documentation of the complete `cobea` module.

2.1 `cobea` (main namespace)

Closed-Orbit Bilinear-Exponential Analysis (COBEA)

This is a Python implementation of the COBEA algorithm [1] to be used for studying betatron oscillations in particle accelerators by closed-orbit information.

[1] B. Riemann. “The Bilinear-Exponential Model and its Application to Storage Ring Beam Diagnostics”, PhD Dissertation (TU Dortmund University, 2016), DOI Link: (<https://dx.doi.org/10.17877/DE290R-17221>)

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`cobea.cobea` (*response*, *drift_space=None*, *convergence_info=False*)
Main COBEA function with pre- and postprocessing.

Parameters

- **response** (*object*) – A valid `cobea.model.Response` object representing the input.
- **drift_space** (*iterable*) – if not None, a tuple or list with 3 elements (monitor name 1, monitor name 2, drift space length / m)
- **convergence_info** (*bool*) – if True, convergence information from L-BFGS is added to the result dictionary (before saving).

Returns **result** – A `cobea.model.Result` object.

Return type `object`

`cobea.load_result` (*savefile*)
Load (un-pickle) a Result object (or any other object)

`cobea.optimization_layer` (*result*, *iprint=-1*)
Implementation of the Optimization layer. It uses L-BFGS [1] as special case of L-BFGS-B [2] in `scipy.optimize`. The result object is modified to yield the optimal BEModel. A sub-dictionary with additional information is added under the key `result.additional['Opt']`.

[1] D.C. Liu and J. Nocedal, “On the Limited Memory Method for Large Scale Optimization”, Math. Prog. B 45 (3), pp.~503–528, 1989. DOI 10.1007/BF01589116

[2] C. Zhu, R.H. Byrd and J. Nocedal, “Algorithm 778: L-BFGS-B: Fortran subroutines for large-scale bound-constrained optimization”, ACM Trans. Math. Software 23 (4), pp.~550–560, 1997. DOI 10.1145/279232.279236

Parameters **result** (*object*) – A valid `cobea.model.Result` object. The object is modified during processing; the model variables are set to their optimal values.

Returns `result` – Identical to input object.

Return type `object`

`cobea.read_elemnames (fname)`

A helper function to read element names from text files into a list of strings. Standard input is a text file with linebreaks between elements.

2.2 cobea.model: COBEA classes and objects

This COBEA submodule defines all classes used by `cobea`. Besides input (*Response*) and output (*Result*) containers, this also includes gradient-based optimization procedures in `BE_Model`.

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class `cobea.model.BEModel (K, J, M, topology, include_dispersion, init_fun=<built-in function empty>)`

Bases: `cobea.model.BasicModel`

Bilinear-Exponential model with topology information and optimization routines. Besides the attributes and methods contained in `Bare_Model`, the following information is included.

Parameters

- **K, J, M** (*int*) – dimensions of the model, with K being the number of correctors, J being the number of monitors, and M the number of modes respectively directions.
- **init_fun** (*function*) – a (possibly self-defined) initialization function like `zeros()` or `empty()` from `numpy`.

topology

object – input topology, represented as *Topology* object

cbeta_jmw

Ripken-Mais beta parameters * constant. If `self.R_jmw` is normalized, constant = 1.

cbeta_km

const*beta at correctors assuming decoupled optics and thin correctors

delphi_jmw

Ripken-Mais phase advances per element

delphi_km

Betatron phase advances per corrector assuming decoupled optics and thin correctors

flip_mu (m)

switch the sign of `mu_m` for given `m`, simultaneously changing the conjugation of `R_jmw` and `A_km` so that the response matrix remains unchanged

phase_integral (m)

integrated phase from first to last BPM (not one turn!), used for `tune()` computation

phi_jmw

Compute Ripken-Mais betatron phases in units of degrees

response_matrix ()

generate a ‘simulated’ response matrix from the present model parameters

Returns `rsim_kjw` – response array of shape (K, J, M)

Return type `array`

tune (m)

compute tune including integer part for a given mode `m`

class `cobea.model.BasicModel (K, J, M, init_fun=<built-in function empty>)`

simple representation of the Bilinear-Exponential model (without topology or optimization attributes).

Parameters

- **K, J, M** (*int*) – dimensions of the model, with K being the number of correctors, J being the number of monitors, and M the number of modes respectively directions.
- **init_fun** (*function*) – a (possibly self-defined) initialization function like `zeros()` or `empty()` from numpy.

K*int* – total number of correctors. defines limit of corrector index k.**J***int* – total number of monitors. defines limit of monitor index j.**M***int* – number of directions respectively modes. defines limits of mode index m and direction index w.**R_jmw***array* – monitor vectors in format [monitor, mode, direction]**A_km***array* – corrector parameters, format [corrector, mode]**d_jw***array* – unnormalized dispersion function at monitors, format [monitor, direction]**b_k***array* – unnormalized dispersion coefficients at correctors, format [corrector]**mu_m***array* – fractional phase advances per turn (in rad)

A reduced model class without topology or gradient computation

class `cobea.model.Response` (*matrix*, *corr_names*, *mon_names*, *line*, *include_dispersion=True*,
unit='')

Representation of COBEA input, used as such for the function `cobea.cobea()`

During creation of the this object, `py:data:matrix` rows and columns, as well as the corresponding `py:data:corr_names` and `py:data:mon_names`, are resorted to their respective order in `py:data:line`.

Parameters

- **matrix** (*array*) – input response matrix of shape (correctors, monitors, directions). If only one direction is considered, the last dimension can be omitted.
- **corr_names** (*list*) – a list of corrector labels corresponding to each row of the matrix
- **mon_names** (*list*) – a list of monitor labels corresponding to each column of the matrix
- **line** (*list*) – a list of element names in ascending s order
- **include_dispersion** (*bool*) – whether to use a model with or without dispersion for fitting. default: True
- **unit** (*str*) – unit for the input values of the matrix (optional)

topology

object – A `Topology` object holding the re-ordered `py:data:'corr_names'`, `py:data:'mon_names'`, and `py:data:'line'` as attributes.

matrix*array* – re-ordered input response matrix.

class `cobea.model.Result` (*response*, *additional={}*, ***kwargs*)

Bases: `cobea.model.BEModel`

COBEA Result.

Besides the attributes and methods contained in `BEModel`, the following information is included.

matrix

array – Original input response matrix

error

object – computed BE model errors, represented as `ErrorModel` object

additional

dict – may contain the following keywords

coretime [float] time used for computation in the start and optimization layer.

err [dict] dictionary with additional model parameter error estimates.

conv [dict] dictionary with L-BFGS convergence information (if `convergence_info` was True)

invariants [array] computed during normalization of monitor vectors if drift space is given. These are just returned for completeness and do not contain information about beam physics.

pca_singvals [array] custom info from MCS algorithm

pca_orbits [array] custom info from MCS algorithm

version [str] version of the object

save (*filename*)

save the Result object as a pickle file with the given filename. The object can be reloaded using `cobea.load_result()` (which simply uses pickle)

update_errors ()

compute errors in attribute `error` for given BE-Model parameters and input response, including errors for Ripken-Mais parameters

class `cobea.model.Topology` (*corr_names*, *mon_names*, *line*)

Representation of corrector/monitor labels and the order between them along the ring. During creation, all columns and rows of the input matrix, together with their labels in `corr_names`, `mon_names`, are re-ordered in ascending s-position according to the line list.

Parameters

- **corr_names** (*list*) – corrector labels (strings), e.g. ['HK01', 'VCM1', 'special_Hcorr', ...]. The list index should correspond to the monitor_index, e.g. `matrix[1, :, :]` holds all information for the corrector named 'VCM1' in the above example.
- **mon_names** (*list*) – monitor labels (strings), e.g. ['BPM1', 'BPM2a', 'buggy_BPM', ..., 'important-bpm42']. the list index should correspond to the monitor_index, e.g. `matrix[:, 0, :]` holds all information for the monitor named 'BPM1' in the above example.
- **line** (*list*) – corrector and monitor labels in ascending s position, downstream of the storage ring.

2.3 cobea.mcs: Monitor-Corrector Subspace algorithm

Monitor-Corrector Subset (MCS) algorithm submodule

MCS can be used as start-value layer of COBEA.

`cobea.mcs.complexsolv` (*realvec*, *mat*)

solve the half-complex equation system `realvec = real(compmat*conj(compsol))` for `compsol`. :returns: `compsol`, `res` (from `lstsq`),

`realvec_rc`: reconstructed `realvec` from `compsol`, `s`: singular values of `compmat` (from `lstsq`)

`cobea.mcs.composite_vectors` (*pcaDev*)

make two-orbit vectors (similar to phase space vectors) at beginning and end of partial orbits

`cobea.mcs.corrector_matrix_k` (*R, cE*)
 output the complex corrector equation system matrix `corrmat` for a given corrector. `corrmat.shape = [input_bpm*Directions+direction,mode]` *R*: full input monitor array, *R.shape = [input_bpm,mode,direction]*
cE: `conj(E[:,k,:])` of *Ejkm*

`cobea.mcs.corrector_systems` (*Dev, monvec, bpm_s, corr_s, mus, printmsg=True, E=[]*)
 set up and solve the corrector equation systems. *Dev*[*k,f,d*]: Deviations at all correctors for fast BPMs.
monvec: all input monitor vectors. returns: *D*[*k,m*]: corrector parameters `complexsolv` parameters as arrays

`cobea.mcs.dice_splitpoints` (*n, monidx, splitidx*)
 numpy arrays are passed by reference, so `splitidx` can be overwritten without return

`cobea.mcs.find_indices` (*x, y*)
 find all indices *i* for which `x[n] = y[i[n]]` (*j* arbitrary). `len(x) < len(y)`. (This function could be re-moved to `__init__` later on)

`cobea.mcs.flatten_Dev` (*Dev*)
 Index transform of Deviation matrix (*k,j,w*) to PCA processing matrix (*k,j*w*)

`cobea.mcs.layer` (*response, trials=-1*)
 implementation of the Monitor-Corrector Subspace algorithm

Parameters

- **response** (*object*) – A valid `cobea.model.Response` object.
- **trials** (*int*) – Number of different monitor subsets tried for MCS. If set to -1, value is set automatically.

`cobea.mcs.local_optimization` (*Dev, monidx, corridx, Nelems, include_dispersion, runs*)
 solve CES and MES systems compute residual `Res` error and find optimal `splitidx`

`cobea.mcs.monitor_matrix_j` (*Y, E*)
 output the complex monitor equation system matrix `monmat` for a given monitor AND direction. `monmat.shape = [corrector,mode]` *Y*: corrector parameters, *Y.shape = [corrector,mode]* *E*: `E[j,:,:]` of *Ejkm*

`cobea.mcs.monitor_systems` (*Dev, D, all_bpm_s, corr_s, mus, printmsg=True, E=[]*)
 set up and solve the monitor equation systems, return *R*[*j,m,d*], the full monitor vector set for all monitors.
Dev[*k,j,d*]: Deviations at all correctors for all BPMs. *D*[*k,m*]: all corrector parameters.

`cobea.mcs.pca_core` (*Dev, principal_orbits=True*)
 Principal Component Analysis of a Deviation matrix.

`cobea.mcs.topo_indices` (*strilist, elto*)
 construct indices from stringlists. holds up to level.2 lists. *strilist*: list of elements *elto*: larger list of elements in which *strilist* elements are looked for.

`cobea.mcs.unflatten_Dev` (*pcaproc, Devshp*)
 Index transform of PCA processing matrix (*k,j*w*) to Deviation matrix (*k,j,w*)

2.4 cobea.pproc: Standalone postprocessing functions

Small postprocessing and helper functions for COBEA results.

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`cobea.pproc.guess_mu_sign` (*rslt*)
 for weakly coupled setups, guess the sign of *mu* (quadrant) based on monitor phase advance

`cobea.pproc.invariants_from_eigenvectors` (*Q*)
 Compute invariant of motion from a phase space eigenvector

Parameters *Q* (*array*) – phase space eigenvector with shape (1,2*M)

Returns *invariant* – invariants of motion

Return type float

`cobea.pproc.invariants_of_motion` (*R_drift*, *length*)

Compute invariant of motion from the eigenorbits around a known drift space

Parameters

- **R_drift** (*array*) – An array of two spatial vectors `R_drift[0]` and `R_drift[1]`
- **length** (*float*) – length of the drift space

Returns **invariant** – invariants of motion

Return type float

`cobea.pproc.l_bfgs_iterate` (*alloc_items=10000*)

convert the `iterate.dat` file produced by L-BFGS-B

Parameters **alloc_items** (*int*) – the number of maximum iterations for which memory is allocated.

Returns

iter –

a dictionary with the following fields. The field names and descriptions have been copied from a demo output

‘it’ [array] iteration number

‘nf’ [array] number of function evaluations

‘nseg’ [array] number of segments explored during the Cauchy search

‘nact’ [array] number of active bounds at the generalized Cauchy point

‘sub’ [str]

manner in which the subspace minimization terminated con = converged, bnd = a bound was reached

‘itls’ [int] number of iterations performed in the line search

‘stepl’ [float] step length used

‘tstep’ [float] norm of the displacement (total step)

‘projg’ [float] norm of the projected gradient

‘f’ [float] function value

Return type dict

`cobea.pproc.normalize_using_drift` (*model*, *di*, *drift_length*)

Invariant postprocessing algorithm. The Result object is modified by information from a drift space. monitor vectors, corrector parameters and the sign of `mu_m` is changed accordingly.

Parameters

- **model** (*object*) – A valid `cobea.model.BEModel` object or descendant. The object is modified.
- **di** (*list*) – *j* indices of the used drift space
- **drift_length** (*float*) – length of the use drift space

`cobea.pproc.phasor_eigenvectors` (*R_drift*, *length*)

Compute phase space vector from the spatial vectors around a drift space

Parameters

- **R_drift** (*array*) – An array of two spatial vectors `R_drift[0]` and `R_drift[1]`
- **length** (*float*) – length of the drift space

Returns Q – Phase space vector

Return type array

`cobea.pproc.symplectic_form(D=2)`

Compute the symplectic form.

Parameters D (*int*) – number of spatial dimensions of the phase space vectors considered.

Returns Ω – a matrix that can be used to compute invariants I from phase space eigenvectors Q via (* matrix product) $I = Q.T * \Omega * Q$

Return type array

2.5 cobea.plotting: Routines for plotting results

routines for plotting cobea results

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`cobea.plotting.A_km(result, m, ax=<matplotlib.axes._subplots.AxesSubplot object>)`

plot real and imaginary parts of corrector parameters (incl. errors) into an axis for a given mode m

`cobea.plotting.R_jmw(result, m, w=None, direction='xy', ax=<matplotlib.axes._subplots.AxesSubplot object>)`

plot real and imaginary parts of monitor vectors (incl. errors) into an axis for a given mode m

`cobea.plotting.cbeta_jmw(result, m, w=None, comparison_data={}, direction='xy', ax=<matplotlib.axes._subplots.AxesSubplot object>)`

plot beta resp. const*beta (incl. errors) into an axis for a given mode m

`cobea.plotting.cbeta_km(result, m, comparison_data={}, ax=<matplotlib.axes._subplots.AxesSubplot object>)`

plot const*beta at correctors assuming decoupled optics and thin correctors ToDo: errors for this quantity

`cobea.plotting.coleur(n=-1)`

a colorset compiled of: - 0-5: colorbrewer2 2-class paired - 6-11: inverse of 0-5

`cobea.plotting.corrector_label(corr_labels=[], spacing=0, dir='y', ax=<matplotlib.axes._subplots.AxesSubplot object>)`

apply corrector labels to an axis

`cobea.plotting.corrector_results(result, m=0, comparison_data={}, direction='xy')`

create a figure with corrector results for a given mode m

`cobea.plotting.d_jw(result, w, comparison_data, direction='xy', ax=<matplotlib.axes._subplots.AxesSubplot object>)`

plot const*dispersion (incl. errors) into an axis for a given direction w (0: x, 1: y)

`cobea.plotting.delphi_jmw(result, m, w=None, comparison_data={}, yl=-1, direction='xy', ax=<matplotlib.axes._subplots.AxesSubplot object>)`

plot phase-advance per monitor (incl. errors) into an axis for a given mode m

`cobea.plotting.monitor_label(mon_labels=0, spacing=0, ax=<matplotlib.axes._subplots.AxesSubplot object>)`

apply monitor labels to an axis

`cobea.plotting.monitor_results(result, m=0, w=None, comparison_data={}, direction='xy')`

plot monitor results for mode m , optionally in comparison with `comparison_data`.

Parameters

- **result** (*object*) – A `cobea.model.Result` object.
- **m** (*int*) – mode index to plot results for
- **w** (*int*) – direction index to plot results for

- **comparison_data** (*dict*) – a dictionary containing optional data from alternative decoupled storage ring models, which may contain the following keys: ‘name’: name of the algorithm or model used ‘beta’: an array of shape (result.M,result.J) that contains Courant-Snyder beta values for each direction and monitor ‘phi’: an array of the same shape as ‘beta’, containing Courant-Snyder betatron phases ‘dispersion’: an array of the same shape, containing dispersion values

`cobea.plotting.plot_Dev_err` (*result*, *w=0*)

create a figure that shows response matrix and residual error for a given direction *w* (0: x, 1: y)

`cobea.plotting.plot_matrix` (*Devdr*, *devlbl*, *cmap=(‘PRGn’, ‘Greens’)*,
ax=<matplotlib.axes._subplots.AxesSubplot object>)

plot an arbitrary matrix with divergent or sequential colormap (helper function)

`cobea.plotting.plot_residual` (*result*, *w=0*, *label=‘residual’*,
ax=<matplotlib.axes._subplots.AxesSubplot object>)

plot fit residual into an axis for a given direction *w* (0: x, 1: y)

`cobea.plotting.plot_response` (*response*, *w=0*, *label=‘deviation’*,
ax=<matplotlib.axes._subplots.AxesSubplot object>)

Plot response matrix into an axis for a given direction *w* (0: x, 1: y)

`cobea.plotting.plot_result` (*result*, *print_figures=True*, *prefix=‘’*, *comparison_data={}*, *direction=‘xy’*, *plot_flags=‘mcdtv’*)

plot cobea results.

Parameters

- **result** (*object*) – A `cobea.model.Result` object.
- **print_figures** (*bool*) – whether to print figures into separate pdf files instead of showing them. Default: True
- **prefix** (*str*) – if `print_figures=True`, prefix contains the relative path to the current folder where results are printed.
- **comparison_data** (*dict*) – a dictionary containing optional data from alternative decoupled storage ring models, which may contain the following keys: ‘name’: name of the algorithm or model used ‘beta’: an array of shape (result.M,result.J) that contains Courant-Snyder beta values for each direction and monitor ‘phi’: an array of the same shape as ‘beta’, containing Courant-Snyder betatron phases ‘dispersion’: an array of the same shape, containing dispersion values
- **direction** (*str*) – direction characters for the result object. can be ‘x’, ‘y’, or ‘xy’.
- **plot_flags** (*str*) – which plots are to be created. Each character represents a different result plot: ‘m’: monitor_results -> monitor_m*.pdf ‘c’: corrector_results -> corrector_m*.pdf ‘d’: plot_Dev_err, hist -> Dev_err_w*.pdf, hist_w*.pdf ‘t’: plot_topology -> topology.pdf ‘v’: convergence information -> convergence.pdf. Only works if convergence information is available.

`cobea.plotting.plot_size` (*plot_type=0*)

plot sizes for all plot types

`cobea.plotting.plot_topology` (*topology*)

create a figure that shows the accelerator topology. Input: Topology object

`cobea.plotting.prepare_figure` (*plot_type=0*)

set fonts, tex packages, and figure size. returns figure

C

cobea, 7
cobea.mcs, 10
cobea.model, 8
cobea.plotting, 13
cobea.pproc, 11

A

A_km (cobea.model.BasicModel attribute), 9
 A_km() (in module cobea.plotting), 13
 additional (cobea.model.Result attribute), 10
 additional (Result attribute), 4

B

b_k (cobea.model.BasicModel attribute), 9
 BasicModel (class in cobea.model), 8
 BEModel (class in cobea.model), 8

C

cbeta_jmw (cobea.model.BEModel attribute), 8
 cbeta_jmw (cobea.model.Result attribute), 4
 cbeta_jmw() (in module cobea.plotting), 13
 cbeta_km (cobea.model.BEModel attribute), 8
 cbeta_km (cobea.model.Result attribute), 4
 cbeta_km() (in module cobea.plotting), 13
 cobea (module), 7
 cobea() (in module cobea), 7
 cobea.mcs (module), 10
 cobea.model (module), 8
 cobea.plotting (module), 13
 cobea.pproc (module), 11
 couleur() (in module cobea.plotting), 13
 complexsolv() (in module cobea.mcs), 10
 composite_vectors() (in module cobea.mcs), 10
 corrector_label() (in module cobea.plotting), 13
 corrector_matrix_k() (in module cobea.mcs), 10
 corrector_results() (in module cobea.plotting), 13
 corrector_systems() (in module cobea.mcs), 11

D

d_jw (cobea.model.BasicModel attribute), 9
 d_jw() (in module cobea.plotting), 13
 delphi_jmw (cobea.model.BEModel attribute), 8
 delphi_jmw (cobea.model.Result attribute), 4
 delphi_jmw() (in module cobea.plotting), 13
 delphi_km (cobea.model.BEModel attribute), 8
 delphi_km (cobea.model.Result attribute), 4
 dice_splitpoints() (in module cobea.mcs), 11

E

error (cobea.model.Result attribute), 10
 error (Result attribute), 4

F

find_indices() (in module cobea.mcs), 11
 flatten_Dev() (in module cobea.mcs), 11
 flip_mu() (cobea.model.BEModel method), 8
 flip_mu() (cobea.model.Result method), 4

G

guess_mu_sign() (in module cobea.pproc), 11

I

invariants_from_eigenvectors() (in module
 cobea.pproc), 11
 invariants_of_motion() (in module cobea.pproc), 12

J

J (cobea.model.BasicModel attribute), 9

K

K (cobea.model.BasicModel attribute), 9

L

l_bfgs_iterate() (in module cobea.pproc), 12
 layer() (in module cobea.mcs), 11
 load_result() (in module cobea), 7
 local_optimization() (in module cobea.mcs), 11

M

M (cobea.model.BasicModel attribute), 9
 matrix (cobea.model.Response attribute), 9
 matrix (cobea.model.Result attribute), 10
 matrix (Response attribute), 3
 matrix (Result attribute), 4
 monitor_label() (in module cobea.plotting), 13
 monitor_matrix_j() (in module cobea.mcs), 11
 monitor_results() (in module cobea.plotting), 13
 monitor_systems() (in module cobea.mcs), 11
 mu_m (cobea.model.BasicModel attribute), 9

N

normalize_using_drift() (in module cobea.pproc), 12

O

optimization_layer() (in module cobea), 7

P

pca_core() (in module cobea.mcs), 11

`phase_integral()` (cobeamodel.BEModel method), 8
`phase_integral()` (cobeamodel.Result method), 4
`phasor_eigenvectors()` (in module cobeaproc), 12
`phi_jmw` (cobeamodel.BEModel attribute), 8
`phi_jmw` (cobeamodel.Result attribute), 4
`plot_Dev_err()` (in module cobea.plotting), 14
`plot_matrix()` (in module cobea.plotting), 14
`plot_residual()` (in module cobea.plotting), 14
`plot_response()` (in module cobea.plotting), 14
`plot_result()` (in module cobea.plotting), 14
`plot_size()` (in module cobea.plotting), 14
`plot_topology()` (in module cobea.plotting), 14
`prepare_figure()` (in module cobea.plotting), 14

R

`R_jmw` (cobeamodel.BasicModel attribute), 9
`R_jmw()` (in module cobea.plotting), 13
`read_elemnames()` (in module cobea), 8
`Response` (class in cobeamodel), 3, 9
`response_matrix()` (cobeamodel.BEModel method), 8
`response_matrix()` (cobeamodel.Result method), 4
`Result` (class in cobeamodel), 4, 9

S

`save()` (cobeamodel.Result method), 4, 10
`symplectic_form()` (in module cobeaproc), 13

T

`topo_indices()` (in module cobeamcs), 11
`Topology` (class in cobeamodel), 10
`topology` (cobeamodel.BEModel attribute), 8
`topology` (cobeamodel.Response attribute), 9
`topology` (Response attribute), 3
`tune()` (cobeamodel.BEModel method), 8
`tune()` (cobeamodel.Result method), 5

U

`unflatten_Dev()` (in module cobeamcs), 11
`update_errors()` (cobeamodel.Result method), 5, 10