

EEEC 417/517
Embedded Systems
Cleveland State University

Lab 8

Stepper Motor Fundamentals and Control

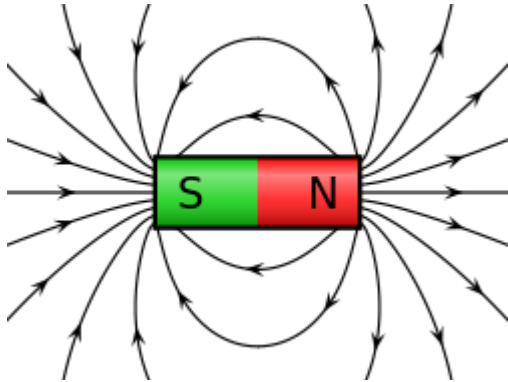
Dan Simon
Rick Rarick
Spring 2018

Lab 8 Outline

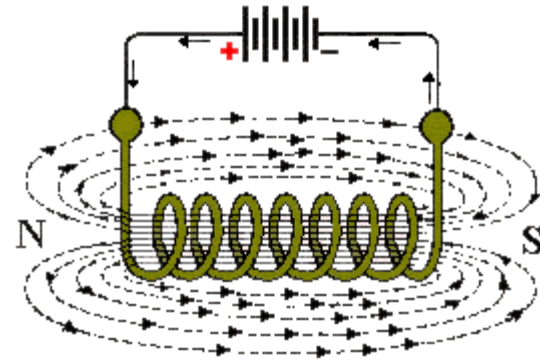
- 1. Stepper Motor Fundamentals**
2. Stepper Motor Classifications
3. Full Stepping, Half Stepping, and Micro-stepping
4. Lab 8 Setup

Stepper Motor Fundamentals

Pole Convention



Permanent Magnet



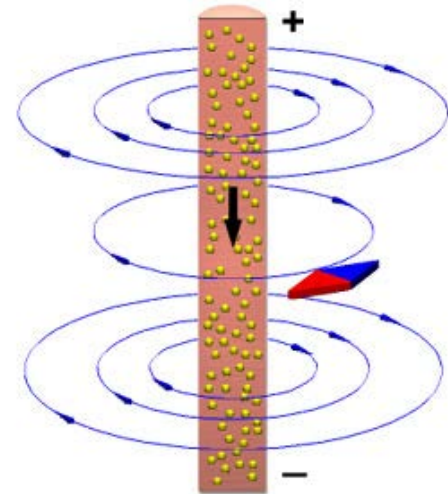
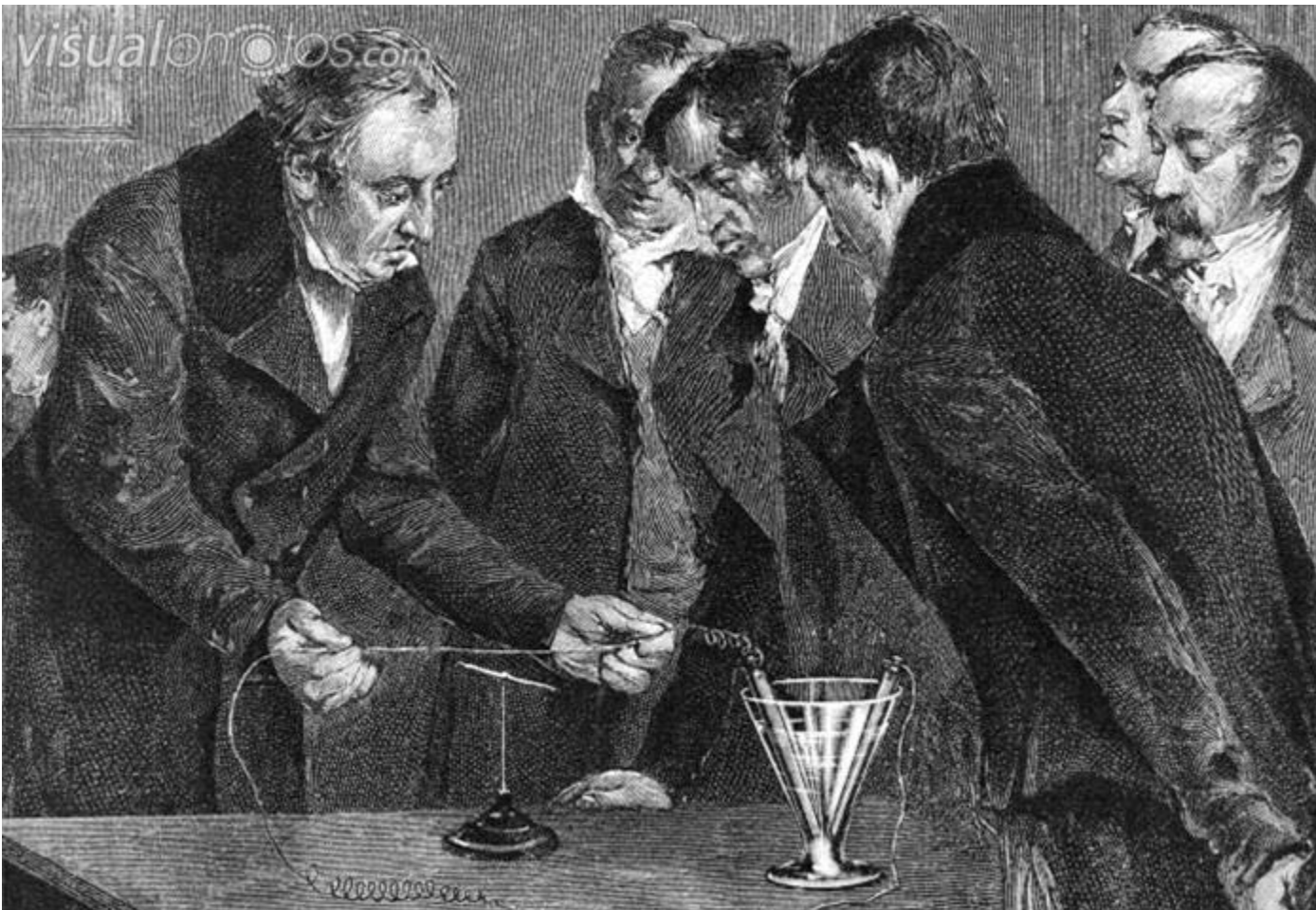
Electromagnet

By convention, the north pole of a magnet is the pole where the magnetic field (**B**-field) lines or lines of force **exit** the magnet.

Stepper Motor Fundamentals

Electromagnetism

1820: Hans Christian Oersted (1777 – 1851) showed that an electric current produces a magnetic field.



Stepper Motor Fundamentals

Electromagnetism

1820: Biot-Savart Law

Mathematical formula for computing the strength of a magnetic field at a point **P** produced by a current **I** in a wire

Differential Form

$$d\mathbf{B} = \frac{\mu_0 I}{4\pi} \frac{d\mathbf{s} \times \hat{\mathbf{r}}}{r^2}$$

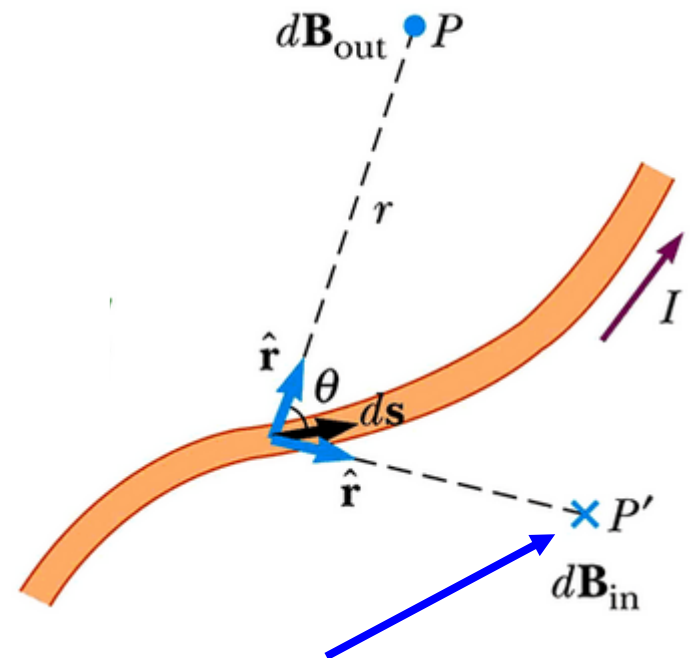
Line Integral Form

$$\mathbf{B} = \frac{\mu_0 I}{4\pi} \int_C \frac{d\mathbf{s} \times \hat{\mathbf{r}}}{r^2}$$

where μ_0 is the permeability of free space.

Jean-Baptiste Biot (1774–1862)

Felix Savart (1791–1841)



A different point

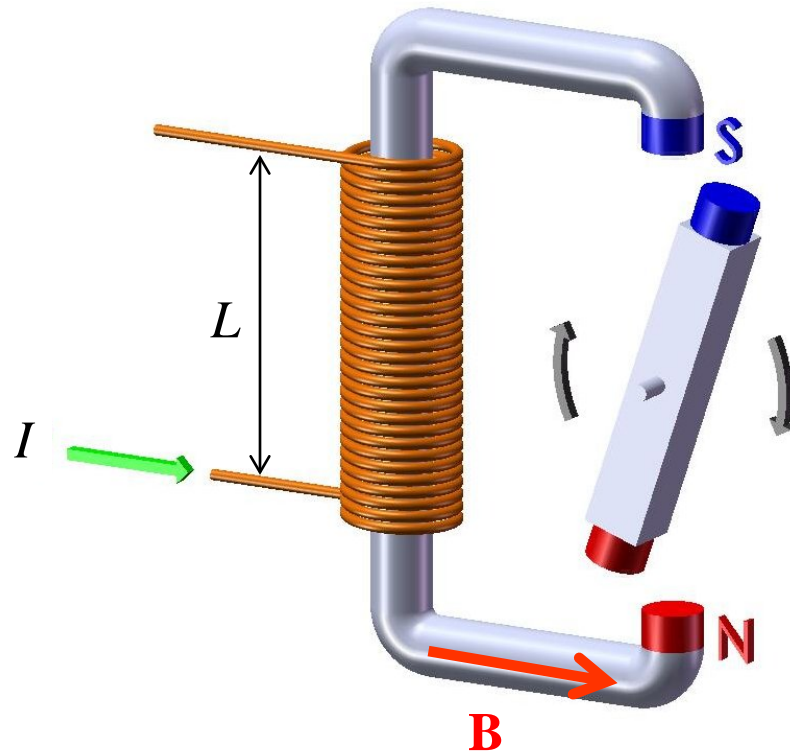
Stepper Motor Fundamentals

Electromagnetism

1826: Ampere's Law (André-Marie Ampère, 1775 – 1836)

From Ampere's Law, we get the formula for computing the strength of a magnetic field produced by a coil.

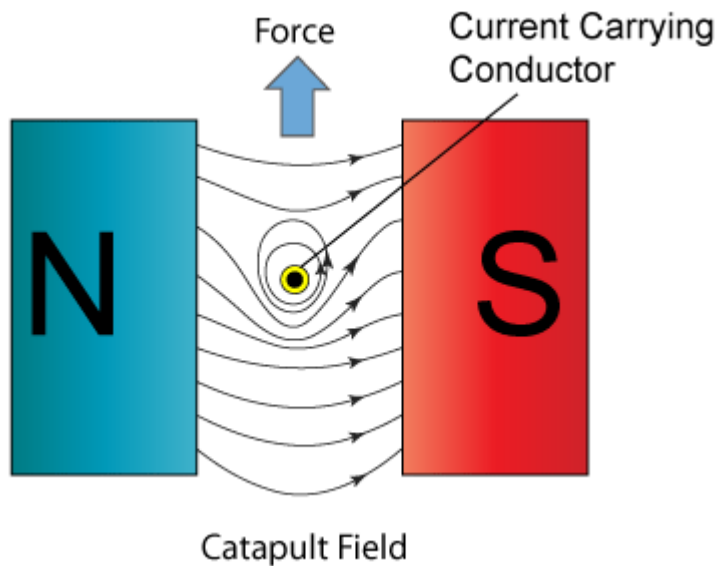
$$B = \frac{\mu NI}{L}$$



Stepper Motor Fundamentals

Magnetic Force on a Current

1830's: Michael Faraday (1791 – 1867) described the force on a current in terms of **lines of force**.



1. Compression of the lines of force below the conductor produces an upward force on the conductor.
2. This is the basic principle of an electric motor.
3. The distorted magnetic field is called a **catapult** field.
4. First electric motor usually attributed to Faraday.

Stepper Motor Fundamentals

Magnetic Force on a Current

1881: J. J. Thomson (1856 – 1940)

1886: Oliver Heaviside (1850 – 1925)

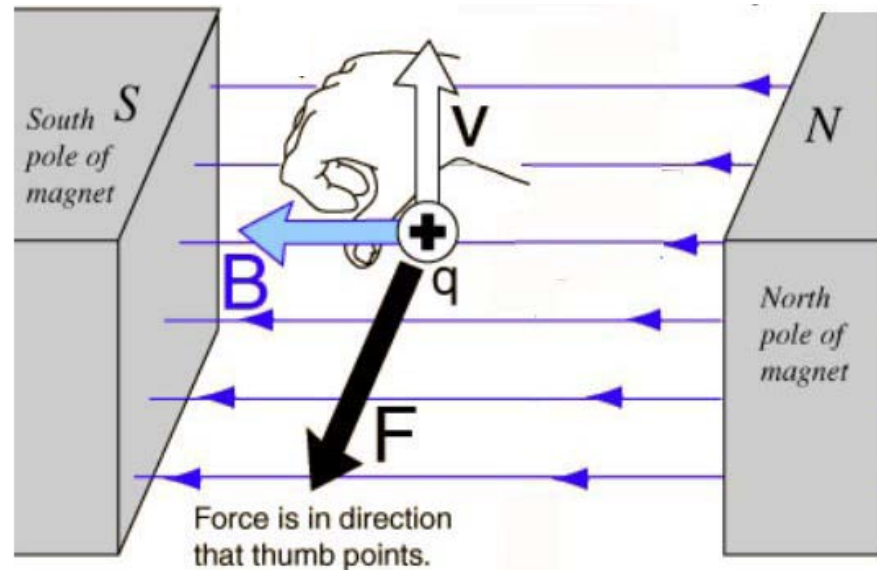
1892: Hendrik Lorentz (1853 – 1928)

Together derived the mathematical formula for the magnetic force on a moving charge:

$$\mathbf{F} = q\mathbf{v} \times \mathbf{B}$$

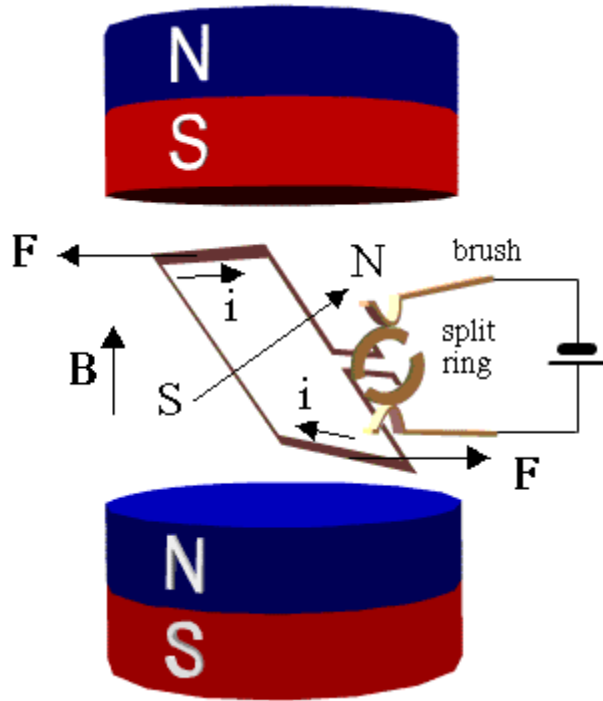
This is the **Lorentz Force Equation**.

It is the fundamental principle of motor operation.

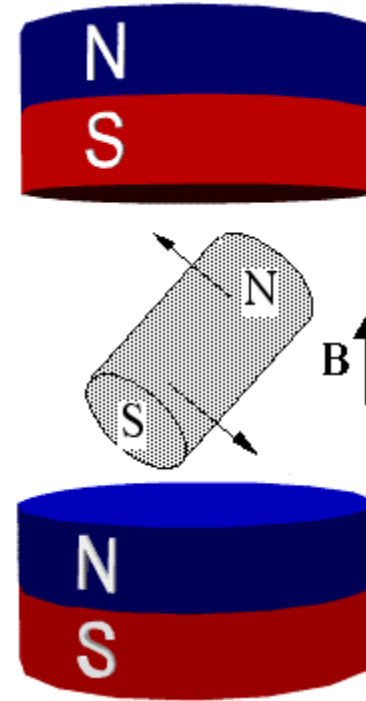


Stepper Motor Fundamentals

Motor Torque



Torque on Loop



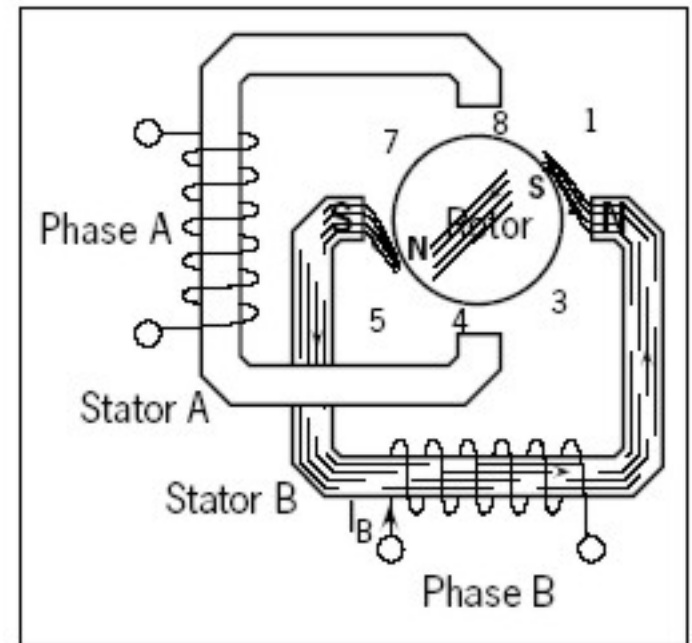
Torque on Permanent Magnet

Left: The current loop can be viewed as a magnetic dipole as indicated by the arrow SN . Right: The magnetic dipole is represented as a permanent magnet with the same torque (North attracts South).

Stepper Motor Fundamentals

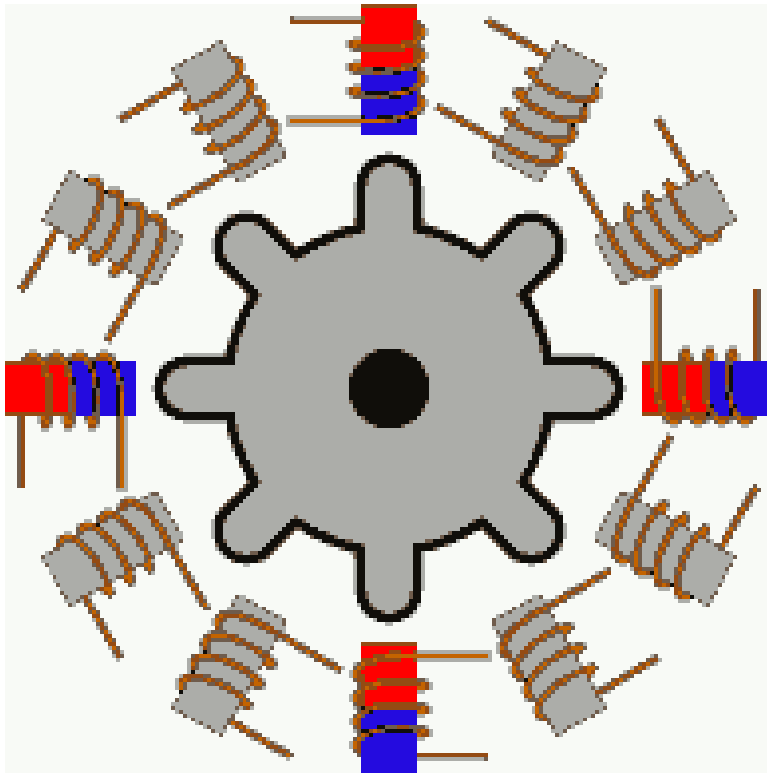
Motor Torque

1. Faraday's view: Lines of force (flux) or field lines.
2. In rotor position shown, lines of force are "stretched" and "compressed."
3. Rotor will turn to minimize this effect.
4. In magnetic circuits terminology, this stretching and compressing results in increased magnetic resistance or reluctance.
5. Rotor will turn to minimize the reluctance.



Stepper Motor Fundamentals

What is a stepper motor ?



Stepper motors are devices that do not rotate continuously but move in precise steps.

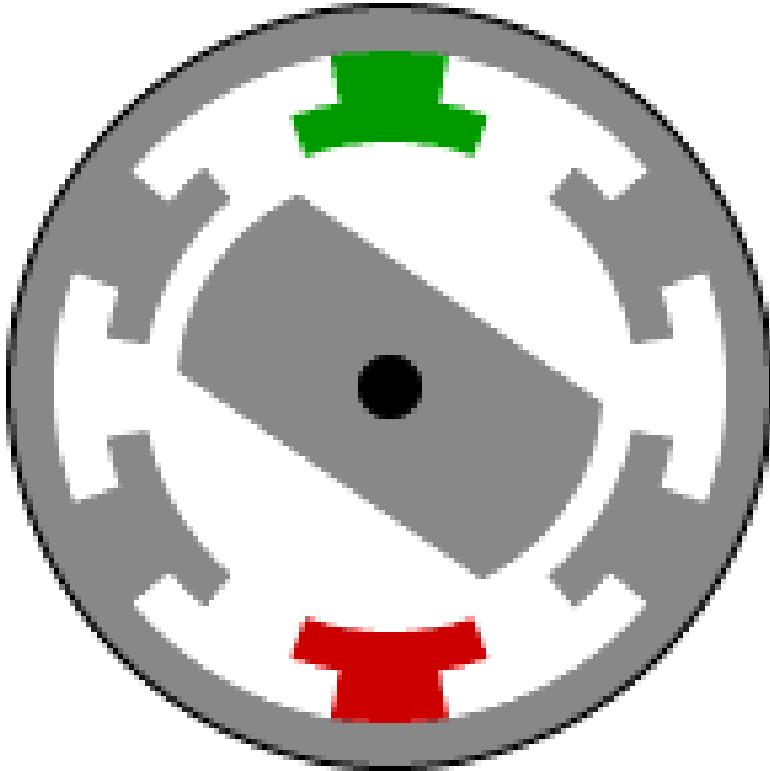
At low speed, low inertia gives "step" motion.

Many different kinds.

(animation: must view in Slide Show mode)

http://pcbheaven.com/wikipages/How_Stepper_Motors_Work/?p=1

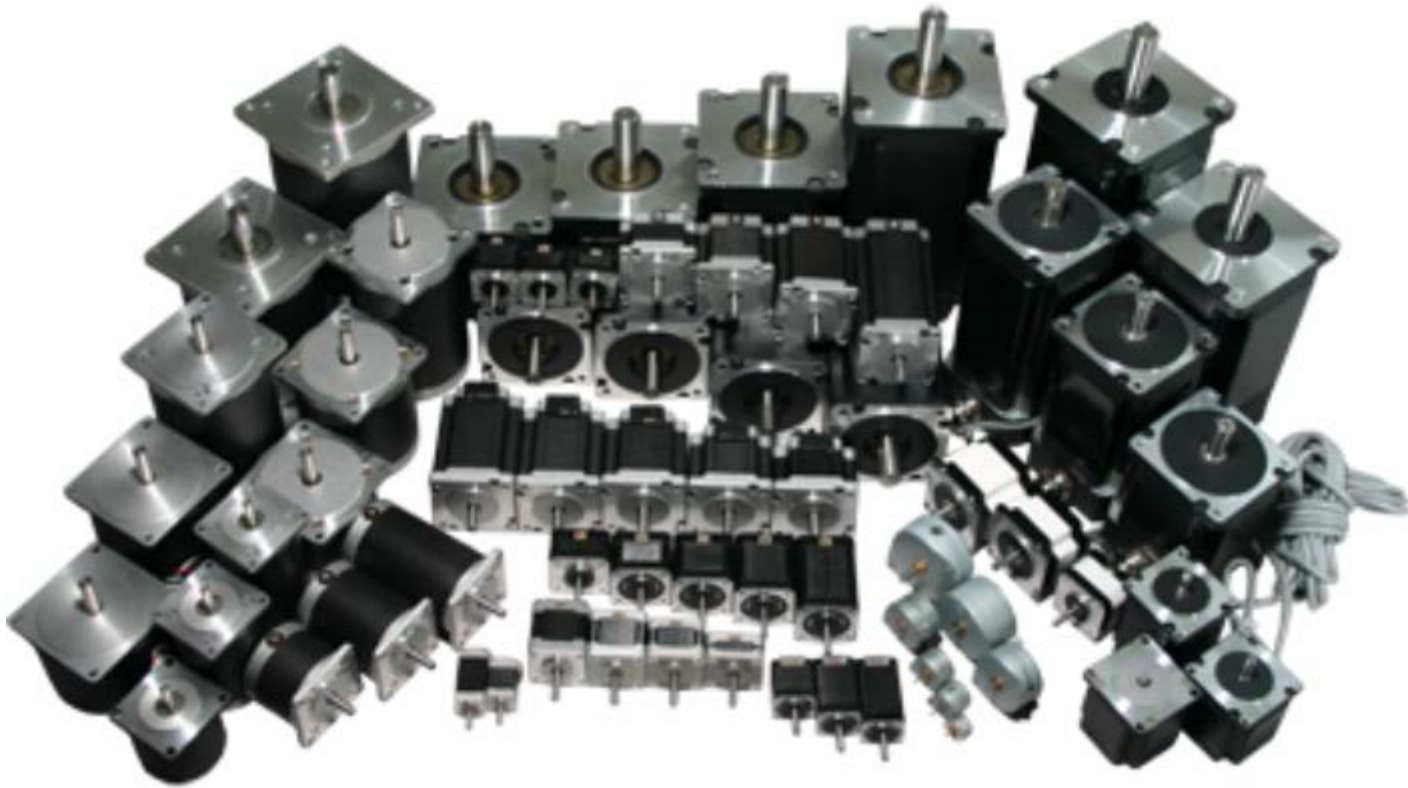
Stepper Motor Fundamentals



(animation)

At higher speed and/or
higher inertia, motion
appears continuous.

Stepper Motor Fundamentals



Lab 8 Outline

1. Stepper Motor Fundamentals
- 2. Stepper Motor Classifications**
3. Full Stepping, Half Stepping, and Micro-stepping
4. Lab 8 Setup

Stepper Motor Classifications

Three basic types of stepper motor:

1. Variable Reluctance
2. Permanent Magnet
3. Hybrid

Stepper Motor Classifications

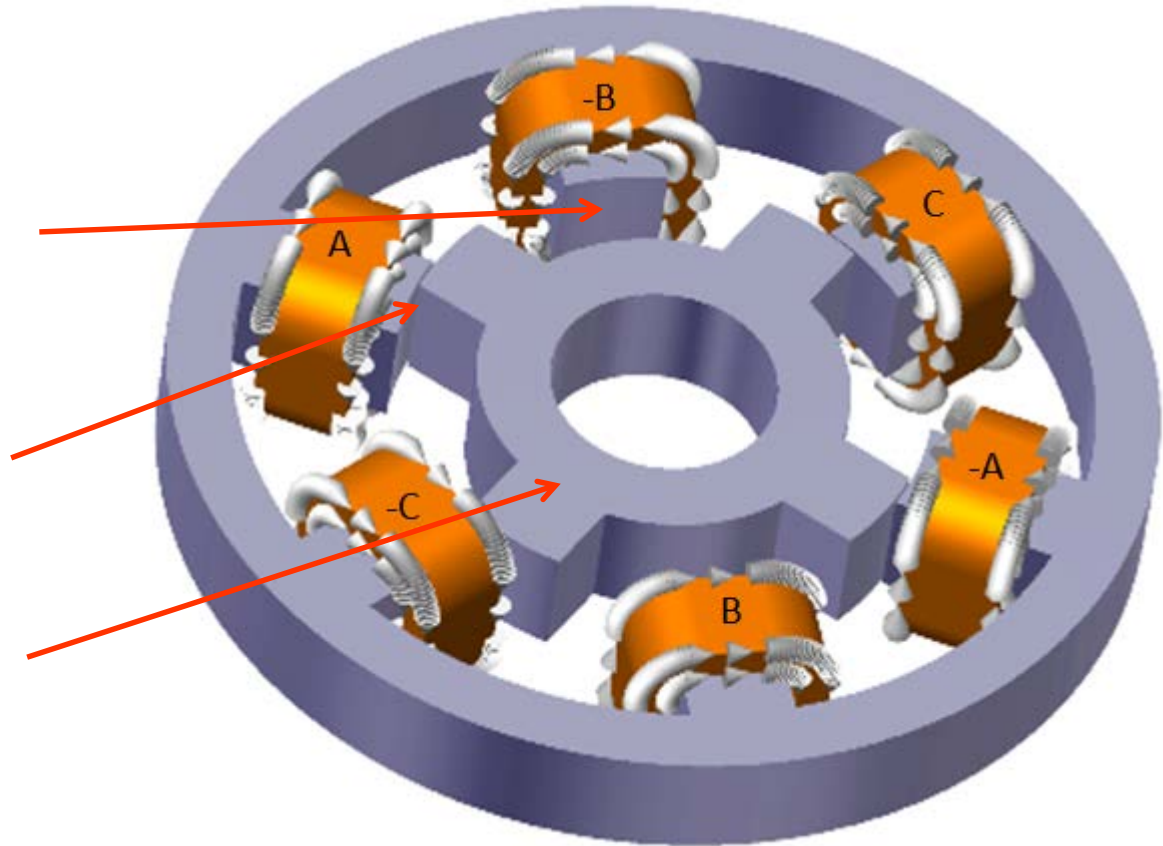
Variable Reluctance Motor

Reluctance of the rotor varies because of geometric shape.

High reluctance gap

Low reluctance gap

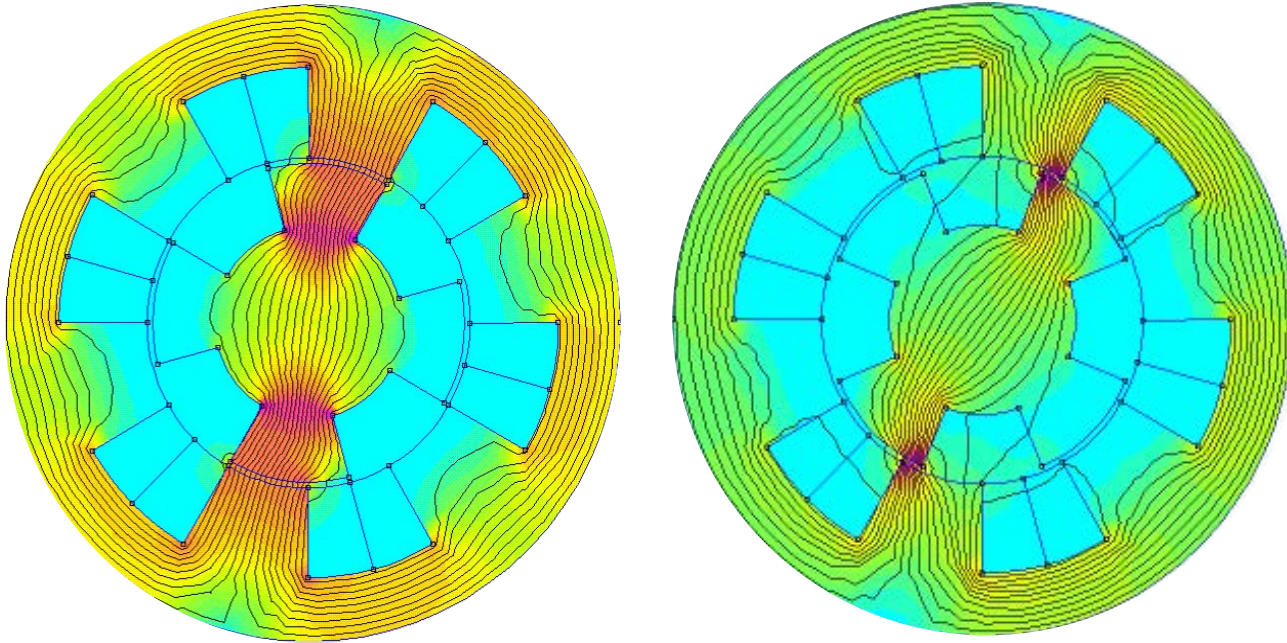
Ferromagnetic Rotor



Rotor will turn in a manner to reduce reluctance.

Stepper Motor Classifications

Variable Reluctance Motor

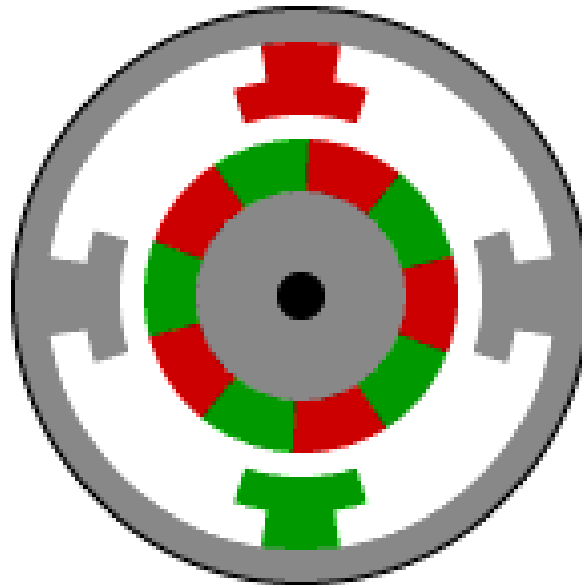


Magnetic flux path

Rotor rotates to try to minimize reluctance = flux resistance.

Stepper Motor Classifications

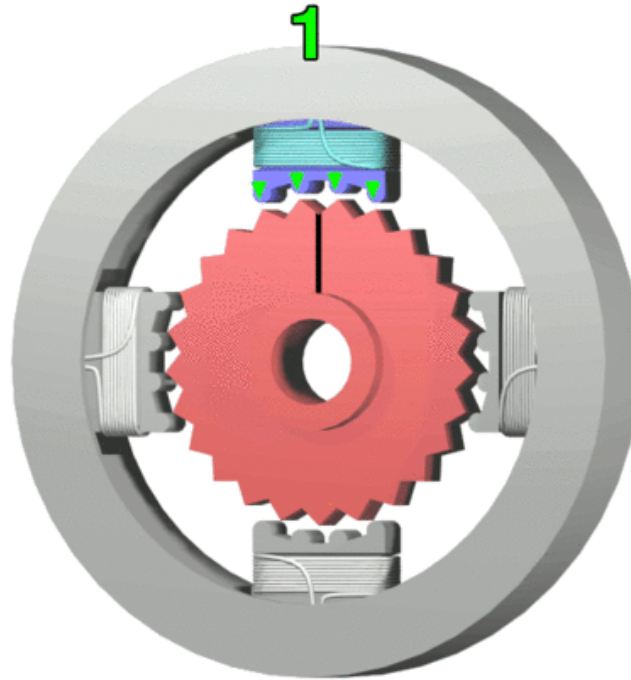
Permanent Magnet Motor



(animation)

Stepper Motor Classifications

Hybrid Motor

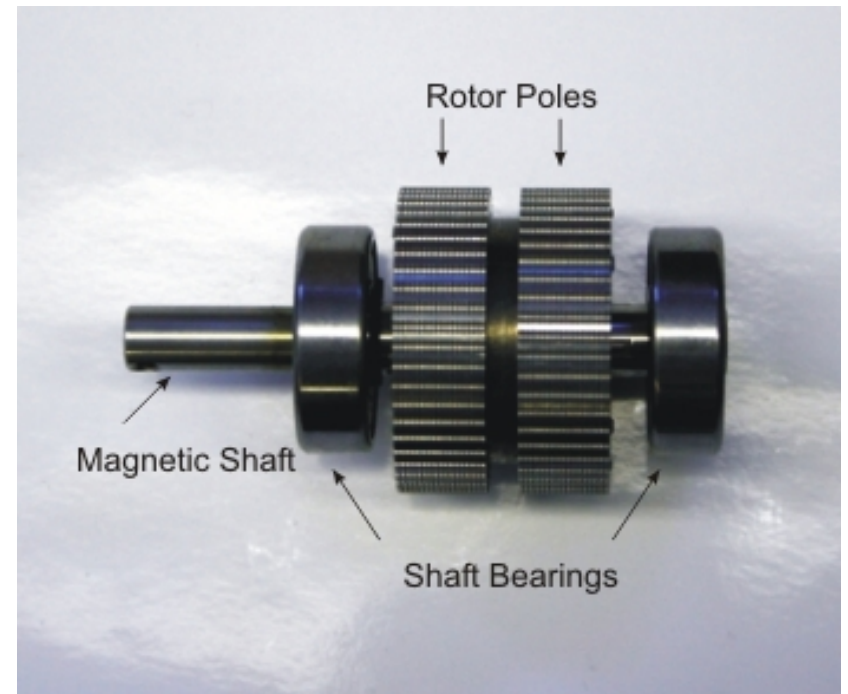
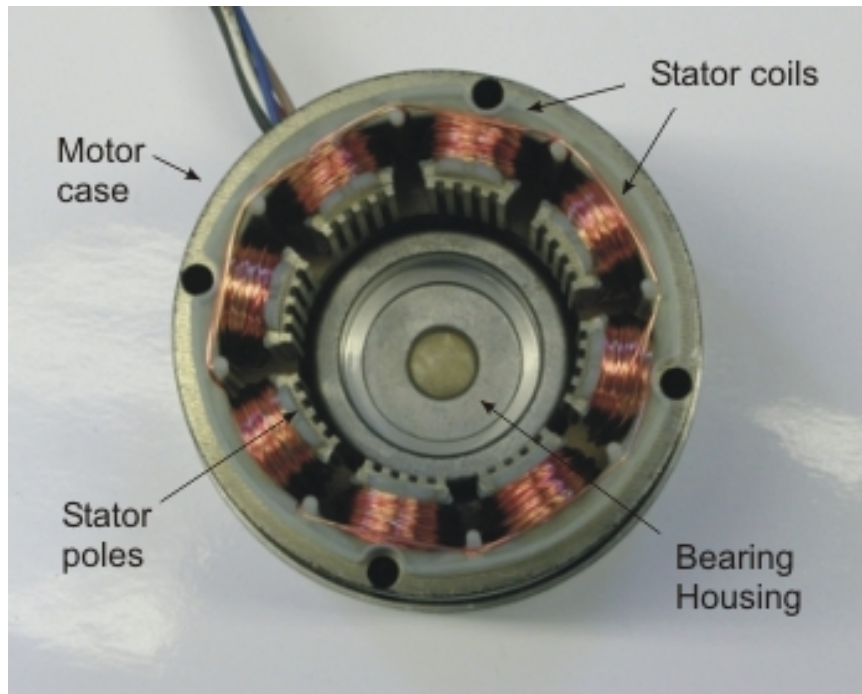


(animation)

Combination of a variable reluctance motor and a permanent magnet motor.

Stepper Motor Classifications

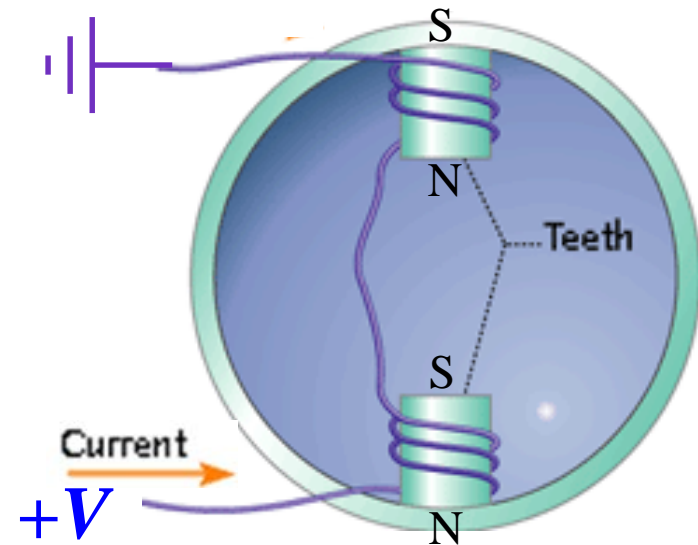
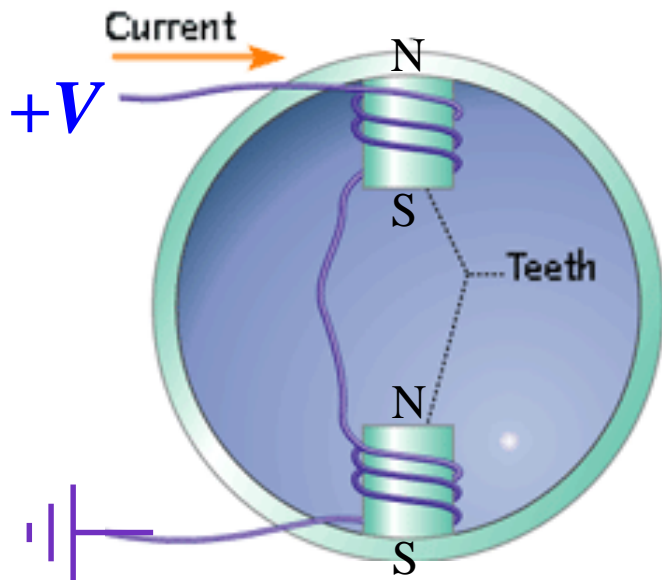
Hybrid Stepper Motor



Stepper Motor Classifications

Bipolar Stator Windings

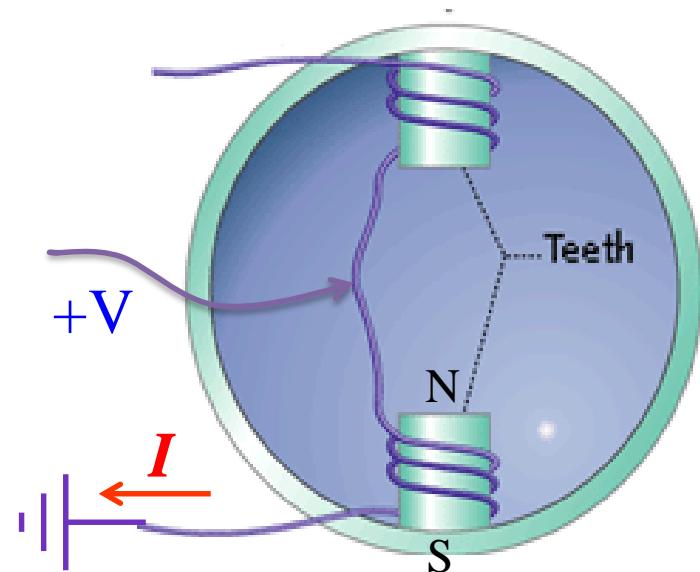
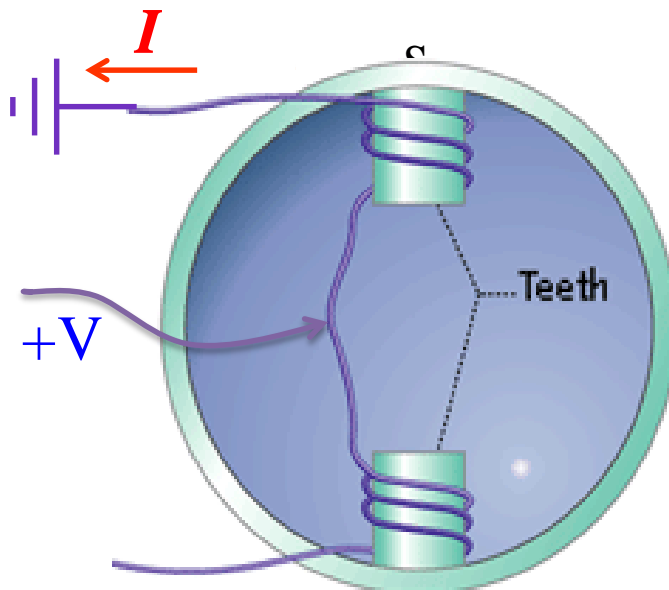
- The current through the winding can be reversed by reversing the polarity of the terminal voltage.
- This reverses the polarity of the magnetic poles on the teeth.
- Thus, the stator winding is **bipolar**.



Stepper Motor Classifications

Unipolar Stator Winding

- The winding has **center tap**. Each lead is grounded (one at a time) to induce current flow.
- The polarity of the voltage across each segment of the winding does not change, nor does the magnetic polarity on the teeth.
- Thus, the stator winding is **unipolar**.

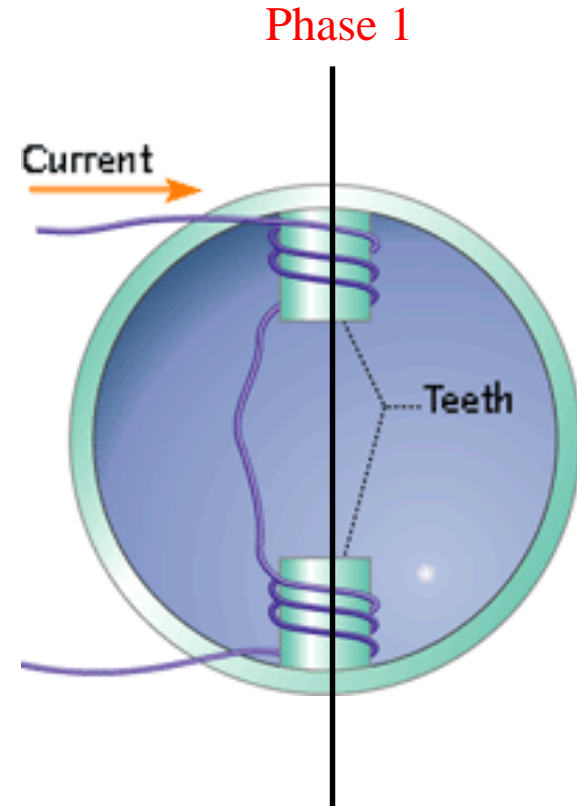


Stepper Motor Classifications

Winding Phases

In general, each stator winding determines a **phase** (electrical phase angle), so the diagram depicts the stator winding for a **one-phase** motor.

Note that winding is considered a single winding (or phase) even though it is coiled around two teeth.

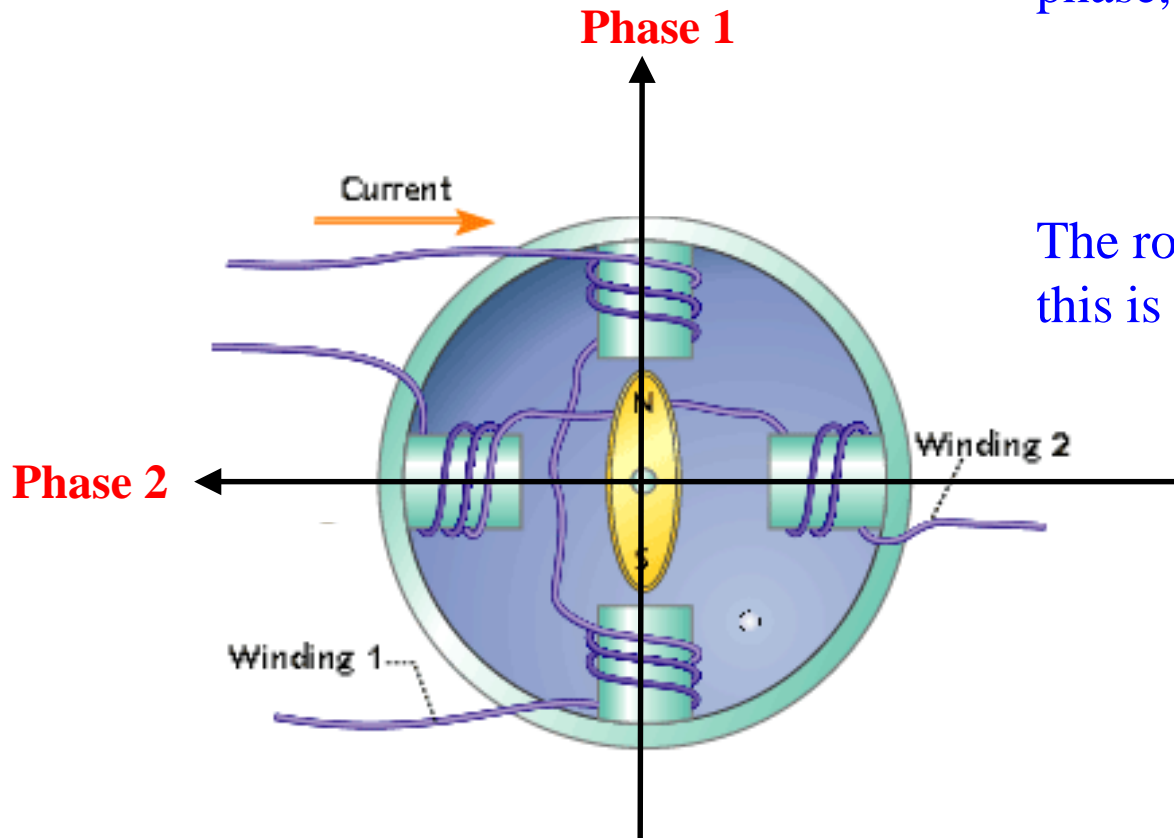


Bipolar Motor Winding

Stepper Motor Classifications

Winding Phases and Rotor Poles

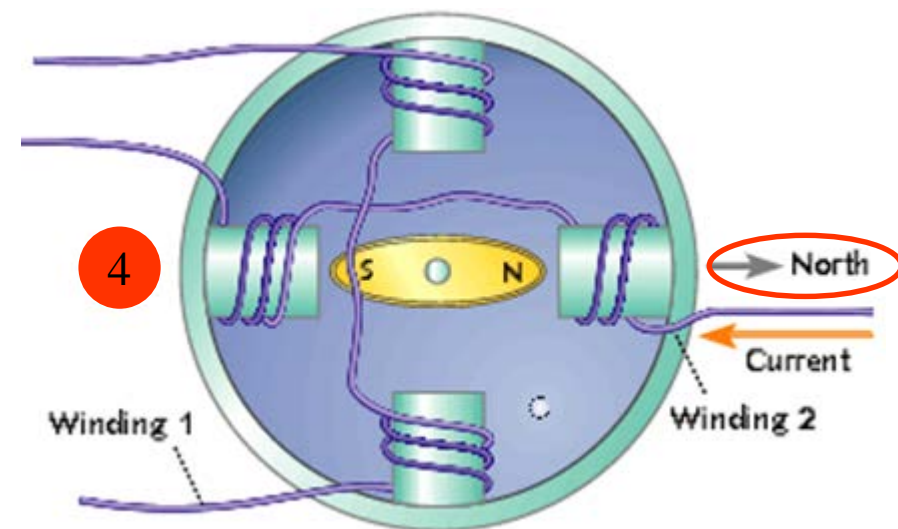
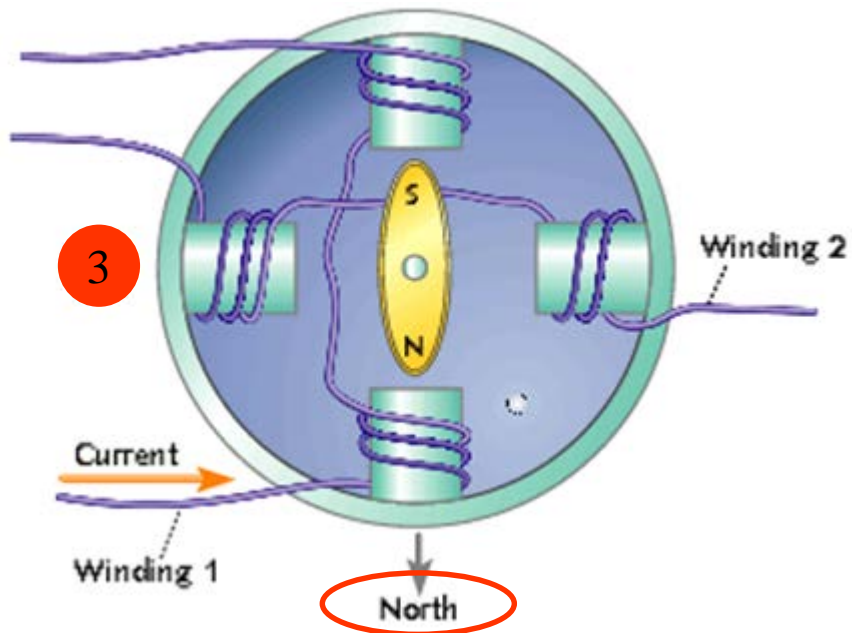
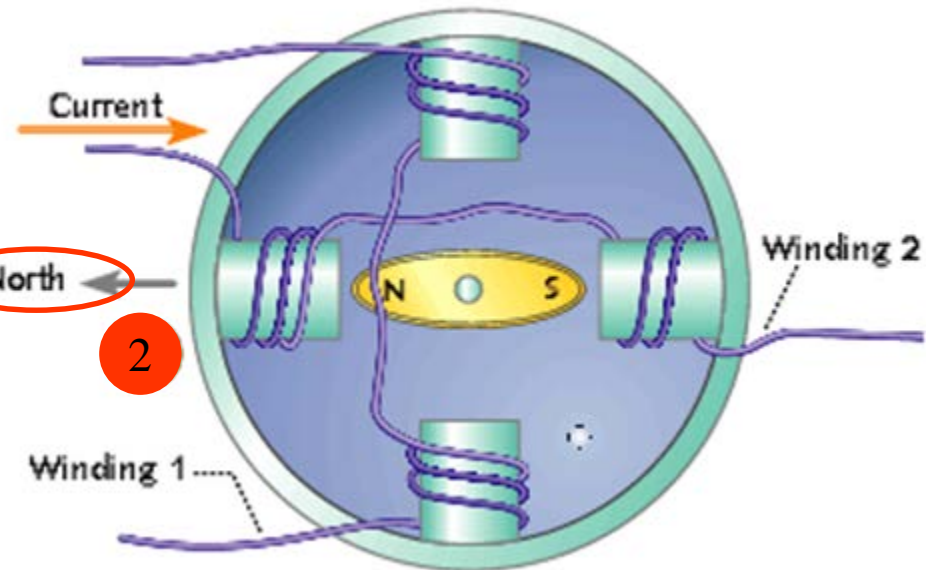
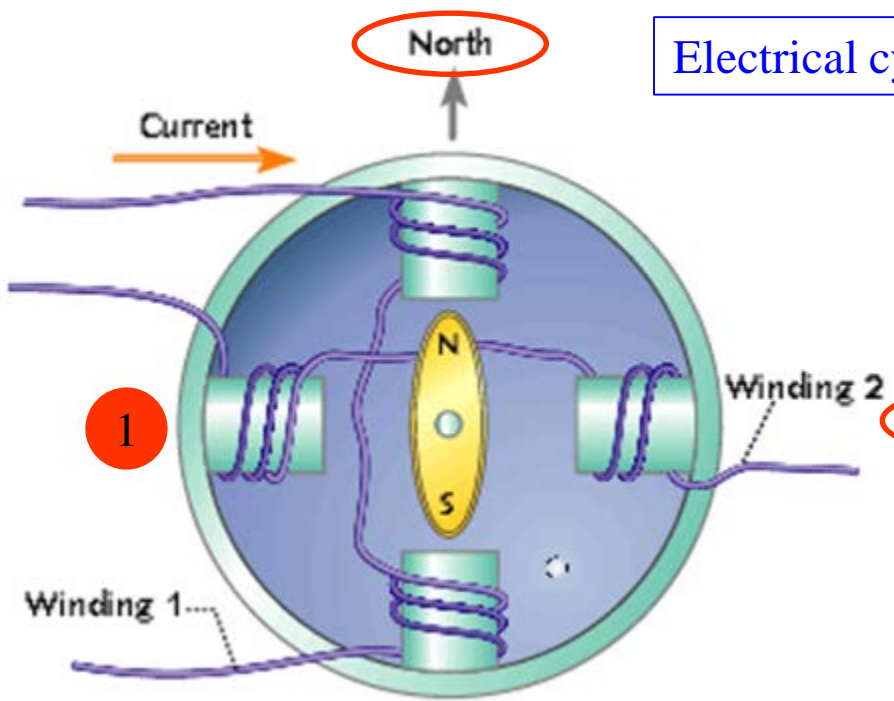
Each winding determines a phase, so this is a **two-phase** motor.



The rotor has two poles (N and S), so this is called a **two-pole** motor.

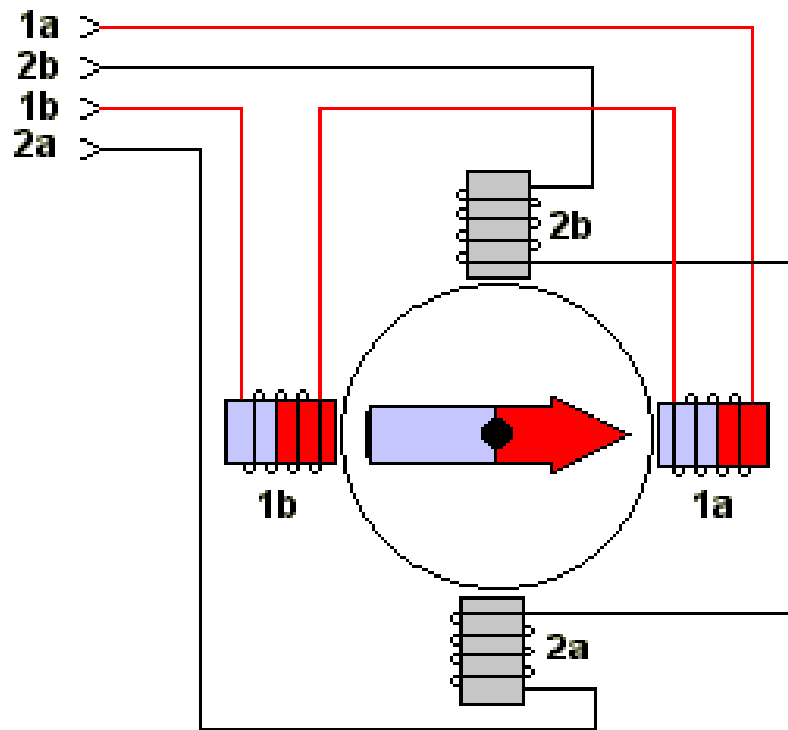
Bipolar Motor Windings

Electrical cycle for a 2-phase, 2-pole, bipolar stepper motor.

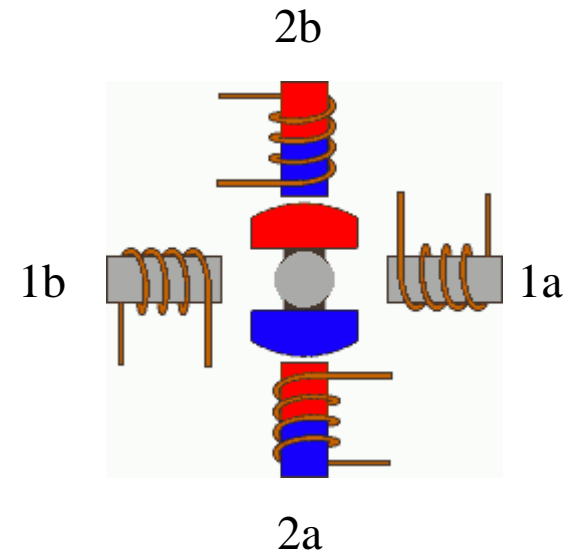


Conceptual model of a 2-phase, 2-pole, **bipolar** stepper motor.

Driving mode: The coils are activated in sequence to rotate the rotor.



2-phase, 2-pole

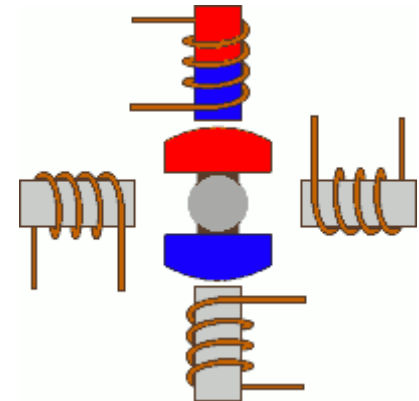
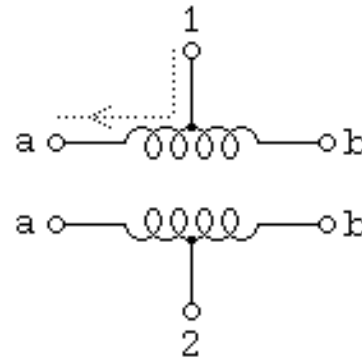
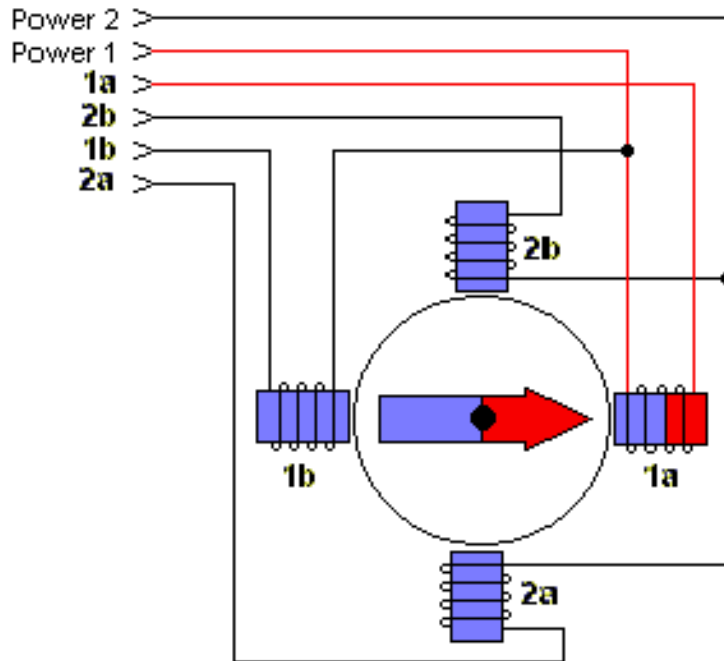


1a	1b	2a	2b
1	0	0	0
0	0	0	1
0	1	0	0
0	0	1	0

Conceptual model of a 2-phase, 2-pole, **unipolar** stepper motor.

With the center taps of the windings wired to the positive supply, the terminals of each winding are grounded in sequence to rotate the rotor.

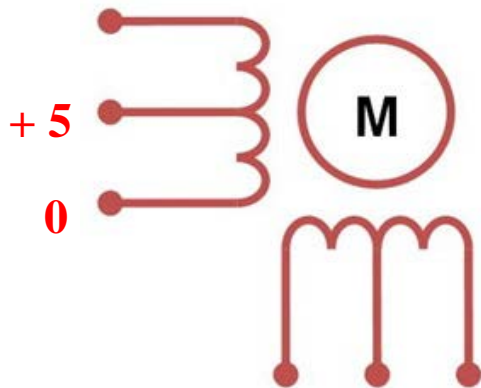
Note: Some sources call this a 4-phase unipolar motor.



1a	1b	2a	2b
0	1	1	1
1	1	0	1
1	0	1	1
1	1	1	0

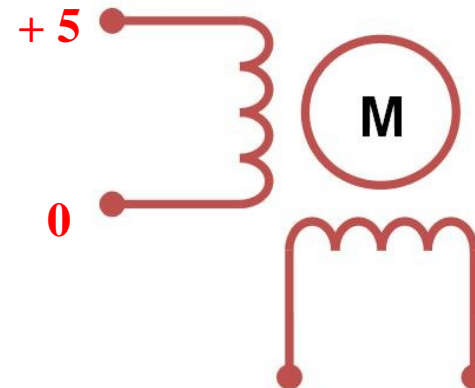
2-phase, Unipolar and Bipolar Schematics

Unipolar



Current flows in **one direction** through winding.

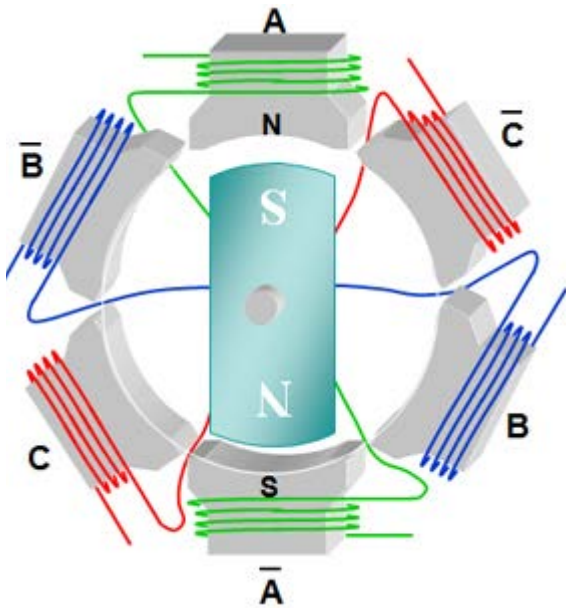
Bipolar



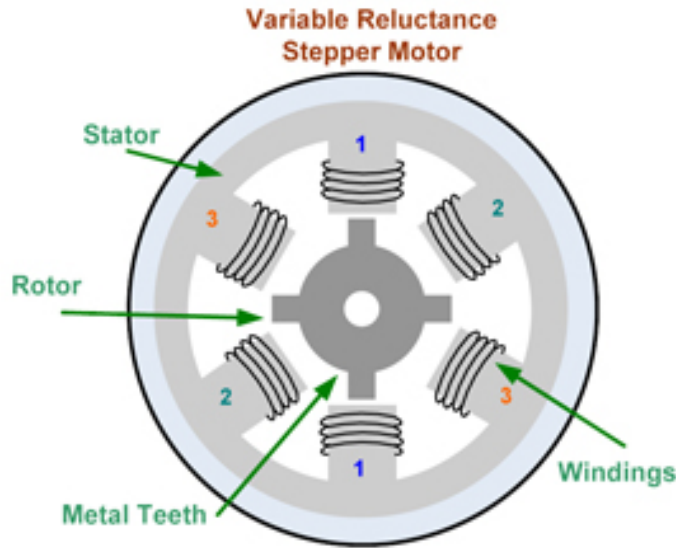
Current flows in **both directions** through winding.

Note: Can be operated as a bipolar motor.

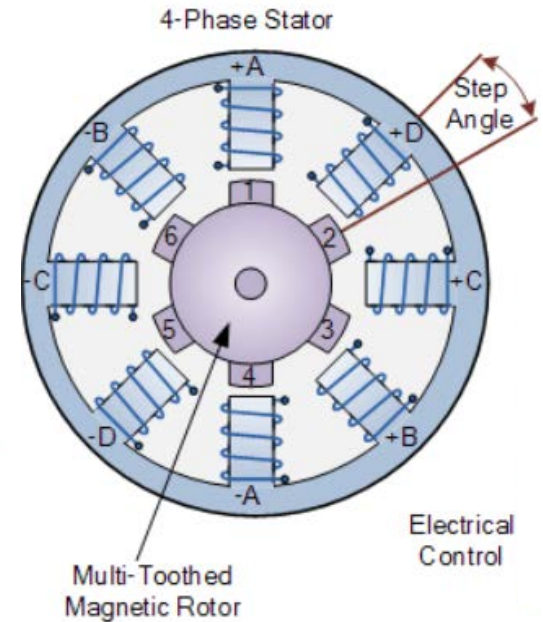
Stepper Motor Classifications



3-phase, 2-pole,
bipolar motor



3-phase, 4-pole,
bipolar motor



4-phase, 6-pole,
bipolar motor

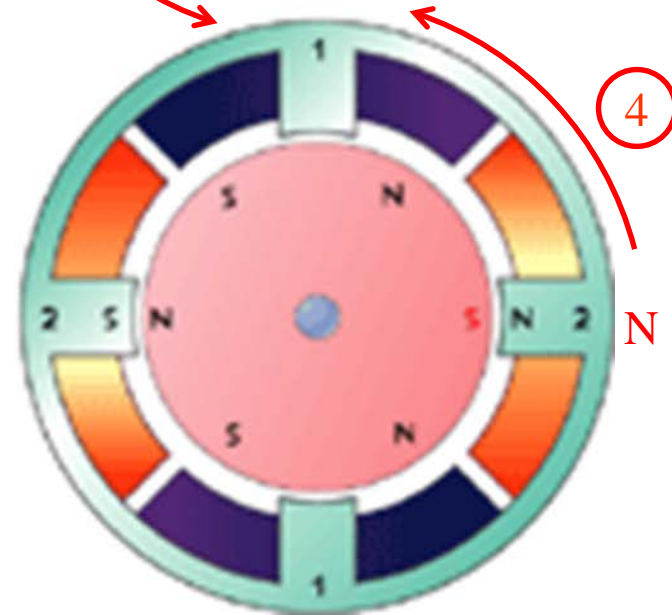
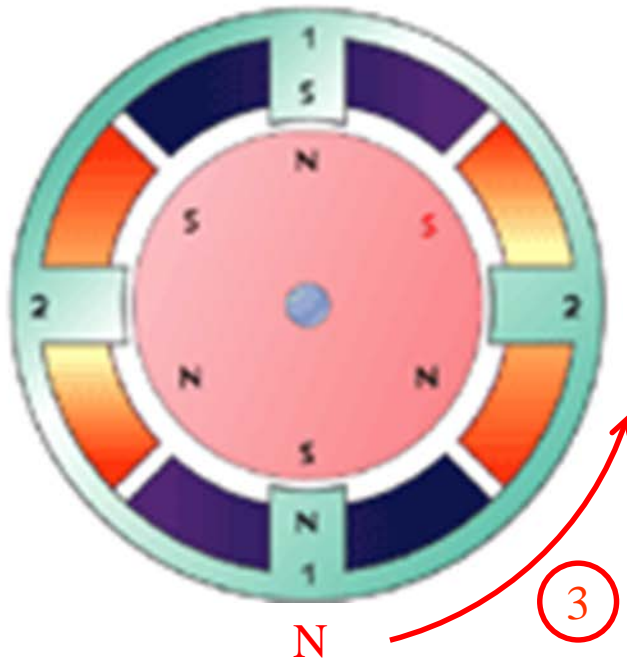
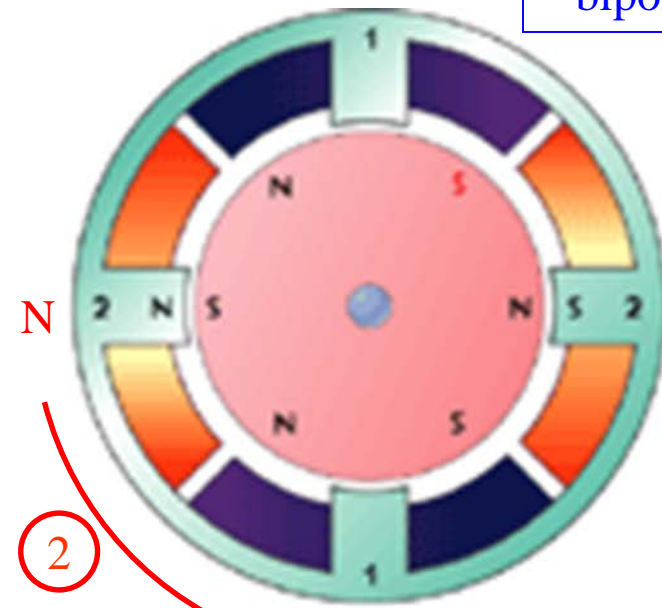
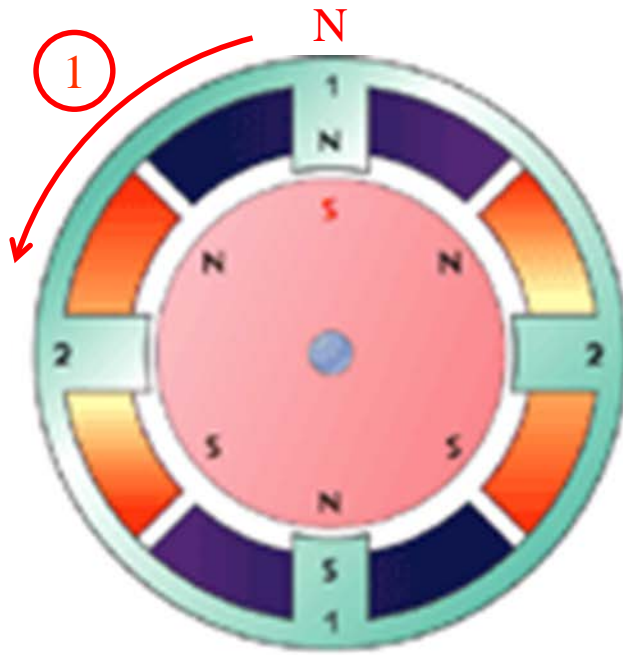
2-phase, 6-pole,
bipolar motor

Electrical Cycle

Magnetic
pole
rotates
around
stator.

After 4
steps, the
north pole
returns to
top of
stator.

This is
one
electrical
cycle.



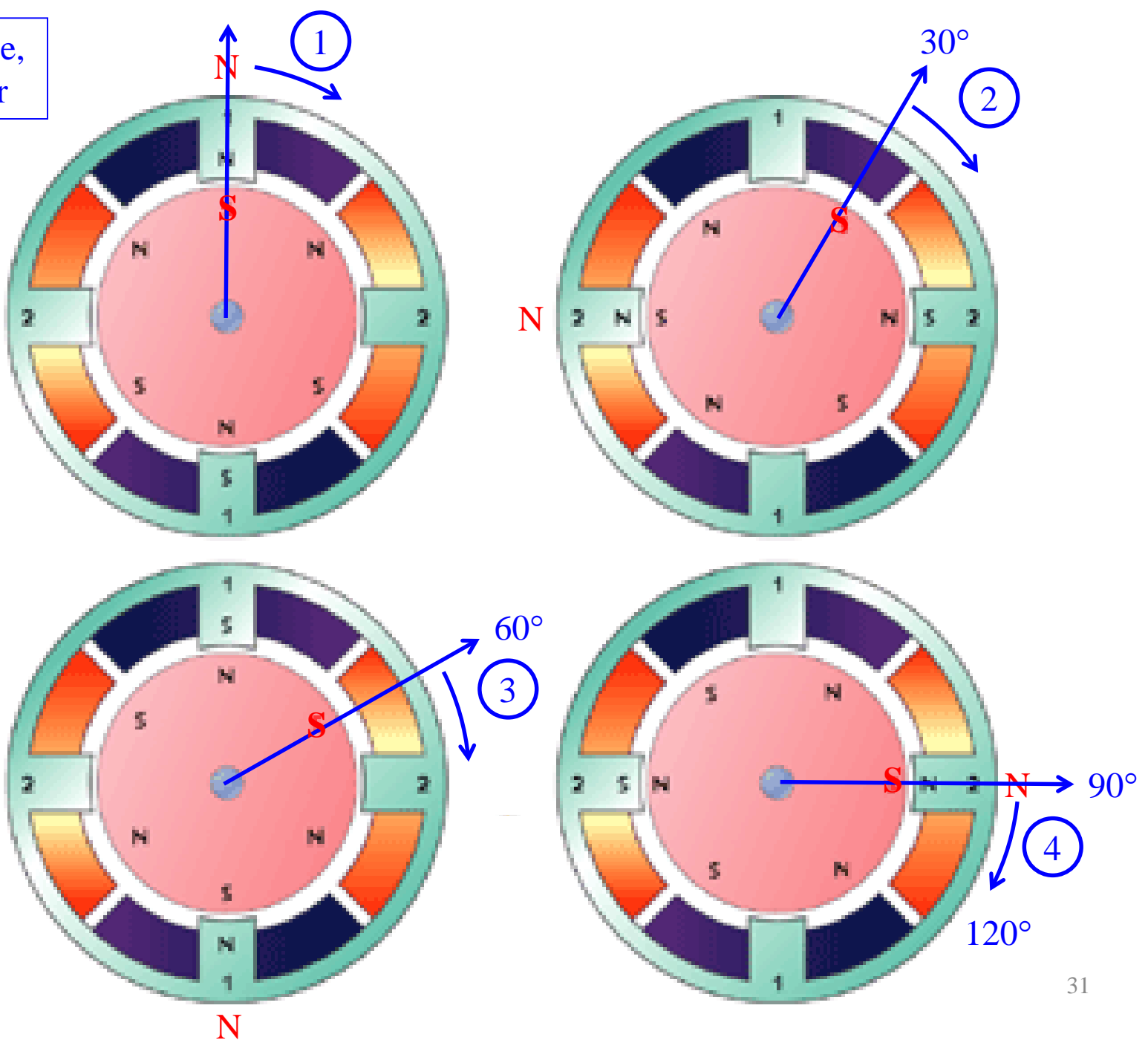
2-phase, 6-pole,
bipolar motor

Mechanical Cycle

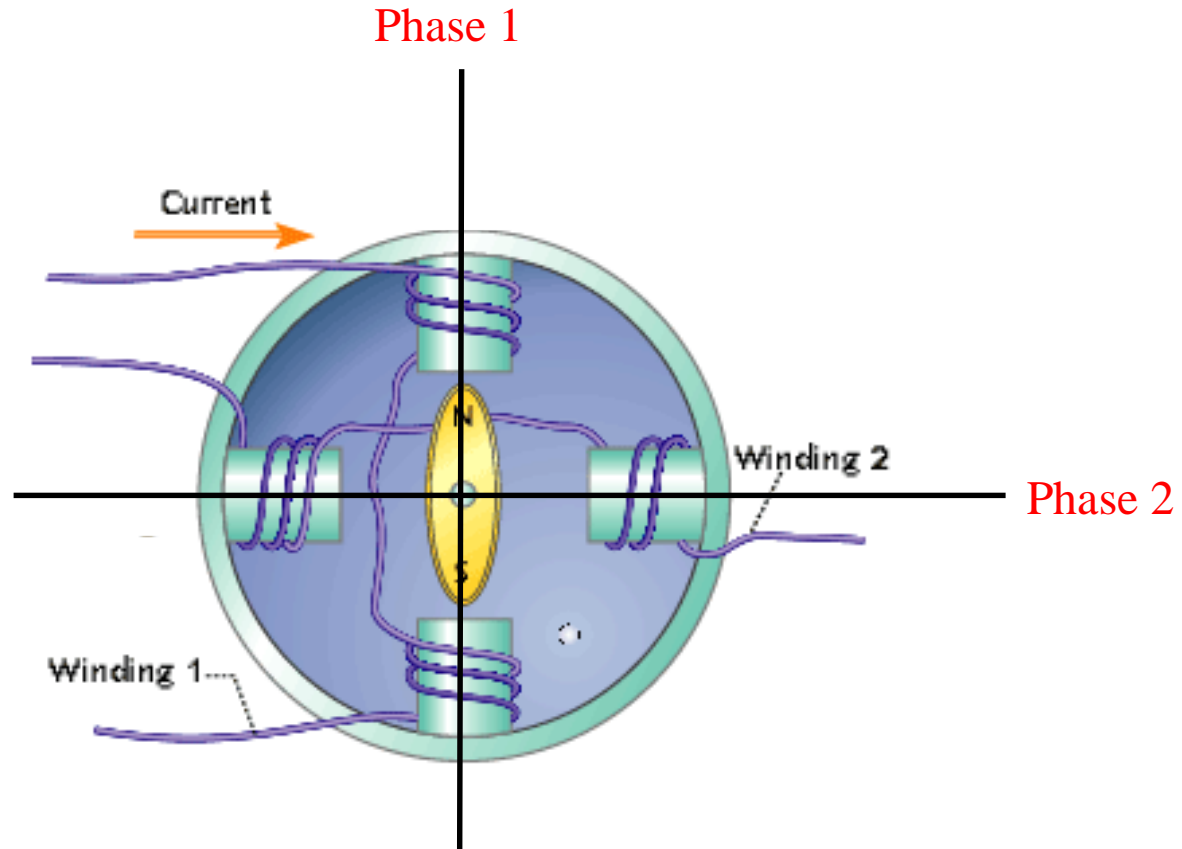
Rotor
rotates
in opposite
direction
of stator
pole
rotation.

After 4
steps, the
rotor is at
 120°

This is 1/3
mechanical
cycle.



- **Conclusion:** For a 2-phase, 6-pole, bipolar motor, after one electrical cycle (4 steps), the rotor has rotated 120° . So, it takes 3 electrical cycles for the rotor to rotate 360° or 1 mechanical cycle.
- For the 2-phase, 2-pole motor, bipolar below, after one electrical cycle (4 steps), the rotor has rotated 360° . So, it takes 1 electrical cycle for the rotor to rotate 360° or 1 mechanical cycle.



Summary (bipolar motor)

1. Two-phase, **two-pole** stepper motor ($P = 2$)

- 1 electrical cycle = 1 mechanical cycle
- 1 step = $90 \text{ deg} = 180 / 2 = 180 / P \text{ (deg)}$
- $T_e = T_m = T_m (2 / 2) \text{ (sec)}$ ($T = \text{period}$)

2. Two-phase, **six-pole** stepper motor ($P = 6$)

- 1 electrical cycle = $1/3$ mechanical cycle
- 1 step = $30 \text{ deg} = 180 / 6 = 180 / P \text{ (deg)}$
- $T_e = T_m / 3 = T_m (2 / 6) \text{ (sec)}$

3. Two-phase, **P-pole** stepper motor

- 1 step = $180 / P \text{ (deg)}$
- $T_e = T_m (2 / P) \text{ (sec)}$
- $f_e = f_m (P / 2) \text{ (Hz)}$

Advantages of a Stepper Motor

1. Cost-effective
2. Simple designs
3. High reliability
4. Brushless construction (maintenance-free)
5. If windings are energized at standstill, the motor has full torque
6. No feedback mechanisms required (but may be desirable)
7. A wide range of rotational speeds can be attained as the speed is proportional to the frequency of the input pulses
8. Known limit to the dynamic position error

Disadvantages of a Stepper Motor

1. Low efficiency (Motor uses substantial amount of power regardless of the load)
2. Torque drops rapidly with speed
3. Prone to resonance
4. Missed steps
5. Cannot accelerate loads very rapidly
6. Motor gets very hot in high performance configurations
7. Motor is noisy at moderate to high speeds
8. Low output power for size and weight

Stepper Motors – Many Applications

1. **Aircraft** – In the aircraft industry, stepper motors are used in aircraft instrumentations, antenna and sensing applications, and equipment scanning
2. **Automotive** – The automotive industry implements stepper motors for applications concerning cruise control, sensing devices, and cameras. The military also utilizes stepper motors in their application of positioning antennas
3. **Chemical** – The chemical industry makes use of stepper motors for mixing and sampling of materials. They also utilize stepper motor controllers with single and multi-axis stepper motors for equipment testing
4. **Consumer Electronics and Office Equipment** – In the consumer electronics industry, stepper motors are widely used in digital cameras for focus and zoom functionality features. In office equipment, stepper motors are implemented in PC-based scanning equipment, data storage drives, optical disk drive driving mechanisms, printers, and scanners

Stepper Motors – Many Applications

5. **Industrial** – In the industrial industry, stepper motors are used in automotive gauges, machine tooling with single and multi-axis stepper motor controllers, and retrofit kits which make use of stepper motor controllers as well. Stepper motors can also be found in CNC machine control
6. **Medical** – In the medical industry, stepper motors are utilized in medical scanners, microscopic or nanoscopic motion control of automated devices, dispensing pumps, and chromatograph auto-injectors. Stepper motors are also found inside digital dental photography (X-RAY), fluid pumps, respirators, and blood analysis machinery, centrifuge
7. **Scientific Instruments** –Scientific equipment implement stepper motors in the positioning of an observatory telescope, spectrographs, and centrifuge
8. **Surveillance Systems** – Stepper motors are used in camera surveillance

Recommended Stepper Motor Videos

[Microchip Stepper Motor Video – Part 1 \(18 min\)](#)

[Microchip Stepper Motor Video – Part 2 \(12 min\)](#)

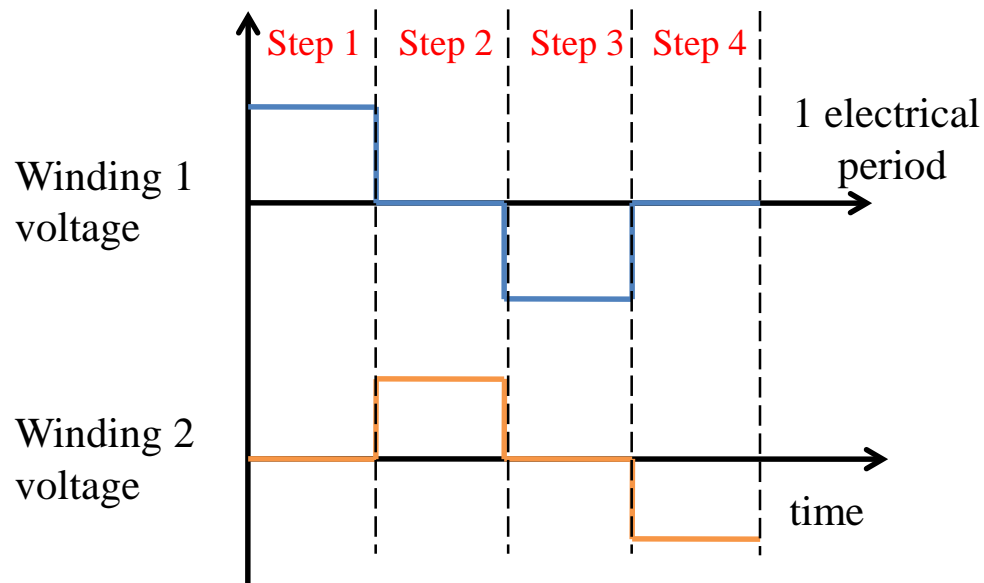
Lab 8 Outline

1. Stepper Motor Fundamentals
2. Stepper Motor Classifications
- 3. Full Stepping, Half Stepping, and Micro-stepping**
4. Lab 8 Setup

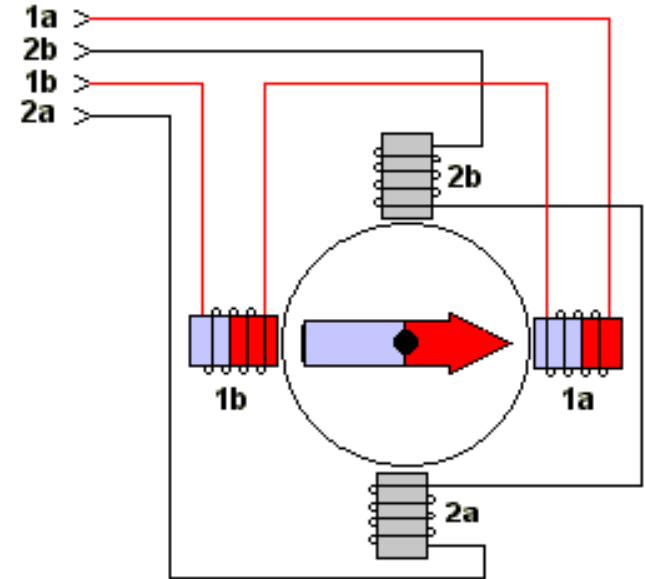
Bipolar Driving Modes

Winding voltage: Four steps, one electrical period:

1. Winding 1 positive, Winding 2 zero
2. Winding 2 positive, Winding 1 zero
3. Winding 1 negative, Winding 2 zero
4. Winding 2 negative, Winding 1 zero

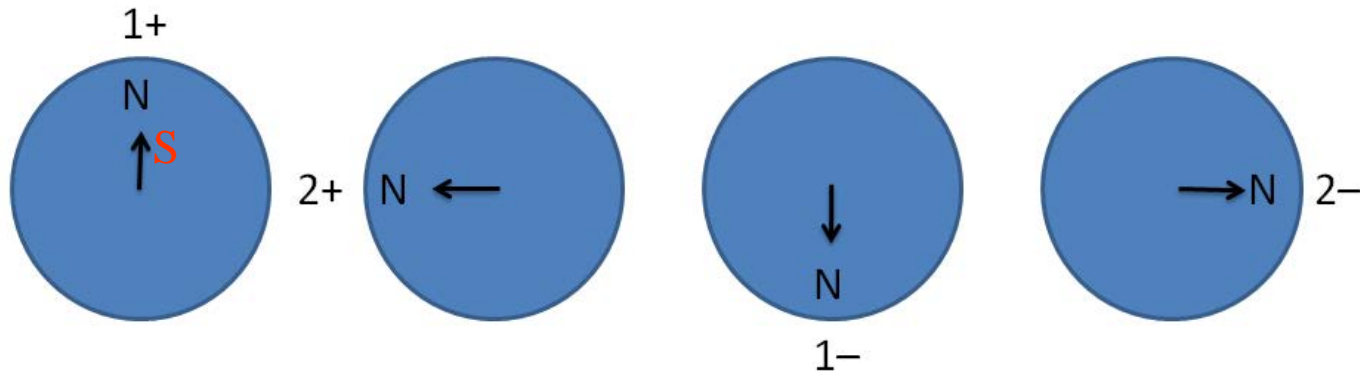


Two-Coil Excitation Full Step

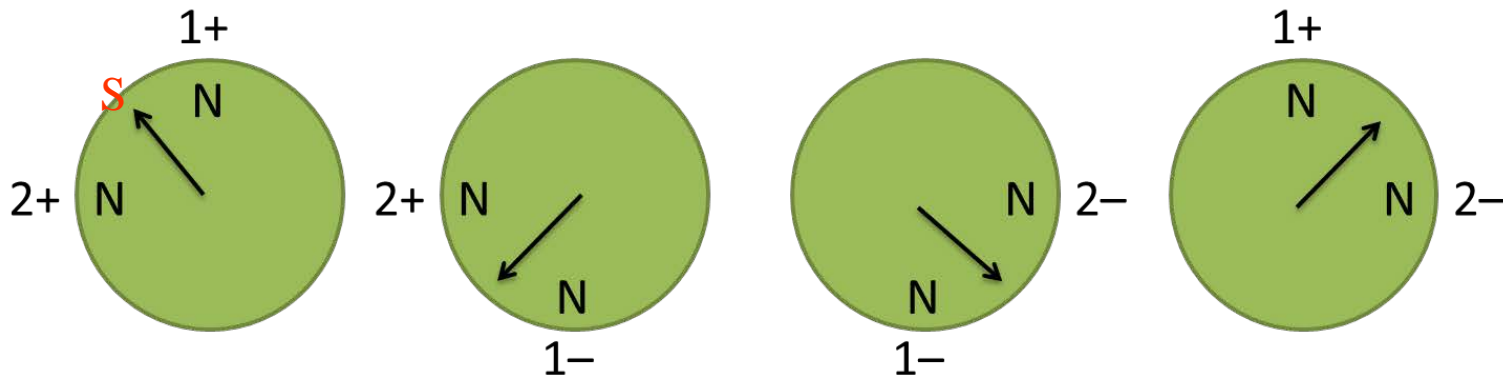


	1a	1b	2a	2b
Step 1	1	0	0	0
Step 2	0	0	0	1
Step 3	0	1	0	0
Step 4	0	0	1	0

Bipolar Driving Modes



Single-Coil
Excitation

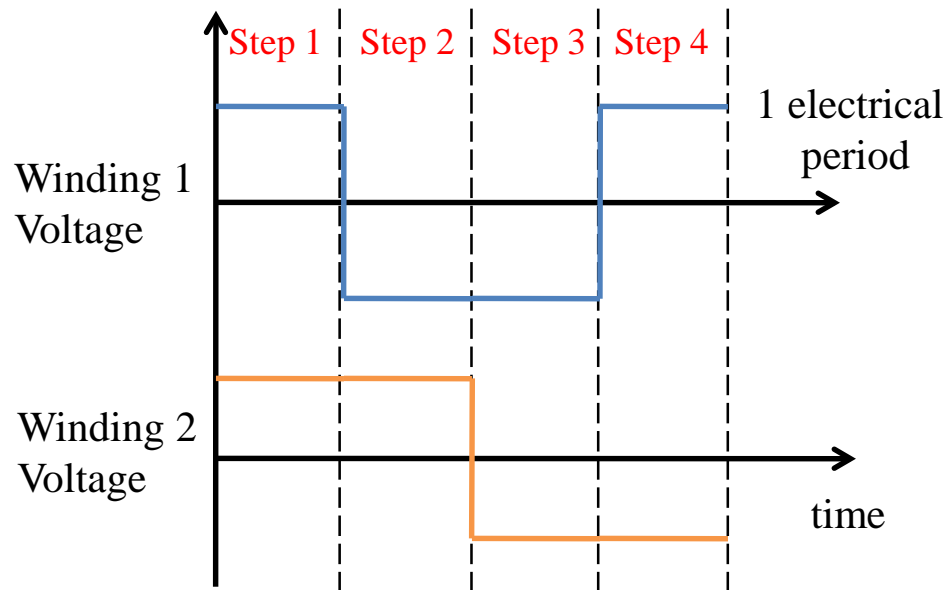


Two-Coil
Excitation

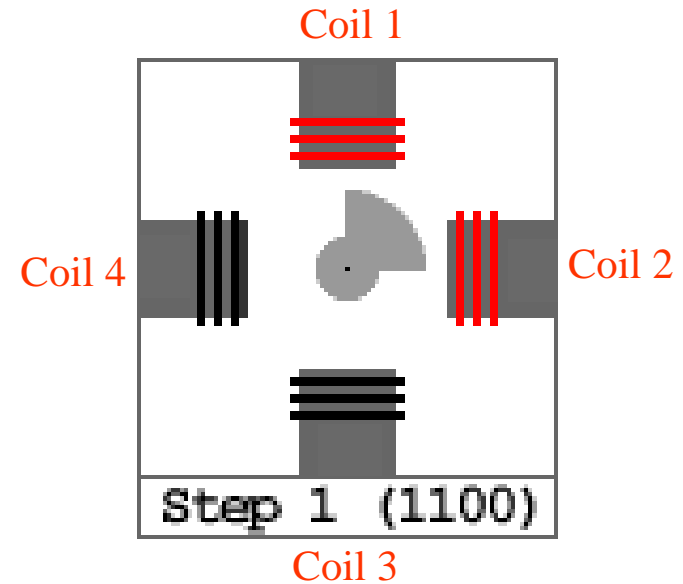
- We can energize two adjacent windings at the same time.
- Is more energy is required?
- Is more torque is obtained?
- "1-" means reverse the current in Winding 1.

Bipolar Driving Modes

Two-Coil Excitation
Full-Step, High Torque



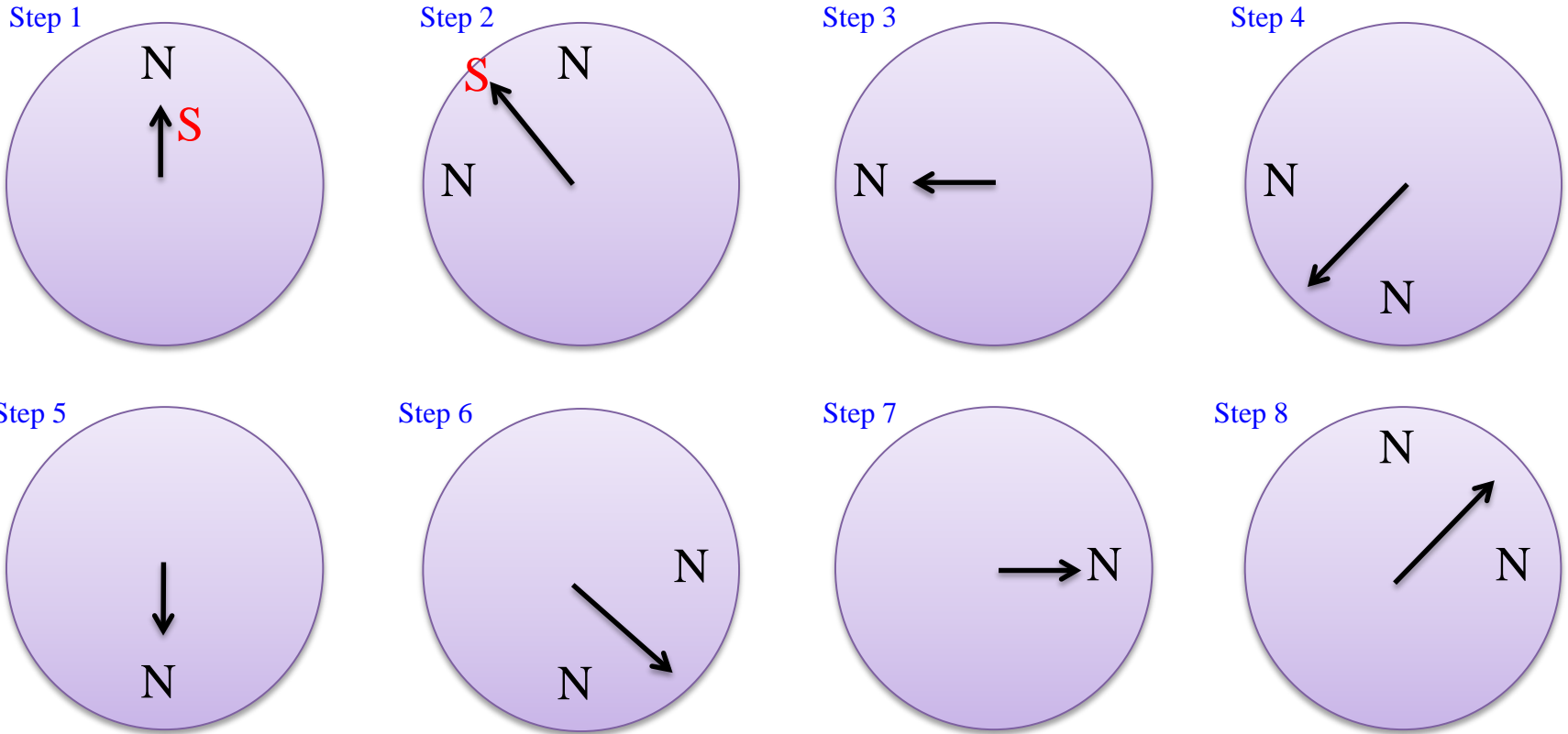
(animation)



	Coil 1234
Step 1	1100
Step 2	0110
Step 3	0011
Step 4	1001

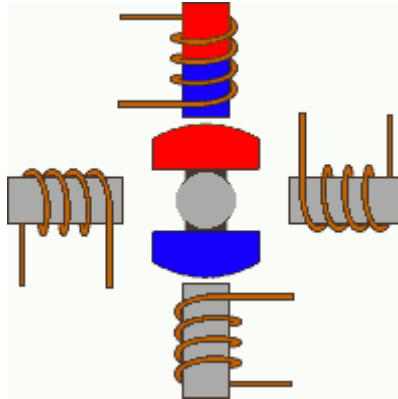
Half-stepping (bipolar)

Combine the two sets of excitations shown previously.



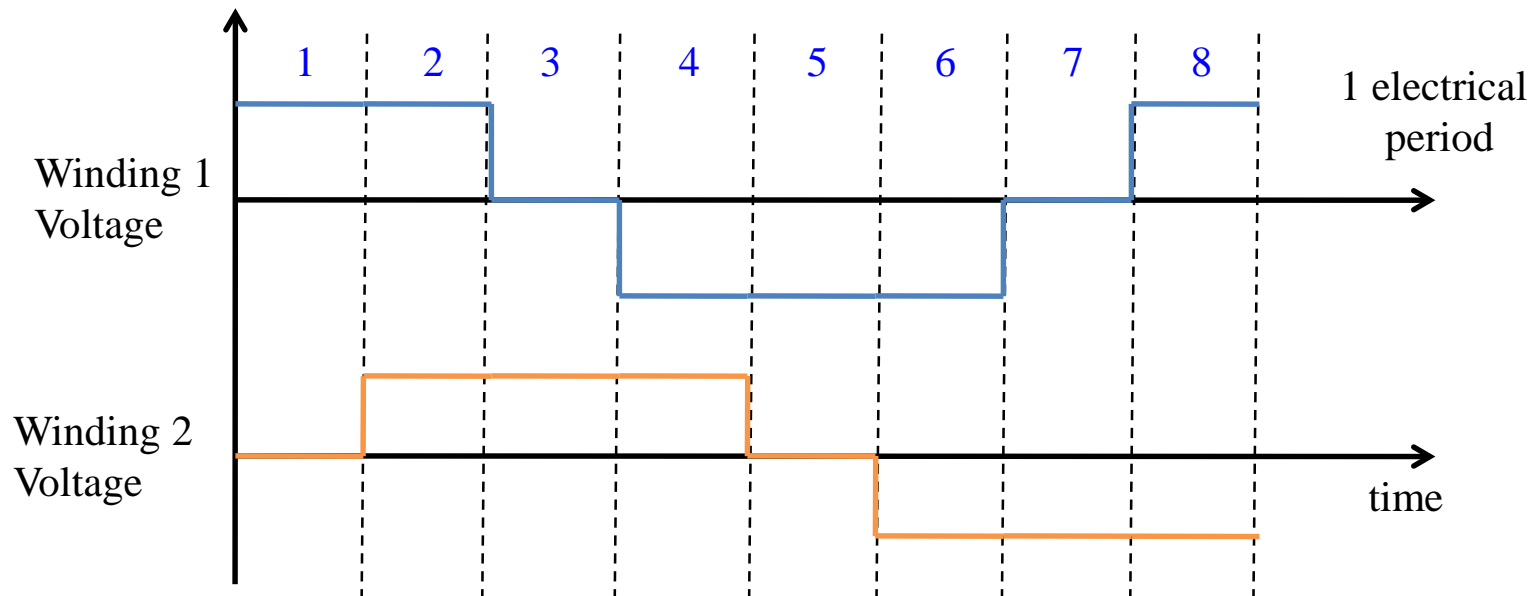
Eight half-steps per electrical cycle.
One half-step = $(90 / \text{Poles})$ degrees.

Half-step Winding Voltages



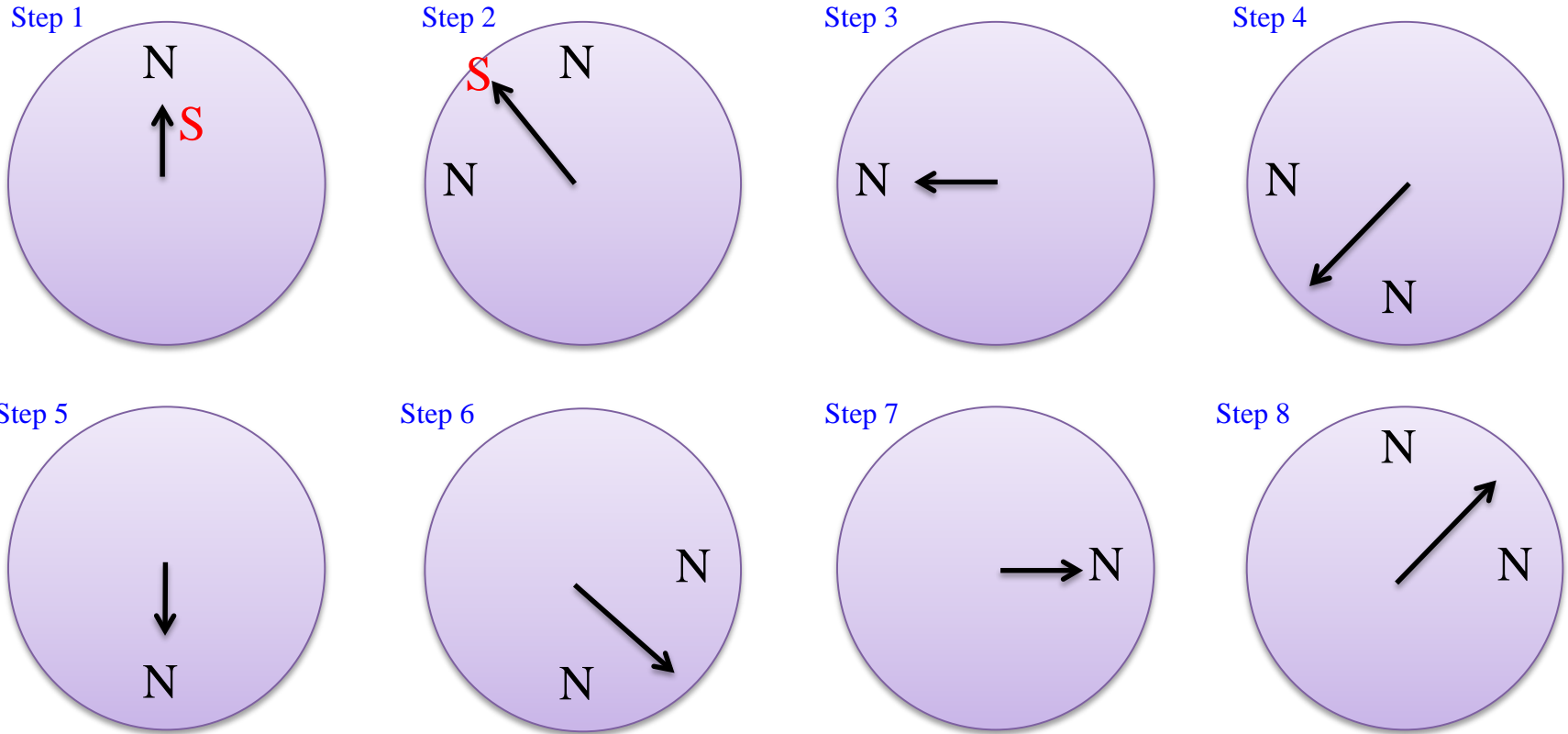
(animation)

Eight half-steps, one electrical cycle



Micro-stepping

Problem with half-stepping: **Uneven torque**



To even out the torque, if one winding is off, increase the current in the other winding. Now what do the waveforms look like? (See next slide . . .)

Micro-stepping

Winding 1
Voltage

Half-stepping

Winding 2
Voltage

1 electrical
period

time

1 step

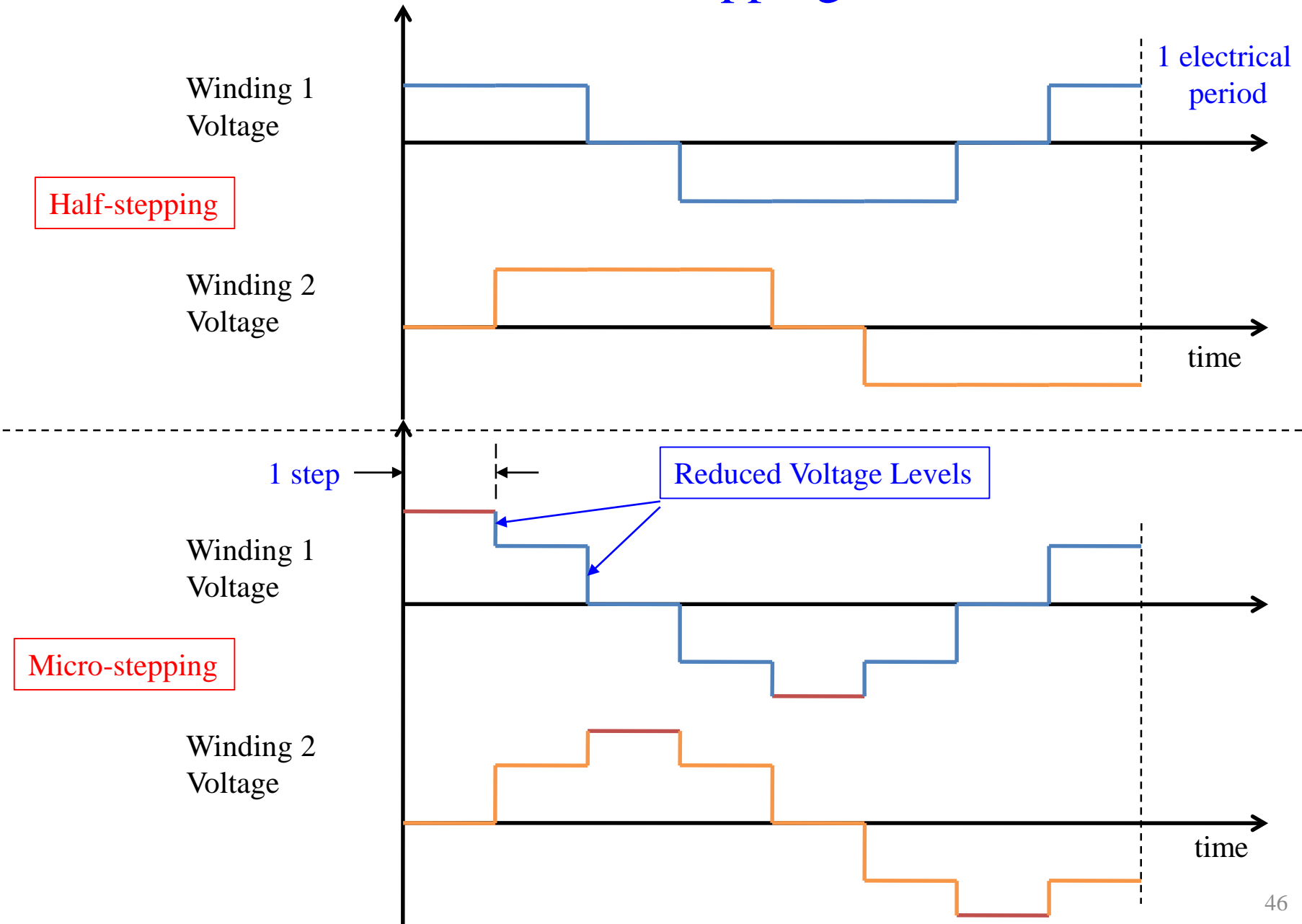
Winding 1
Voltage

Micro-stepping

Winding 2
Voltage

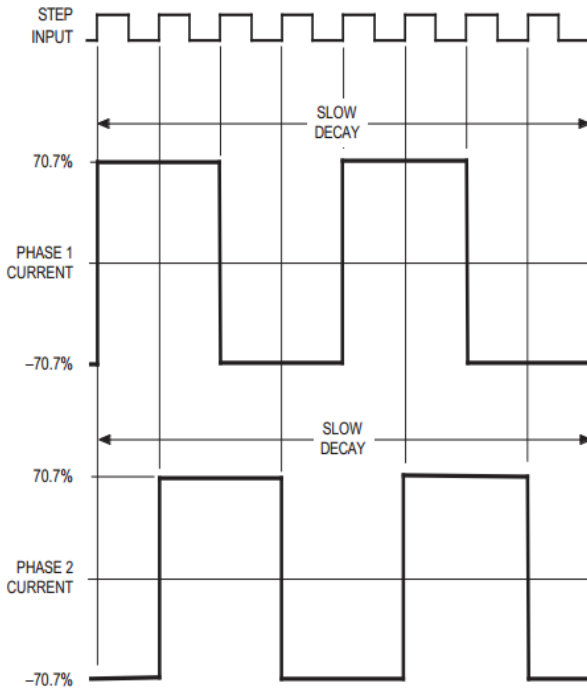
Reduced Voltage Levels

time

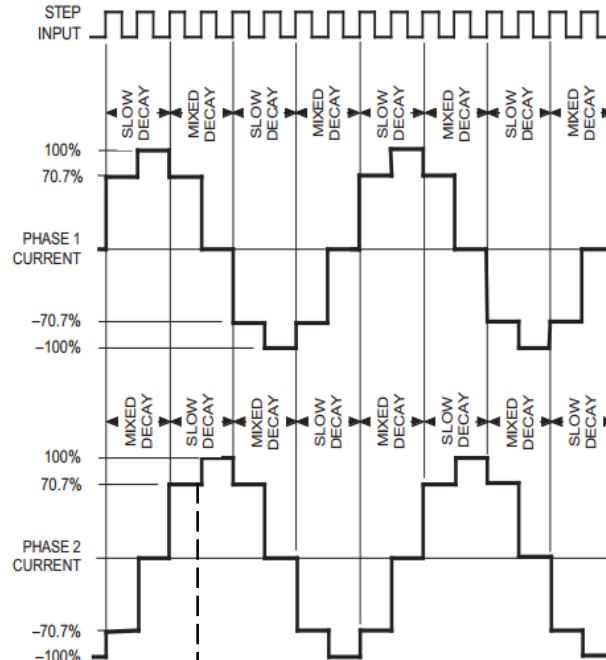


Micro-stepping

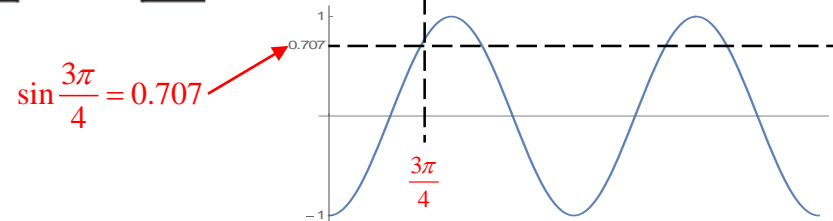
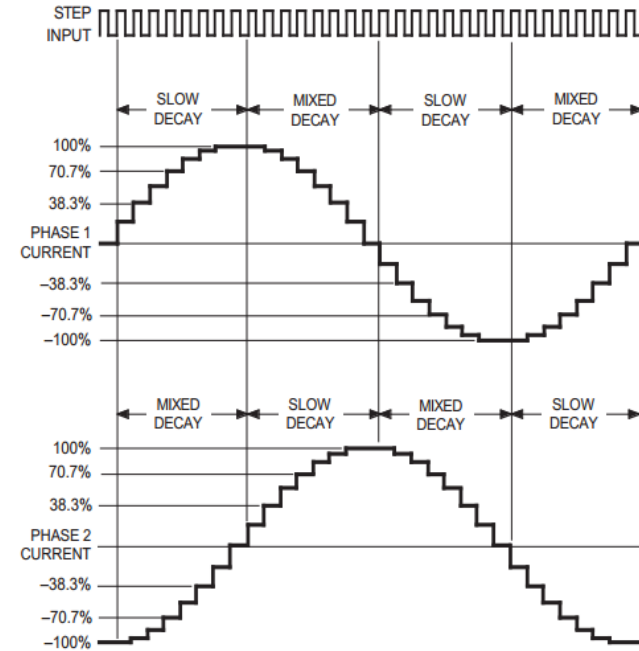
Full Step Operation



Half Step Operation

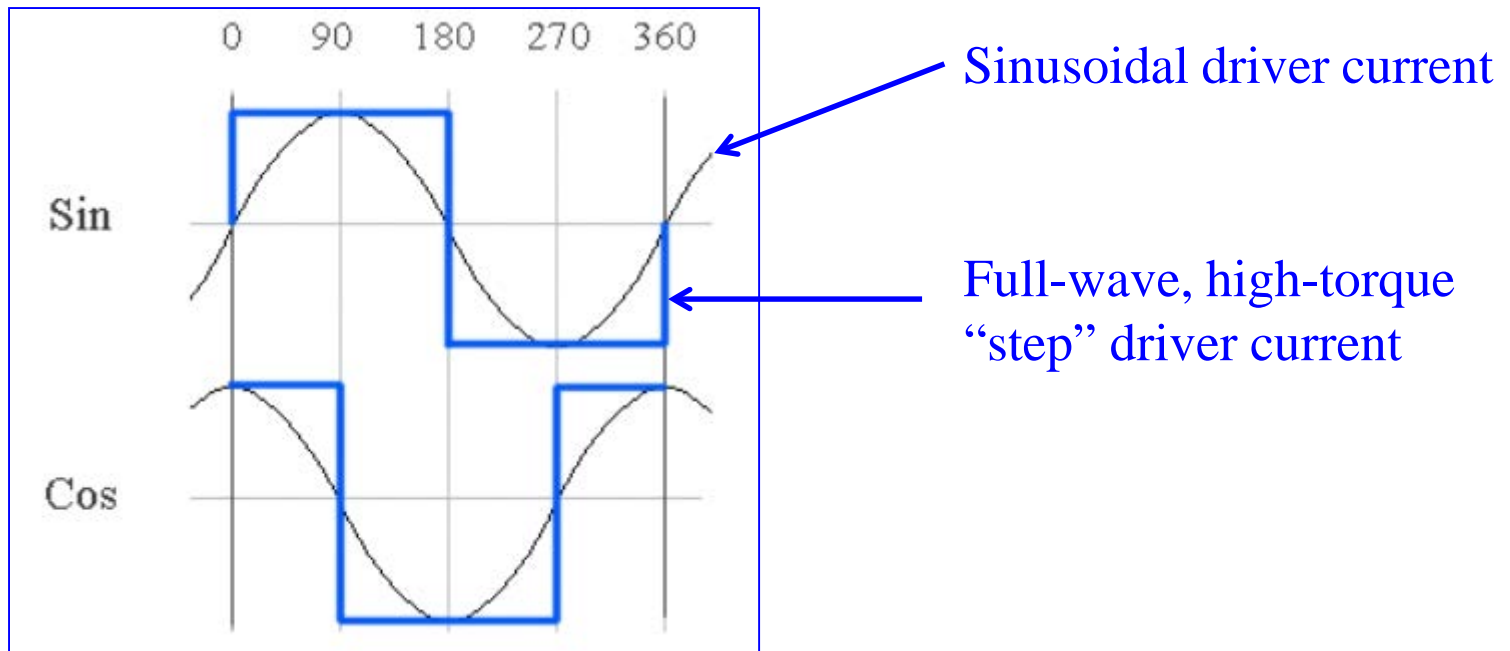


8 Microstep/Step Operation



Micro-stepping

- Two sine waves in '**quadrature**' (90 degrees out of phase) form the **ideal** current drive for a 2-phase, bipolar stepper motor.
- If the two stepper coils follow the sinusoidal waveforms depicted in the diagram, the motor will run quietly and smoothly and the "step" associated with stepper motors will disappear.



Micro-stepping

Why is the torque constant with sinusoidal driving current?

The magnitude of the torque on the rotor is proportional to the vector sum of the magnitudes of the **B**-fields in the windings:

$$|\tau| = a(|\mathbf{B}_1| + |\mathbf{B}_2|)$$

For perpendicular **B**-fields, the magnitude of the torque is given by

$$|\tau| = a\sqrt{|\mathbf{B}_1|^2 + |\mathbf{B}_2|^2} = b\sqrt{I_1^2 + I_2^2}$$

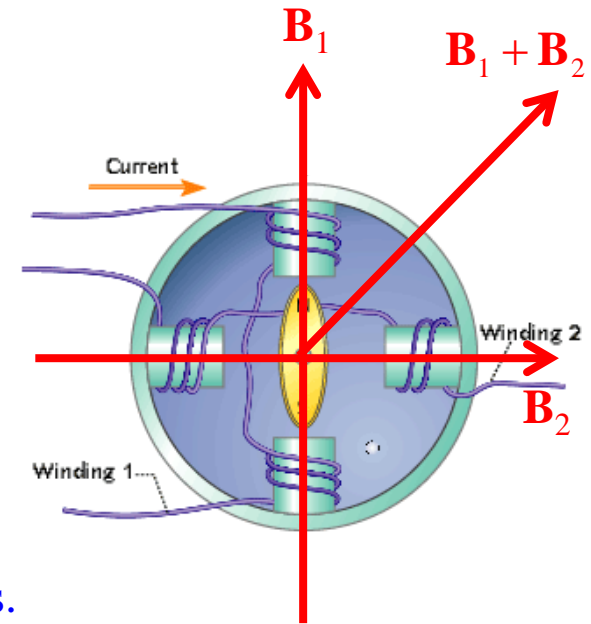
where a , b are constants and I_1 and I_2 are the winding currents.

The magnitudes of the **B**-fields are proportional to the currents.)

If the currents are sinusoidal, of equal magnitude, and 90° out of phase, then

$$I_1 = I_{peak} \sin \omega t \quad \text{and} \quad I_2 = I_{peak} \cos \omega t$$

$$\tau = bI_{peak} \sqrt{\sin^2 \omega t + \cos^2 \omega t} = bI_{peak} = \text{constant}$$

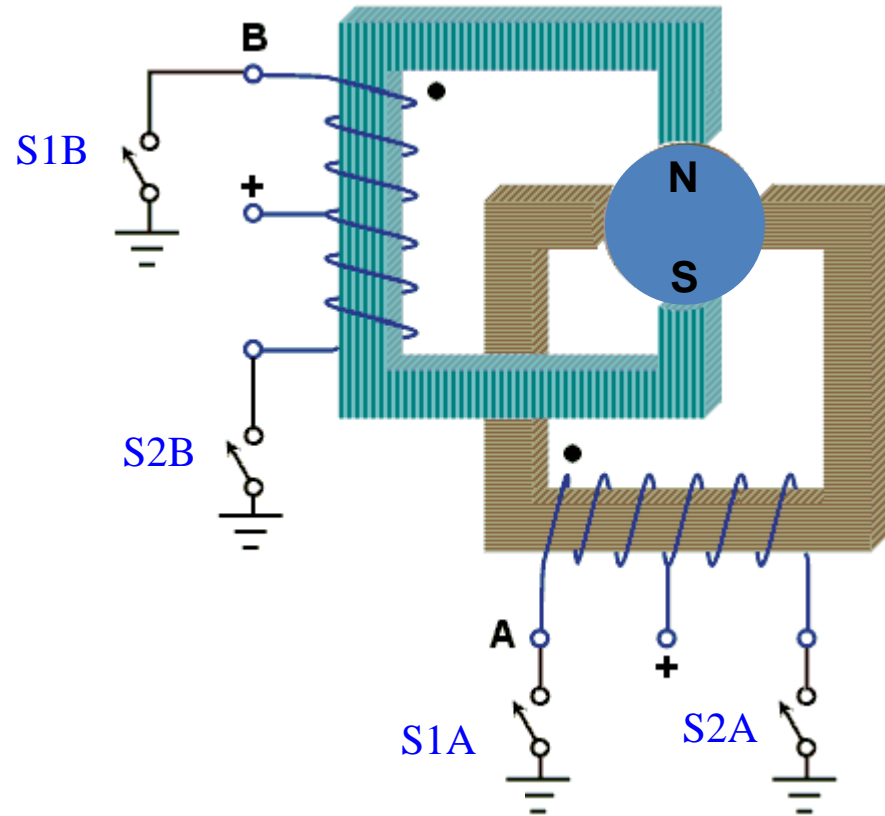


2-phase, 2-pole Unipolar Motor Drive

Two-Coil Excitation
Full-Step, High Torque

Step	Winding A		Winding B	
	S1A	S2A	S1B	S2B
1	0	1	0	1
2	1	0	0	1
3	1	0	1	0
4	0	1	1	0

Logic 0: Switch open
Logic 1: Switch closed

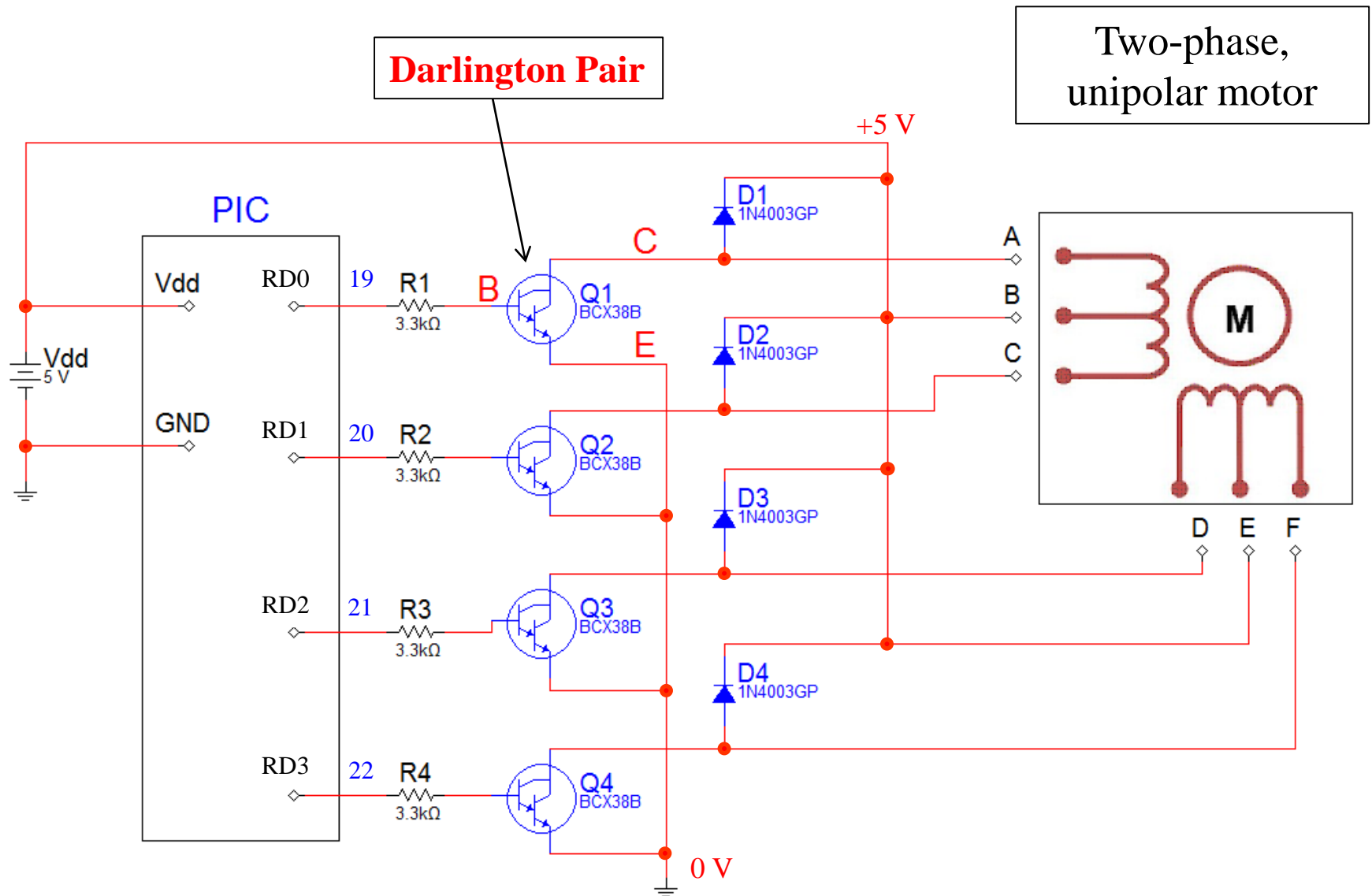


Note: The unipolar motor is being driven in a bipolar mode.

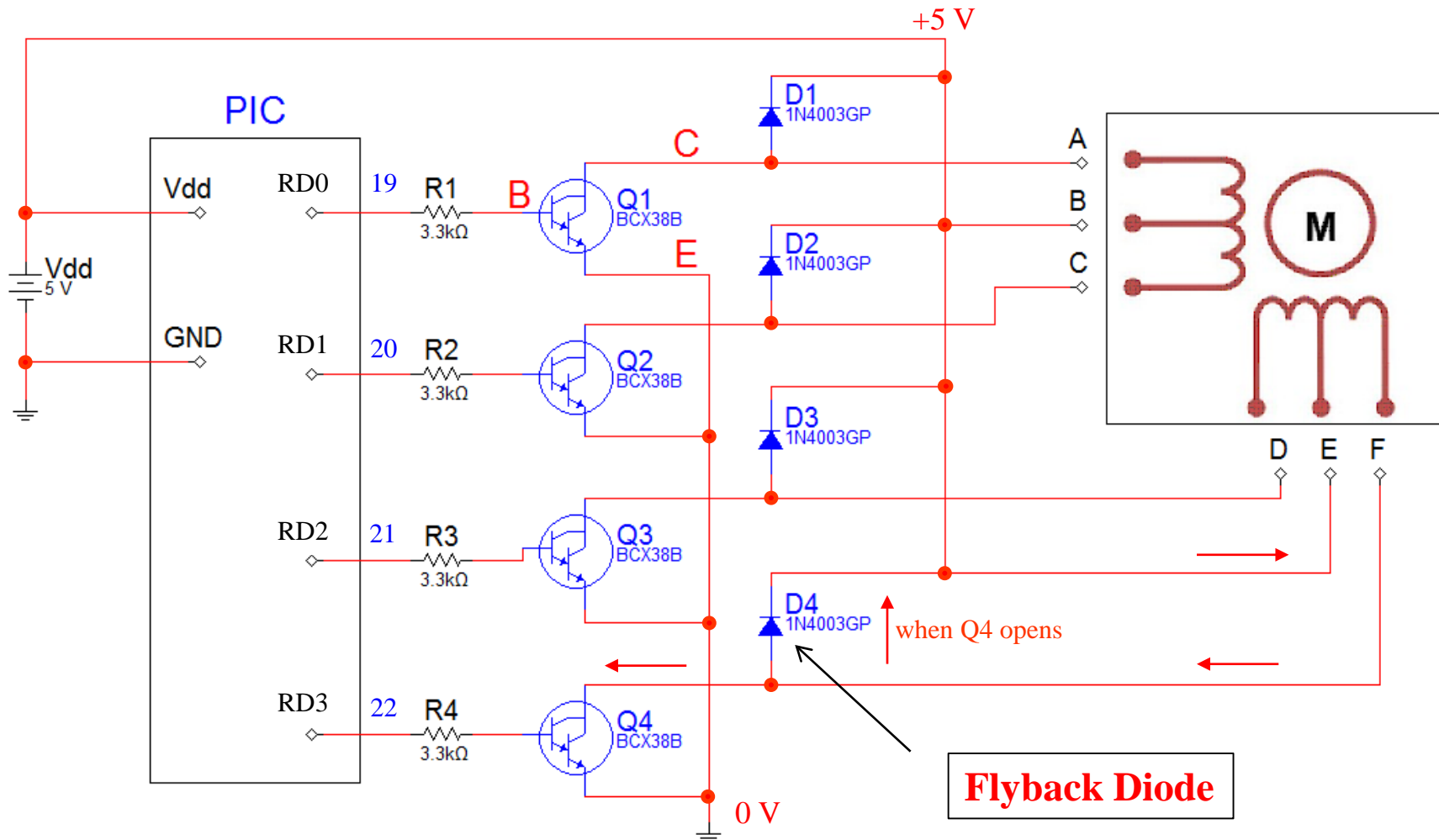
Lab 8 Outline

1. Stepper Motor Fundamentals
2. Stepper Motor Classifications
3. Full Stepping, Half Stepping, and Micro-stepping
4. Lab 8 Setup

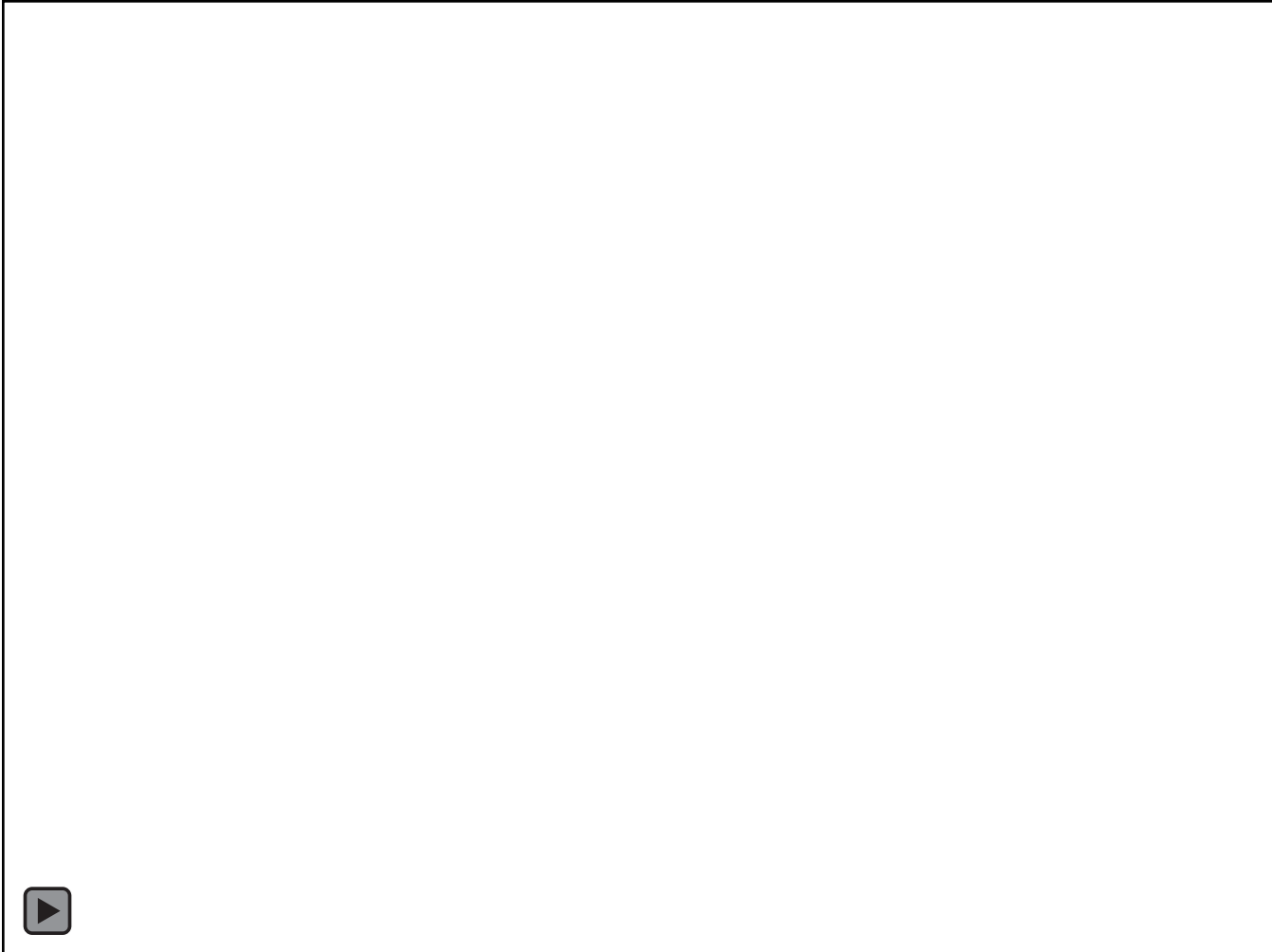
Lab 8 Schematic



A **flyback diode** (also called a **snubber diode**, **commutating diode**, **freewheeling**, or **clamping diode**), is a diode used to eliminate **flyback**, which is the sudden voltage spike seen across an inductive load when its supply current is suddenly reduced or interrupted.



500 kV Circuit Switch Opening



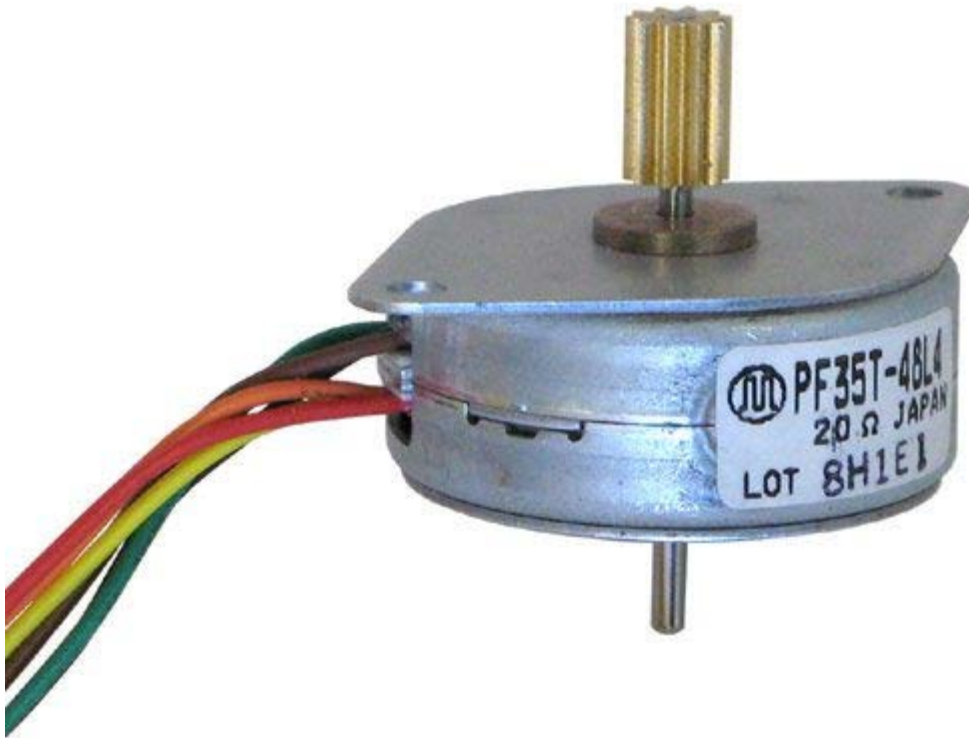
Stepper motors in the kits

Caution:

1. The stepper motors in the kits are from different manufacturers, often unidentified.
2. The numbers on them might not be part numbers.
3. The colors of the lead wires vary.
4. Some of the lead wires are very thin stranded wire. They won't make a good connection. **Twisting the leads is not acceptable.** We have header pins that you can crimp on your motor leads.
5. When the program is halted, reset the program, otherwise the PORTD bits will continue to provide power to the motor, and the LM7805 regulator will become very hot depending on the motor specifications. It may also become very hot during motor operation.

Stepper motors in the kits

Mabuchi PF35T-48L4



UNIPOLAR STEPPER

Mabuchi # PF35T-48L4

Four phase, unipolar stepper motor with 6 leads. 3.6 Degree step angle. 20 Ohms. 7V, 350mA. 1.38" diameter x 0.59" long.

Mounting flange has two holes on 1.68" centers. Dual shaft, 0.078" dia. Brass gear on one side, 10 teeth, 0.25" dia. 2.75" leads with socket connector.

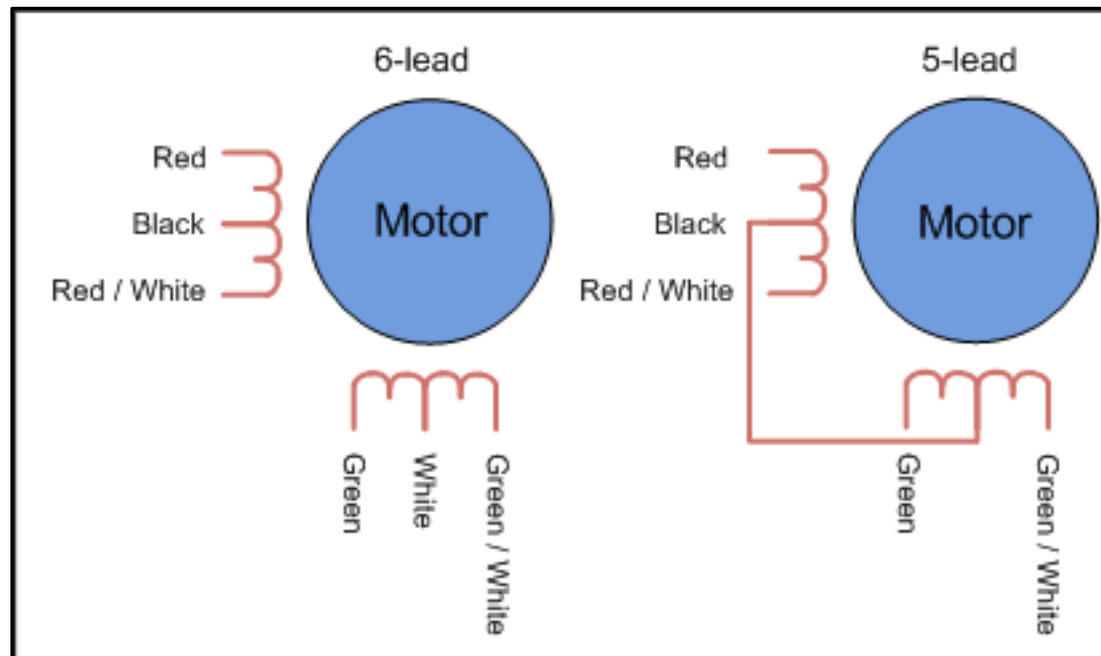


Note: Some manufacturers call a two-phase unipolar stepper motor a four-phase motor.

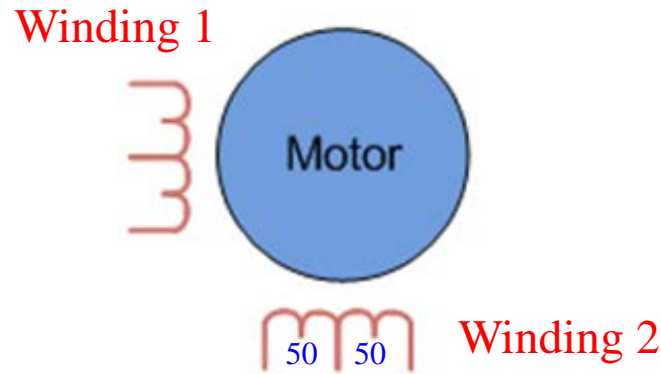
Two-phase, Unipolar Schematic

Your motor may have 5 or 6 leads.

Colors may vary.



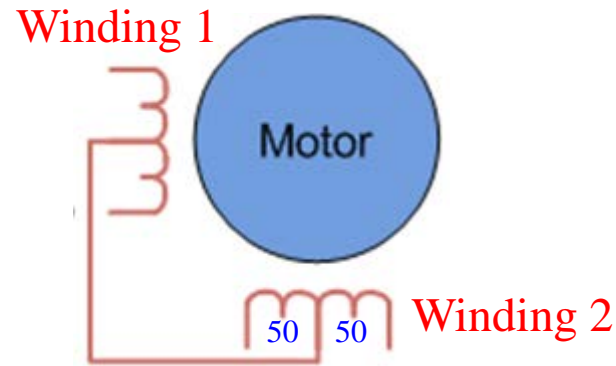
Determining Lead Connections for 6-Lead Motor



50 ohms is typical.
Your motor may be
different.

1. Choose any lead X. It will be a center tap or an end lead.
2. Check the resistance between X and any other lead.
3. The resistance will be infinity, 50, or 100 ohms.
4. If two of the resistances are 50 ohms, then X is a center tap.
5. Otherwise, X is an end lead and one of the others is a center tap.
6. After identifying the center taps, the end leads may have to be swapped to obtain proper motor rotation.

Determining Lead Connections for 5-Lead Motor

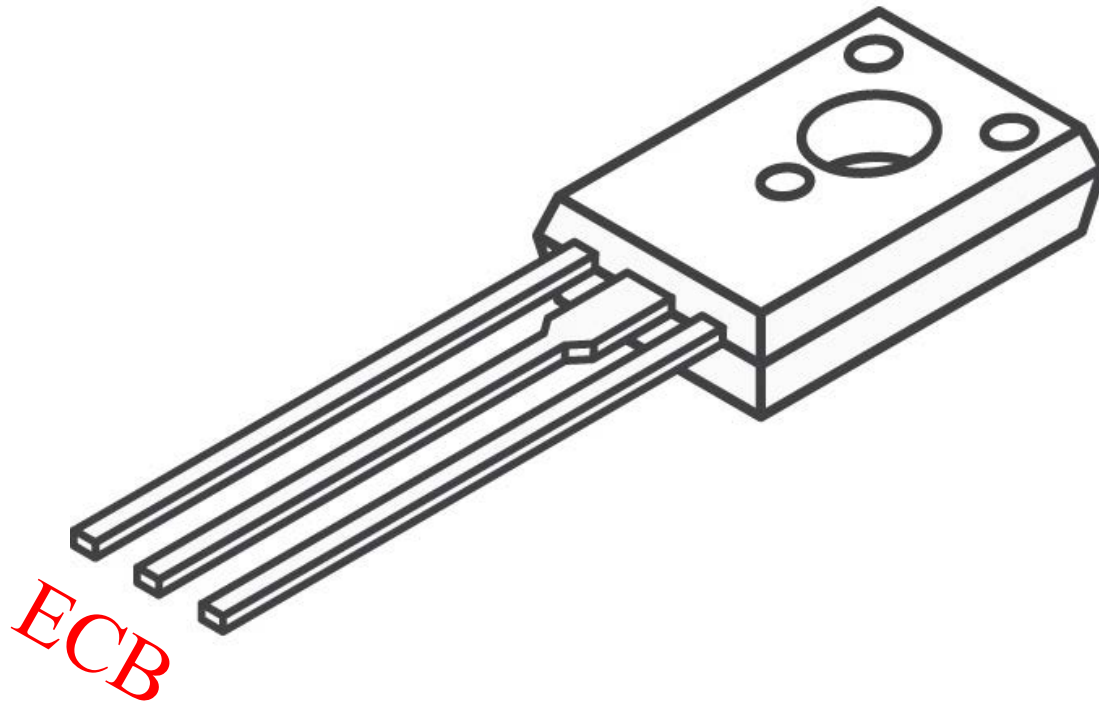


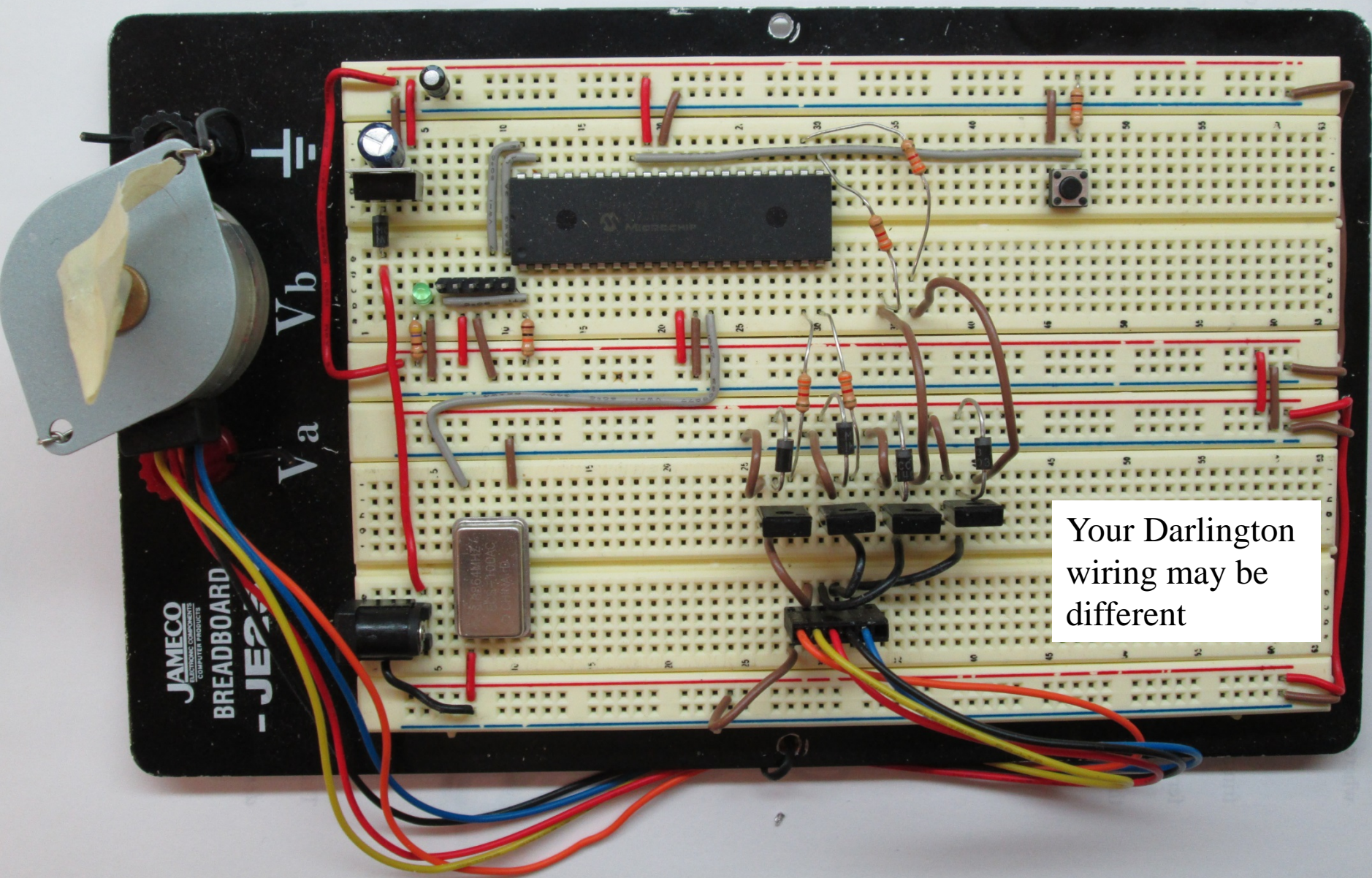
1. Choose any lead X. It will be a center tap or an end lead.
2. Check the resistance between X and any other lead.
3. The resistance will be 50 or 100 ohms
4. If all of the resistances are 50 ohms, then X is the center tap.
5. Otherwise, X is an end lead and one of the others is the center tap.
6. After identifying the center tap, the end leads may have to be swapped to obtain proper motor rotation.

Panasonic 2SD1276A



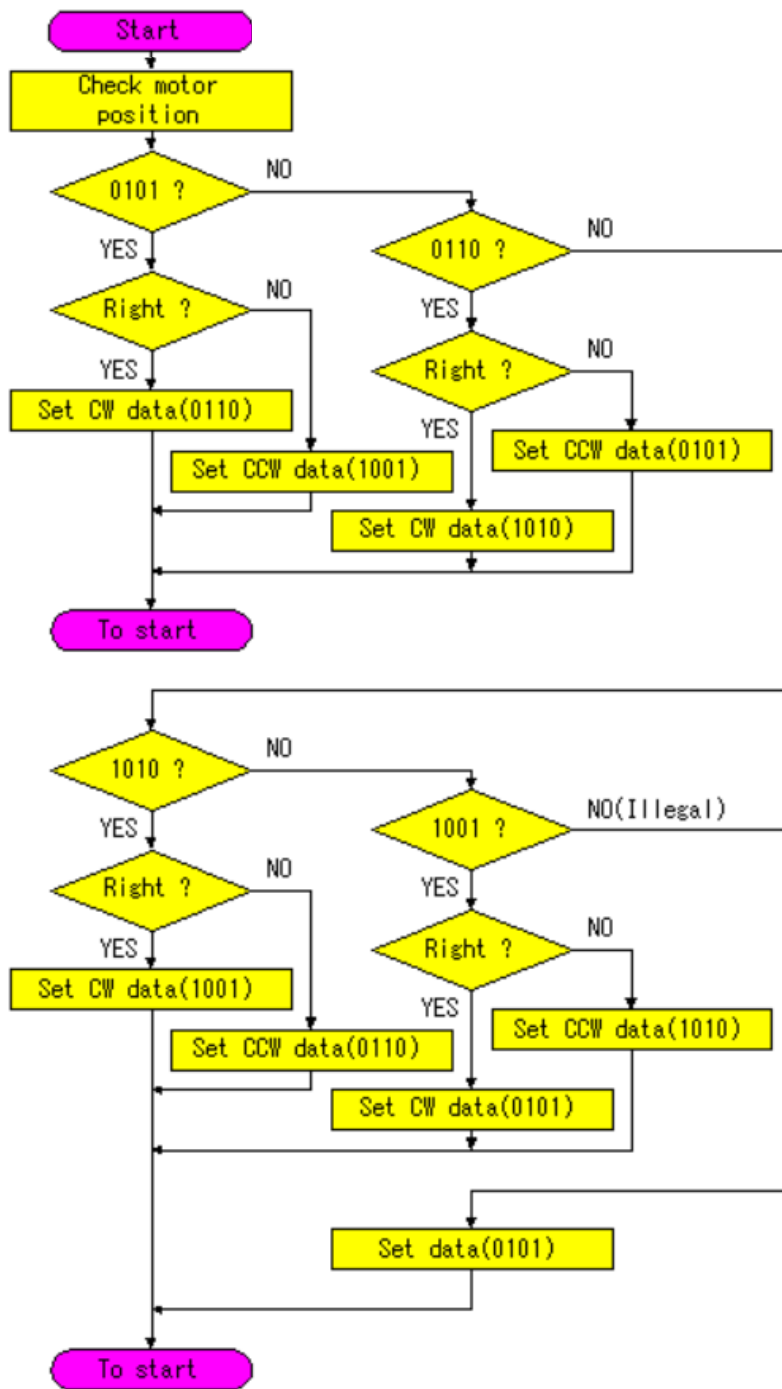
Fairchild BD679A





Your Darlington wiring may be different

Step Control Flow Chart Two-Coil Excitation, Full-Step, High Torque



Rotate
Left
(CCW)

Winding 1		Winding 2	
Q1	Q2	Q3	Q4
0	1	0	1
1	0	0	1
1	0	1	0
0	1	1	0
0	1	0	1
1	0	0	1
1	0	1	0
0	1	1	0

Rotate
Right
(CW)

Modes: CCW, CW, Stop

Undocumented Instructions

1. Alternative mnemonics for standard instructions
2. Instructions that were not fully implemented/tested
3. Product line mergers/compatibility issues (portability)
4. Used to facilitate development
5. Not recommended for new designs (liability)
6. See MPASM Quick Reference Card for more pseudo-instructions

- Suppose the result of some instruction sets or clears the Z-bit.

- bz: (branch if result is zero) **if Z = 1, branch to <label>**

`bz <label> ⇔ btfsc STATUS, Z`
`goto <label>`

- bnz: (branch if result is not zero) **if Z = 0, branch to <label>**

`bnz <label> ⇔ btfss STATUS, Z`
`goto <label>`

Lab08a.asm

```
;*****  
; Assembler Directives  
;*****  
  
WaitTime          equ          d'50'    ; Wait 50 ms between each motor step  
  
Position1          equ          b'0101' ; step motor position 1  
Position2          equ          b'1001' ; step motor position 2  
Position3          equ          b'1010' ; step motor position 3  
Position4          equ          b'0110' ; step motor position 4
```

Lab08a.asm

```
INIT
    banksel    TRISD                ; Set RD0, RD1, RD2, RD3 as outputs
    movlw      0xF0                ; for motor drive
    movwf      TRISD

    banksel    PORTD
    clrf       mode                ; mode = 0 = stop
    clrf       count1              ; Clear counter
    clrf       count2              ; Clear counter

    movlw      Position1
    movwf      PORTD                ; Write PORTD, move to Position1
Start
    movlw      d'2'                ; mode = 2 = rotate CCW
    movwf      mode

drive
    movf       mode, W              ; Read mode. mode = 0 = stop
    bz         Start                ; Branch on zero. If W = 0, goto Start
```

Lab08a.asm

```
        movlw    WaitTime      ; Set loop count (1 msec units)
        movwf    count1        ; count1 = WaitTime = 50 (msec)

loop    call     timer          ; timer = 1 msec delay
        decfsz   count1, F      ; count 1 - 1 = 0 ?
        goto     loop           ; No. Continue

        movf     PORTD, W       ; Read PORTD
        sublw    Position1
        bnz      drive2         ; PORTD != Position1
        movf     mode, W        ; Read mode
        sublw    d'1'           ; CW ?
        bz       drive1         ; Yes. CW
        movlw    Position2
        goto     drive_end      ; Jump to PORTD write

.....

drive_end
        movwf    PORTD          ; Write PORTD
        goto     start          ; Jump to start
```

First time through:
mode = 2 = CCW
PORTD = Position1 →
Position 2

```

        movlw    WaitTime      ; Set loop count (1 msec units)
        movwf    count1        ; Save loop count
loop    call     timer          ; Wait 1 msec
        decfsz   count1, F      ; count - 1 = 0 ?
        goto     loop          ; No. Continue
        movf     PORTD, W       ; Read PORTD
        sublw    Position1
1      bnz       drive2         ; Unmatch
        movf     mode, W        ; Read mode
        sublw    d'1'          ; CW ?
2      bz        drive1         ; Yes. CW
        movlw    Position2
        goto     drive_end      ; Jump to PORTD write
drive1  movlw    Position4      ; Set CW data
        goto     drive_end      ; Jump to PORTD write
drive2  movf     PORTD, W       ; Read PORTD
        sublw    Position4
3      bnz       drive4         ; Unmatch
        movf     mode, w        ; Read mode
        sublw    d'1'          ; CW ?
4      bz        drive3         ; Yes. CW
        movlw    Position1
        goto     drive_end      ; Jump to PORTD write

```

Second time
through:
mode = 2
PORTD =
Position2

```

drive3    movlw    Position3    ; Set CW data
          goto     drive_end     ; Jump to PORTD write
drive4    movf     PORTD, W      ; Read PORTD
          sublw    Position3
          5  bnz     drive6       ; Unmatch
          movf     mode, W       ; Read mode
          sublw    d'1'         ; CW ?
          6  bz      drive5       ; Yes. CW
          movlw    Position4
          goto     drive_end     ; Jump to PORTD write
drive5    movlw    Position2     ; Set CW data
          goto     drive_end     ; Jump to PORTD write
drive6    movf     PORTD, W      ; Read PORTD
          sublw    Position2
          7  bnz     drive8       ; Unmatch
          movf     mode, W       ; Read mode
          sublw    d'1'         ; CW ?
          8  bz      drive7       ; Yes. CW
          movlw    Position3
          goto     drive_end     ; Jump to PORTD write
drive7    movlw    Position1     ; Set CW data
          goto     drive_end     ; Jump to PORTD write
drive8    movlw    Position1
drive_end movwf    PORTD         ; Write PORTD
          goto     start        ; Jump to start

```

Second time
through:
mode = 2
PORTD = Position2
→ Position3

End of Lab 8