GSoC 2020 Application - Implement a control systems package for SymPy

About Me

Basic Information

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Personal Background

I'm Naman Gera, a sophomore at Indian Institute of Information Technology, Guwahati, pursuing a Bachelor of Technology (4 years) in Electronics and Communication engineering.

I spend my free time playing soccer with my friends, reading books (poetry and biographies) or playing chess online. A few of the courses I had the chance to take at school are Linear Algebra and calculus; complex analysis; Differential equations; Signals and Systems (covering some part of Control theory); principles of communication; Object-Oriented Design and Analysis; & Data Structures.

Programming Background

I use Ubuntu 19.04 as my operating system, along with VS Code being my primary source code editor because it has a nice debugger. I try to complete some of the mundane tasks using the terminal. I am familiar with the git and Github workflow.

I started programming almost 2 years ago through the introductory CS course called CS50 by Harvard University on edX.com. I was really amazed by the enthusiasm of the professor to teach some fundamental CS concepts to beginners from scratch. Post the course, I continued to expand my learning and right now, I feel comfortable writing code in C, C++, Python, and Java.

My curiosity to further learn computer science has increased by taking MOOCs online, with Coursera being my favorite platform. From the past two years, I have continuously worked upon improving my knowledge and skills by proactively learning through several courses online like these:

- 1. Python Data Structures
- 2. Programming for Everybody in Python
- 3. Learning How to Learn

I like python because of its English like syntax, and because of its advantages over other languages. I'm amongst the top 3 committers to this ProjectEuler focused repository as can be seen here because I really like problem-solving in general and I frequently take part in coding competitions including ACM ICPC, and on various other platforms.

One of my favorite features of sympy is pprint.

```
>>> from sympy.abc import x, y
```

```
>>> from sympy import pprint, sqrt
>>> expr = (x**2 - 5*x*y + 10*y**2)/sqrt(8)
>>> pprint(expr)

(2 2)

\[ \sqrt{2 \cdot (x - 5 \cdot x \cdot y + 10 \cdot y)} \]

4
```

Contributions

I started using SymPy in November 2019 and made my first contribution to the main repository the next month. I have been continuously contributing to the software since then. I'm a long-term-contributor and will continue to improve this software even after this program is finished.

Merged PRs

- #18100 Change Basic.NaN to S.NaN, it raised AttributeError earlier. Fixes #4841.
- #18107 Fix bug in cancel function. Fixes #17843.
- #18109 Add global_evaluate[0] condition in add, sub, mul, div methods in Infinity and NegativeInfinity class. Fixes #18052.
- #18149 Add regression test for subs. Fixes #11746.
- #18187 Remove unused imports from test_evaluate.py
- #18192 Handle Mul.is_imaginary for infinite values. Fixes #17556.
- #18222 Fix bug in intersection of two Line3D. Fixes #8615.
- #18250 [feature] Make Curve Callable with parameter values.
- #18264 Remove filterfalse and Python 2 related things from compatibility file.
- #18275 Completes one todo task in shor.py

- #18286 [WIP] Remove python 2 related things from the entire codebase. Helps in fixing #17943.
- #18302 Cleaning up compatibility.py. Helps in fixing #17943.
- #18335 [feature] Add bisectors method for Polygon class.
- #18339 Sympified output numbers for factorial and binomial used with Mod. Fixes #18338.
- #18362 Use __index__ instead of checking for explicit list of types. Fixes #16779.
- #18373 Removes an unreachable part of code.
- #18409 Improves code for gcdex_diophantine.
- #18463 Add check for integrating Piecewise function. Closes #7370.
- #18498 Add some of the missing core docstrings.
- #18601 Remove _print_GeometricEntity method from StrPrinter class.
- #18612 Dropping python 2 support. Helps in fixing #17943.
- #18633 Fix random failing test in test_tensor_operators.py. Fixes #18620.
- #18828 Improve free_symbols method in class Point.

Unmerged PRs

- #18169 Add dra, drm functions in ntheory module. Further improved dra (O(1) time complexity), but couldn't get merged because a fellow contributor was working on adding a similar feature.
- #18240 Crypto: Add XOR cipher.
- #18329 Add factmod function in ntheory module.
- #18429 Implement Chinese remainder theorem over a cartesian product of vectors.
- #18436 Add control package to sympy.physics.
- #18517 Add Min/Max support for decompogen.

Issues raised

- #18144 trigsimp does not simplify expression.
- #18372 Sympy docs show Sympy 1.5.1 twice.
- #18460 Discussion regarding the API for control package.
- $\#18514 \exp(x) \cdot \exp(x^*I)$ and $\exp(-x) \cdot \exp(x^*I)$ don't work.

Apart from these, I was also involved in discussions or reviewing some of the PRs and issues namely:

- Code Review #18849, #18834, #18502.
- Discussions #18627, #16500.

Questions answered on stack overflow related to SymPy

- [permalink] Integrate exponential function using sympy.
- [permalink] How can I specify an integer index in sympy?
- [permalink] How to use a list of symbols for sympy calculation in python?

The Project

Overview and Motivation

The main aim of this project is to implement in sympy a basic Control System functionality that would benefit a Control System engineer. So what exactly is CST? CST is the mathematical process of designing a machine to control another machine. The machine to be controlled is called the *plant*, and the machine doing the controlling part is called the *controller*. Both these machines are referred to as a system.

Some contributors made efforts to add control package to sympy.physics in #17866 and #12189. But those were not polished enough to get into the sympy codebase. As I have completed some parts of this section from my course, I'm familiar with the required theory behind this. Throughout this project, two classes would be implemented, namely: StateSpaceModel and TransferFunctionModel.

StateSpaceModel will use sympy matrix, so it would be able to support most of the symbolics. SymPy already has a very rich polynomial module that will back our well defined TransferFunctionModel class. TFM will subclass Mul and SSM will subclass Basic. My proposal aims at adding a package that would be a full symbolic model more than just a simple solver. I would also love to maintain a blog during this program so that it is easier for others to further expand this package.

Implementation Plan

I have planned to divide my work into four phases so that the package can be added swiftly and systematically.

- **Phase 1** := Adding StateSpaceModel and TransferFunctionModel class. Methods that are already implemented in #17866 will be polished for merging. In the last week of this phase, I will also write the required tests to ensure that everything is implemented correctly.
- Phase 2:= These methods will be implemented --
 - * `observability matrix` (for StateSpaceModel)
 - * `observable_subspace` (for StateSpaceModel)
 - * `is_observable` (for StateSpaceModel)
 - * ` neg ` (for both)
 - * `_eval_rewrite_as_StateSpaceModel` (for TransferFunctionModel)
 - * `_eval_rewrite_as_TransferFunctionModel` (for

StateSpaceModel)

Tests will be added for these methods in the last week of this phase. Also, documentation and examples for phase 1 will be covered.

- **Phase 3**:= bode_plot and root_locus_plot will be implemented, along with the final documentation. Bugs will be resolved if any.
- Phase 4:= Preparing documentation of examples and tutorials for our implemented control systems package (Week 10).
 Adding IVPSolution to represent a solution of initial value problems, along with required tests and documentation (Week 11 and 12).

Phase 1

We use our StateSpaceModel class to represent a linear, time-invariant (LTI) control system.

```
x'(t) = A * x(t) + B * u(t);   x in R^n, u in R^k

y(t) = C * x(t) + D * u(t);   y in R^m
```

Where u(t) is an input signal, y(t) is the corresponding output and x(t) is the state of the system.

Here, A, B, C, and D are sympy matrices.

We use TransferFunctionModel class to also represent a linear, time-invariant control system. This class introduces a transfer function matrix G in Laplace space. The input-output relation for the system in Laplace space is given by:

```
Y(s) = G(s) * U(s); s in C
```

where u(s) is the input to the system in Laplace space and Y(s) is the corresponding output.

A **transfer function** basically represents a ratio of output to the input:

$$\frac{Y(s)}{U(s)} = \frac{c_m s^m + c_{n-1} s^{n-1} + \dots + c_1 s + c_0}{a_n s^n + a_{n-1} s^{n-1} + \dots + a_1 s + a_0}.$$

An important property that the transfer function may have is that of being *proper*. So in this phase, I also implement a function <code>is_proper</code> which checks if the degree of the numerator is less than or equal to the degree of the denominator.

As we know that the transfer function is a ratio of polynomials, we already have a way to represent that using sympy's core class Mul. We are now able to use all the features from that class, for example -- as_numer_denom, expressing in evaluated and non evaluated form and much more.

```
>>> from sympy import Mul
>>> from sympy.abc import s
>>> expr = Mul(s**2 - 3*s + 4, 1/(s**4 - s*2))
>>> pprint(expr)
2
s - 3·s + 4

4
s - 2·s
>>> expr.as_numer_denom()
(s**2 - 3*s + 4, s**4 - 2*s)
```

Both the classes have already been proposed in #17866, I will continue working in #18436 (WIP) which I had raised before. We can use these guidelines (suggested by @sylee957) to make this a candidate for a full symbolic model. All that can be done while we subclass Basic.

- 1. Define the constructor with __new__ than __init__ (as implemented in the PR), such that the sympification of arguments is possible.
 - So, the StateSpaceModel uses Basic.__new__(cls, A, B, C, D) signature where A, B, C, D are matrices.
 - TransferFunctionModel uses Basic.__new__(cls, num, denom) signature where num, denom are polynomials, each representing the numerator and denominator of the transfer function as explained above.
 - represent, block_represent will be derived from .args rather than storing represent and block_represent by mutating the objects.
- 2. eq don't have to be defined because it inherits Basic.
- 3. __str__ , __repr__, __repr_latex_ will be moved under
 _print_TransferFunctionModel and _print_StateSpaceModel in
 StrPrinter and LatexPrinter.
- 4. _eval_rewrite_as_TransferFunctionModel and _eval_rewrite_as_StateSpaceModel to be implemented in phase two. And then the model interconversion would be .rewrite(StateSpaceModel) and .rewrite(TransferFunctionModel).

In the docstrings, symbols will be used instead of var, and plenty of examples and use cases will be added.

Along with addressing all the comments, I'm gonna define total_degree for TransferFunctionModel. This gives back the total degree of the rational function. If the degree of the denominator is greater than that of the numerator, we get a negative result.

```
def total_degree(en):
    num, denom = en.as_numer_denom()
    return degree(num) - degree(denom)
```

This function will help in the simplification of <code>is_proper</code> from this:

To this:

```
def is_proper(m, strict=False):
    if strict is False:
        return all(total_degree(en) <= 0 for en in m)
    else:
        return all(total_degree(en) < 0 for en in m)</pre>
```

Some examples for methods in StateSpaceModel are:

```
>>> from sympy import Matrix, Symbol
>>> from sympy.physics.control import StateSpaceModel
>>> A, B, C, D = Matrix([1, 2]), Matrix([2, 3]),
Matrix([2]), Matrix([0])
>>>
>>> # now creating a state space system
```

```
>>> ssm = StateSpaceModel(A, B, C, D)
>>> ssm
StateSpaceModel(
Matrix([
[1],
[2]]),
Matrix([
[2],
[3]]),
Matrix([[2]]),
Matrix([[0]]))
```

We can use less matrices as well, and the rest will be filled with a minimum of zeros.

```
>>> ssm_2 = StateSpaceModel(A, B)
>>> ssm_2
Matrix([
[1],
[2]]),
Matrix([
[2],
[3]]),
Matrix([[0]]),
Matrix([[0]]))
```

We can also use a TransferFunctionModel to create a StateSpaceModel. Like this:

```
>>> s = Symbol('s')
>>> from sympy.physics.control import TransferFunctionModel
>>> tfm = TransferFunctionModel(Matrix([1/s, s/(1+s**2)]))
```

```
>>> StateSpaceModel(tfm)
StateSpaceModel(
Matrix([
[0, -1, 0],
[1, 0, 0],
[0, 1, 0]]),
Matrix([
[1],
[0],
[0]]),
Matrix([
[1, 0, 1],
[1, 0, 0]]),
Matrix([
[0],
[0]]))
```

Symbolic evaluation of StateSpaceModel is possible -

```
>>> ssm = StateSpaceModel(Matrix([[-1, 1], [1, -1]]),
ones(2, 1), eye(2))
>>> u = Matrix([exp(2*t)])  # input
>>> x = Matrix([1, 0])  # initial state
>>>
>>> # symbolic evaluation
>>> ssm.evaluate(u, x, t)  # `t` is a Symbol.
Matrix([
[cosh(2*t)],
[sinh(2*t)]])
```

Finally, series and parallel interconnection of two StateSpaceModel

```
>>> A, B, C, D = Matrix([1, 2]), Matrix([2, 3]),
Matrix([2]), Matrix([0]);
>>> ssm 1 = StateSpaceModel(A, B, C, D)
>>> ssm 2 = StateSpaceModel(A, B)
>>> ssm 1.series(ssm 2) #series interconnection.
StateSpaceModel(
Matrix([[1, 0], [2, 0], [4, 1], [6, 2]]),
Matrix([[2], [3], [0], [0]]),
Matrix([[0, 0]]),
Matrix([[0]]))
>>> ssm 1.parallel(ssm 2) #parallel interconnection.
StateSpaceModel(
Matrix([[1, 0], [2, 0], [0, 1], [0, 2]]), #deliberately
written horizontally.
Matrix([[2], [3], [2], [3]]),
Matrix([[2, 0]]),
Matrix([[0]]))
```

API (with some basic examples) for TransferFunctionModel --

```
>>> G = Matrix([1/s, 1/(s + 1)])
>>> # creating a TransferFunctionModel from a matrix.
>>> tfm = TransferFunctionModel(G)

>>> tfm.G # this gives back the Matrix G.

>>> # Create TransferFunctionModel from StateSpaceModel
>>> tfm_2 = TransferFunctionModel(StateSpaceModel(A, B, C, D), s)
```

Required tests will be added in the last week of this phase to ensure that everything is implemented correctly. If possible, I'll start coding in the last week of the community bonding period so that I get a good headstart and work in the next phases will proceed swiftly.

Phase 2

Now I'll further add more features to this control systems package by opening up a PR. These are the following methods that I will implement.

- observability_matrix (in StateSpaceModel)
- observable_subspace (in StateSpaceModel)
- is_observable (in StateSpaceModel)

- __neg__ (in TransferFunctionModel)
- __neg__ (in StateSpaceModel)
- _eval_rewrite_as_TransferFunctionModel (in SSM)
- _eval_rewrite_as_StateSpaceModel (in TFM)

Observability - Given a multiple-state system in StateSpace form, it may be desirable to know which states are observable. Observability is a property that indicates that each state of the system is observable from the output, that is, the value of each state may be deduced.

Observability matrix can be constructed as below for a state space system {A, B, C, D} or order n. This matrix would be of np rows and n columns for n-by-n matrix A and p-by-n matrix C.

$$\begin{bmatrix} C^T & A^T C^T & \dots & (A^T)^n C^T \end{bmatrix}$$

If the observability matrix is *non singular*, the system is observable.

Another thing that can be useful is observable_subspace of an LTI system. It is equal to the image of its observability_matrix. The implementation for that is simple, like this:

```
def observable_subspace(self):
    return self.observability_matrix().columnspace()
```

is_observable := is_observable() returns a Boolean indicating whether or not a system is observable. There are many approaches to check if the system is observable or not.

- Observability matrix test The system is observable if and only if rank
 O = n (where O is the observability matrix!). This one is easy to implement.
- Eigenvector test for observability An LTI system is said to be observable if and only if no eigenvector of A is in the kernel of C.

Proposed API:

```
>>> ssm.observability_matrix() # depends only on A and C.
>>> ssm.observable_subspace() # returns a list of vectors,
and depends only on A and C
>>> ssm.is_observable() # returns a Boolean
```

<u>Negation</u> - Sometimes, negation of a system is required while solving control problems. So, I think <u>neg</u> would be a nice addition for StateSpaceModel and TransferFunctionModel.

__neg__ for StateSpaceModel: This method negates a state space system __neg__ for TransferFunctionModel: This method negates a transfer function.

```
Matrix([[0]]))
```

Similarly, we can have __neg__ for TransferFunctionModel, whose API would be something like this -

```
>>> expr = Mul(s**2 - 3*s + 4, 1/(s**4 - s*2))
>>> expr.__neg__()
(-s**2 + 3*s - 4)/(s**4 - 2*s)
>>> pprint(_)
2
- s + 3·s - 4

4
s - 2·s
```

As we've seen that 'StateSpaceModel' already takes in four arguments, so now there's a need for model interconversion handled as a special case for one argument.

```
def _eval_rewrite_as_TransferFunctionModel(self):
    return self.rewrite(TransferFunctionModel)

def _eval_rewrite_as_StateSpaceModel(self):
    return self.rewrite(StateSpaceModel)
```

After defining both of them, model interconversion would be as simple as .rewrite(StateSpaceModel) & .rewrite(TransferFunctionModel)

All the required tests will be added along in the same PR. So, with this our basic control systems functionality is implemented!

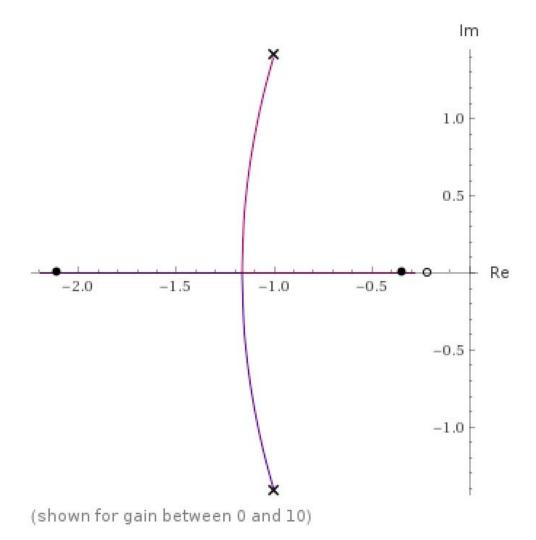
Phase 3

Plotting - Visualization is an important aspect while dealing with control problems. SymPy has a Plotting module which can be used as our backend. In this phase, I'll add functionality for root_locus_plot and bode_plot because these are two of the most popular control related plots used.

 Root Locus Plot - As we know that our transfer function is a ratio of polynomials, we can get the root locus for that, given the provided gains.

Following is a rough idea of what the plot would look like for gains between 0 and 10. The purple (dark blue) plot is the *locus*, **x** is for *poles* and **o** is for *zeros* for our transfer function.

SymPy's plotting module supports dynamic positioning of the coordinates, so getting value of any quantity by just moving the cursor over it would be an added advantage for us. Some hints can be taken from this blog post.



 Bode Plot - It is another commonly used control related plot. The bode plot for a linear, time invariant system with transfer function H(s)

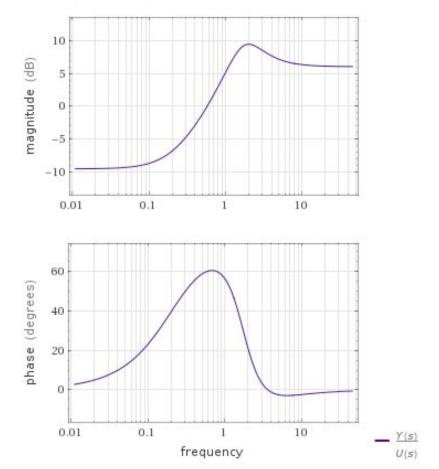
consists of a magnitude plot and a phase plot.

- 1) Bode Magnitude plot is the graph of the function |H(s=jw)| of frequency w. The w-axis of the magnitude plot is logarithmic and the magnitude is given in decibels, i.e., a value for the magnitude |H| is plotted on the axis at 20 log |H| (base 10).
- 2) Bode phase plot is the graph of the phase (commonly expressed in degrees), of the transfer function as a function of

w(frequency). The value for the phase is plotted at the linear vertical axis.

```
>>> # transfer function
>>> tf = (2*s**2 + 5*s + 1)/(s**2 + 2*s + 3)
>>> tf.bode_plot(range) # pass frequency range.
```

Following is a rough idea of what the plots would look like:



Examples will also be added in the same PR. Some of them can be taken from this manuscript.

Phase 4

By the time I would reach this phase, I would have implemented a control package for SymPy along with the tests and docs.

However I think that we should have a nice documentation of a bunch of examples depicting the uses of this package. People tend to use the software more if the docs are top-notch. So in the first week of this phase (Week 10), I'm gonna prepare a well structured docs which will show each and every feature and assists the users in realizing these features along with examples of control problems solved using the implemented API.

There is already a great python package, python-control, that implements basic control systems functionality but I think the docs are not that great, with too few examples. I want SymPy's control package to be a *full symbolic model* with a great documentation, like it already has.

I can easily find a bunch of examples in this manuscript and in this book - Linear Systems Theory by Joao P. Hespanha, 2009.

In the following weeks (Week 11, 12), I'll add an object, IVPSolution, that represents the solution of an ODE initial value problem. Given an ODE of type Eq(f(x).diff(x), x) with an initial condition Eq(f(x), 0), we'll be able to define an object IVPSolution(t, (Eq(f(x).diff(x), x),), (Eq(f(x), 0)) which would mathematically represent f(t) (f is the solution of the initial value problem).

We can now apply subs, evalf, or lambdify for further work as per our requirement. The idea (suggested by @oscarbenjamin in #18023) would be to get numerical solutions for ODE.

IVPSolution.evalf will use the odefun of mpmath to give us numeric solutions to ODE initial value problems.

Like this for example:

```
>>> ft = IVPSolution(t, (Eq(f(x).diff(x), x),), (Eq(f(x),
0)));
>>> # In this example, f(t) = exp(t)
>>> ft.evalf(subs={t:1})
2.71828182845905
```

Required tests and documentation will be added along in the same PR.

Timeline

I have prepared a tentative timeline for the above mentioned tasks. I assure that I'll give all my time to this project and try to finish what I have proposed.

Community Bonding Period (April 27 - May 17)

- In this period, I will discuss the project with my mentor so that we come up with an efficient way of implementation. My end sem exams will be over by 2nd of May and if possible, I will start coding in the last week of the community bonding period so that I get a good head-start for Phase 1, which is the most important of all.
- Also I'll be studying the Plotting and matrices module in more detail to utilize it to the fullest in the official coding period.

Week 1, 2, 3 (May 18 - June 7) - Phase 1

Add StateSpaceModel and TransferFunctionModel class.

- Required tests will be added to ensure that everything is implemented correctly.
- Since the major task is to set up both these classes, I'll write documentation in phase 2.

Week 4, 5, 6 (June 8 - June 28) - Phase 2

- These methods will be implemented in this phase observability_matrix, observable_subspace, is_observable,
 __neg__ (for TransferFunctionModel and StateSpaceModel),
 _eval_rewrite_as_TransferFunctionModel,
 eval_rewrite_as_StateSpaceModel.
- Tests and documentation for this newly implemented functionality will be added in the same PR that I'll open specifically for this phase.
- Also, documentation for phase 1 will be added.

Week 7, 8, 9 (June 29 - July 19) - Phase 3

- Implementation of bode_plot and root_locus_plot will be done in a new PR along with documentation and examples.
- Will do required changes to make plots look more visually appealing, readable and useful.
- Bugs will be taken care of, if any.

Week 10, 11, 12 (July 20 - Aug 10) - Phase 4

- Week 10 I will prepare a proper documentation of examples and tutorials for this package.
- Week 11, 12 Add IVPSolution to represent solution of an ODE initial value problem along with required tests and documentation.

Week 13 (Aug 10 - Aug 17)

- I will make sure all the PRs are successfully merged into the codebase.
- Submitting final evaluations.

Post GSoC

After working with SymPy for about nine months, I would still be eager to contribute more to this software. If the circumstances are good enough, I will become a mentor for next year's GSoC.

Notes

I've got no other commitments apart from this project, and thus would be able to devote 40 to 50 hours per week. My college will restart on the 2nd of August, and in the first month we have a light coursework, so I would be able to give all my time and energy to finish the project.

References

[1] - Oscar Benjamin

https://github.com/oscarbenjamin

[2] - Oscar's issue on IVPSolution.

https://github.com/sympy/sympy/issues/18023

[3] - Feedback Systems (Second Edition)

http://www.cds.caltech.edu/~murray/books/AM08/pdf/fbs-xferfcns_12Aug20 19.pdf

[4] - Python Control

https://python-control.readthedocs.io/en/latest/index.html

[5] - Bicycle Control Design

https://plot.ly/python/v3/ipython-notebooks/bicycle-control-design/

[6] - SY Lee

https://github.com/sylee957

[7] - Discussion with mentors in this issue.

https://github.com/sympy/sympy/issues/18460

- [8] Some good previous year GSoC applications.
- [9] Gagandeep's PR on control systems.

https://github.com/sympy/sympy/pull/17866