# Maxima by Example: Ch.3: Algebra, Part 2 \*

## Edwin L. Woollett

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<sup>\*</sup>This version uses Maxima 5.14. Check http://www.csulb.edu/~woollett/ for the latest version of these notes. Send comments and suggestions to woollett@charter.net

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## 3 Algebra, Part 2

We continue presenting algebra examples. In Ch. 2, we presented examples for expanding, factoring, and substituting. We will freely use techniques presented already in Ch. 2.

## 3.1 Extracting Parts of an Expression

Often one wants to apply some simplification function to only a part of a complicated expression. Maxima has many tools to select the correct part of an expression.

We will present examples of the use of the following Maxima functions:

- part returns the subexpression you specify, according to its position in the expression.
- **dpart** is similar to **part** except that it returns the entire expression, with the selected subexpression displayed inside a box.
- **substpart** substitutes the characters you specify for the indicated subexpression, then returns the new value of the expression.
- **pickapart** assigns intermediate display lines to all subexpressions of an expression, down to a specified depth.
- reveal displays an expression to the specified integer depth, indicating the length of each part.
- **lhs** and **rhs** return the left and right sides of the given equation, respectively.
- first and last return the first and last part of the specified expression, respectively.
- **rest** returns the expression with one or more of its leading elements removed.
- coeff and ratcoef return the coefficient of a given variable in the specified expression.

In addition, the system variable **piece** holds the last expression selected with one of the part extraction commands. The variable **piece** is set during the execution of the part extraction command and thus can be used within the command itself.

### 3.1.1 part, dpart, and piece

To extract part of an expression you can use **part** (exp, n), where exp refers to an equation or expression, and n is an integer that represents the part you want.

Here **part** is used to extract the second part of eq1 (the right hand side) and then extract the first term of the right hand side:

Notice in the following table that part 0 is always the operator and the arguments of the operator are the successive parts. The equation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command as if it were in the functional notation a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **part** command a = b is interpreted by the **p** 

Version	expr: f(x, y, z);	expr: a = b;
part(expr, 0)	f	=
part(expr, 1)	x	a
part(expr, 2)	y	b
part(expr, 3)	z	

Table 1: Using the part function

With additional arguments, part (expr, num1, ..., numn) allows you to obtain the part of the expression expr specified by part num1 then find the num2 part of the resulting expression, and so on.

The following is equivalent to the combined inputs (%i2) and (%i3) above:

The command **dpart** (expr, num1, ..., numn) is similar to **part** except that instead of simply returning the specified subexpression, this command returns the entire expression with the selected subexpression displayed inside a box.

In addition, the system variable **piece** holds the last expression selected with one of the part selection commands, such as **part**, **dpart**, and **substpart** (see below).

Here we select part of the expression expr1 to be highlighted with a box in the output:

We next ask for the value of **piece**, whose value is the subexpression selected by **dpart** above.

#### 3.1.2 substpart

The command substpart (x, expr, num1, ..., numn) substitutes x for the subexpression (of the given expr) picked out by the set of integers (num1, num2, ..., numn), then returns the resulting new value of the expression expr. You indicate the subexpression for substpart just as you do for part by specifying the arguments expr, num1, ..., numn.

Note that x can be some operator to be substituted for an operator of expr. In some cases, you might need to enclose x in double quotes; for example, the command **substpart** ("+", a\*b, 0) returns b + a.

Here we factor the part of expr1 selected by **dpart**, and then substitute back into the expression.

#### 3.1.3 pickapart and reveal

The command **pickapart** (expr, depth) assigns intermediate expression labels %t1, %t2, ... to all subexpressions of the expression expr down to the specified integer depth. You will find this command useful for dealing with large expressions, and in order to assign parts of expressions to variables without having to use the **part** command.

Here we display subexpressions of (large) expr2 down to the second level, assigning each subexpression to an intermediate expression label %tn.

The expressions identified by intermediate expression labels can then be used by referring to that label.

The function **reveal** (expr, depth) displays the expression expr to the specified integer depth, indicating the length of each part.

Here is the Maxima manual entry for this function:

Function: reveal (expr, depth)

Replaces parts of expr at the specified integer depth with descriptive summaries.

- Sums and differences are replaced by Sum (n) where n is the number of operands of the sum.
- Products are replaced by Product (n) where n is the number of operands of the product.
- Exponentials are replaced by Expt.
- Quotients are replaced by Quotient.
- Unary negation is replaced by Negterm.

When depth is greater than or equal to the maximum depth of expr, reveal (expr, depth) returns expr unmodified.

Here we use **reveal** to summarize the five term expression expr2 to successively greater depths.

At depth 2, both the  $\log^4$  term and the  $e^(neg)$  term are simply labeled Expt, while the -1/sqrt term is simply Negterm.

Looking at depth 3, the a0\*sin^2 term is labeled as a0 Expt, while the 1/sqrt term becomes Ouotient.

#### 3.1.4 rhs and lhs

The function **lhs** extracts the left hand side of an equation, and the function **rhs** extracts the right hand side. Here we use **rhs** to extract the right side of the equation below.

If the argument is not an equation, but rather an expression, **lhs** returns the expression and **rhs** returns 0.

The Maxima manual has the following entry for **lhs**.

Function: **lhs** (expr)

Returns the left-hand side (that is, the first argument) of the expression expr, when the operator of expr is one of the relational operators < <= = # equal notequal >= >, one of the assignment operators := ::= : ::, or a user-defined binary infix operator, as declared by infix.

When expr is an atom or its operator is something other than the ones listed above, lhs returns expr.

#### 3.1.5 first, last, and rest

The syntax **first** (expr) returns the first part of the expression expr and the syntax **last** (expr) returns the last part of the expression expr.

The syntax **rest** (expr) returns the expression with its leading element removed.

With an additional integer argument, **rest** (expr, num) returns the expression expr with the first num terms removed.

Here we use **first** to display the first term in the expression expr2:

```
(%i7) expr2: \log(a*x^2 + b*x + c)^4 - 1/(1 + 1/y)^(1/2)
              + \exp(-\%i*\cos(12*a - b + c))
              + a0*sin(a*x^2 + b)^2 - x*y;
                 1 4 2
                                                       2
                                                          2
(\%07) - x y - ---- + \log (a x + b x + c) + a0 \sin (a x + b)
             sqrt(- + 1)
                 У
                                                     - \%i \cos(c - b + 12 a)
                                                   + %e
(%i8) first(expr2);
(%08)
                                   - x y
(%i9) last(expr2);
                           - \%i \cos(c - b + 12 a)
(%09)
```

Note that "first" and "last" refer to the internal canonical ordering which Maxima uses, for example, when Maxima displays the expression, and does not refer to the order in which the terms of the expression were entered on the input line.

Here we use **rest** to display all of expr2 except the first term, and secondly, display all of expr2 except the first two terms.

The functions **first**, **last**, and **rest** have similar behavior when the argument is a list, rather than an expression.

#### 3.1.6 coeff and ratcoef

The commands **coeff** and **ratcoef**, take as arguments an expression, a variable in the expression for which you want the coefficient, and optionally, a power to which the variable is raised. Both functions return the coefficient. The function **ratcoef** expands and rationally simplifies the expression before finding the coefficient, and thus can produce answers different from **coeff**, which is purely syntactic.

The Maxima manual has the following entry for **coeff**:

```
Function: coeff (expr, x, n)
```

Returns the coefficient of  $x^n$  in expr. The integer n may be omitted if it is 1. x may be an atom, or complete subexpression of expr e.g., sin(x), a[i+1], x + y, etc. (In the last case the expression

(x + y) should occur in expr). Sometimes it may be necessary to expand or factor expr in order to make  $x^n$  explicit. This is not done automatically by coeff.

The Maxima manual has two examples, the first showing use with an equation, and the second showing use with an expression:

The Maxima manual entry for **ratcoef** is:

```
Function: ratcoef (expr, x, n)
Function: ratcoef (expr, x)
```

Returns the coefficient of the expression  $x^n$  in the expression expr. If omitted, n is assumed to be 1.

The return value is free (except possibly in a non-rational sense) of the variables in x.

If no coefficient of this type exists, 0 is returned.

ratcoef expands and rationally simplifies its first argument and thus it may produce answers different from those of coeff which is purely syntactic.

```
Thus ratcoef ((x + 1)/y + x, x) returns (y + 1)/y whereas coeff returns 1. ratcoef (\exp r, x, 0), viewing \exp r as a sum, returns a sum of those terms which do not contain x
```

Therefore if x occurs to any negative powers, ratcoef should not be used.

Since expr is rationally simplified before it is examined, coefficients may not appear quite the way they were envisioned.

Here we compare **coeff** with **ratcoef**.

```
(%i5) e3: (a*x + b)^2;

(%o5) (a x + b)

(%i6) coeff(e3,x);

(%o6) 0

(%i7) ratcoef(e3, x);

(%o7) 2 a b
```

The function **coeff** is acting on the expression  $(a*x + b)^2$ , where (a\*x + b) is seen as a single entity. On the other hand, **ratcoef** first expands the expression and then looks for coefficients of x in the expanded expression.

We can, of course, first do the expansion by hand, and then use **coeff** to get the same result:

```
(%i8) expand(e3);  2 \quad 2 \qquad \qquad 2 \\ (%o8) \qquad \qquad a \quad x + 2 \quad a \quad b \quad x + b \\ (%i9) \quad coeff(%, x); \\ (%o9) \qquad \qquad \qquad 2 \quad a \quad b
```

## 3.2 Extracting Parts of a Complex Expression

## 3.2.1 realpart, imagpart, rectform, polarform

The following functions allow you to manipulate expressions containing complex numbers.

- realpart and imagpart return the real and imaginary parts of an expression, respectively.
- rectform returns an expression in the form a + %i\*b, where a and b are purely real.
- **polarform** returns an expression in the form  $r*\%e^$  (%i\*theta) where r and theta are purely real, and %e is the base of the natural logarithms.

The Maxima manual has the following entry for **realpart**:

```
Function: realpart (expr)
```

Returns the real part of expr. The functions realpart and imagpart will work on expressions involving trigonometic and hyperbolic functions, as well as square root, logarithm, and exponentiation.

Here is an example of the use of all four of the above functions (note x and y are assumed to be real).

```
(%i1) e1 : sin(exp(%i*y + x));
                                     %i y + x
(%01)
                               sin(%e)
(%i2) realpart(e1);
(%02)
                      sin(%e cos(y)) cosh(%e sin(y))
(%i3) imagpart(e1);
(%03)
                      cos(%e cos(y)) sinh(%e sin(y))
(%i4) rectform(e1);
(\%04) %i cos(%e cos(y)) sinh(%e sin(y)) + sin(%e cos(y)) cosh(%e sin(y))
(%i5) polarform(e1);
                               2
(%o5) sqrt(cos (%e cos(y)) sinh (%e sin(y))
                       2
+ sin (%e cos(y)) cosh (%e sin(y))) expt(%e,
%i atan2(cos(%e cos(y)) sinh(%e sin(y)), sin(%e cos(y)) cosh(%e sin(y))))
```

The **polarform** result makes use of **atan2** (y, x) which returns the arctangent of y/x in the interval  $(-\pi, \pi)$ .

## 3.3 Evaluating Trigonometric Functions

The following table provide the names of the trig functions in Maxima. Maxima can compute the derivatives of all these functions.

Circular	Inverse Circular	Hyperbolic	Inverse Hyperbolic
sin	asin	sinh	asinh
cos	acos	cosh	acosh
tan	atan	tanh	atanh
cot	acot	coth	acoth
sec	asec	sech	asech
csc	acsc	csch	acsch

Table 2: Trig Functions and Inverses

Maxima always numerically evaluates trigonometric functions (such as **sin**, **asin**, **sinh**, and **asinh**) that have floating point arguments. To avoid introducing approximations prematurely, Maxima does not do so automatically for trigonometric functions that have integer arguments. In cases where Maxima can return an exact value, however, a number can result. This section presents the following commands:

- **exponentialize** converts the given expression containing trigonometric functions to an exponential with complex variables
- **demoivre** converts the given exponential with complex variables to a trigonometric function.

Several option variables control the evaluation of trigonometric functions. The options **numer**, **exponentialize**, and **% emode**, are introduced in this section.

You can evaluate trigonometric functions with integer arguments numerically by setting the option variable **numer** to true.

```
(\%i1) \sin(0);
(%01)
                                            0
(\%i2) \sin(1);
(%02)
                                        sin(1)
(%i3) sin(1), numer;
                                    0.8414709848079
(%03)
(%i4) numer;
(%04)
                                          false
(%i5) sin(1), numer:true;
(%05)
                                    0.8414709848079
(%i6) numer;
(%06)
                                          false
```

Inputs %i3 and %i5 are equivalent and have the effect of setting **numer** temporarily true.

The Maxima computation engine is aware of simple values attained by trig functions if the argument has the special form  $n\pi/m$ , where n is an integer, and m has one of the values [1, 2, 3, 4, 5, 12].

Evaluating functions or expressions which include trig functions is simple. Here is an example of a Maxima function f(x) and a Maxima expression g. First, define the function f in terms of the trig function f.

(%i1) 
$$f(z) := \sin(z)^2 + 1;$$
  
(%o1) 
$$f(z) := \sin(z) + 1$$

Now evaluate f at z = x + 1.

(%i2) 
$$f(x+1)$$
;  
2  
(%o2)  $\sin(x+1) + 1$ 

Define the expression g in terms of trig functions and then evaluate the expression at the angle  $\pi/3$ ,:

(%i3) g: 
$$cos(x)^2 - sin(x)^2$$
;  
2 2  
(%o3)  $cos(x) - sin(x)$   
(%i4) g,  $x = %pi/3$ ;  
1  
(%o4) - - - 2

To differentiate an expression or function we use:

To get the indefinite integral we use:

The above indefinite integrals cry out for simplification.

## 3.3.1 exponentialize

When you set the option variable **exponentialize** to **true**, subsequent computations convert trigonometric functions to exponentials with complex variables. You can also use the command **exponentialize** (expr) which performs the same transformation on a given expression.

With x, y, and z all real (by default), the real and imaginary parts of the following expression e1 are obvious from its definition. As an exercise, we convert the trig functions to their complex exponential equivalents and then find the real and imaginary parts of the resulting expression.

```
(%i15) exponentialize:false$
(%i16) e1 : tan(x) + %i*cos(y) - sin(z);
           -\sin(z) + \%i\cos(y) + \tan(x)
(%016)
(%i17) e11 : exponentialize(e1);
                       %i y - %i y %i x - %i x
     %i z - %i z
    %i (%e - %e ) %i (%e + %e ) %i (%e - %e )
(%017) ------ + ------ + -------
                              2.
                                            %i x - %i x
                                            %e + %e
(%i18) imagpart(e11);
(%018)
                          cos(y)
(%i19) realpart(e11);
                       sin(x)
                       ----- - sin(z)
(%019)
                       cos(x)
```

#### 3.3.2 demoivre

To convert an expression containing exponentials whose arguments involve factors of %i to trig function equivalents, we use the function **demoivre** (expr).

Abraham De Moivre (1667 - 1754) was a French-born mathematician who pioneered the development of analytic geometry and the theory of probability. His name is associated with what Richard Feynman called "the most remarkable formula in mathematics":  $e^{i\theta} = cos(\theta) + i sin(\theta)$ .

#### 3.3.3 % emode

The Maxima manual description of %emode is

Option variable: %emode

Default value: true

When %emode is true, %e^ (%pi %i x) is simplified as follows.

 $e^(\pi)$  % is an integer or a multiple of 1/2, 1/3, 1/4, or 1/6, and then further simplified.

For other numerical x,  $e^(\sin x)$  simplifies to  $e^(\sin x)$  where y is x - 2 k for some integer k such that abs (y) < 1.

When <code>%emode</code> is false, no special simplification of <code>%e^(%pi %i x)</code> is carried out.

## Here are some simple examples:

```
(%i1) %emode;
(%01)
                                       true
(\%i2) f(x) := \%e^(\%i * \%pi * x);
                                         %i %pi x
(%02)
                               f(x) := e
(%i3) f(1);
                                        - 1
(%03)
(\%i4) f (1/2);
(%04)
                                        응i
(\%i5) f(2/3);
                                 sqrt(3) %i 1
(%05)
                                      2
(%i6) f(1/4);
                              sqrt(2) %i sqrt(2)
                               ----- + -----
(%06)
                                   2
                                                2
(%i7) f(2);
                                         1
(%07)
(%i8) f(3);
(%08)
                                        - 1
(%i9) f(1.4);
                                       3 %i %pi
                                          5
(%09)
                                   응e
(%i10) %emode: false$
(%i11) f(2);
                                      2 %i %pi
(%011)
                                    %e
```

## 3.4 Expanding and Simplifying Trig Expressions

You can expand expressions involving trigonometric functions. This section presents the following commands:

- **trigexpand** expands expressions that contain trigonometric and hyperbolic functions of sums of angles and of multiple angles.
- **trigreduce** combines products and powers of the trigonometric and hyperbolic functions for a specified variable and tries to eliminate these functions when they occur in the denominator.
- **trigsimp** converts expressions containing functions such as **tan** and **sec** to contain **sin**, **cos**, **sinh**, and **cosh** instead, so that **trigreduce** can further simplify the expressions.

#### 3.4.1 trigexpand

The option variables **trigexpand**, **trigexpandplus**, **trigexpandtimes**, and **halfangles** are also described in this section.

The full Maxima manual description of **trigexpand** is

```
Function: trigexpand (expr)
```

Expands trigonometric and hyperbolic functions of sums of angles and of multiple angles occurring in expr. For best results, expr should be expanded.

To enhance user control of simplification, this function expands only one level at a time, expanding sums of angles or multiple angles. To obtain full expansion into sines and cosines immediately, set the switch trigexpand: true.

trigexpand is governed by the following global flags:

trigexpand : (Default: false). If true causes expansion of all expressions containing sin's and cos's occurring subsequently.

```
halfangles : (Default: false). If true causes half-angles to be simplified away.
```

trigexpandplus : (Default: true). Controls the "sum" rule for trigexpand, expansion of sums (e.g. sin(x + y)) will take place only if trigexpandplus is true.

trigexpandtimes : (Default: **true**). Controls the "product" rule for trigexpand, expansion of products (e.g. sin(2 x)) will take place only if trigexpandtimes is true.

By default, **trigexpandplus** is **true**, so Maxima expands a trig function of a sum of angles, like sin(x + y). The option variable **trigexpandtimes** is **true** by default, so Maxima's default behavior is to expand a trig function whose argument is a multiple of some angle, hence expanding sin(2\*y).

Let's illustrate the **trigexpand** function and the **trigexpand** option with the simplest cases. The expression e1 is a trig function of a multiple angle. The expression e3 is a trig function of a sum of angles. The expression e3 is a trig function of a sum of angles, one of which is a multiple of another angle.

```
(%i8) e5 : trigexpand(e4);

2 2

(%o8) (cos (x) - sin (x)) sin(y) + 2 cos(x) sin(x) cos(y)

(%i9) e6 : trigexpand(e3), trigexpand;

2 2

(%o9) (cos (x) - sin (x)) sin(y) + 2 cos(x) sin(x) cos(y)
```

We see that **trigexpand** ( $\sin$  (2\*x + y) expands the sum of angles (top level) without expanding the multiple angle argument. A second use of **trigexpand** expands the multiple angle argument. Instead of two applications of the function **trigexpand**, we could have used one application, but with the **trigexpand** option set to **true** (as we did in input %i9). Remember that f(expr), option is equivalent to f(expr), option: true. The default value of the option **trigexpand** is **false**.

Let's illustrate dealing with half-angles. The default value of **halfangles** is **false**.

In input %i3 we evaluated sin(x/2) with **halfangles** locally set to **true**. This does not change the binding of the symbol e1 nor the global value of **halfangles**:

An example which contains a sum of angles, a multiple of an angle, and also a half angle:

```
(\%i1) \ el: \sin(2*x) + \cosh(y - z) + \tan(a/2) \$ (\%i2) \ [trigexpandtimes, trigexpandplus, halfangles]; (\%o2) \qquad \qquad [true, true, false] (\%i3) \ trigexpand(el); \qquad \qquad a (\%o3) \quad -\sinh(y) \ \sinh(z) + \cosh(y) \ \cosh(z) + 2 \ \cos(x) \ \sin(x) + \tan(-)
```

Here we bind **trigexpandtimes** to **false** locally to prevent expansion of trig functions of multiple angles:

Here we locally bind **trigexpandplus** to **false** to prevent the expansion of trig functions of sums of angles:

```
(%i5) trigexpand(e1),trigexpandplus:false; a  (\%o5) \qquad \qquad cosh(z-y) + 2 cos(x) sin(x) + tan(-) \\ 2
```

Here we perform all possible expansions for the expression e1:

Finally, we allow only expansion of trig functions of half angles:

```
(%i8) trigexpand(e1),trigexpandtimes:false,trigexpandplus:false,halfangles;  1 - \cos(a)  (%o8)  \cosh(z - y) + \sin(2 x) + -----   \sin(a)
```

#### 3.4.2 trigreduce

The Maxima function **trigreduce** (expr, var) carries out a procedure which is inverse to the effect of **trigexpand**. Products and powers of trig functions are written as expressions involving trig functions whose arguments are multiples of angles. If you do not include the optional argument var, **trigreduce** uses all the variables in the expression. The Maxima manual description is:

```
Function: trigreduce (expr, x)
Function: trigreduce (expr)
```

Combines products and powers of trigonometric and hyperbolic sin's and cos's of x into those of multiples of x. It also tries to eliminate these functions when they occur in denominators. If x is omitted then all variables in expr are used.

Here is a simple example of using **trigreduce**:

## 3.4.3 trigsimp

The Maxima function **trigsimp** uses the identities:  $\sin^2 x + \cos^2 x = 1$  and  $\cosh^2 x - \sinh^2 x = 1$  to convert expressions containing functions such as  $\tan$  and  $\sec$  to contain  $\sin$ ,  $\cos$ ,  $\sinh$ , and  $\cosh$  instead, so that **trigreduce** can further simplify the expression.

The functions **trigreduce**, **ratsimp**, and **radcan** may be able to further simplify the result. There is a **demo** file which shows the results of **trigsimp** on some quite long expressions. Use demo ("trgsmp.dem"); to run this **demo** file.

Consider the following expression:

The function **trigsimp** can simplify this expression with one call:

```
(%i8) trigsimp(e4);
(%o8)
```

or you can simplify by using trig identities "by hand" as follows:

## 3.5 Evaluating Summations

Maxima functions which help evaluate sums include

• **sum** is used to obtain the sum of values of an expression which depends on a "summation index" when the summation index varies over a given range. **sum** is a "verb" or "procedure" which mostly expands, as in

```
(%i1) sum(f(i), i, 2, 3);
(%o1) f(3) + f(2)
```

• **nusum** is a procedure which uses "Gosper's algorithm" for "indefinite hypergeometric series summation". See the web page http://en.wikipedia.org/wiki/Bill\_Gosper.

Ralph William Gosper, Jr., (b. 1943), known as Bill Gosper, is an American mathematician and programmer... Along with Richard Greenblatt, he may be considered to have founded the hacker community, and holds a place of pride in the Lisp community. He is also noted for his work on continued fractional representations of real numbers, and for suggesting the algorithm (which bears his name) for finding closed form hypergeometric identities.

The **nusum** procedure is not useful with infinite summation limits.

- unsum is a backward difference function with the effect unsum(f(n), n);  $\rightarrow f(n) f(n-1)$
- sumcontract will combine sums whose upper and lower index values differ by constants.

- **intosum** places external factors inside the summation.
- simplify\_sum, a package by Maxima developer Andrej Vodopivec, which tries both the Gosper algorithm, and, if needed, Zeilberger's algorithm for definite hypergeometric summation (see web page http://en.wikipedia.org/wiki/Doron\_Zeilberger. You can download the book A = B, coauthored by Doron Zeilberger, at the web page http://www.math.upenn.edu/~wilf/AeqB.html This book was an outcome of one of the Knuth exercises: "Develop computer programs for simplifying sums that involve binomial coecients." In this book, chapter five discusses Gosper's algorithm, and chapter six discusses Zeilberger's algorithm.

Also discussed is the global flag **simpsum**, which extends the abilities of **sum** to handle cases like **sum** ( $a^i$ , i, i0, i1 and **sum** ( $i^N$ , i, i0, i1).

#### 3.5.1 sum, simpsum, binomial

The Maxima manual entry for sum is:

```
Function: sum (expr, i, i_0, i_1)
```

Represents a summation of the values of expr as the index i varies from  $i_0$  to  $i_1$ . The noun form 'sum is displayed as an uppercase letter sigma.

sum evaluates its summand expr and lower and upper limits  $i_0$  and  $i_1$ , sum quotes (does not evaluate) the index i.

If the upper and lower limits differ by an integer, the summand expr is evaluated for each value of the summation index i, and the result is an explicit sum.

Otherwise, the range of the index is indefinite. Some rules are applied to simplify the summation. When the global variable simpsum is true, additional rules are applied. In some cases, simplification yields a result which is not a summation; otherwise, the result is a noun form 'sum.

When the evflag (evaluation flag) cauchy sum is true, a product of summations is expressed as a Cauchy product, in which the index of the inner summation is a function of the index of the outer one, rather than varying independently.

The global variable genindex is the alphabetic prefix used to generate the next index of summation, when an automatically generated index is needed.

gensumnum is the numeric suffix used to generate the next index of summation, when an automatically generated index is needed. When gensumnum is false, an automatically-generated index is only genindex with no numeric suffix.

 $See \, also \, \verb|sum| contract|, into \verb|sum|, bashindices|, nice indices|, nouns|, evflag|, and \, zeilberger|.$ 

What is the sum of  $i^2$  for i = 1, 2, ..., 5?

```
(%i1) sum(i<sup>2</sup>, i, 1, 5);
(%o1) 55
```

You could have used one version of the **do** statement to get the same answer as follows (an example similar to one in the Maxima manual):

(Note that the lower limit is understood to be 1 in the above version.)

A version in which the initial value of the sum is left unspecified is:

You can evaluate the previous output with ss = 0 as follows:

(%i7) 
$$ev(%, ss = 0);$$
  
(%o7) 55

If you apply the **ev** function to %06 again without specifying that ss = 0, Maxima evaluates all the variables in %06 and re-executes all function calls (here the function call is "plus"):

You can define an equation or expression, etc., containing a sum or sums that are not evaluated by using the noun form 'sum employing a single quote. Here we write an equation relating y to a sum of powers of x with coefficients  $a_i$  using the noun form:

The explicit equation was generated using the **ev** function with the **sum** function name included. The Maxima manual entry for **ev** begins as:

```
ev(expr, arg_1, ..., arg_n)
```

Evaluates the expression expr in the environment specified by the arguments arg\_1, ..., arg\_n. The arguments are switches (Boolean flags), assignments, equations, and functions. ev returns the result (another expression) of the evaluation.

and then, within a long list of possible arguments, one finds:

Any other function names (e.g., sum) cause evaluation of occurrences of those names in expr as though they were verbs.

Maxima is able to simplify some sums defined with symbolic index limits if the global parameter **simpsum** is set **true** (either locally or globally). Here are two examples from the Maxima manual:

```
(%i1) simpsum;
(%01)
                                             false
(\%i2) sum (2^i + i^2, i, 0, n);
                                       ====
                                               i
(%02)
                                              (2 + i)
                                       ====
                                       i = 0
(%i3) sum (2^i + i^2, i, 0, n), simpsum;
                              n + 1 \quad 2 \quad n \quad + \quad 3 \quad n \quad + \quad n
(%03)
(\%i4) sum(1/3^i, i, 1, inf);
                                           inf
                                           ----
                                                  1
(%04)
                                                   i
                                                  3
                                           i = 1
(\%i5) sum (1/3^i, i, 1, inf), simpsum;
                                               1
(%05)
                                               2
```

And an example from the mailing list:

The binomial coefficients are provided by the Maxima function **binomial** (x, y), which has the manual description:

Function: **binomial** (x, y)

The binomial coefficient x! / (y! (x - y)!). If x and y are integers, then the numerical value of the binomial coefficient is computed. If y, or x - y, is an integer, the binomial coefficient is expressed as a polynomial.

#### An alias for **binomial** is **binom**.

```
(%i2) binomial (11, 7);
(%o2) 330
(%i3) binom(11, 7);
(%o3) 330
(%i4) 11! / 7! / (11 - 7)!;
(%o4) 330
```

#### 3.5.2 nusum and unsum

Here is an example of an expression expr which Maxima cannot reduce to closed form, even with **simpsum** set equal to **true**.

However, **nusum** is successful:

The Maxima manual has the following entry for **nusum**:

```
Function: nusum (expr, x, i_0, i_1)
```

Carries out indefinite hypergeometric summation of expr with respect to x using a decision procedure due to R.W. Gosper. Both expr and the result must be expressible as products of integer powers, factorials, binomials, and rational functions.

The terms "definite" and "indefinite summation" are used analogously to "definite" and "indefinite integration". To sum indefinitely means to give a symbolic result for the sum over intervals of variable length, not just e.g. 0 to inf. Thus, since there is no formula for the general partial sum of the binomial series, nusum can't do it.

nusum and unsum know a little about sums and differences of finite products. See also unsum.

The Maxima manual entry for **unsum** is;

```
Function: unsum (f, n)
```

Returns the first backward difference f(n) - f(n-1). Thus unsum in a sense is the inverse of sum.

Simple examples of the use of **unsum**:

```
(\%i9) \ [unsum(n^2,n), \ unsum(n^3,n) \ ]; (\%o9) \qquad \qquad [2\ n-1,\ 3\ n-3\ n+1] \\ (\%i10) \ unsum(\ f(n),n); (\%o10) \qquad \qquad f(n)-f(n-1) \\ (\%i11) \ sum(\ f(i),\ i,\ n-1,n); (\%o11) \qquad \qquad f(n)+f(n-1)
```

The simplest example of the use of **nusum** is:

If we compare outputs 0.13 and 0.14, we can interpret the strange syntax  $\mathbf{nusum}(\mathbf{j}, \mathbf{j}, \mathbf{0}, \mathbf{j})$  as the two step process,  $\mathbf{val}$ :  $\mathbf{nusum}(\mathbf{j}, \mathbf{j}, \mathbf{0}, \mathbf{n})$  where  $\mathbf{val}$  is not a function of the dummy index  $\mathbf{j}$ , followed by replacing  $\mathbf{n}$  by  $\mathbf{j}$ . Because the  $\mathbf{j}$  that appears in the expression in slot one and slot two is a dummy index, (and could have been called anything), the only permanent variables for the answer are the contents of slot three and four.

#### 3.5.3 intosum and sumcontract

The Maxima manual has the following **intosum** entry

Function: **intosum** (expr)

Moves multiplicative factors outside a summation to inside. If the index is used in the outside expression, then the function tries to find a reasonable index, the same as it does for sumcontract. This is essentially the reverse idea of the outative property of summations, but note that it does not remove this property, it only bypasses it.

In some cases, a **scanmap**(**multthru**, expr) may be necessary before the **intosum**.

The manual entry for **sumcontract** is:

Function: **sumcontract** (expr)

Combines all sums of an addition that have upper and lower bounds that differ by constants.

The result is an expression containing one summation for each set of such summations added to all appropriate extra terms that had to be extracted to form this sum.

sumcontract combines all compatible sums and uses one of the indices from one of the sums if it can, and then trys to form a reasonable index if it cannot use any supplied.

It may be necessary to do an intosum (expr) before the sumcontract.

Here is a simple example taken from the mailing list.

The following summations are automatically simplified into one sum:

#### 3.5.4 simplify\_sum, assume, forget, facts

The powerful simplification function **simplify\_sum** has the manual description:

```
Function: simplify_sum (expr)
Tries to simplify all sums appearing in expr to a closed form.
simplify_sum uses Gosper and Zeilberger algorithms to simplify sums.
To use this function first load the simplify_sum package with load("simplify_sum").
```

This package is the file simplify\_sum.mac and is located in the share/contrib/solve\_rec/folder.

In some of the following examples, the functions **assume**, **forget**, and **facts** are used to (in order) add new assumptions about variables, forget certain assumptions, and inquire as to what are the active assumptions in play.

Here are a few examples of the use of **simplify\_sum**:

```
(%i5) s : sum( binomial(n,k)/(k+1), k, 0, n);
                             n
                             ====
                                  binomial(n, k)
                                  _____
(%05)
                                     k + 1
                            ____
                            k = 0
(%i6) simplify_sum(s);
                                  n + 1
                                  2 - 1
(%06)
                                  n + 1
(%i7) facts();
(%07)
                                     []
(\%i8) assume(n>k,m>k-1);
(%08)
                           [n > k, m - k + 1 > 0]
(%i9) facts();
(%09)
                           [n > k, m - k + 1 > 0]
(%i10) s : sum( (r*binomial(n,r)*binomial(m,k-r))/(k*binomial(n+m,k)),r,0,k);
                  ====
                        binomial(m, k - r) binomial(n, r) r
                  ====
                  r = 0
(%010)
                           k \text{ binomial}(n + m, k)
(%i11) simplify_sum(s);
                              n (n + m - 1)!
(%011)
                 k (k - 1)! binomial(n + m, k) (n + m - k)!
(%i12) makefact(%);
                              k! n (n + m - 1)!
(%012)
                             ______
                             k (k - 1)! (n + m)!
(%i13) minfactorial(%);
                                      n
(%013)
                                    n + m
(\%i14) forget(n>k,m > k - 1);
(%014)
                           [n > k, m - k + 1 > 0]
(%i15) facts();
(%015)
                                      []
```

A number of Maxima functions have appeared in these examples. We have already discussed the **binomial** function when giving examples of the use of the global flag **simpsum** above.

#### 3.5.5 makefact and minfactorial

The function **makefact** has the description:

Function: makefact (expr)

Transforms instances of binomial, gamma, and beta functions in expr into factorials.

See also makegamma.

The function **minfactorial** has the description:

Function: **minfactorial** (expr)

Examines expr for occurrences of two factorials which differ by an integer.

minfactorial then turns one into a polynomial times the other.

#### with the example:

## 3.5.6 psi, bfpsi, bfpsi0, gamma, and %gamma

Finally the **psi** function was generated by the action of **simplify\_sum**, and has the manual description:

Function: **psi**[n](x)

The derivative of log (gamma (x)) of order n+1. Thus, psi[0](x) is the first derivative, psi[1](x) is the second derivative, etc.

Maxima does not know how, in general, to compute a numerical value of psi, but it can compute some exact values for rational args. Several variables control what range of rational args psi will return an exact value, if possible. See maxpsiposint, maxpsinegint, maxpsifracnum, and maxpsifracdenom. That is, x must lie between maxpsinegint and maxpsiposint. If the absolute value of the fractional part of x is rational and has a numerator less than maxpsifracnum and has a denominator less than maxpsifracdenom, psi will return an exact value.

The function bfpsi in the bffac package can compute numerical values.

The function psi[n](x) is the polygamma function of order n evaluated at point x, and is defined as the (n+1) th derivative of the log of the Gamma function gamma(x). The particular case n = 0 is the digamma function, which is the first derivative of the log of gamma(x).

For positive integer n, the Gamma function  $\Gamma(n)=(n-1)!$ . Note that Maxima accepts either **factorial(m)** or m!.

The global variable **maxpsiposint** has the description:

Option variable: maxpsiposint

Default value: 20

maxpsiposint is the largest positive value for which psi[n] (x) will try to compute an exact value.

The global variable **maxpsinegint** has the description:

Option variable: maxpsinegint

Default value: -10

maxpsinegint is the most negative value for which psi[n] (x) will try to compute an exact value. That is if x is less than maxnegint, psi[n] (x) will not return simplified answer, even if it could.

The global variable **maxpsifracnum** has the description:

Option variable: maxpsifracnum

Default value: 6

Let x be a rational number less than one of the form p/q. If p is greater than maxpsifracnum, then psi[n](x) will not try to return a simplified value.

The global variable **maxpsifracdenom** has the description

Option variable: maxpsifracdenom

Default value: 6

Let x be a rational number less than one of the form p/q. If q is greater than maxpsifracdenom, then psi[n](x) will not try to return a simplified value.

The **bfpsi** and the **bfpsi0** functions have the description

Function: **bfpsi**(n, z, fpprec)

Function: **bfpsi0**(z, fpprec)

bfpsi is the polygamma function of real argument z and integer order n.

bfpsi0 is the digamma function. bfpsi0 (z, fpprec) is equivalent to bfpsi (0, z, fpprec).

These functions return bigfloat values. fpprec is the bigfloat precision of the return value.

load ("bffac") loads these functions.

Here we have a brief look at getting exact and floating point values of the polygamma and digamma functions.

```
(%il) [maxpsinegint, maxpsiposint, maxpsifracnum, maxpsifracdenom];
                                [- 10, 20, 6, 6]
(%01)
(%i2) load("bffac");
(%o2) C:/PROGRA~1/MAXIMA~3.0/share/maxima/5.14.0/share/numeric/bffac.mac
(%i3) psi[0](6);
                                  137
(%03)
                                  --- - %gamma
                                  60
(%i4) float(%);
                                1.706117668431801
(%04)
(%i5) bfpsi0(6,8);
                                   1.7061177b0
(%05)
(%i6) float(%);
                                1.706117670983076
(%06)
(%i7) float(%gamma);
                                0.57721566490153
(%07)
(%i8) psi[0](3/4);
                                          %pi
                            -3 \log(2) + --- - %qamma
(%08)
                                          2
(%i9) float(%);
(%09)
                               - 1.085860879786472
(\%i10) float (bfpsi0(3/4,8));
                               - 1.085860878229141
(%010)
(%i11) psi[1](3);
                                       2
                                           5
                                    %pi
(%011)
                                     6
                                           4
(%i12) float(%);
(%012)
                                0.39493406684823
(%i13) float(bfpsi(1,3,8));
                                0.39493400231004
(%013)
```

Output %07 finds the value of **%gamma**, the Euler-Mascheroni constant.