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Theoretical error compensation when measuring an S-shaped test piece

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Abstract S-shaped test piece aims to assess the performance of five-axis numerical control (NC) machine tools. When the draft international standard (DIS) was introduced at the 79th ISO/TC39SC2 meeting, it was agreed that this test piece would be included. The S-shaped test piece, however, has undeveloped surfaces, which contribute to theoretical error. Because the test piece is used to assess the performance of machine tools and to conduct error tracing, theoretical error should not be included in the detection results obtained by the coordinate measuring machine (CMM). Therefore, the Sshaped test piece, excluding the influences of theoretical error, is crucial to research. This paper calculates the theoretical error of the S-shaped test piece when processed with the single-point offset (SPO) position method and proposes precompensation (PRC) and post-compensation (POC) methods to eliminate the influences of theoretical error. We conducted a theoretical analysis to compare three methods, the two compensation methods and the one uncompensated method, and verified the results through actual experiments. Research from principle and practice demonstrates that both the PRC and POC methods compensated for theoretical error up to 0.01 mm and that PRC is more accurate when considering the difference of approximately ± 0.0015 mm.

Keywords Five-axis numerical control machining . Measurement . Theoretical error . Compensation . S-shaped test piece

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1 Introduction

The five-axis machine tool is presently one of the most versatile tools available, especially in the aeronautics and astronautics industries [[1](#page-9-0)]. These tools have become increasingly popular because of their growing geometric complexity and highdimensional accuracies. Therefore, the need to improve the performance of five-axis machine tools is significant [[2](#page-9-0)–[6\]](#page-9-0). The Chengdu Aircraft Industrial Group proposed the Sshaped test piece, which integrates many characteristics of aviation parts, for precision measurement [\[7\]](#page-9-0). This test piece has been applied in practical testing for many years, and in 2012, it was submitted as an additional sample for standards testing at the 74th ISO meeting [\[8](#page-9-0), [9](#page-9-0)]. Subsequently, in May 2016, the test piece was added to the draft international standard (DIS) at the 79th ISO/TC39SC2 meeting.

The S-shaped test piece clearly has many advantages in its configuration [[10,](#page-9-0) [11](#page-9-0)], and such characteristics can be integrated for better detection of accuracy in five-axis numerical control (NC) machine tools. The variegated orientation of the machine tool's ruled surface has higher requirements for the multi-axis linkage ability. Therefore, investigation of the use of the S-shaped test piece and its ability for accuracy measurement holds great theoretical and practical significance. Previous studies [[12](#page-9-0)–[15](#page-9-0)], however, have focused mainly on assessing theory, reconstruction, optimization, and sources of error of the test piece. Theoretical error is well known by researchers, but such influences on measurement and the compensated methods have not been investigated thoroughly.

Although this test piece solves assessment problems associated with five-axis NC machine tools, it also introduces theoretical errors because of the typically undeveloped ruled surface of the S-shaped test piece. Thus, the theoretical error cannot be avoided as long as the radius of the tool is not equal to zero. Hence, when firms use the S-shaped test piece and

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detect processing results, the theoretical error will affect the results of the analysis. This interference in evaluating the performance of five-axis NC machine tools introduces mistakes in conclusion.

For this reason, theoretical error should be excluded from accuracy detection. Although many flank milling algorithms [\[16](#page-9-0)–[20\]](#page-9-0) have been proposed, most methods are not practical because of high calculation time or other limitations. Therefore, the traditional single-point offset (SPO) method remains the standard way to conduct flank milling on an undeveloped ruled surface in CAD/CAM software systems [\[21](#page-9-0)–[23\]](#page-9-0).

When discussing the SPO method, this paper proposes two optional methods to subtract theoretical error: the precompensation (PRC) method and the post-compensation (POC) method. By using these methods, the theoretical error of every point on the ruled surface can be eliminated.

This paper is organized as follows: Section 2 introduces the S-shaped test piece and an accurate calculation means for the theoretical method. Section [3](#page-3-0) demonstrates the necessity of compensating the theoretical error and proposes the PRC and POC methods. Section [4](#page-6-0) explains the problem of the influence of theoretical error in precision measurement through experiments and applies the corresponding resolution methods in actual detection experiment. Section [5](#page-6-0) gives the paper's conclusions.

2 Theoretical error of the S-shaped test piece

The three-dimensional model of the S-shaped test piece, with a rectangular base, is shown in Fig. 1. The Cartesian coordinate O-XYZ is established (X and Y are datum lines achieved by intersecting the middle plane between plane B1/C1 and

plane B2/C2 with plane A). The S-shaped test piece is defined mainly by two S-shaped ruled surfaces, A and B, each of which consists of two quasi-uniform cubic rational B-splines [\[24](#page-9-0)], like an S.

The main characteristic of the undeveloped ruled surfaces is the twist angle γ , which causes the theoretical error. As shown in Fig. 2, the projections of the upper curve $C_1(u)$ and the lower curve $C_2(u)$ in the view of a ruled line cross each other instead of being coincident, resulting in the twist angle γ between the normal vectors $N_1(u_0)$ and $N_2(u_0)$.

2.1 Calculation method for theoretical error

The calculation method for theoretical error refers to the computation of the theoretical error of the S-shaped test piece under a certain given tool-positioning algorithm, which, in this paper, is the SPO algorithm. The traditional method [[22\]](#page-9-0) uses the mathematical formula to solve the theoretical error, which ignores the interplay of adjacent tool positions. To obtain the more accurate theoretical error, we used the minimum distance method [\[25\]](#page-9-0). According to this method, many discrete points on the ruled surface are given first, and the minimum distance between each point and the whole range of tool positions is calculated. This minimum distance subtracts the radius of the tool to obtain the theoretical error. The minimum distance method is more direct and easily includes detecting points along the discrete points of the ruled surface, which is beneficial for comparing and analyzing results for accuracy detection. The MATLAB program chart of the minimum distance method is as follows (Fig. [3\)](#page-2-0):

The data for the imported tool positions can be the G code data or the position of the tool tip plus the orientation of the vector of the tool axis. If the G code data are imported, they must be transferred to the position of the tool tip and to the orientation of the vector of the tool axis. Considering that each line of G code has defined the values of X , Y , Z , A , and B (this paper takes AB swing head machine tools as example), we can obtain the position of the tool tip (X, Y, Z) and then calculate the vector of the tool axis by using A, B. The process of the transfer is related to the coordinate system transformation. We first establish the fixed

Fig. 1 S-shaped test piece Fig. 2 Projection of curves

Fig. 3 Calculation method for theoretical error

coordinate system $O-X_0Y_0Z_0$ on the work piece. We next establish the tool coordinate system o -xyz, where the zaxis is upward along the tool axis, and the x-axis and the y-axis are parallel to the X_0 -axis and the Y_0 -axis, respectively. Finally, the attitude relation between frames ${o}$ and ${O}$ are described as two continuous rotations with angles B and A around the y-axis and the x-axis (rotated x-axis), respectively. The rotation matrix can be written as follows (symbol c stands for cosine operation, and symbol s stands for sine operation):

$$
R(A,B) = \begin{bmatrix} cB & sAsB & cAsB \\ 0 & cA & -sA \\ -sB & cBsA & cAcB \end{bmatrix}.
$$
 (1)

The vector of the tool axis is expressed as $[0, 0, 1]^T$ in frame $\{o\}$; thus, this vector is $T = R(A, B) [0, 0, 1]^T$ in frame $\{O\}$.

When solving the distance between a certain point and the tool axis, we use the vector method to obtain this value rapidly. The theory of the vector method is shown in Fig. 4, where

 \boldsymbol{T} is the unit vector of the tool axis, \boldsymbol{P} is the vector from point O to point S, and d is the distance from S to the tool axis.

The plus or minus of $(P \cdot T)$ is important because the angle between the two vectors P and T has the possibility to be greater than 90°. If $(P \cdot T) > 0$, then $d = (||P||^2 - (P \cdot T)^2)^{1/2}$, and otherwise, $d = ||P||$. Finally, traversal operators can give the minimum distance, and the theoretical error is equal to the minimum distance subtract the tool radius R.

2.2 Distribution of theoretical error

Figure [5](#page-3-0) presents the distribution of theoretical error of the S-shaped test piece processed using the SPO method.

The general features and trends of the distributions are discussed as follows.

- (1) For surface A, relatively larger error values appear in three areas where X is approximately equal to 40, 140, and 250 (the homologous arc lengths are about 130, 270, and 480, respectively). And for surface B, relatively larger error values appear in three areas where X is approximately equal to 40, 120, and 260 (the homologous arc lengths are about 130, 240, and 530, respectively).
- (2) The largest theoretical error for surface A is about $25 \mu m$, while for surface B, it appears to be 20 μm. And the theoretical error in two surfaces Fig. 4 Theory of vector method is less than 10 µm for most areas.

Fig. 5 Distributions of theoretical error. a Surface A. b Surface B Fig. 6 Diagrammatic sketch of PRC and POC

3 Theoretical error compensation of accuracy detection

3.1 Reasons for compensation

The measurement results of the processing error are expected to effectively reflect the performance of the machine tool. The main characteristic of the S-shaped test piece, however (i.e., the inconsistent size and direction of its curvatures), introduces an irregular theoretical error. The S-shaped test piece is applied to evaluate the five-axis NC machine tools by using its sharp changes for the tool axis vector when flank milling cylindrical tools. The non-uniform changes will lead directly to severe fluctuations in the processing of milling force, causing tool and part vibration, which disrupts machine stability [\[12](#page-9-0)]. Therefore, the theoretical error should not be included in accuracy detection because it is incapable of assessing the performance of machine tools. In a special case, suppose that the undercut error caused by the machine tool, plus the overcut error induced by position algorithm, equals 0. This process result would indicate absolute accuracy. Nevertheless, the performance of the machine tool is affected adversely when compensating for this theoretical error.

According to the present DIS, the recommended measurement points are located on the planes $Z = 11$ and $Z = 25$, for which the theoretical error is approximately less than 5 μm. Because the widely recognized standard requires an allowable range of final error from −50 to +50 μm, the theoretical error seems to be negligible. It is obvious, however, that the theoretical error has significant effects when the S-shaped test piece is considered to be nearly unqualified or qualified for use. Assuming that the maximum overcut error equals a value between −50 and −55 μm, the test piece instead might be qualified when considering the theoretical error. The maximum undercut error, between 45 and 50 μm, in turn, might indicate that the test piece is unqualified. Additionally, if the S-shaped test piece is

Fig. 7 Angle between vectors of the PRC and the POC methods

considered to be unqualified, it would be necessary to find the causes, which require the accurate distribution of machining error. So the accurate distribution of machining error requires not only the measurement points located on the planes $Z = 11$ and $Z = 25$, which would include the maximum theoretical error $25 \mu m$. From this perspective, the compensation of theoretical error is more reasonable. Furthermore, the compensation methods are convenient and may be conducted quickly (demonstrated in Section 3.2) without additional cost.

3.2 PRC and POC methods

Resolution strategies require a decrease in the theoretical error, and therefore, this paper proposes two methods to solve this problem. One, the PRC method, offsets the theoretical error before deciding on the data of the measurement points; and the second, the POC method, offsets the theoretical error after accuracy detection. On the basis of the PRC method, the measurement points are calculated by tool position. In reference to Fig. [4,](#page-2-0) the vector **D** and point P (S – theoretical error value \times

Fig. 8 Distance between S and P

 \bf{D}) are the exact data of the measurement points, where \bf{D} is the unit vector from S to the tool axis. For the POC method, however, it is not necessary to first correct the measurement points constructed by point S and normal vector N of the ruled surface. Instead, the theoretical error is subtracted after detection, which is equivalent to measure P′. The measurement points given by DIS, POC, and PRC are demonstrated in the [Appendix](#page-7-0).

Theoretically, the PRC method is more accurate because the test points and their normal vector must have changed once the tool position was confirmed. As shown in Fig. [6](#page-3-0), S is the original test point, and P is

the actual position of the machined S. The vector \bm{D} and point P can be obtained by the method mentioned in Section [2.1.](#page-1-0) And the vector N and point S can be calculated from the definition of the S-shaped test piece.

As presented in Fig. [7](#page-4-0), however, the angle between the vectors of the PRC and the POC methods is nearly 0, making the POC method efficient as well. Conversely, this result also proves that the PRC method is more precise than the POC method. In addition, although the distance between points S and P is not equal to 0, as shown in Fig. [8,](#page-4-0) it is also the theoretical error that would be subtracted after detection, according to the POC method. The maximum value of the

Fig. 10 Differences of results between PRC and POC

distance between S and P is approximately 0.01 mm, which would be the maximum value difference between the uncompensated method and the POC method. In other words, the curve of the distance between S and P is just the difference between the uncompensated method and the POC method. Therefore, the only slight difference between the two compensated methods is from the vectors, indicating that the POC and PRC methods would obtain similar results and that any dissimilarity should relate to the angle between their vectors.

4 Experiments

We machined two S-shaped test pieces with the SPO position method at the machining center VMC35120U of the Shenyang No. 1 Machine Tool Factory. These test pieces were then detected using a coordinate measuring machine. The measurement points used are demonstrated in the PRC and POC methods and are shown in the [Appendix.](#page-7-0)

The error results of the experiments are shown in Fig. [9](#page-5-0)a (test piece 1) and b (test piece 2). From the pictures and the judgment standard discussed earlier, test piece 1 is considered to be unqualified, and test piece 2 is considered to be qualified. Despite these qualifications, significant differences are apparent between uncompensated error and compensated error. The biggest difference is approximately 0.01 mm at point 19 of test piece 1, and most of the differences are approximately 0.005 mm, in accordance with the theoretical analysis in Fig. [8](#page-4-0). Although it seems to make no different in most situations, the error value near the critical point, such as at the 13th point in Fig. [8](#page-4-0), is likely to influence the decision to qualify the test piece or not. In addition, the uncompensated error might exercise an influence on the analysis of the source of error. Therefore, considering the low cost and

convenience of the method, it actually is necessary to compensate the measurement.

The specific differences between the PRC and the POC could be obtained from further study. By subtracting the POC from the PRC, Fig. 10 investigates the calculation results, along with the angle between their vectors. No obvious relationship exists between the qualified test piece and the unqualified test piece. The consequences demonstrate that the differences in the results between PRC and POC are as low as anticipated, which in most cases, are less than 0.001 mm. Therefore, a shortage does not exist to the extent that the POC method should be abandoned. Certainly, if the search for sources of error must be especially precise, it is best to use the PRC method. In addition, the tendency of the differences between the PRC and POC is related to the angle of their vectors, which is particularly apparent from the 40th point to the 50th point.

5 Conclusions

Considering the important application of the S-shaped test piece, this paper investigates the detection error caused by DIS measurement points, which is beneficial to tracking errors and making qualified judgments. After explaining why it is necessary to eliminate this error, two methods, PRC and POC, were proposed to prevent the error. Finally, two S-shaped test pieces were machined to verify the theory that both the PRC and the POC methods efficiently eliminate measurement error. The experiment also concludes that the PRC and the POC methods would decrease error by 0.01 mm. In addition, the PRC method is more suitable than the POC method when considering the difference of 0.0015 mm. Furthermore, using the PRC method to substitute the DIS measurement points is the best choice. On the basis of Appendix

the application of PRC, further research can be conducted better identify sources of machining error.

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Measurement points according to DIS, POC, and PRC

 X Y Z I J K

63.2523 −88.7096 25 0.0066 −0.9784 0.2066

Table 1 Measurements points in DIS and POC

presented in Tables 1 and [2.](#page-8-0)

 -0.1597

 -0.2157

 -0.2335

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