



CoToLiP, a new tool to handle each of the six degrees of mutual situation between any two integral features

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Session « Tools and Monitoring II »

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CoToLiP: where does it come from







2020 - 2022 (and beyond)

In special leave at LBNL since 2023





ADVANCED LIGHT SOURCE



1994 - 2004



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2024-10-10, B. Nicquevert, IWAA 2024

Expert since 2013

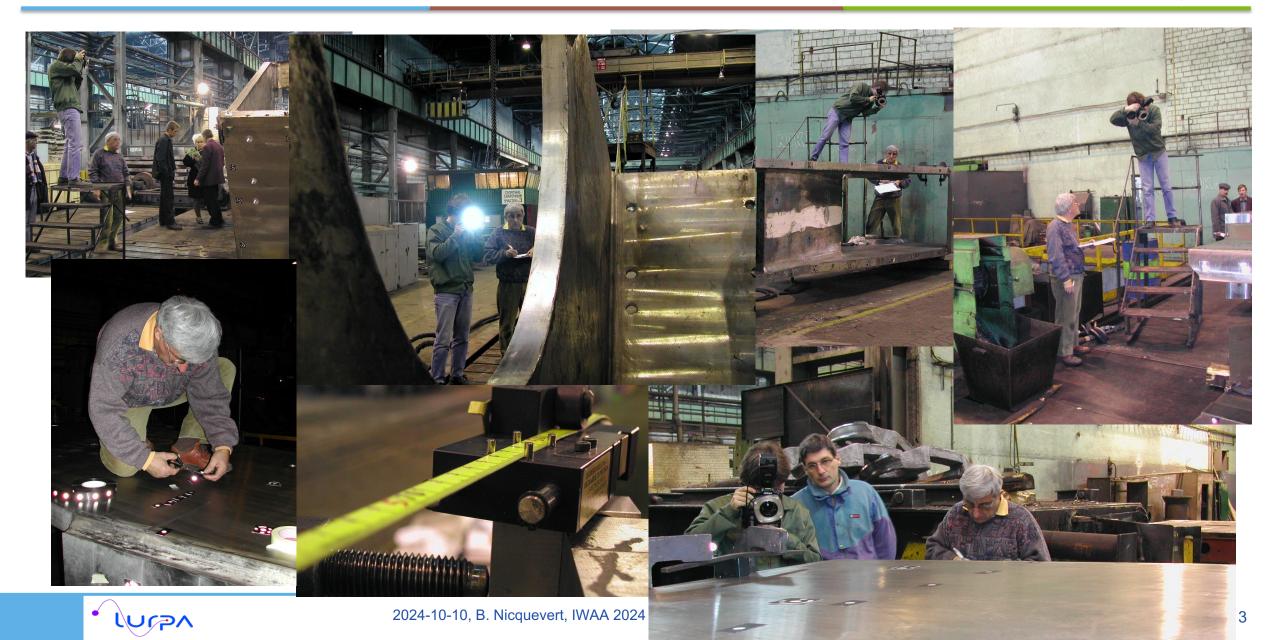
ISO

TECHNICAL COMMITTEES

ISO/TC 213 Dimensional and geometrical product specifications and verification

Start point: photogrammetry of ATLAS feet in Russia in 2002

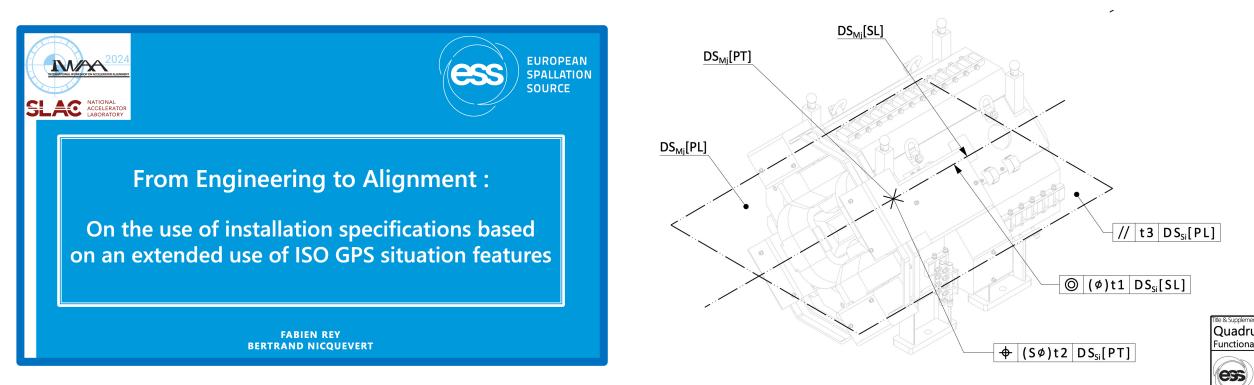




Behind the curtain of "Engineering to Alignment"



This talk can be seen as a complement, an introduction, or the theoretical background of our talk from IWAA 2024 (Tuesday 10/08 1:30pm PT):



"Behind the curtain" of the creation of the generic set of drawings for functional definition, fiducialization and installation



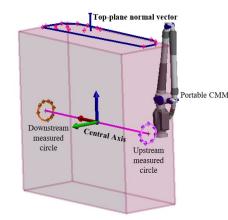


... This also a follow-up on yesterday's Peter Manwiller's insightful talk!

More specifically:

- Typical of the cognitive gap between the functional and the verification perspectives
- And on the diversity of mindsets of the various communities

A component needs to be fiducialized by probing mechanical features with a portable CMM as shown in Figure 3. A central axis is defined by connecting two measured circle centers-one measured at the upstream end and one at the downstream end. The component's topplane is also measured. The central axis of the component is desired to be placed on a horizontal beamline to define the component's yaw and pitch orientation. The top-plane's normal vector is desired to be pointing up to define the component's roll. The measured angle between the top-plane normal vector and the central axis is 90.02 degrees.



Question 6

Figure 3: Magnet Fiducialization Measurements

Using the fiducialization data, how should the ideal placement be determined?

A) The top-plane's normal vector should be held as the primary axis, and the central axis should be the secondary axis. The third axis follows the right-hand rule.
B) The central axis should be held as the primary axis, and the top-plane's normal vector should be the secondary axis. The third axis follows the right-hand rule.
C) It doesn't matter whether the mid-plane or the central axis is held as primary.



Facility for Rare Isotope Beams U.S. Department of Energy Office of Science | Michigan State University 640 South Shaw Lane • East Lansing, MI 48824, USA frib.msu.edu

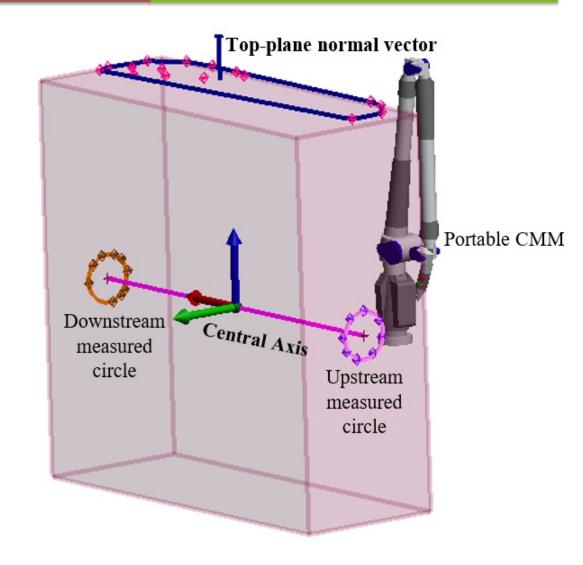
A Survey of Accelerator Alignment Concepts for Professional Development, Slide 8

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Good questions...



- □ Is B the correct answer? (top "plane" 1st)
- □ Or is it A? ("central axis" 1st)
- Or none of these?
- Actually I do not know
- And if I am the surveyor, I should prevent myself from looking for the answer, if this is not provided in the TPD (Technical Product Documentation = drawing or annotated 3D)
- Because this extends beyond my scope and responsibility!
- What is FUNCTIONAL first





ISO 8015:2011 principles



Duality principle

5.10.2 Duality principle statement

The duality principle states that:

- 1) a GPS specification defines a GPS specification operator independent of any measurement procedure or measurement equipment, and;
- 2) the GPS specification operator is realized in a verification operator which is independent of the GPS specification itself, but is intended to mirror the GPS specification operator.

The GPS specification does not dictate which verification operators are acceptable. The acceptability of a verification operator is evaluated using the measurement uncertainty and any ambiguity of the specification.

Responsibility principle

5.13 Responsibility principle

Given the duality principle and the functional control principle, it is necessary to describe the closeness of a specification operator to the functional operator and the closeness of a verification operator to a specification operator. The ambiguity of the description of the function and the ambiguity of the specification together describe the closeness of the specification operator to the functional operator. These ambiguities are the responsibility of the designer. The measurement uncertainty quantifies the closeness of the verification operator. Unless otherwise stated, the measurement uncertainty is the responsibility of the party who is providing proof of conformance or non-conformance with a specification; see ISO 14253-1.

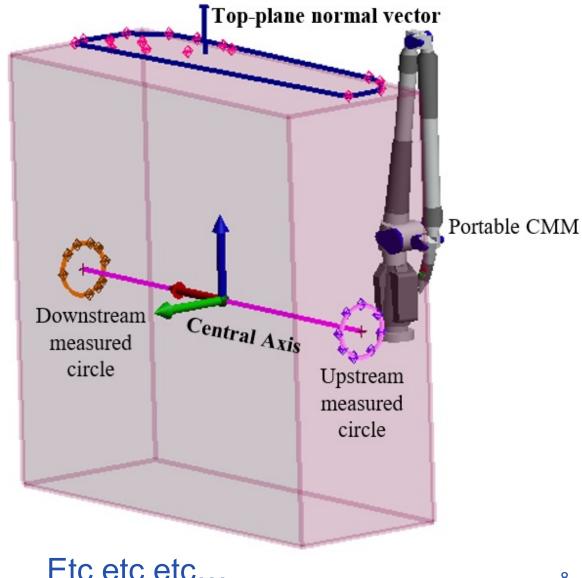


Beyond that, what is induced, guessed, implicitly interpreted?



□ (Fiducialization, really?)

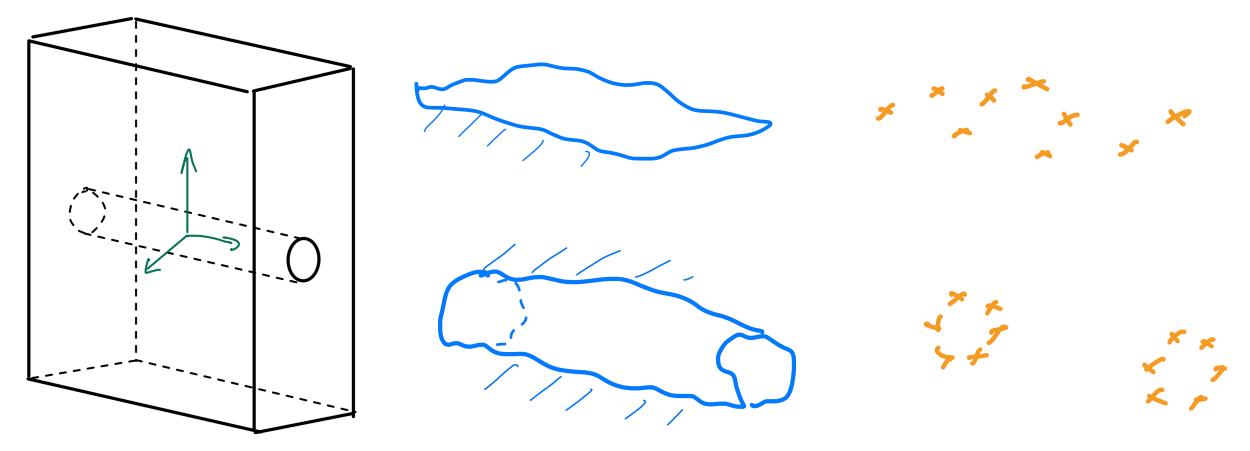
- How do we get the "top-plane normal vector"?
- □ How do we get the "central axis"?
- Where do we measure the circles?
- How do I "orientate" the normal vector and the central axis?
- And first: how do I know I need to measure circles and the plane?
- And that I am looking for an "axis and plane" based coordinate system?
- And: the axis is axis of what?







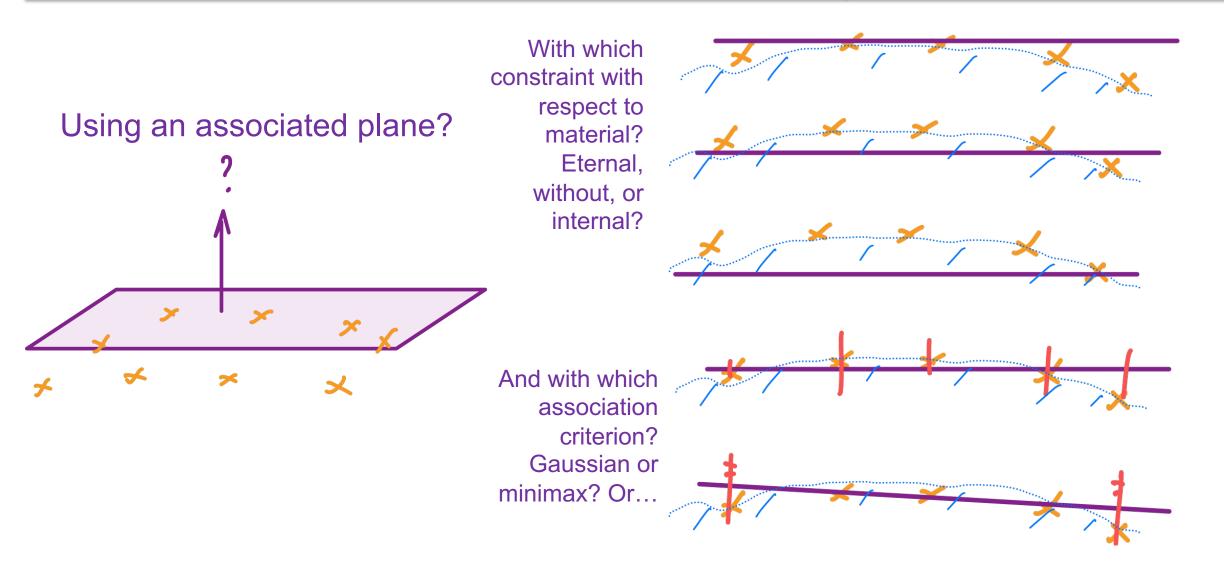
Here follows a series of last minute hand-drawn slides to comment the case
 ... and to (partially) attempt to make explicit the implicit (hidden) assumptions





How to get the normal to the "plane"?

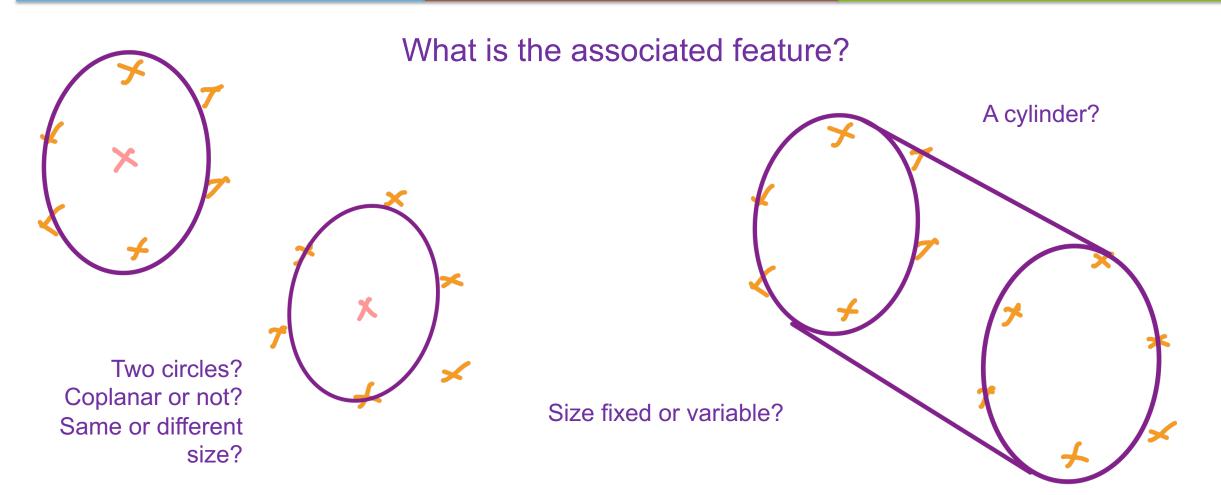






How to establish the "axis"?





Or from magnetic measurement? (See our preprint paper)

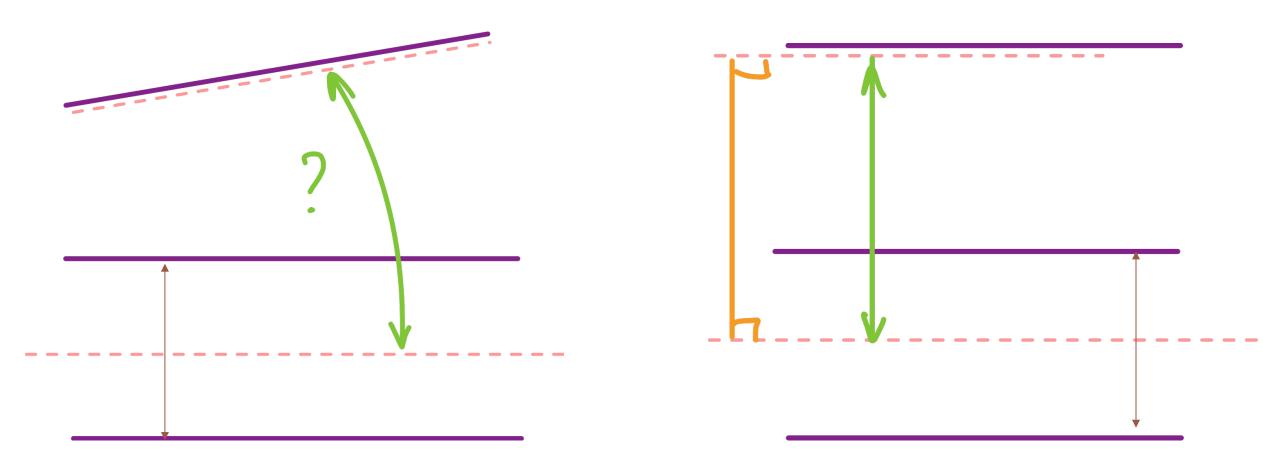


2024-10-10, B. Nicquevert, IWAA 2024

Nicquevert and Rey. "Establishing and Situating Functional Features of a Machine Component Using ISO GPS Situation Features. Application to the Alignment of Magne in a Particle Accelerator" 11

How to orientate the "plane" and the "axis"?





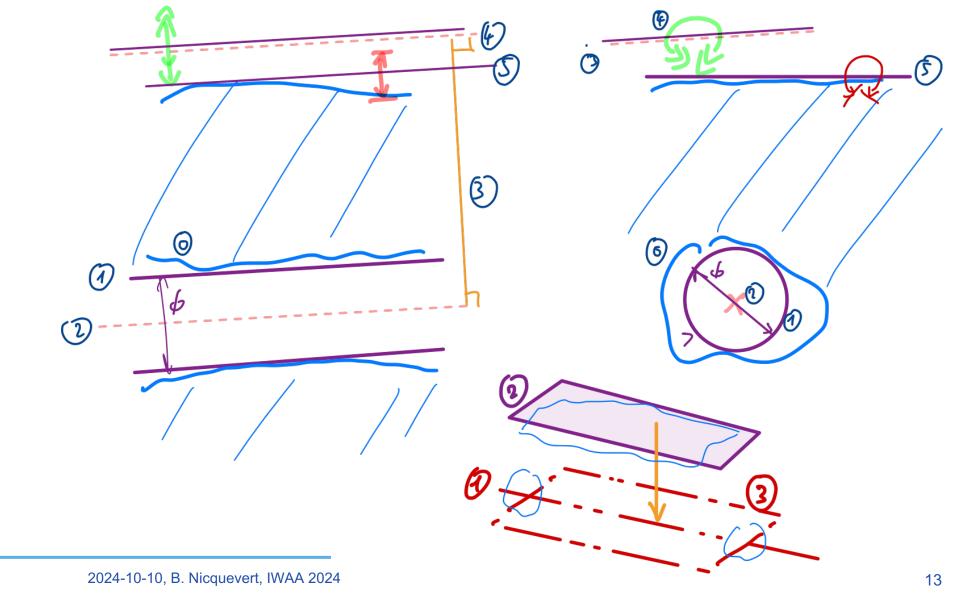


In which order the establishment of plane and axis?



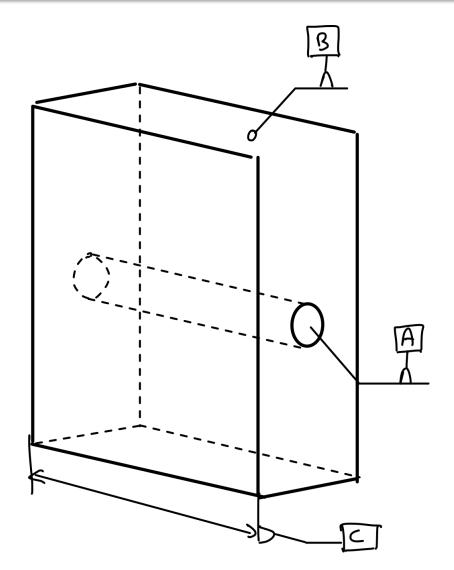
First possibility A: starting with the axis

lurpn



How to indicate it in the drawing? ISO 5459:2024 (Oct 4th...)





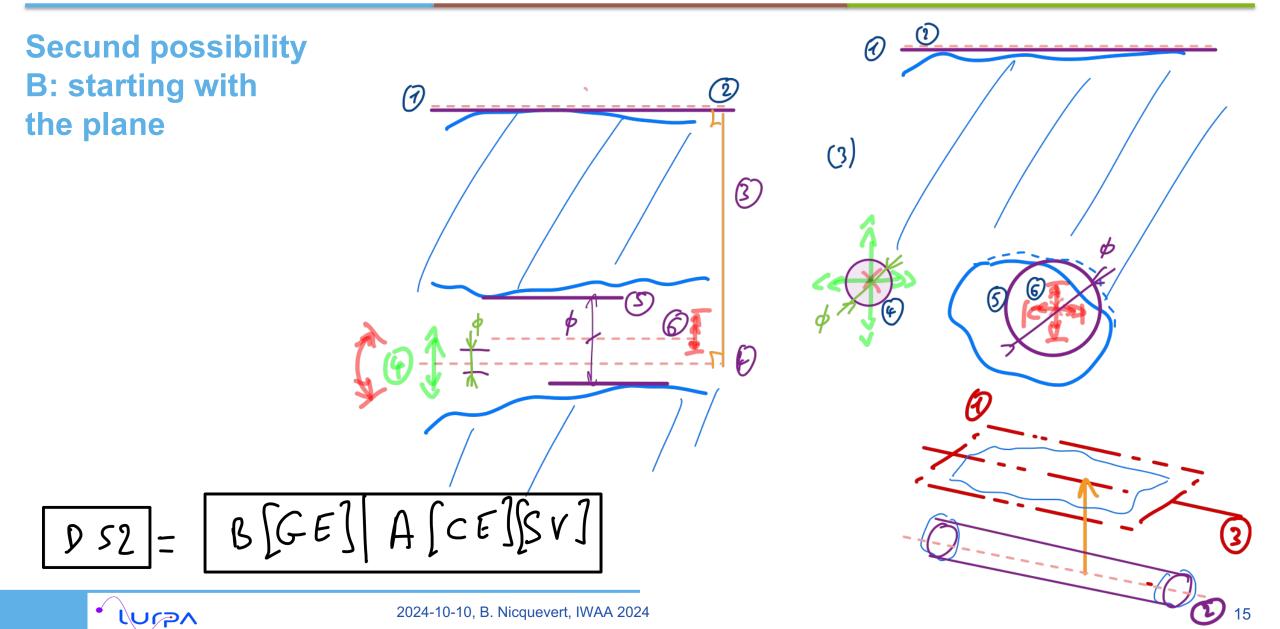
$$DS1 = A[C e][S v] B[G e]$$

C: minimax E: external to material SV: size variable G: gaussian (least squares)



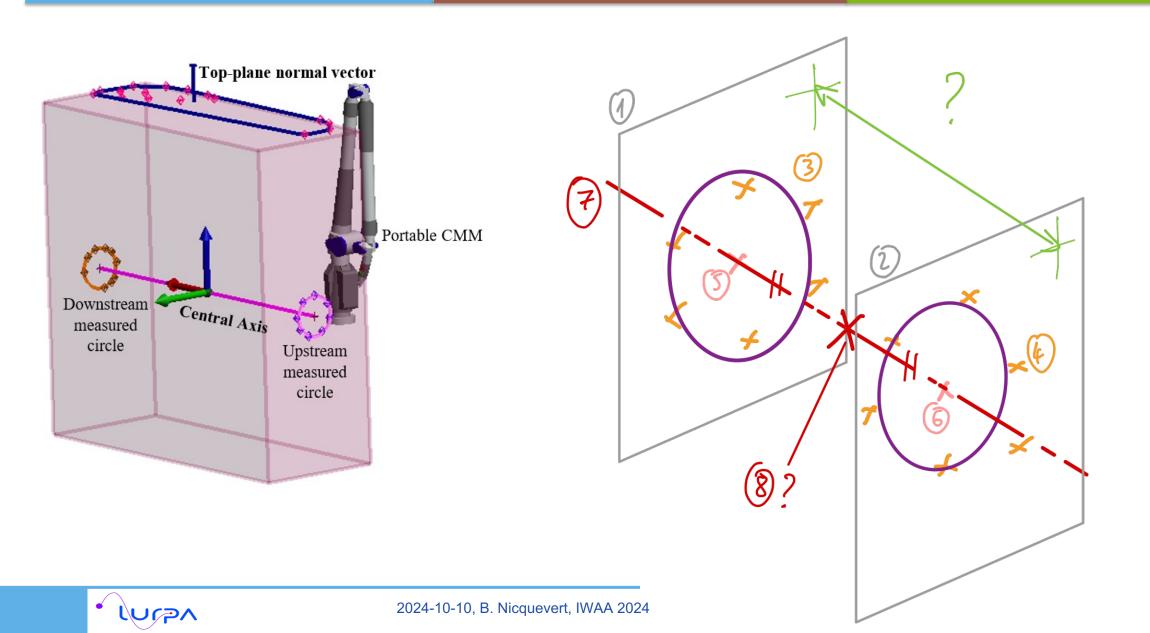
In which order the establishment of plane and axis?





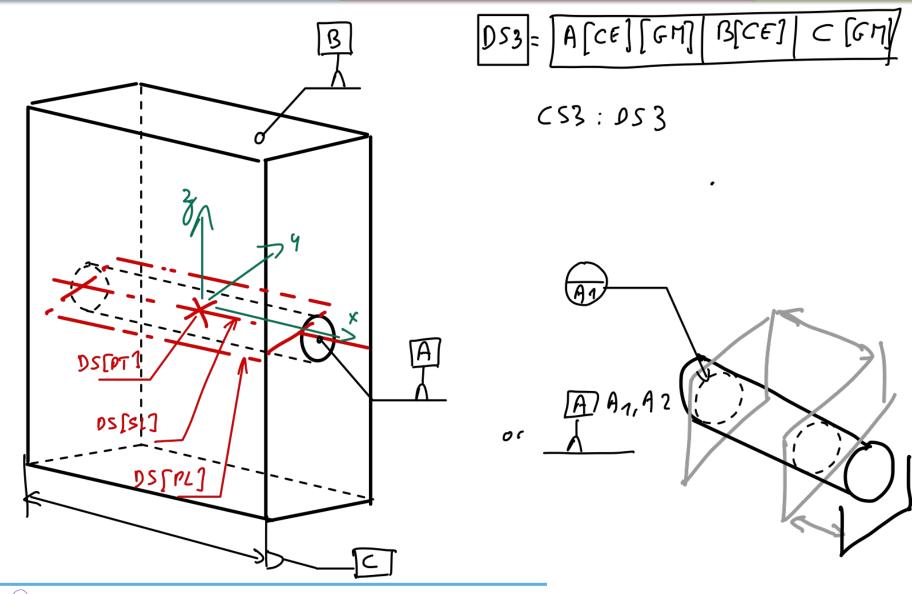
And what about the "center" of the CS?





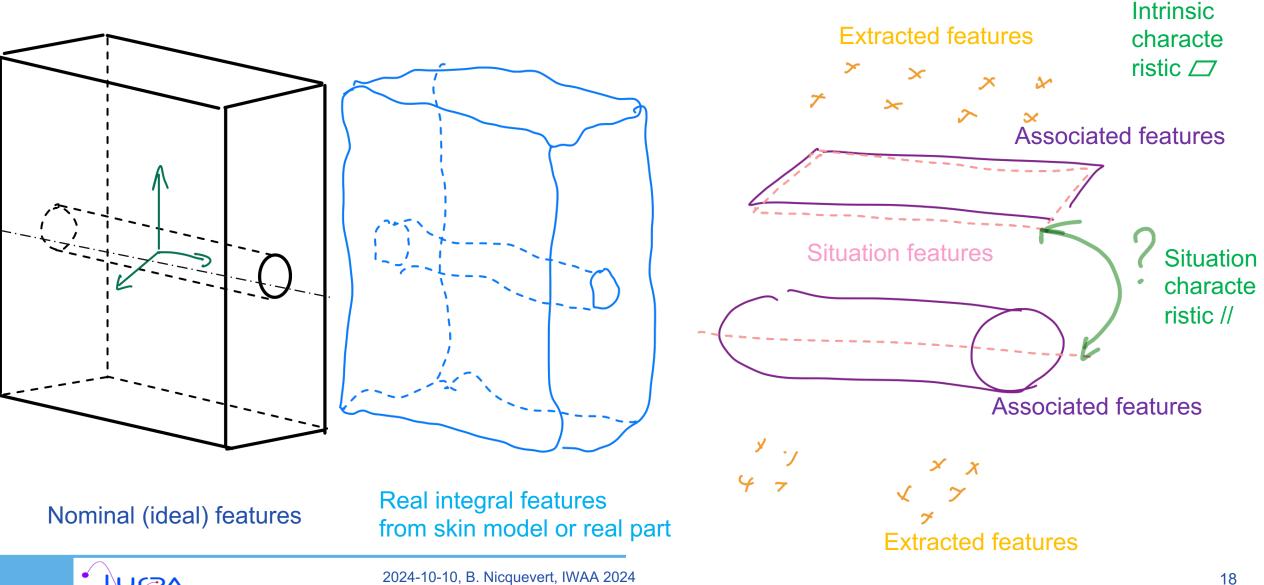
A (more) complete and functional (?) explicitation





Take away: what is *explicit*, what is *implicit* and should not be





2024-10-10, B. Nicquevert, IWAA 2024

LUCPA



- If, as a verifier (a metrologist, a surveyor), or even as a producer, I am tempted to answer these implicit questions, on the behalf of those who (should) know and fix them, it means that I am starting interpreting. Guessing. Inventing. Drifting. Potentially diverging. No more univocal.
- Is it a good idea to take on their shoulders answers to questions that should, must, shall be addressed by the designer?
 - "I would prefer not to." (Melville). Well, just don't.
- □ Then, how do I get these answers? From the TPD
 - Better to ask them to be expressed with ISO GPS (or GD&T) language
- □ So what?
 - Require, request, demand that these answers BE addressed by designer
 - Train and accompany people all along the chain: functional specification, design, production, verification

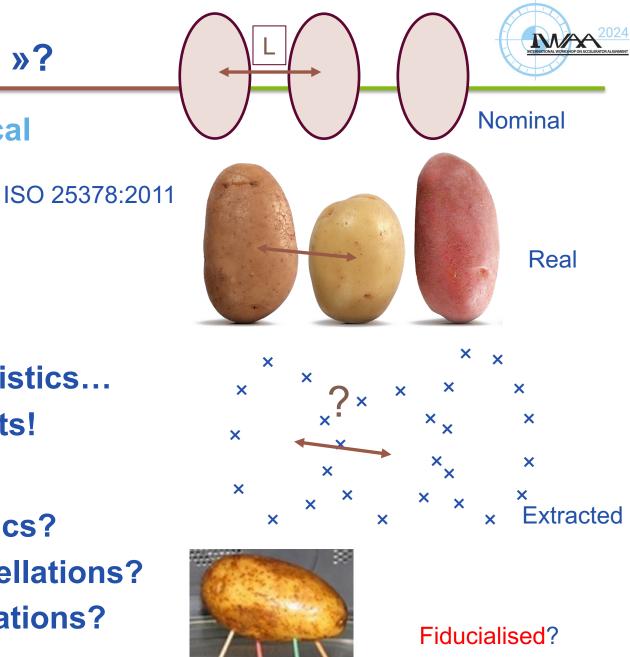


How to deal with « mutual situation »?

- Design defines surfaces with geometrical characteristics: intrinsic or situational
- Then real surfaces are manufactured
- Metrology captures points on surfaces
- Survey and alignment

lurp^

- Focus mainly on situation characteristics...
- ... starting from sets of fiducial points!
- How to deal with mutual situation?
 - How to define situation characteristics?
 - For any kind of surfaces? For constellations?
 - How to constraint these mutual situations?

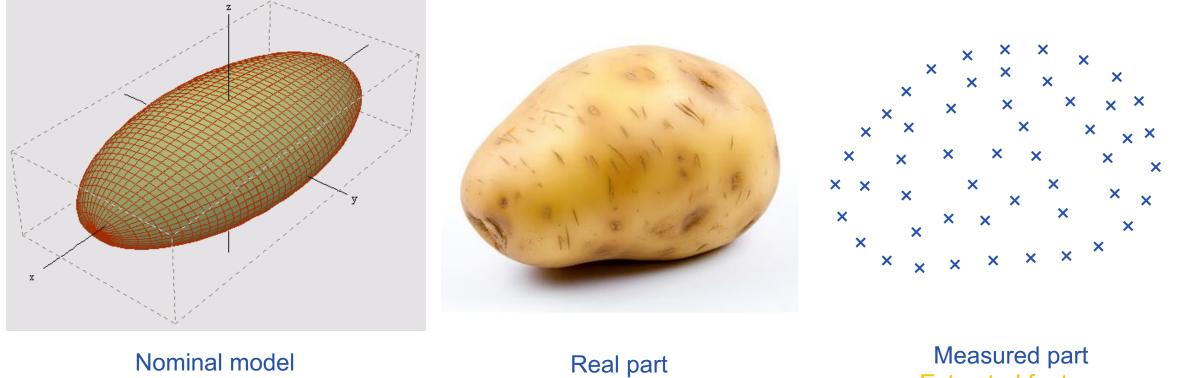


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Intrinsic form and size of an "integral feature"



How to find the (minimum) set of parameters to define the nominal feature? How to characterize deviations with respect to nominal?



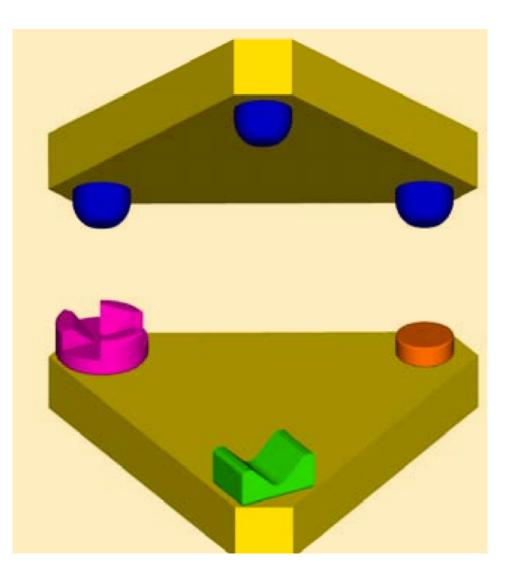
Measured part Extracted feature = set of points





Situation = location and orientation

- Which features are sufficient to determine the situation of any surface?
- ISO GPS situation features: « point, straight line, plane, from which the situation of a geometrical feature can be totally or partially defined »
- [SOURCE: ISO 17450-1:2011, 3.3.1.3 modified]
- Origin: probably the *Kinematic System* of Kelvin (1868-1871)





Technologically and Topologically Related Surfaces (TTRS) model



Invariance classes (ISO 17450-1)

Gives situation feature: concept of a **minimum set of a point, a straight line, and a plane** that ensures the surface invariance

ISO/DIS 20223:2024(en))
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			_ R
	Type of the minimum set of situation features	Type identifier	
Minimum set of a single	Point (PoinT)	[PT]	
situation feature	Straight line (S traight L ine)	[SL]	
-	Plane (PL ane)	[PL]	Pr
Minimum set of a pair of	Point in plane (poin T i n P lane)	[TiP]	
situation features	Point on line (poin T o n L ine)	[ToL]	$\neg \vdash$
-	Line in plane (Line in Plane)	[LiP]	
Complete minimum set of situation features	Point on line in plane (poin T o n Line in P lane)	[ToLiP]	C

Invariance class	Invariance degrees for which the surface is invariant	Illustration	Situation features	Example of types of surfaces
Spherical	3 rotations around a point	+	Point	Sphere
Planar	1 rotation perpendicular to the plane and 2 translations along 2 lines of the plane		Plane	Plane
Cylindrical	1 translation and 1 rotation around a straight line		Straight line	Cylinder
Felical	Combination of 1 translation and 1 rotation around a single straight line	GINI	$\mathbf{\times}$	Helical surface with a basis of involute to a circle
Revolute	1 rotation along a straight line		Straight line Point	Cone Torus
Prismatic	1 translation along a line of a plane		Plane Straight line	Prism with an elliptic basis
Complex	None		Plane Straight line Point	Bezier surface based on an unstructured cloud of points in space

Invariance classes and corresponding situation features



2024-10-10, B. Nicque Werenty A. Bizière, A., Serré, P., & Valade, C. (1998). The TTRSs: 13 constraints for dimensioning and tolerancing. Geometric design tolerancing: theories, standards and applications, 122-131.

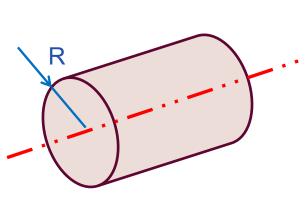
Extension of single situation features to ToLiPs



 A triplet of a point, a line and a plane satisfying

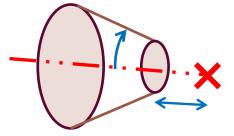
'poinT on Line in Plane', i.e. T∈L⊂P

 Allows an explicitation of situation features for any types of geometrical features depending on their invariance class

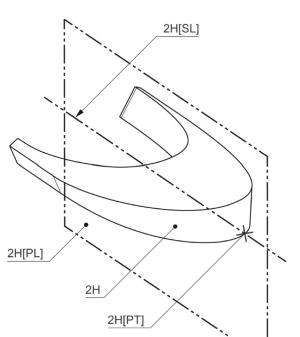


A feature of invariance class *Cylindrical*: a single situation feature, one intrinsic parameter

A feature of invariance class *Complex*: a minimum set of three situation features, and many parameters



A feature of invariance class *Revolut*: a pair of situation features, two parameters

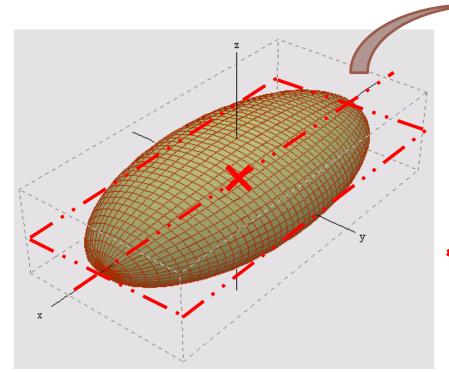


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Association

(e.g. here: with Gaussian criterion – least squares sum – and without material constraint [GM]; + without situation constraint; + with offset of intrinsic dimensions "size variable")



Assumes that the nominal is known

Nominal situation features

Situation features of the associated feature

Actual situation features of the real integral feature



ATTERNITIONAL VOIDS OF ON ACCELERATION ALLONMENT

the world of *design* (features and characteristics)
 the world of *metrology* (points and coordinate systems)

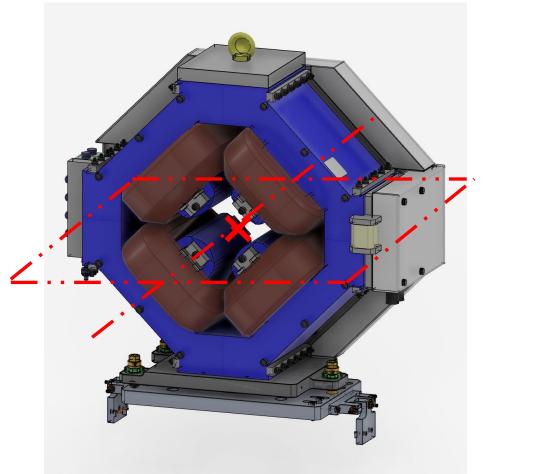




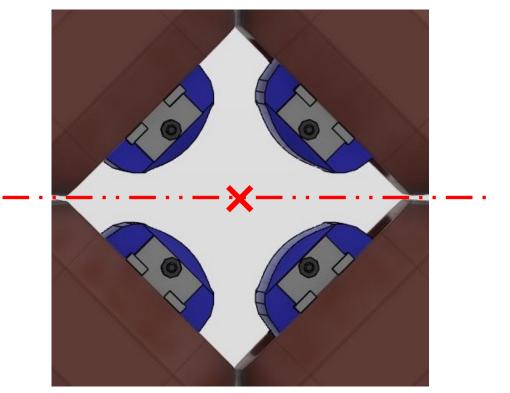




□ For a ESS quadrupole: magnetic axis? Magnetic center? Polarization plane?



Pole "profile": invariance class **complex** (convex surfaces)



=> Minimum set of situation features: [ToLiP]

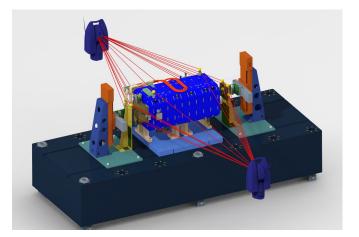


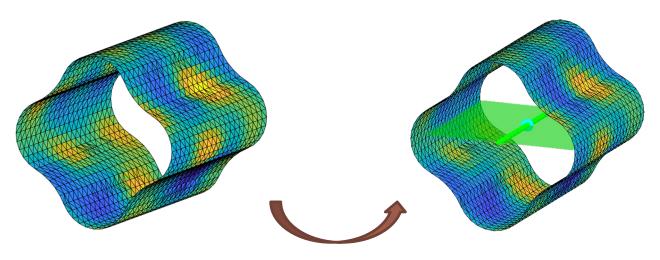
Invariance class complex and choice of situation features



- Obtained by association between nominal and real features
- When the nominal is not known, we can use a Laplace-Beltrami Operator: it gives the first "rigid body" modes even if nominal is not known
- Actually any choice of situation feature is agreedable, provided that the situation features are:
 - Meeting the ToLiP condition "Point on a Line in a Plane"
 - Explicitly represented on the TPD

Or, by fiducialization, by *association* between the nominal and the real magnetic field!



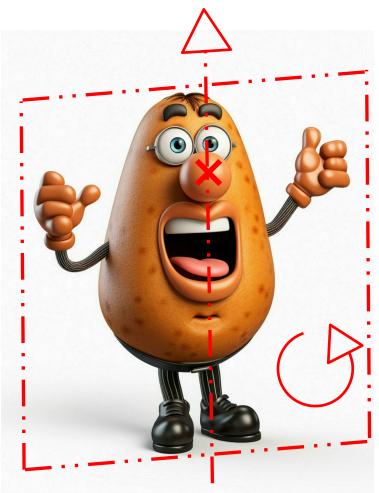


Situation features determination for a geometrical feature of prismatic invariance



ToLiP with positive directions of situation features





□ A way to deal with "chirality"

Defined in ISO/DIS 20223:2024, it enables to fully establish an *oriented* coordinate system

Figure 6 explains the implicit direction of the situation features of type [SL] and of type [PL] induced by the representation of the coordinate system of Figure 5.

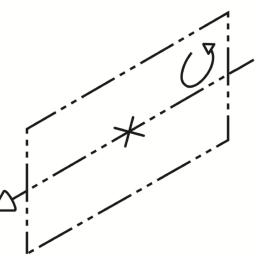


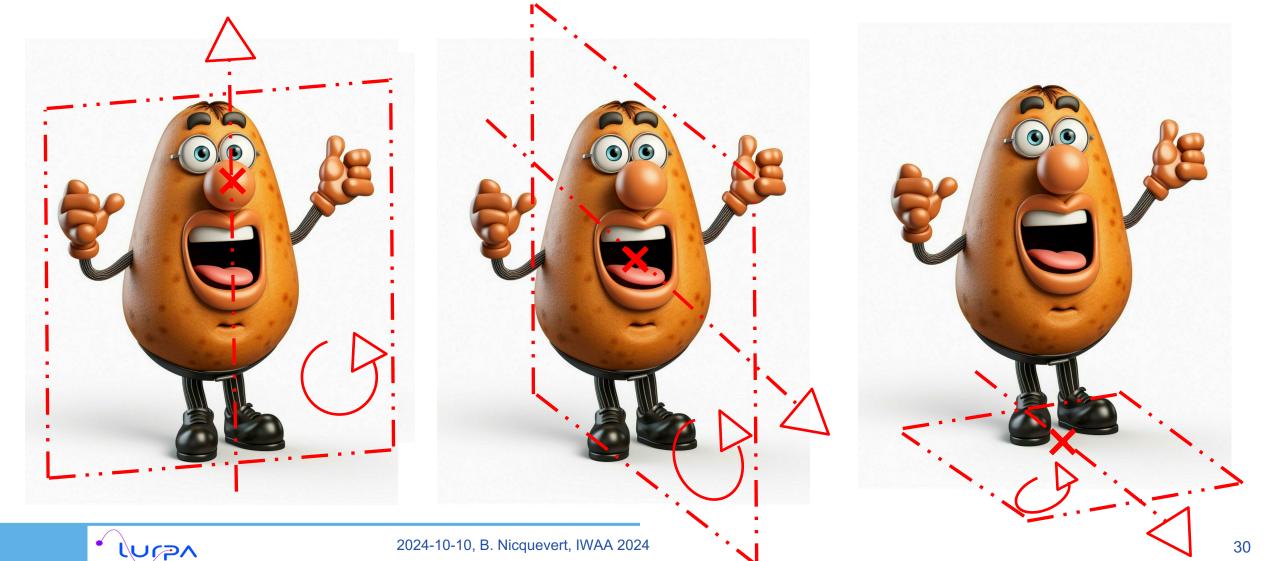
Figure 6 — Interpretation of the positive directions of the situation features indirectly defined by the representation of <u>Figure 5</u>



Explicit representation of the ToLiP



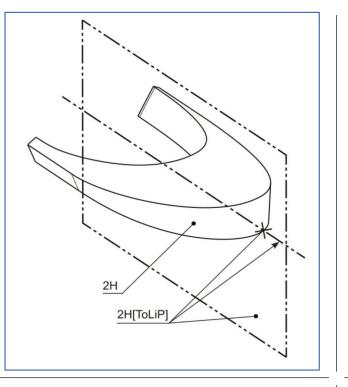
□ Three possible choices (out of *many*) for the ToLiP of Mr Potatoe



An ISO standard to represent and identify situation features







DRAFT International Standard

- A project developed starting from ESS and CERN needs
- Currently under public consultation
- Please send your comments through your national committee
 - AFNOR, ASME, BSMI, BS, DIN, DS, JISC, SAC, SCC, SIS, SNV, UNE, UNI...
 - Deadline: by end of November = now!

Technical product documentation (TPD) — Representation and identification of situation features

Documentation technique des produits (TPD) — Représentation et identification des éléments de situation

ICS: 01.110

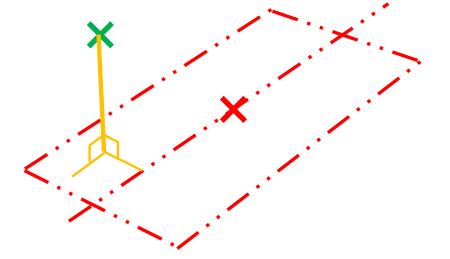
ISO/DIS 20223



ToLiPs and coordinate systems



□ How to define the distance from a point to a (complete) ToLiP?

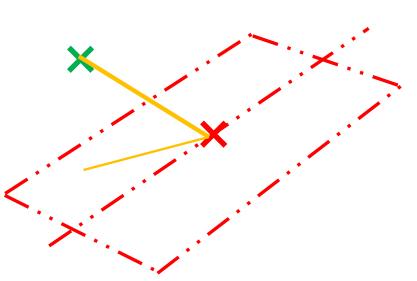


Distance from point to **plane**: induces a cartesian coordinate system

Distance from point to straight line: induces a polar coordinate system

e.g. a datum system (DS)



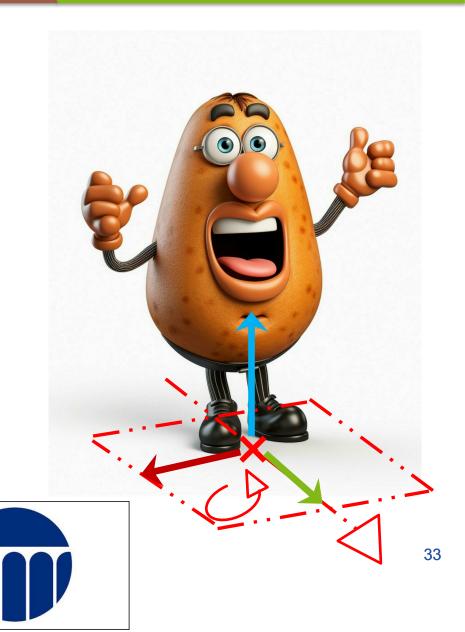


Distance from point to point: induces a spherical coordinate system





- A complete ToLiP is a minimum set made of three situation features of different types, with condition
 - point on line in plane
- A ToLiP does not depend on any coordinate system
- This is the other way round: a Coordinate System is established on a ToLiP
- Nota: a ToLiP can be established on any set of integral features (not only datum features)



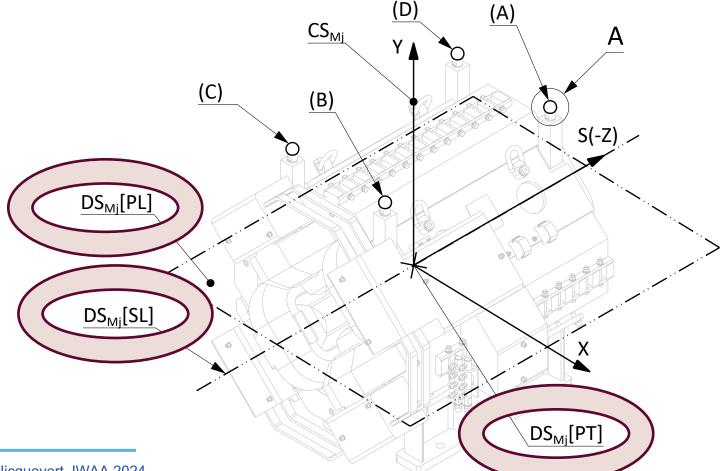


Explicit representation and indication of situation features



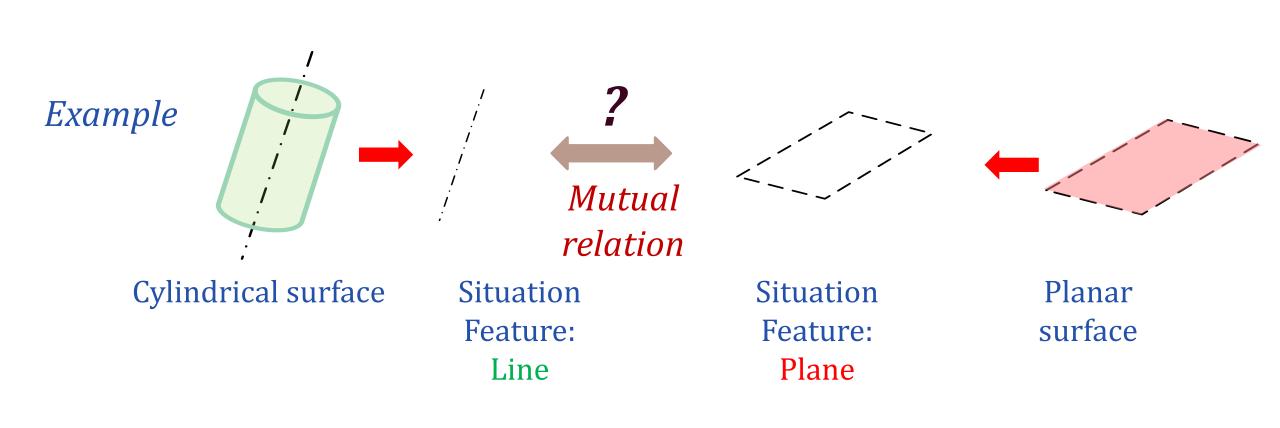


Representation and indication of situation features according to ISO/DIS 20223:2024 A complete ToLiP defines the situation of the surfaces upon which it is established





Mutual situation of single situation features?

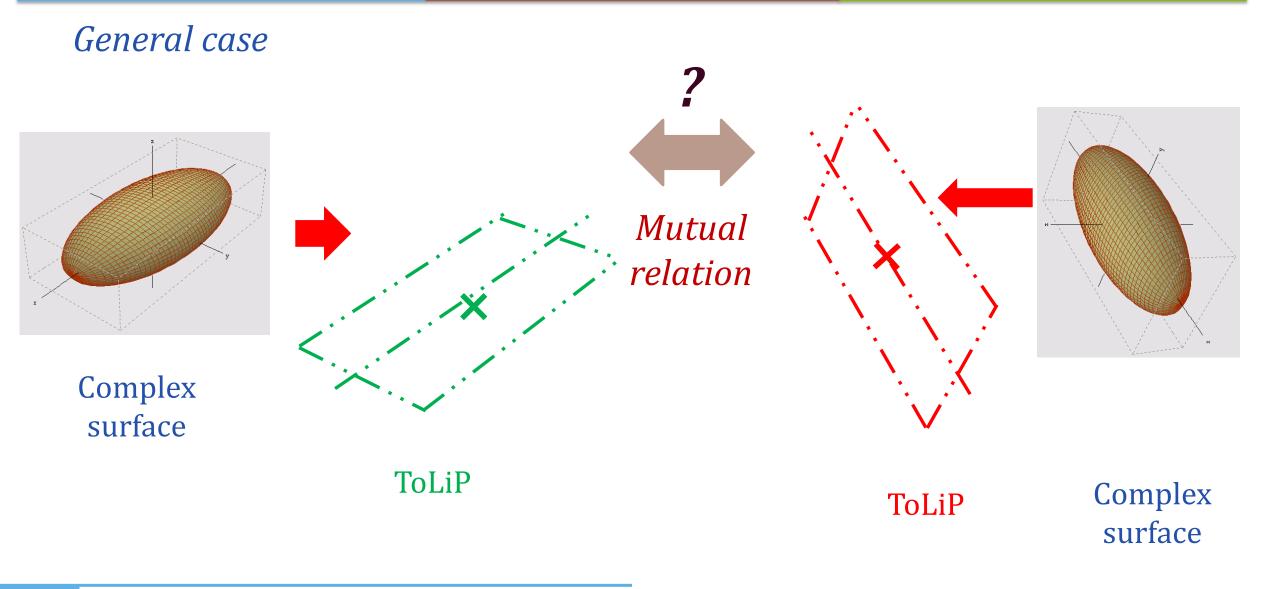




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Mutual situation between any two ToLiPs?









Mathematical representation of the mutual situation of two ToLiPs: CoToLiP

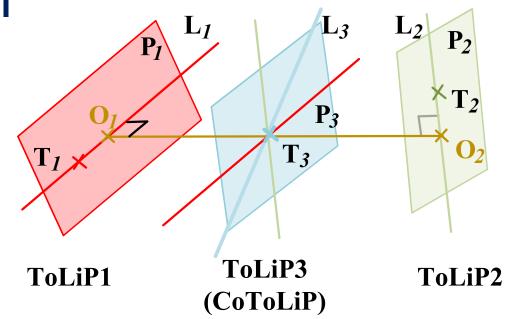
<u>Composition of two ToLiPs:</u>

ToLiP3 = ToLiP1 ⊕ ToLiP2,

CoToLip is a ToLiP <u>along with six</u> parameters (distances and angles)

CoToLiP:

- A commutative operator,
- Handles both relative or absolute mutual situation



<i>d</i> (O ₁ , T ₁),	$\varphi(\mathbf{P}_1, \mathbf{P}_3),$
$d(0_{2}, \mathbf{T}_{2}),$	$\varphi(\mathbf{P}_2, \mathbf{P}_3),$
$d(0_{1}, 0_{2}),$	$\varphi(\mathbf{L}_1, \mathbf{L}_2)$

Nicquevert, B., Rey, F. "Handling the Functional Features of Accelerator Components Using ISO GPS Situation Features". *J. Phys.: Conf. Ser.* **2687** 072028 (2024). <u>https://doi:10.1088/1742-6596/2687/7/072028</u>



Mock-up demo

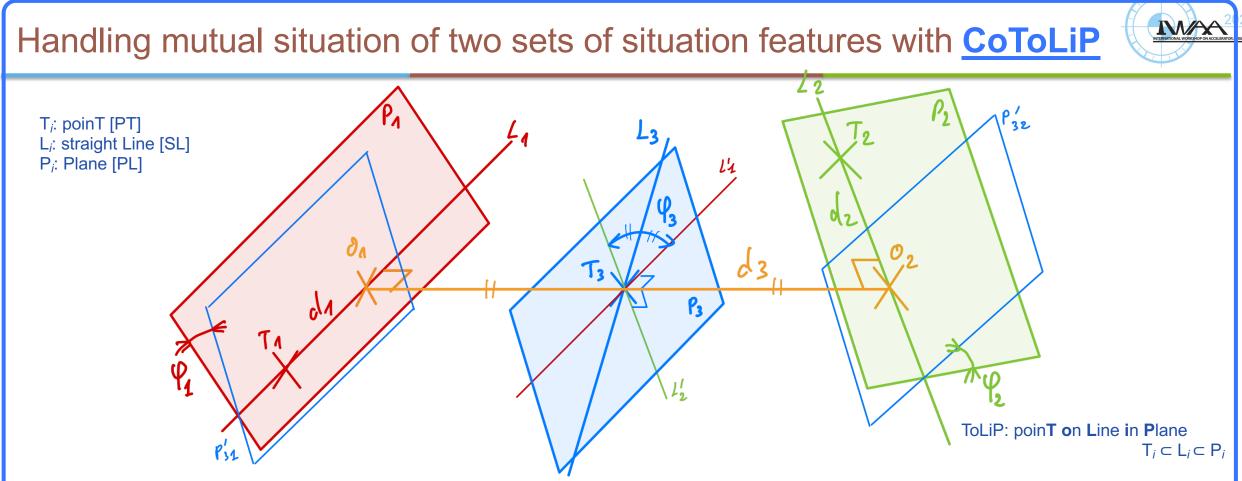


Lund, Sept 2024:

- demo of the mock-up
- □ prepared by ESS SAM team (tack så mycket, mina vänner!)
- □ to ISO/TC213 (GPS) experts







Definition of the **CoToLiP** (in blue), composition of two sets (red and green) of situation features **ToLiP**.

 O_1O_2 is the common perpendicular to L_1 and L_2 ; T_3 is the middle of $[O_1O_2]$; P_3 is perpendicular to O_1O_2 containing T_3 ; L_i are orthogonal projections of L_i on P_3 ; L_3 is the bisector line of L_1 and L_2 ; P_{3i} are translations along (O_1O_2) of P_3 containing L_i (also known as antiprojections on L_i).

The six parameters of mutual situation: mutual position d_1 , d_2 , d_3 ; mutual orientation φ_1 , φ_2 , φ_3 are directly derived [18].

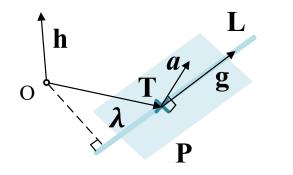
The CoToLiP is an operator. Input features: ToLiP1 and ToLiP2; output features: ToLiP3 and the six parameters of mutual situation as output features. ToLiP3 = CoToLiP (ToLiP1; ToLiP2) = CoToLiP (ToLiP2; ToLiP1) = CoToLiP (ToLiP2; ToLiP2) = CoToLiP (ToLiP2; ToLiP1) = CoToLiP (ToLiP2; ToLiP2) = CoToLiP (ToLiP2) = CoToLiP (ToLi

B. Nicquevert, "Les éléments de situation. Sur quelques éléments fondamentaux de « tolipologie »" (in French), 2023, CERN, Geneva, Switzerland, EDMS 2817750, preprint HAL-03996426, March 2023.

The math of CoToLiP: behind the "behind the curtain"



Developing underlying mathematical models, using *PGA* (Projective Geometric Algebra) and Flag manifolds



Geometric product: the extension of elementary algebra to new binary operation

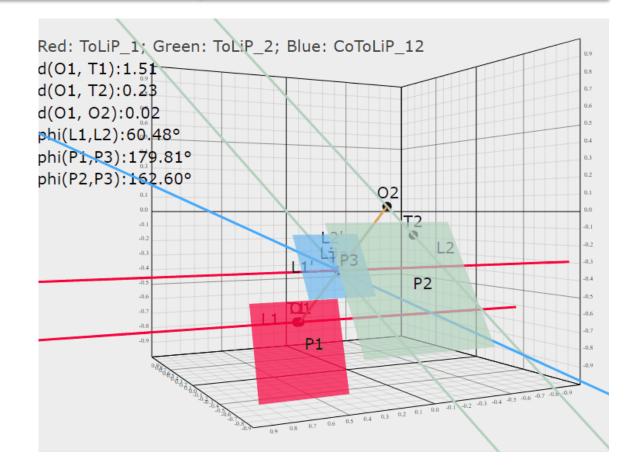
 $AB = A \cdot B + A \wedge B$

ToLiP using Flag Theory: (g, h, a, λ)

Elementary mutual situation parameters

	Point T ₂	Plane P ₂	Line L ₂
Point T1	d : $\mathbf{T}_1 \wedge \mathbf{T}_2$	$d: \mathbf{P}_2 \lor \mathbf{T}_1 $	$d: \mathbf{T}_1 \wedge \mathbf{T}_1' $
Plane P 1	$d: \mathbf{P}_1 \lor \mathbf{T}_2 $	$d: \mathbf{P}_1 \lor \mathbf{P}_2 \text{ or } \\ \varphi: \sin^{-1} (\mathbf{P}_1 \lor \mathbf{P}_2)$	$d: \mathbf{P}_2 \wedge \mathbf{T}_1 \text{ or} \\ \varphi: \sin^{-1} [(\mathbf{L}_1 \vee \mathbf{P}_2) \cdot \mathbf{L}_1 \vee \mathbf{P}_2]$
Line L1	$d: \mathbf{T}_2 \wedge \mathbf{T}_2' $	$d: \mathbf{P}_1 \wedge \mathbf{T}_2 \text{ or}$ $\varphi: \sin^{-1} [(\mathbf{L}_1 \vee \mathbf{P}_2) \cdot \mathbf{L}_1 \vee \mathbf{P}_2]$	$d: -(\mathbf{g}_1 \cdot \mathbf{h}_2 + \mathbf{h}_1 \cdot \mathbf{g}_2) + \mathbf{g}_1 \times \mathbf{g}_2 $ and $\varphi: \cos^{-1}(\mathbf{g}_1 \cdot \mathbf{g}_2)$

 $||\cdot||$ represents the Euclidean norm; T_i is the projection point of T_i onto L_j .



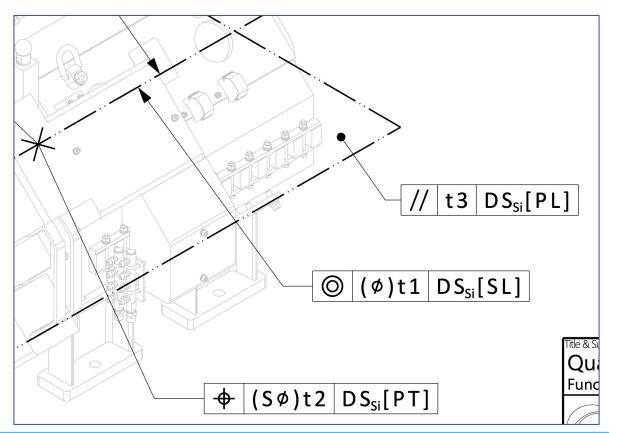
Qie, Y., Nicquevert, B., Anwer, N. "Functional specification of complex assemblies using projective geometric algebra". *CIRP Annals*, vol. 73, 1, pp. 105-108 (2024). https://doi.org/10.1016/j.cirp.2024.04.059

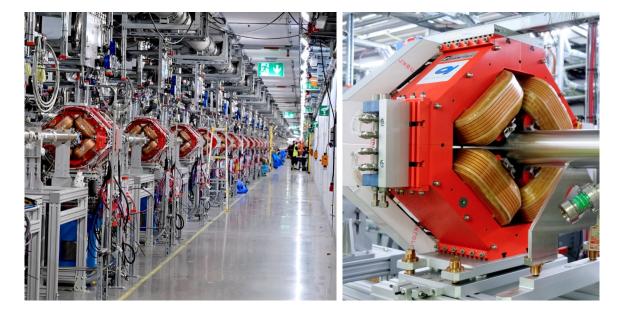




Mutual situation between a "tolerance feature" and a datum system

□ A generalization of "derived" features





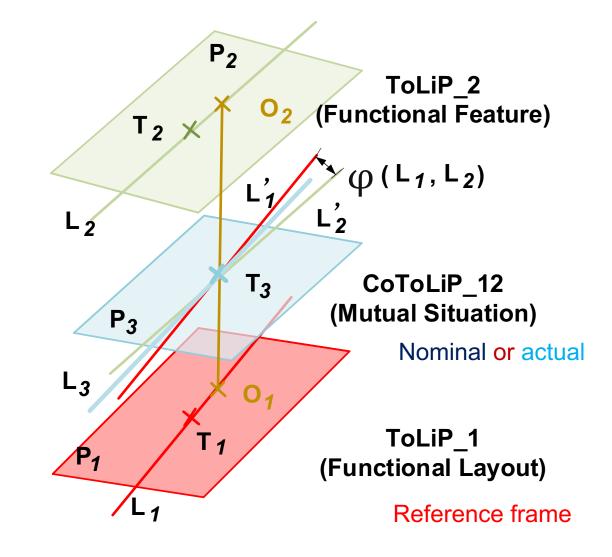
 DS_{Si} is a datum system used to define the nominal situation of the equipment along the beam The situation feature of type [SL] is the magnetic axis: new possibility to address and specify with ISO GPS *non-mechanical features*! Pending issue: define the restriction of the toleranced situation feature (by default of infinite extension)



Functional situation: absolute mutual situation



- Absolute mutual situation: the CoToLiP parameters define the nominal situation of ToLiP 2 with respect to ToLiP1 representing the datum system / reference frame
- □ E.g. here for the coaxiality: d(O1,O2) = 0 and φ =0
- No more "cross-talks" between translations: the features defining rotations are always defined

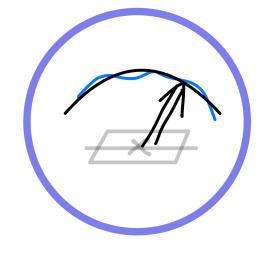




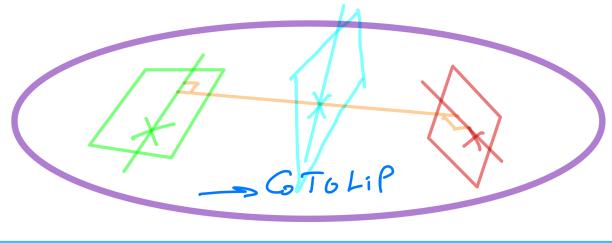
Summary: intrinsic or situational generic characteristics

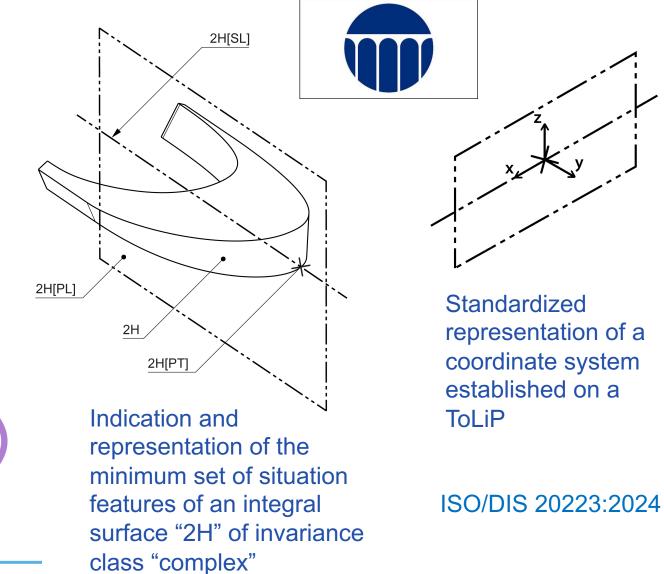






(Mutual) situation (Location and / or orientation)







Relative mutual situation: case of two features

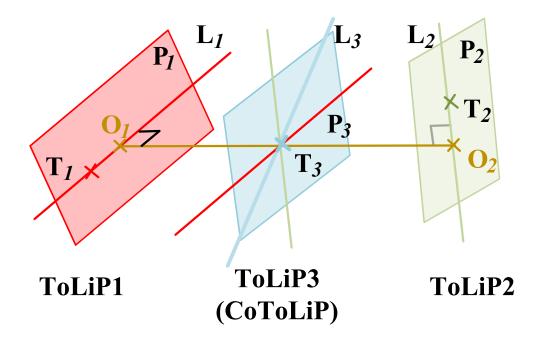


How to characterize the relative mutual situation of two quadrupoles on a raft?



□ With a CoToLiP!

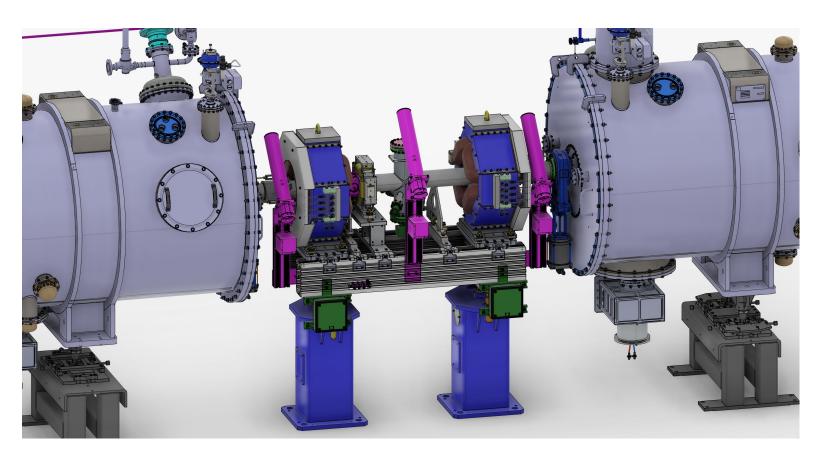
□ Relative = "no one is leading the pair"







- A LWU (girder) between two cryomodules of the LINAC
- Absolute mutual situation
 = Position on the lattice
- Same formalism!
- □ The CoToLiP is a ToLiP!
 - ToLiP3 now represents the whole girder
 - Situation with respect to datum sytem = absolute mutual situation





Mutual situation of two ToLiPs is handled by CoToLiP

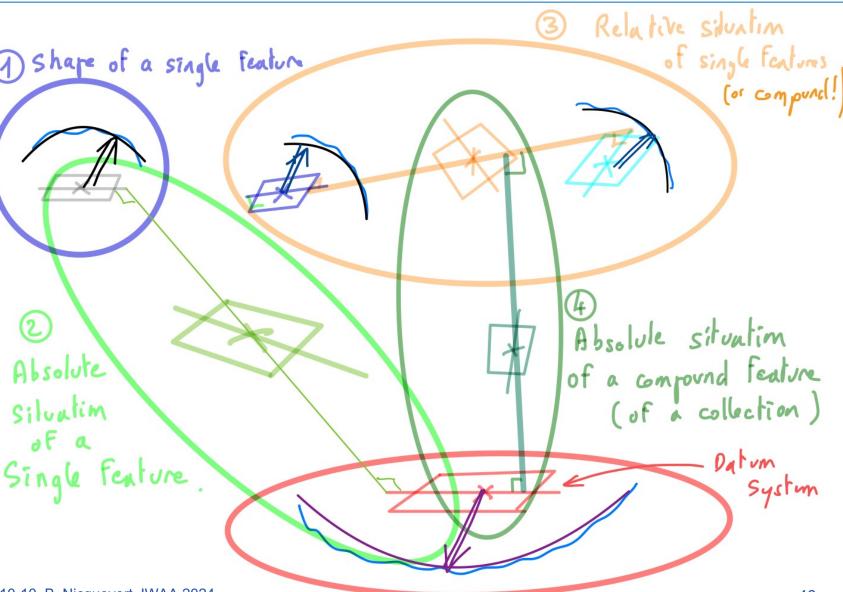


 Allows for handling relative mutual situation of a collection of two members
 Allows for handling (1) Shape of a single feature (1)

 CoToliP then represents the collection of two ToliPs (a CS of collection can be established on it

 CoToLiP handles the absolute mutual situation of any collection

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- 1. Extension to more than two ToLiPs: MuToLiP
- 2. Extension to contacting features, using contacting feature as tolerance feature
- 3. Using CoToLiP to evaluate deviations: CoCoToLiP
- 4. Developing the rules for using situation features as tolerance features 🐲
 - Restricted extension, corresponding characteristic, acceptance criteria, ...
- 5. Contributing to ISO GPS tools to encode the specifications per degree of freedom (Mutual Situation Module)
- 6. Integrate this into a roadmap leading to a Global Process to Set Up Geometrical Product Specifications (GPS² model)



Persp. 1: if the collection is made of more than two members?

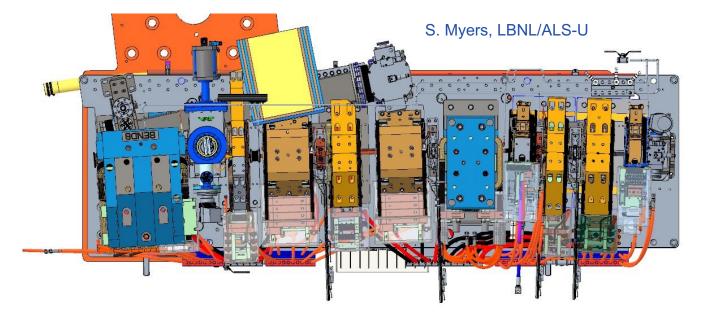


- Accelerators (circular or linear) are made of (sometimes many) sectors
- Sectors are made of (sometimes many) rafts / girders (circular or linear)
- Rafts are made of (sometimes many) magnets (with straight or bended axis) and other components

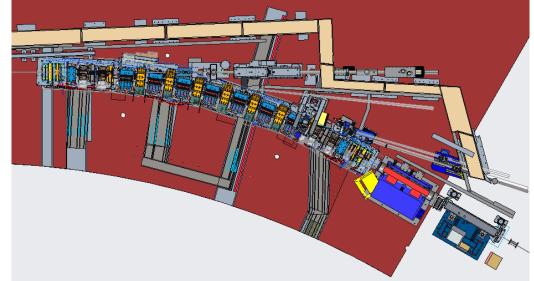


Persp. 1: Another case: ALS-U @ LBNL





...making up one of the 12 sectors



A raft of type 4: up to 9 magnets of different types Along a lattice that is bended...

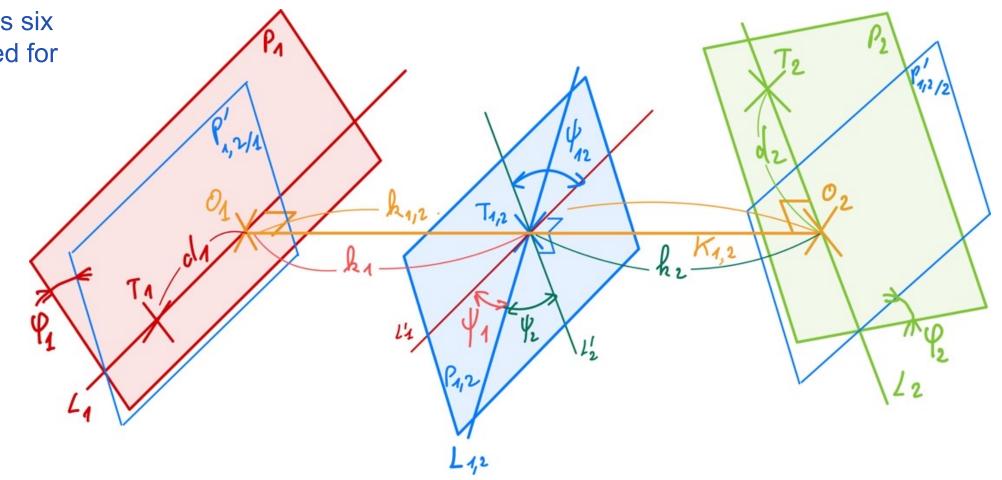
How to characterize:

Magnet to magnet on a raft? Raft to raft in a sector? Sector to sector in the ring? What is the "coordinate system"? How is it established?



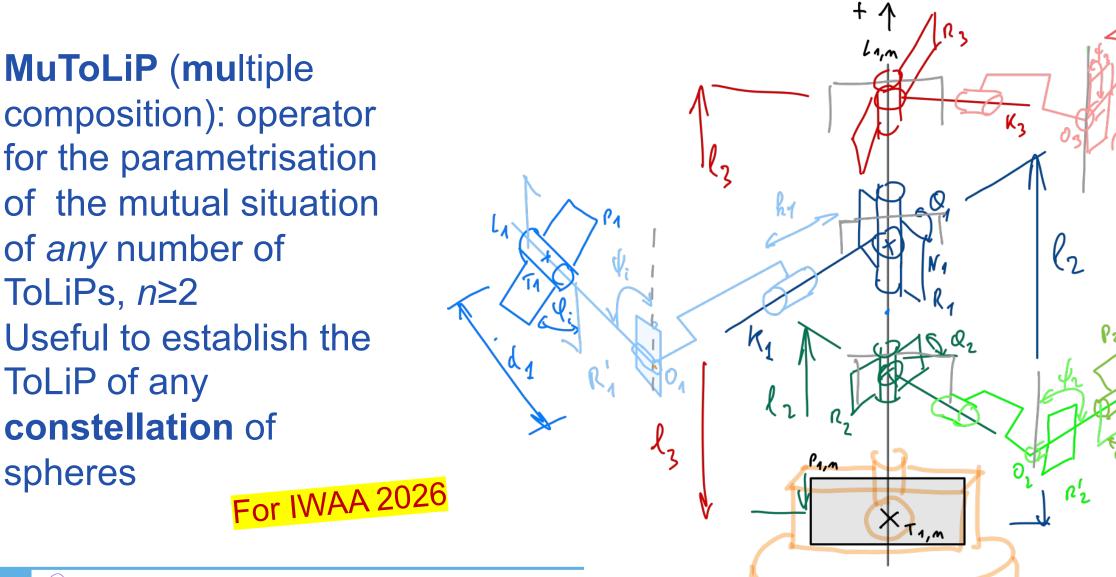


The CoToLiP with its six parameters prepared for our next phase: generalized to **MuToLiP**











composition): operator for the parametrisation of the mutual situation of any number of ToLiPs, *n*≥2 Useful to establish the ToLiP of any constellation of spheres

lurp^

NEININTONA WORSHOP ON ACCELERATOR ALIGNMENT

Extension of invariance classes to include contacting features [CF]

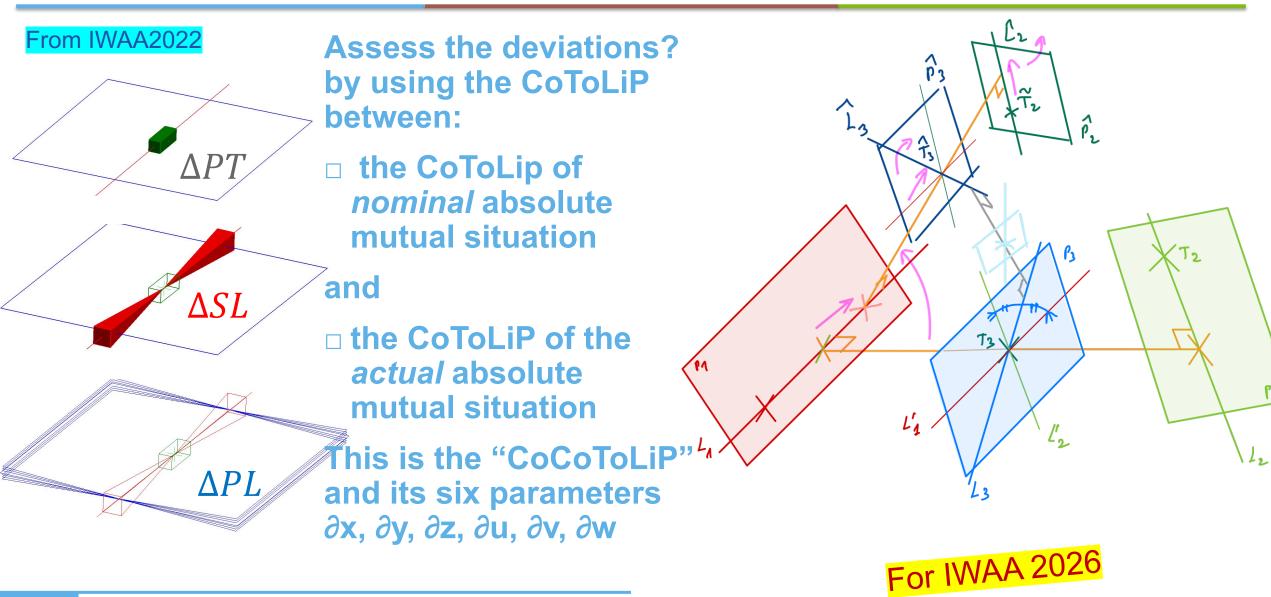
- Features that are technologically but NOT topologically related (i.e. of a different types than the integral features they are associated w ith)
- Situation features of the CoToLiP in these cases may have intrinsic mobilities extending beyond the TTRS cases
- Using contacting feature as tolerance feature





Perspective 3: handling deviations 🔅 🤳

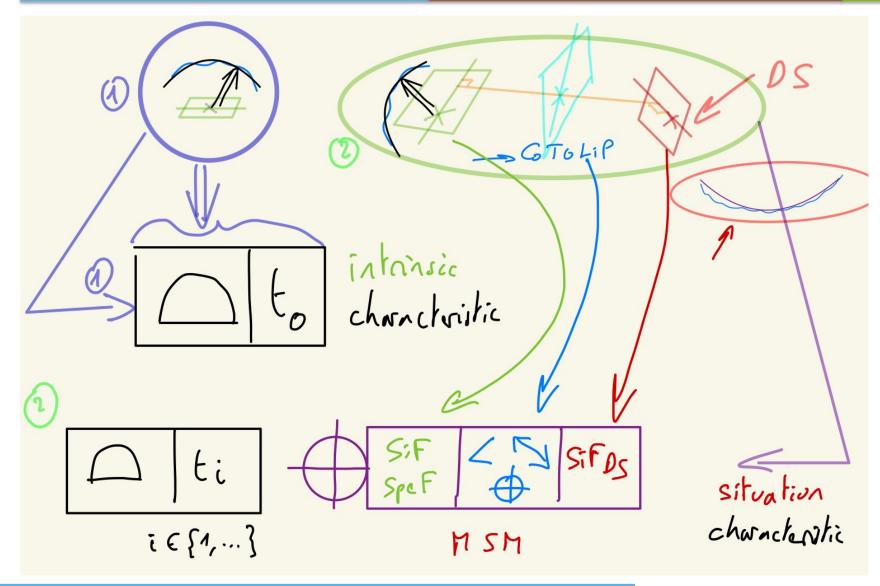






Perspectives 4 and 5: GPS standard of mutual situation





 MSM (Mutual Situation Module) is proposed to indicate explicit individual constraints between situation features into an ISO GPS specification frame

DS: Datum System

SiF: Situation feature set

NEW project ISO/PWI 25431



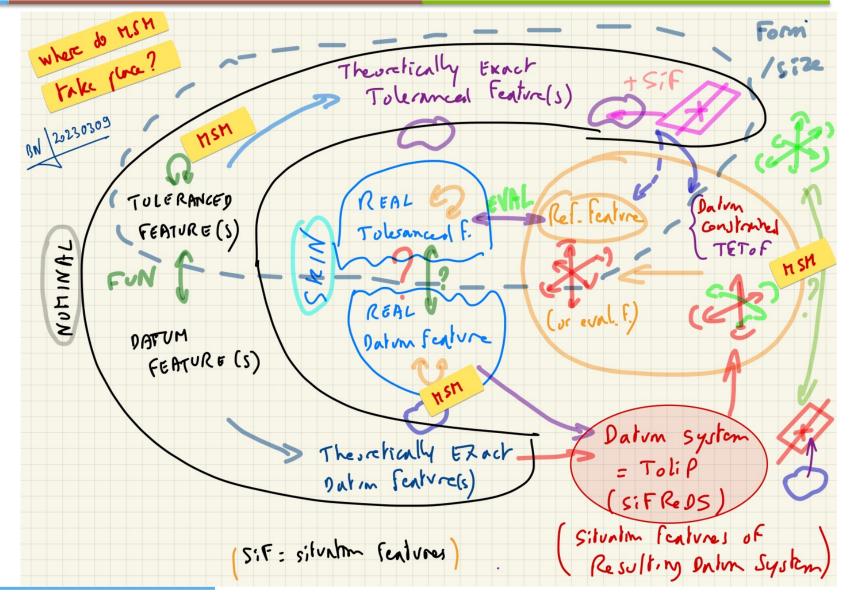
Perspective 6: GPS²



Challenge: assess the conformity of a real part (in blue) with respect to the specifications (in green) defined in the nominal model (in black) Overall map model v 1.2 Model v. 2.5 is available

More in "For a Global Process to Set a Geometrical Product Specification [GPS^2]: a R&D Roadmap Toward an Extensive and Extended Use of Situation features in ISO Geometrical Product Specification (GPS) Standards."

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