



Using encoders with the SimpleBGC 32 controllers

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1. General information

Using encoders with the SimpleBGC32 controller board gives the following advantages:

1. Prevents motors from losing synchronization and skipping steps.
2. Provides full information about the position of a camera relative to a frame, that provides better model than 2nd IMU and makes use of 2nd IMU obsolete. This information extends the range of working positions and functionality of a gimbal.
3. Can significantly decrease power consumption by using field-oriented control strategy to drive motors.
4. Increases instant torque the same way.
5. Provides possibility to get information about the camera balance and makes automatic balancing (with help of extra DC servomotors and moving counterweights).
6. Allows to adjust camera position by hands.
7. Increase the precision of stabilization and the maximum speed of rotation that gimbal is able to compensate.

Encoders give completely new feel of operating the system, and recommended to use in the products of all class, from consumer to professional-grade.

All SimpleBGC32 controllers supports encoder-enabled and regular firmware versions. For controllers purchased before July 2020 it may be required to change license type to get access to the encoder-enabled firmware. You can do it here: <http://www.basecamelectronics.com/encoders/>

Note, that with this special firmware, all motors should have encoders installed! It is not possible to have one motor with encoder and other two without.

List of supported encoders

Below is the list of encoders supported by the SBGC32 gimbal controllers, CAN_Drv and I²C_Drv expansion boards, and interfaces used for their connection.

Encoder	SBGC32 controllers family ¹⁾		CAN_Drv	I ² C_Drv
	“Regular”	“Extended”		
AMT203 – absolute 12 bit, capacitive technology	SPI		SPI	SPI
AMT222, 223 – absolute 12 or 14 bit, capacitive technology	SPI <i>frw. ver.2.70b1</i>		SPI	-
AS5048A – absolute 14 bit on-axis magnetic	PWM, SPI		PWM, SPI	SPI
AS5048B – absolute 14 bit on-axis magnetic	PWM, I ² C		PWM, I ² C address 0x40	I ² C address 0x40
AS5050A – absolute on-axis magnetic 10 bit	-		-	SPI
AS5055A – absolute on-axis magnetic 12bit	-		-	SPI

1. General information

MA3 – absolute on-axis magnetic	PWM 10bit/1kHz PWM 12bit/244Hz	PWM 10bit/1kHz PWM 12bit/244Hz	PWM 10bit/1kHz PWM 12bit/244Hz
MA730 – absolute 14 bit on-axis magnetic	SPI, PWM	SPI, PWM	SPI
Analog potentiometer or any other type where analog output is proportional to the angle	ADC1..3	-	ADC
AS5600 – low-cost absolute 12 bit on-axis magnetic encoder <i>Note: I²C address selection is not possible!</i>	I ² C, PWM 460Hz, ADC1..3	I ² C, PWM 460Hz	I ² C
RLS Orbis – absolute off-axis (pass-throw) magnetic encoder.	SPI, PWM 549Hz <i>frw. ver. 2.61</i>	SPI, PWM 549Hz	SPI
Zettlex IncOder – absolute off-axis high-precision encoder utilizing inductive technology, high resolution 14..21 bit, various sizes	-	SPI (RS-422) ³⁾ <i>frw. ver. 2.68</i>	SPI (RS-422)
RLS AM4096 – absolute 12 bit on-axis magnetic encoder	I ² C <i>frw. ver. 2.67b2</i>	I ² C	I ² C
TLE5012B - absolute 15 bit on-axis magnetic	SPI, PWM E5000 <i>frw. ver. 2.68</i>	SPI, PWM E5000	-
Allegro A1335 - absolute 12 bit on-axis magnetic	SPI, I ² C <i>frw. ver. 2.68</i>	SPI, I ² C	-
iC-Haus IC-MU - absolute magnetic off-axis, high precision and high-resolution, several size options	-	SPI <i>frw. ver. 2.69b2</i>	SPI
RLS Aksim-2 – absolute magnetic off-axis, high-precision and high-resolution (up to 20 bits), several size options	-	BiSS-C (RS-422) ³⁾ , SPI <i>frw. ver. 2.70b1</i>	BiSS-C (RS-422), SPI
AEAT-8800-Q24 – absolute on-axis magnetic, 16 bit	-	-	SPI
Netzer VLP, VLX series – absolute off-axis (ring-shape) high-precision and high-resolution	-	BiSS-C (RS-422) ³⁾ <i>frw. ver. 2.70b3</i>	BiSS-C (RS-422)
Support is planned ²⁾			

¹⁾ "Regular" family includes "Regular Rev. A, B, B+", "Tiny Rev. A, B, C+". "Extended" family includes "Extended", "Extended Long", "Pro", "CAN_MCU".

²⁾ Support of these models is planned, or work in progress. Please contact us for details.

³⁾ External RS-422 adapter is required, connected to the SPI "encoder" port of the controller. Example schematics:

1. General information

https://www.basecamelectronics.com/files/rs422_rs485_2spi.pdf

Type of encoder can be selected during tuning process in the GUI.

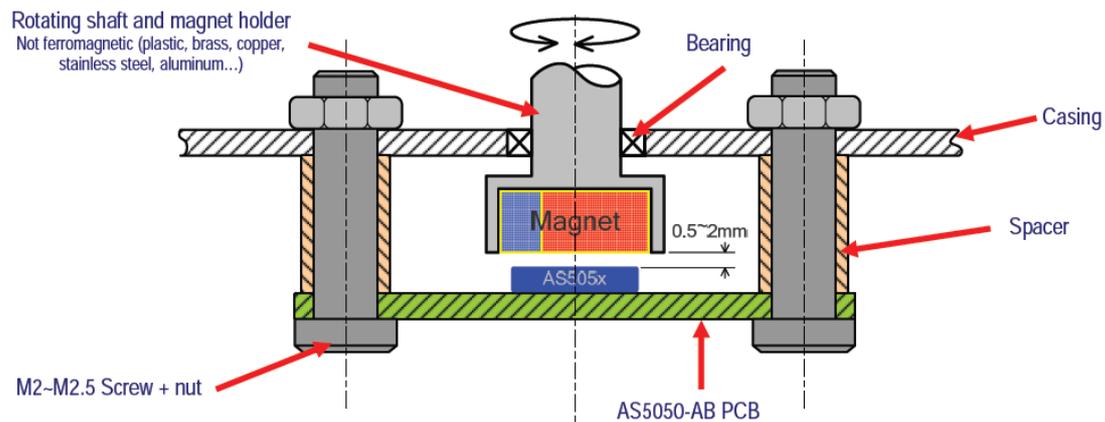
High resolution is not strictly required, because encoders are not used in a closed loop control. But a good linearity is important, especially if working together with the motors having a big number of pole pairs or if IMU external correction is applied and translated from coordinate system linked to the gimbal's frame.

For our application, 14 bit resolution is enough, but if higher resolution is required for external applications, models with the higher resolution can be used. Raw encoder data can be read from SBGC32 controller using Serial API (see `CMD_REALTIME_DATA_CUSTOM` command).

2. Installing encoders

2. Installing encoders

All on-axis magnetic encoders (like AS5048A,B) comes as an IC chip that should be soldered on the custom-made PCB (our version is available here: <https://www.basecamelectronics.com/as5048b/>). This IC should be placed below a specially polarized magnet, installed on the motor's shaft cup. Recommendations on choosing magnet and positions tolerances can be found in a datasheet for the encoder.



For **AS5048B** connected to I²C bus, device address should be selected depending on motor where its installed:

ROLL: 0x40 (A1=0, A2=0)

PITCH: 0x41 (A1=HIGH, A2=0)

YAW: 0x42 (A1=0, A2=HIGH)

Also you can assign address to axis later in the GUI.

The PWM connection option for the AS5048 gives less resolution (12bit compared to 14bit over I²C or SPI) and can give less precision.

IMPORTANT NOTE: AS5048B is not compatible with the "High speed I²C" option!

AM4096 I²C encoder need to be configured for the I²C address. To do this, connect encoder to the main controller, one encoder at a time. In the GUI, select encoder type "RLS AM4096 (I²C)" for the axis it relates to, and select any unique address for it. The new "Encoder configuration tool" group will be shown in the interface. Find an option "Set RLS AM4096 I²C address", select the same address from the provided set and press the "ASSIGN" button. The new address will be assigned for this encoder and permanently stored in its EEPROM. Disconnect configured encoder, connect next encoder and repeat the same steps, but assigning different address to it.

AMT203 encoder has a 8mm pass-through hole and comes fully assembled with variety set of shaft adapters and centering tool. When integrated inside motor, note that it is sensitive to electrical and magnetic fields. Do not place it too close to stator windings or magnets of rotor!

2. Installing encoders



MA3 magnetic encoder comes in 10 bit and 12 bit version (10bit has 1kHz refresh rate, 12bit has 244Hz refresh rate). <http://www.usdigital.com/products/encoders/absolute/rotary/shaft/MA3>



Analog type may be a potentiometer, magnetic or other types with analog output, where voltage is linearly proportional to the angle of rotation of the shaft. Analog encoders do not allow infinite 360 degree rotation, because there are forbidden areas at both ends of its range. It is not recommended to use analog type because of this limitation.

AS5600 magnetic encoder can be connected by its OUT pin, that is by default is configured as analog output, and configured as "Analog" type in the GUI. Also, you can re-program it to the PWM output mode, and choose "AS5600 PWM" type in the GUI. Note, that in the analog and PWM modes encoder does not support full 360 degree of rotation, because it has hysteresis ± 40 points near zero angle (1.75 degree).

HINT: For the PWM output mode, you have to program CONF register* by the I²C interface:

CONF = { WD(0) FTH(001) SF(11) }, { PWMF(10) OUTS(10) HYST(00) PM(00) } = {xx000111}, {10100000} = **0x07, 0xA0** - PWM at 460Hz, fastest response, no watchdog, no hysteresis, normal power mode.

After programming*, CONF should be written into the non-volatile memory. See AS5600 datasheet for details.

* If powered from 3.3V, 10uF buffer capacitor is required on VDD3V3 pin to ground to burn settings into OTP memory.

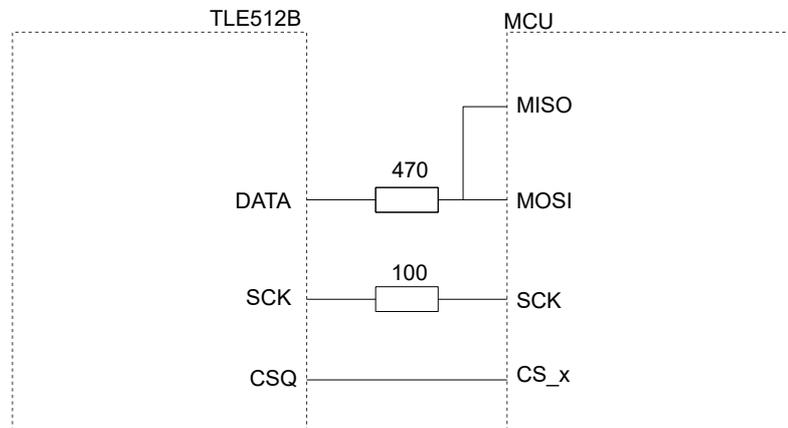
NOTE: starting from 2.60 firmware, AS5600 encoder will be automatically programmed into PWM mode, when connected by the I²C interface first time and selected as "AS5600 (PWM)" in the GUI. Only 1 encoder at a time may be connected by I²C. When programming is done, I²C lines may be disconnected. **WARNING! Its impossible to use encoder in analog mode after configuration is burned into OTP memory!**

The best way is to connect it by the I²C interface – in this case it will support full 360 degree rotation.

IMPORTANT: only single AS5600 encoder may be present on I²C bus! To use more than one device of this type, combine it with the I²C_Drv expansion modules, connect next two encoder to these modules and using them as an external motor driver, connected to the main controller via common I²C bus. More information on the I²C_Drv product page.

2. Installing encoders

For the **TLE512B SPI interface**, link MOSI and MISO lines together and connect to the DATA line of the encoder. It is required to add a series resistor 470 Ohm on the DATA line and 100 Ohm on the SCK line, as recommended in the datasheet:



Zettlex IncOder should be configured for the 5V supply, SPI interface and 14..21 bit resolution. It should be connected to the SPI port of the main controller using the special adapter:

https://www.basecamelectronics.com/files/rs422_rs485_2spi.pdf

For the CAN_Drv connection, no special adapter is required, it connects directly according to diagram:

https://www.basecamelectronics.com/files/CAN_DRV/CAN_Drv_Incoder_connection.pdf

iC-Haus iC-MU need to be calibrated after installing in a device. It requires a special hardware and software from the manufacturer. Take into account to reserve a temporarily connector for calibration purpose.

RLS Aksim-2 need to be calibrated after installing in a device. Note that it requires a very precise machining process because the allowed tolerances are very small. Currently, our BiSS-C implementation does not allow to run calibration or status checking, so it requires a special hardware and software from the manufacturer.

Connector	Soldering pads	BiSS-C		SPI	
1	1		+5V	5 V supply	+5V
2	2		GND	0 V (GND)	GND
3				ature sensor pin	
4				ature sensor pin	
5	3	MA+	RS422_Y	SCK	SCK
6	4	MA-	RS422_Z	NCS	NSS/PWM
7	5	SLO+	RS422_A	MISO	MISO
8	6	SLO-	RS422_B	MOSI	MOSI

RLS Aksim 2 → CAN_DRV electrical connections

2. Installing encoders

Connecting encoders to the SimpleBGC32 board

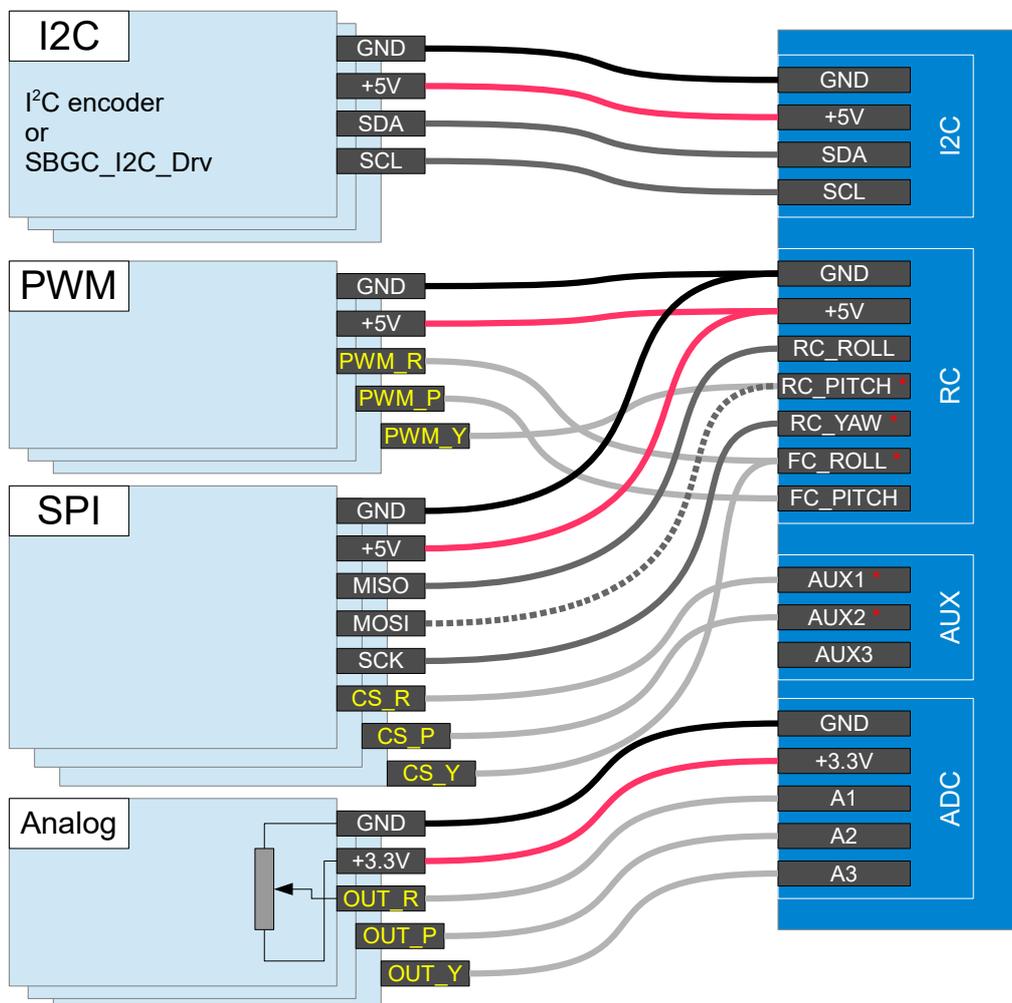
I²C encoders are connected parallel to the I²C IMU sensor for all board versions.

The **"Pro"** and **"Extended"** board versions have dedicated SPI/PWM inputs for the encoders. Check a connection diagram on their product pages.

For the **"Regular"** or **"Tiny"** boards, pins for the SPI or PWM encoder connection are shared with the other inputs. As the RC_ROLL input is occupied by the SPI bus, its alternative functions (Sum-PPM and serial) are moved to the AUX3 input (*"serial functions" are Spektrum, S-bus and SBGC Serial API interfaces*).

NOTE: If the RC_ROLL input is not occupied by the SPI bus, starting from the firmware 2.60, you can return all serial functions to it's origin: disable the check-box "Swap RC_SERIAL ↔ UART2 ports" in the "Advanced" tab. But the Sum-PPM input still stays on AUX3 in the encoder firmware.

SimpleBGC32 "Regular" or "Tiny" encoder connection

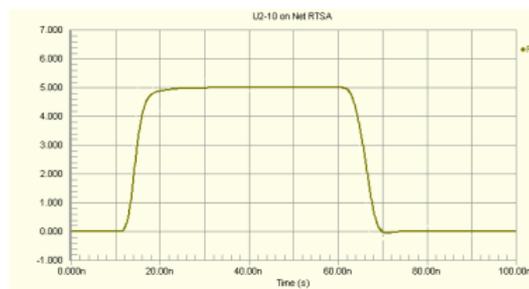


* These pins acts as push-pull output in case of SPI connection. Be careful and avoid short circuit or improper connection to other devices.

2. Installing encoders

Tips on connection

- For a long SPI cable (more than 30cm) resistors on the SCK, MOSI line are strictly required! Use 33.60 Ohm resistor in the series on any output line (SCK, MOSI from the board side, MISO from the encoder side). You can adjust their values more precisely by observing signal slope on the scope on the receiver side. The signal should be sharp enough, without spikes caused by the reflections (see picture below).
- The analog input is very sensitive to the EMI noise, so it's recommended to use a shielded cable in case of long distance. But for big gimbals, its better to choose different type of encoder.
- For all PWM encoder types, it's better to setup them such way, that zero-crossing point (where raw data crosses zero) is located far away from the normal working angles, because near this point PWM signal can rapidly jitter between 0% and 100% duty cycle, that may cause problems with the PWM capturing. Also, some models have a small hysteresis there that can cause problems, too.



Bad signal (direct connection) and good signal (with resistor in series)

4. Calibrating encoders

4. Calibrating encoders

1. Calibrate electrical angle offset and direction

- Tune mechanics. Perfect balance is very important to make good calibration.
- **IMPORTANT STEP!** Enter the exact **number of poles** for each motor in the "Hardware" tab. The automatically detected number of poles may be incorrect. This information is very significant for a normal work of motor with encoder.
- Ensure that encoders provide correct data to a system and they are assigned to proper axis.
- Reset all calibration values in the "Encoders" tab to zero.
- Power on gimbal in "normal" position (frame is leveled, camera is leveled). Starting from firmware ver. 2.62b6, it is possible to calibrate encoders in other positions of a frame and a camera, if normal position is not possible – see below.
- Tune PID. Big precision of stabilization is not required at this moment, but oscillations and jitters are not allowed.
- Disable the "Follow" mode or any kind of RC control.
- Press the **CALIB.EL FIELD** button.
 - *Firmware ver prior to 2.60:* you have about 20 seconds to tilt frame $\pm 10..30$ degrees VERY SLOWLY for each axis, several times for all axes. If any axis will loose sync, reset controller and restart calibration. Also you can tilt a camera instead of a frame by mean of RC controller, but very slowly, too.
 - *Firmware ver. after 2.60:* you do not need to move frame. Just fix it or hold in hands firmly – calibration will be done automatically, each motor in series.
- On completion, the calibration data will be transferred to the GUI and encoders will start working.
- Check that the parameter "**Encoder/motor gearing ratio**" is equals to 1.0 or very close to this value. Otherwise, scale factors of encoder and motor do not match. It means that motor is not properly configured (check number of poles), or calibration is done improperly. More information is given in the "FAQ" section of this manual.
- There is a simple error checking is present: if estimated scale factor differs a lot from the specified value (1.0 by default), "Emergency stop" error will be generated and motors will be turned OFF. You need to check resulting values and accept them, or clear them and repeat calibration after restarting of a system.
- When the **EL. FIELD OFFSET** value is calibrated, motors start working in new field-oriented control (FOC) mode, where current consumption is near zero if system is balanced. In this mode, you can increase the **POWER** parameter significantly without risk of over-heating motor. Set **Heating factor**, **Cooling factor** to 0 to disable current limitation. But remember, that the long operation under stall condition may still overheat the motor or controller. To prevent it, you can setup heating-cooling model to allow big current in short time, but limit it at a stall condition after a while, or cut off power completely.

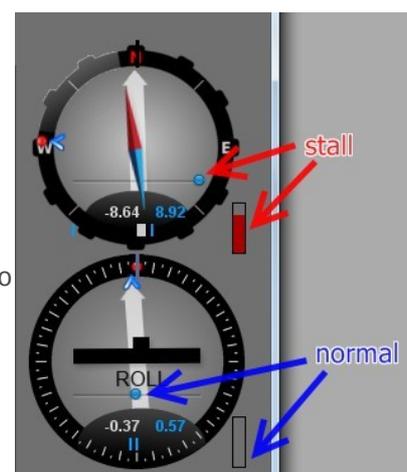
This is a short video that shows procedure of calibration of encoders (for old version of firmware):

<http://www.youtube.com/watch?v=sAnWG2ipavE>

Checking calibration

A "balance error" value (displayed in the GUI as blue ball on the angle panels) should be about neutral position for each axis during work, and go to its limits under pressure. This indicator shows shifts in the balance and may be used as reference to help balancing camera. Power indicator is

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zero in normal condition and goes to maximum at a stall condition, when motor resists to push.

Reusing of calibration data

You can use this data for other gimbals in batch, if encoder is mounted the same way, has the same offset in data, and the motor EXACTLY matches the previous one (including mounting of rotor, stator, winding, connection)

Backing-up a calibration data

Always make a EEPROM backup for each item you are sending to a customer (Menu "Board" – "Backup manager..."). If system will accidentally loose all setting, or customer will brake something, it will be useful to have an option to restore factory default settings and calibration, especially in case of complicated calibration procedure that is hard to repeat.

2. Calibrate the offset parameter

- You may keep gimbal working or turn motors off, it does not matter. Stabilization is not required.
- Align the camera to a "normal" position relative to the frame, where all motors forms zero angle to a frame.
- Press the **CALIB. OFFSET** button. Current angles read by encoders, will be set as zero offset.
- New settings will be written to EEPROM and transferred to the GUI.
- Now the white arrows on a gauge panel reflects the rotation of motors.

3. Calibrating encoders in an unusual position

Requires firmware version 2.62b6 and above.

It may be required to calibrate encoders in an unusual position, if system is designed for a certain *order of motors* (the role of motors counted from the camera platform), that is not supported by the firmware, or system has a very limited range of working angles. For example, we need to build a system with the order of motors "CAM – YAW – PITCH – ROLL". But the nearest supported order is "CAM – YAW – ROLL – PITCH". It is clear that this order can be converted to the desired order by rotating YAW motor 90 degrees. After the encoder calibration will be done, we can simply set the "Follow offset YAW" parameter to ± 90 degrees to shift neutral/home point to desired position. But firstly, we need to calibrate encoders. It could be easily done in the naturally supported position, i.e. "CAM – YAW – ROLL – PITCH". But suppose than YAW working range is limited and system can not be put in this position. In fact, system will not start to work at all in any position excepting normal, until encoders will be calibrated!

Below is a step-by-step recipe how to solve this problem:

1. Calibrate the encoder's "Offset" parameter in the desired position (but still motors should be 90-degrees aligned, intermediate angles are not allowed). Do it by pressing "CALIB.OFFSET" button.
2. Change the value in the "Offset" field for the YAW axis manually, adding or subtracting 4096, that equals to shifting offset by 90 degrees (we update YAW for our example case, in your case it may be different axis). Restart system using menu command "Board" - "Execute action" - "Restart system".
3. Detect if encoder need to be inverted, or not. How to check: when the offset is calibrated, enable the "Follow" mode for each axis. If system becomes completely unstable, most probably encoder is inverted. To invert encoder, assign a special value "-32767" to the "El. field offset" parameter and repeat steps 1, 2, i.e. calibrate offset and add 90 degree again.
4. System should start working properly at this moment, because now it can distribute torque to the motors in any position of a frame.
5. Tune PIDs, ensure system is ready for the "El. field offset" calibration.

4. Calibrating encoders

6. Calibrate the "EL. field offset" parameters by pressing "CALIB. EL. FIELD" button, as described in the section above.

Checking calibration

In the GUI, white arrows show the angle of each motor relative to a frame. They should point up when the camera is in "home" position relative to a frame, that mean zero angle. When motors rotate, white arrows move.

Notes on geared setup

Controller supports 2 types of gearing: encoder/motor and motor/frame. If gear ratio is not equal to 1.0 in any of this cases, there is a potential problem with the detection of initial angles of motors at system startup. In case of encoder/motor gearing is not equal to 1.0, it may be also a problem with the proper electrical field offset detection. Use the following rules to let system to start properly:

- Hold the frame in normal position (where encoders was calibrated) at startup.
- Connect and configure 2nd IMU. If present, its data will be combined with the main IMU and used to detect relative angle of each motor. But its impossible to detect YAW motor angle by this method, because IMU's are not referenced globally by YAW axis.
- Chose the lowest gearing ratios, if possible. Remember that direct drive is the most optimal choice for this application.
- Try to minimize back-lashes. Otherwise, it will be very hard to get good PID values and good precision.

Settings, related to the operation of the system with encoders

Manual set time – if camera is rotated by hands and fixed in new position, firmware waits some time. If camera is held during this time, new position is fixed as target position. Default value is 0.5 sec. To disable this feature for any axis, set it to 0. In this case, camera resists against any external disturbance for infinite time.

Firmware ver. 2.66: this parameter is moved to the "Service" – "Force to new position by hands"

Heating factor, Cooling factor – these are settings for simple "Heat accumulation/decay model". The power applied to a motor, increases a virtual temperature of motor in the model, according to a heating factor. When virtual temperature rises, it chops the output power. Cooling factor specify the rate of heat emitted to the outer space, which decreases the virtual temperature. Tune these values to make model close to real life. It lets to feed big power to motors for a short time without the risk of overheating them.

To control actual state of the model, you can check **V_TEMP_x** debug variables in the "Monitoring" tab. It shows virtual "temperature", where 0 means power is not limited at all, and 100 means power is completely off. To test how model work, apply force to the motor to put it in the "locked" state and see how **POWER_X** and **V_TEMP_x** graphs are evolved. Adjust model settings to provide safe motor temperature under full load during a prolonged time.

Motor's magnetic linkage – this parameter is used to make more precise model of motor in the FOC algorithm. Its depends on motor size, number of poles, number of turns in winding. Starting from 2.60 version of firmware, this parameter was moved to the "Hardware" tab and can be calibrated automatically. Refer to SBGC32 User Manual for more information.

Motor/frame gearing ratio – if a geared drive is used to drive any axis, set the gearing ratio value to this field (value > 1 means that the motor makes more turns then the frame's joint). It's assumed that encoder is

4. Calibrating encoders

mounted on the motor's shaft, not on the frame's shaft!

Range: 0.004 .. 255.996, resolution 0.004

Encoder/motor gearing ratio - If encoder is directly linked to the motor's shaft, disable checkbox to skip using this option. If a gearing between motor and encoder is used, you have to specify the exact ratio of reduction in this field and enable it (value < 1 means that the encoder makes more turns than the motor). Also, this parameter should be used for analog type of encoder to calibrate its sensitivity (scale factor). When this field is disabled, it is used by the calibration routine to inform user about the estimated gearing ratio during the el. field offset calibration. When calibration finished, check this value – it should be close to 1.0 (actual ratio). If it differs a lot, it signals about possible problems in encoder reading, or the number of poles in motor is set incorrectly.

Range: 0.001 ... 65.535, resolution 0.001

Limits (min, max) – software limits applied to the allowed angle of a motor. If specified, when motor reaches this limits, it will be forced to return back to the allowed area. Set the software limits at least 10 degrees ahead of the hardware (mechanical) limits – this is the working range of the soft break algorithm. Additionally, these limits are used for inspection of a system: if the angle of any motor goes more than 20 degrees outside the given limits at startup, system generate an "emergency stop" error and does not start. This test may be disabled for a particular motor.

Range: -3600..+3600°, resolution 1°

Choosing motors

To get maximum from you setup, its recommended to choose motors with the lower winding resistance compared to regular gimbal brushless motors that are present on the market. Most of them designed to work with constant high load and have too big resistance. Because normally full power is not applied to a motor, it can have less resistance and less size. Under external disturbance, such motor may take a higher current and give a greater torque, as a result. Under full load, the maximum voltage that is applied, is defined by the "POWER" parameter where 255 means ~70% of full battery voltage. To limit the amount of time when motor operates under full load, use the "heating-cooling model" that will chop the current after several seconds of work under full load.

But the winding resistance should not be as low, as for regular brushless motors, where the stall condition is outside of the normal operation conditions. Instead, in our case, the stall condition should be considered as a normal mode of operation during prolonged period of time. By this parameter, gimbal motors may be compared to DC servo motors, used in robotics and industry.

Also consider the max. current capabilities of a gimbal controller and a battery. It is recommended to use a buffer capacitor to protect battery from the high spikes of a current and to make a power supply more linear. Such spikes are caused by the PWM type of control and by the stabilization algorithm.

5. FAQ

Could encoder be used on yaw only? (On aerial gimbal I am now using potentiometer on yaw, but would like to replace it with encoder, but not add too much complexity, i.e. not use encoder for pitch and roll) Would current boards support this kind of “simple” use in future (also other than test use)?

Yes, starting from 2.56 ver. of regular firmware, it is possible to use single encoder on YAW motor only (you do not need to update to “encoder” license for this). Encoder is used to read motor angle only, with no changes to the motor control algorithm.

If you are using encoder-enabled firmware, ALL axes should have encoders installed and configured.

I have GB90 and GB85 motors. After reading the documentation I understand they might not be ideal to be used with the encoders. Will they work, what negative effect high resistance/inductance has?

Encoders will work with them, but because of the big pole count, the precision of angle reading is more crucial. For example in case of a magnetic encoder type, pay attention to precise aligning of the magnet over encoder chip (see the recipe related to a non-linearity below).

If inductance is high, KV factor is low. That mean that such motor will not compensate fast speed of rotation (speed is limited by Battery Voltage * KV), but it takes less current to provide the same torque level, that may be important for low-current Li-ion batteries. You may need to chose a higher voltage battery to get the maximum performance from this motor.

What would be ideal resistance for GB90 motor?

All depends on maximum current that controller may provide. For regular SimpleBGC32 boards, where current is limited by several Amps, their actual resistance 5-10 Ohm is good. For more powerful board, resistance 3-10 Ohm is more preferred to get maximum torque and high KV factor. The same is truth for any other motor.

What kind of results are you getting with encoders? The biggest problem I have with my current handheld is jitters when gimbal is moved, especially on follow mode or with joystick, at certain (medium) speeds.

All benefits of using encoders are listed in this document. But it will not help to overcome jitter, if its caused by the cogging effect that is a property of a motor – it remains with the encoders, too. The solution may be a choosing of different motor with the less cogging, or reducing the pole count (because frequency of jitter goes down and becomes closer to the area of reach of the PID loop), or replacing of the discrete rare-earth magnets by the uniform O-ring magnet.

Note: the “Extended” and the “Pro” boards has a function to reduce cogging effect by building a look-up table during calibration.

I calibrated encoders properly, but torque is much less than in the setup without encoders, even with the POWER parameter set to maximum.

Case1: push to motor by hand. If the power indicator in the GUI does not go to maximum, it seems that heating-cooling model limits it. Set Cooling factor, Heating factor = 0 for all axes.

Case2: under push, power indicator goes to maximum, but torque is still low. Repeat calibration. If does not help, see the next two recipes.

I get the "Wrong gearing ratio" error during calibration

First of all, check that encoders provide consistent data and they are assigned to proper axes: in the "Monitoring" tab look at the raw values from encoders ENC_RAW_xx. The rotation of a motor changes the value of the encoder assigned to this axis with the rate 16384 per full turn. If it's not a case, see the next recipe.

The "gearing ratio" value after calibration differs from 1.0 significantly.

or

Motor provides significantly less torque outside the neutral position where encoder was calibrated,

or

Stabilization works well only in neutral position and does not work when deflecting motor further.

1. Check that the "NUMBER OF POLES" parameter is set correctly. Even the error in 1 point will cause wrong operation of FOC algorithm. Auto-detection may give wrong result, so enter this value manually.
2. Another possible problem may be non-linearity of encoder reading, caused by a lot of reasons. In a case of a magnetic encoder type, it may be a bad magnet or its wrong centering (aligning of a magnet over chip), or soft iron located nearby. To check the linearity, in the "Monitoring" tab look at the raw values from encoders – they should reflect the actual angles precisely. Rotate motor by hands by the fixed angles (for example 45, 90 degrees), and observe that the increment of the value is 2048 and 4096 points, correspondingly.