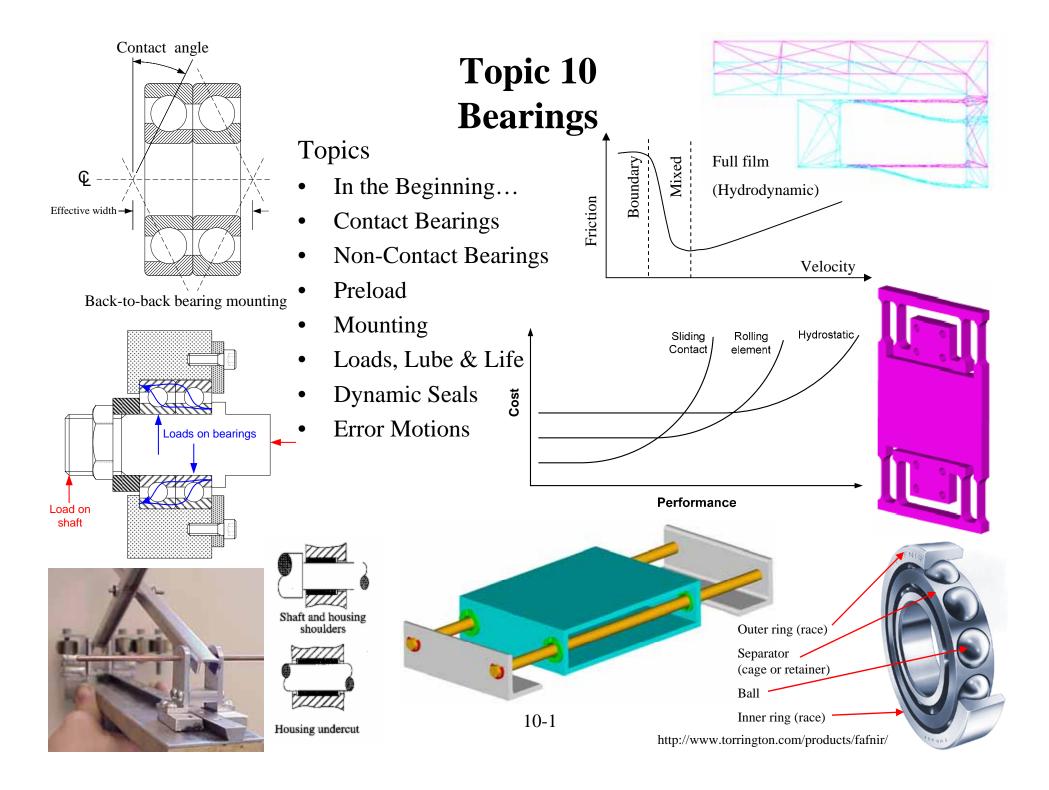
FUNdaMENTALS of Design Topic 10 Bearings

© 2000 Alexander Slocum





Henry Timken 1831-1909



Heinrich Hertz

In the Beginning...

- Bearing is defined by Webster's to be "a support or supporting part"
 - In machines, a *bearing* is a component that allows for relative motion between two parts
 - Your skeleton is the central structure that supports your body
 - Your body's joints are bearings that allow different parts to move

Cleanliness and lubrication

are most important

9

- Bearings can have many forms, but only two types of motions
 - Linear motion or rotary motion
 - Mechanical contact bearings: Sliding, Rolling, Flexing
 - Non-contact bearings: *Fluid Film, Magnetic*
 - One must understand the flow of forces and mechanical constraints

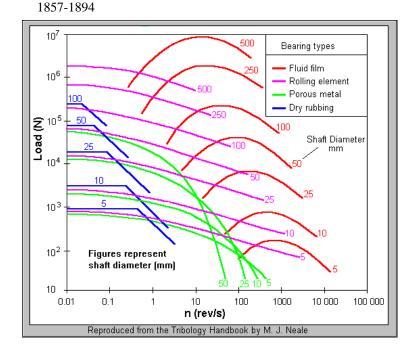
10-2

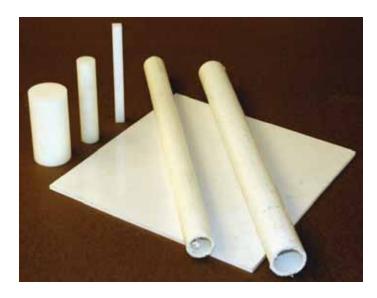


John Harrison (1693–1776)



Leonardo da Vinci 1452–1519



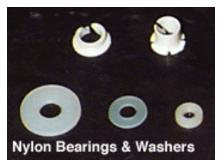


μ

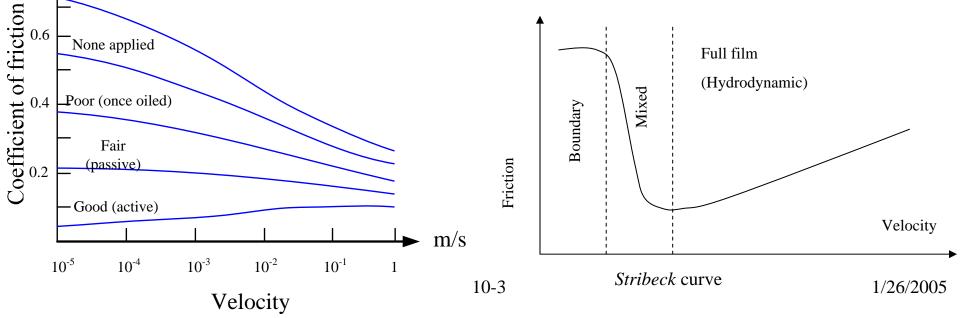
None (clean)

0.8

Contact Bearings: Sliding Contact

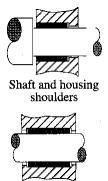


- Sliding contact bearings are commonly used for low speed applications
 - They rely on boundary lubrication to reduce wear and friction
- Polymers, brass, and ceramics are commonly used
 - Hard materials (shaft) slide on soft materials (bushing)
 - Check maximum static pressure and also the PV value
 - Aluminum-on-aluminum is to be avoided!



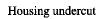
Sliding Contact: Rotary Motion

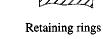
- Modular sliding contact bearings are found in many • catalogs
 - Molded polymer and sintered bronze bearings can be _ impregnated with lubricants
 - Low-cost Nylon spacers ("standoffs") used in electronics work well for design contests
- Also used for linear motion on round shafts
- Flat washers can be used for thrust loads (thrust washers)















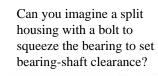


Shaft undercut

Internal groove

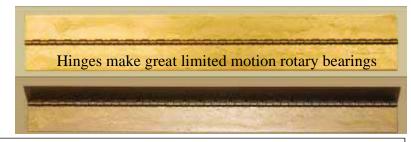
Snap-in

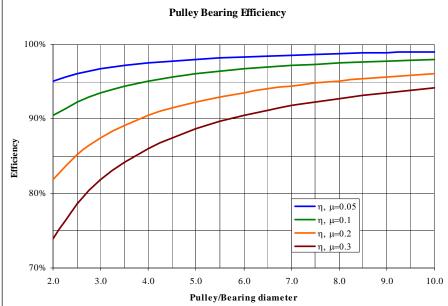
10-4

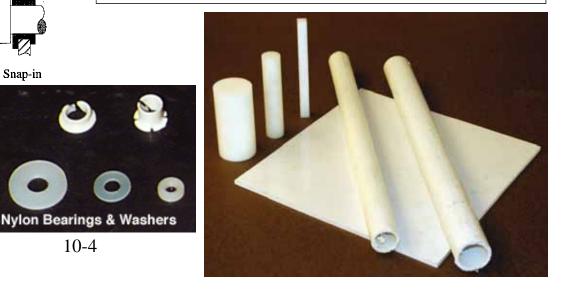




Pillow blocks from www.mcmaster.com

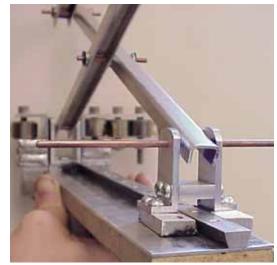






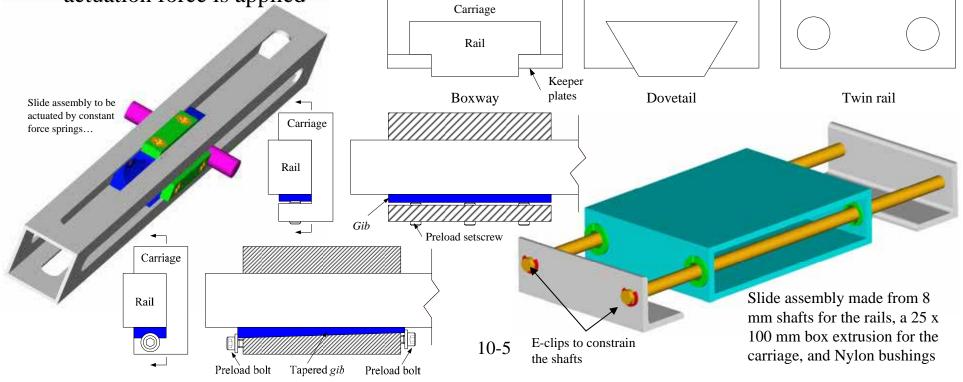
Sliding Contact: Linear Motion

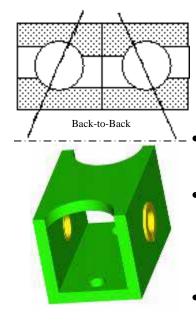
- Linear bearings are essentially rotary bearings with a really large radius of curvature
 - There are many configurations: boxways, dovetail, twin rails...
 - Clearance between bearing and rail or shaft can be removed by circumferential clamping or with *gibs*
- Apply *Saint-Venant's* principle to the ratio of the length of the carriage to the spacing of the bearings to prevent jamming



Bryan Ruddy used sliding contact dovetail bearings to guide his scissor linkage

Beware *centers of mass, stiffness, friction*, and where the actuation force is applied

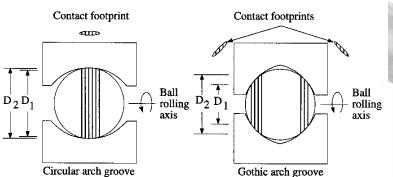




Rolling joint model by Dr. Just Herder of the Delft University of Technology

Contact Bearings: Rolling Elements

- Anti-friction bearings use rolling elements (balls or rollers) to reduce friction
- Linear and rotary bearings can use rolling elements
 - Axial, thrust, and moment loads can be supported depending on the bearing and how it is used in conjunction with other bearings
- Rotary bearings are naturally recirculating
 - Linear bearings can be non-recirculating (limited range of motion, extra low friction) or recirculating (unlimited range of motion)



2 points of contact

differential slip caused

by rolling on different

diameters. Can this be

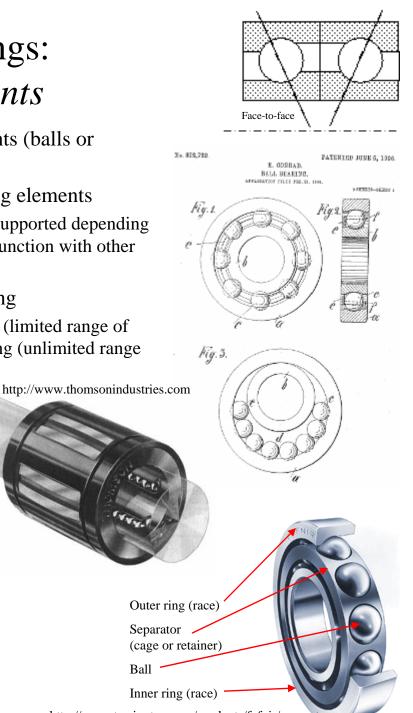
Note difference in

a + effect?

- 2 points of contact

$$\%_{slip} = \frac{D_2 - D_1}{D_2} \times 100$$

10-6



http://www.torrington.com/products/fafnir/

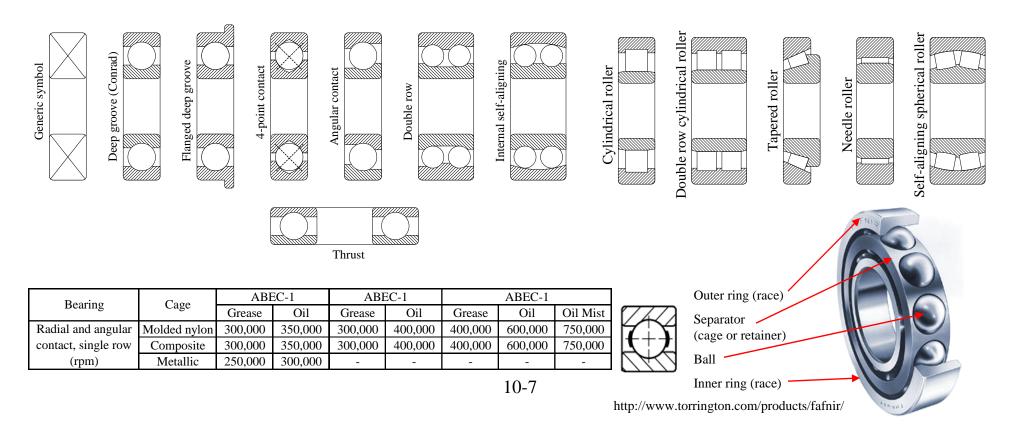
Rolling Elements: Rotary Motion





- Bearing speed is limited by its DN value, where D is the diameter in mm and N is the allowable rpm
 - Shear power is the product of velocity (R ω) and force (R $\omega\mu$ A/h) and thus is equal to (R ω)² μ A/h
 - Centrifugal load is proportional to $r\omega^2$
- Scrutinize mountings and beware over constraint!

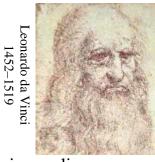




Rotary Motion: "Ball Bearings"

- Deep groove, "Conrad", ball bearings are the most common form of ball bearings
 - Radial loads, & bidirectional axial loads equal to the radial load because all balls share the load
 - Balls have to roll from one side of the contact groove to the other, so bidirectional stiffness is non-linear
 - Same bore-size, different duty bearings have different outer dimensions and load capacities
- Angular contact bearings' contact grooves are preferentially ground on one side, and can accurately support both radial and uni-directional axial loads
 - The most accurate of ball bearings, often used for high speed applications
- Deep Groove and Angular Contact ball bearings are used in pairs to support moment loads
- Four-point contact ball bearings have gothic arch grooves that allow each ball to contact two points of each raceway, and thus allow a single bearing to support radial, axial, and moment loads
 - Giant forms of these bearings, with gear teeth on the inner or outer race, are called slewing rings and they are used as turntable bearings for cranes, excavators...

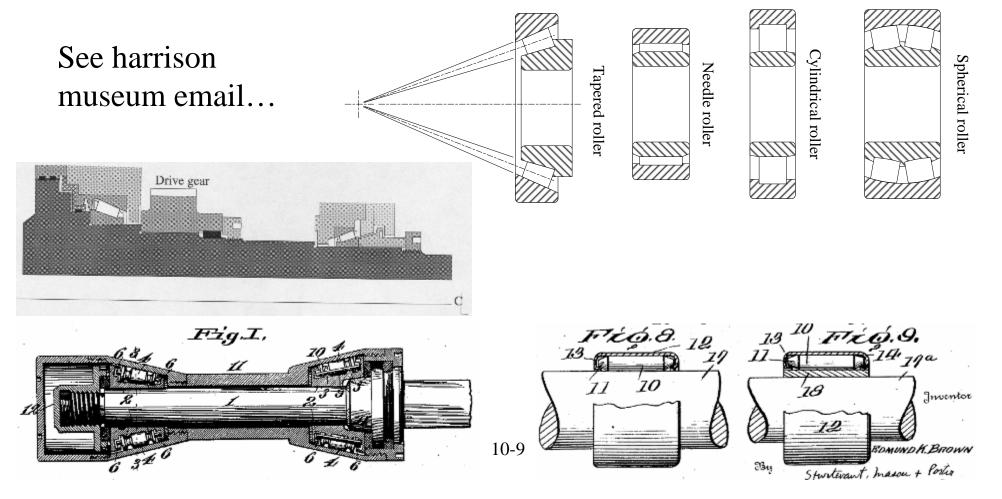
	ID	OD	Width	Cstatic	Cdynamic		9	1 1 ►	
	(mm)	(mm)	(mm)	(N)	(N)				
Extra Light 9100	10	26	8	1960	5100		7740		
	15	32	9	2500	6200	Loads on bearings			
	280	420	65	430000	360000			<u> </u>]]]]]]]]
	600	870	118	1539000	800000		z	z	Z
Light 200K	10	30	9	2650	6550	13	00	8650	3200
	15	35	11	3450	8650	Load on	62(86	132
	280	500	80	710000	560000	shaft 🔶	-		
Light 200W (full compliment)	15	35	11	5000	11000				
	280	500	80	1120000	765000				()
Medium 300K	10	35	11	3750	9000				
	15	42	13	5600	13200		32	35	
	280	580		780000	585000	10-8	,		42
Data from The Torring	gton Compar	y Service C	atalog, 1988				Extra Light	Light	Medium



13

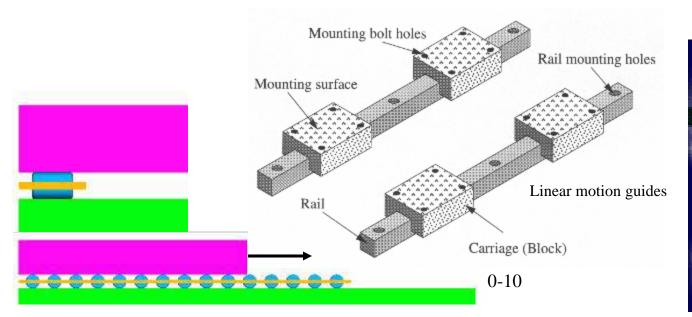
Rotary Motion: "Roller Bearings"

- Line contact gives roller bearings many times the load capacity of a similarly sized ball bearing
- Tapered roller bearings are the roller equivalent of angular contact ball bearings
 - Invented by Henry Timken in 1898, it revolutionized modern industry by simplifying the design of heavy machinery such as railroad axle bearing supports.
- Spherical roller bearings revolutionized steel and paper making by allowing huge rollers to be supported on rolling element bearings without structural deformations overloading bearings



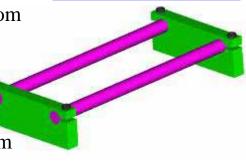
Rolling Elements: Linear Motion

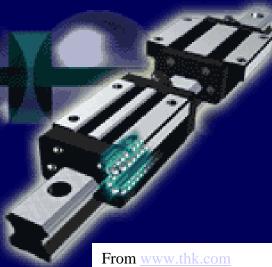
- Linear rolling element bearings can be non-recirculating or recirculating
- Non-recirculating types: wheels (cam followers) & rolling elements
 - More complex arrangements are needed to constrain 5 degrees of freedom
 - Wheels on rails can roll very far
 - Rollers between two surfaces travel half-as-far as the moving surface
- Recirculating types: *linear guides & ball bearing bushings*
 - Modular form makes then easier to use to constrain 5 degrees of freedom
 - Travel distance is only limited by ability to splice together rails
- Scrutinize mountings and beware overconstraint!

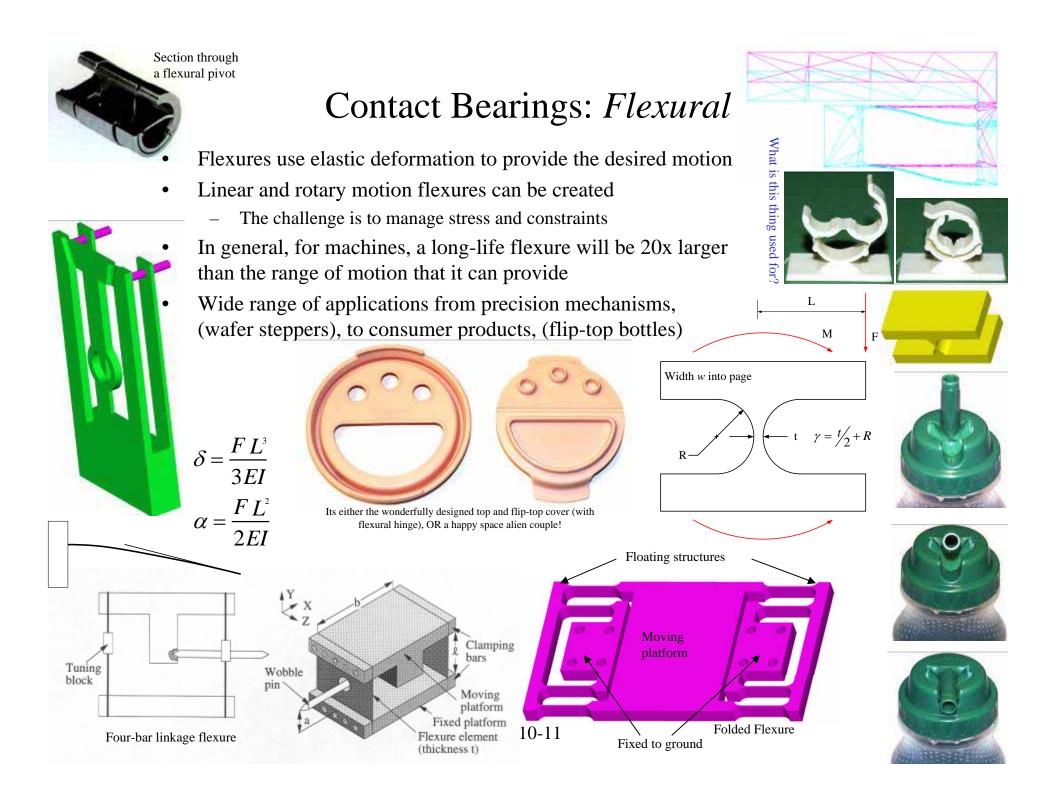




BallBushing[™] from



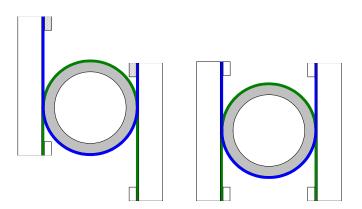


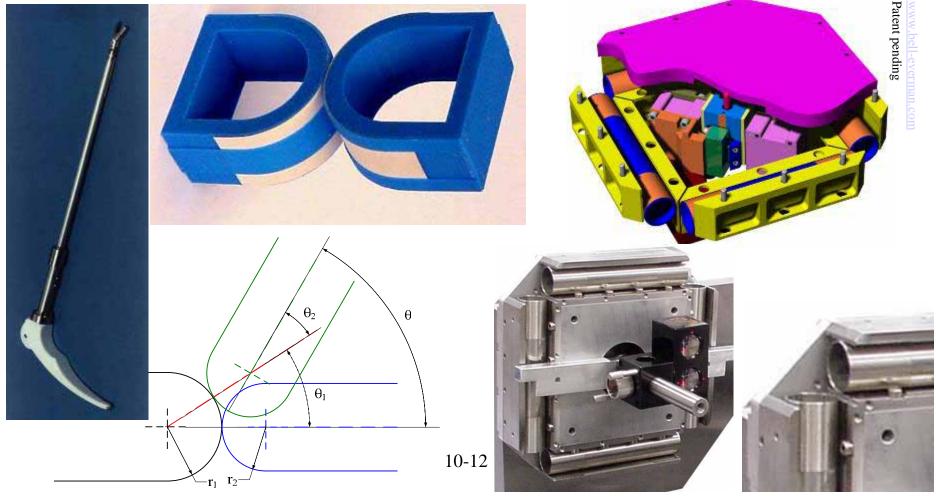


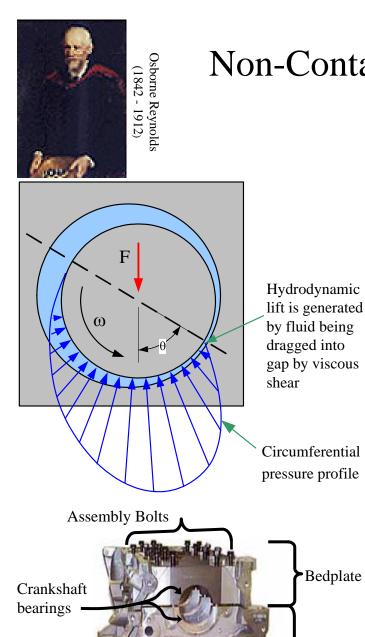
Contact Bearings: Flexural Rolling

- The hybrid combination of flexing & rolling can provide the best of both worlds
 - Large rolling surfaces can provide accurate motion
 - Thin flexible bands constrain the rolling surfaces

Rolling joint model and forceps images provided by Dr. Just Herder of the Delft University of Technology







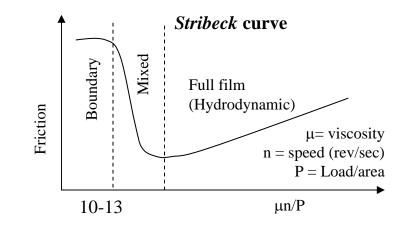
Non-Contact Bearings: *Hydrodynamic*

- The industrial revolution was made possible by rotating • shafts that were supported by a thin film of lubricant induced by hydrodynamic shear
 - Velocities must typically be greater than 0.1 m/s
 - Strongly dependant on lubricant viscosity
 - As long as a shaft is rotating with sufficient speed, and lubricant is available, hydrodynamic bearings can provide good load capacity and long life in a small space
 - Their simplicity and low cost makes them widely applicable
 - They have several drawbacks compared to anti-friction (rolling element) bearings
 - They consume more energy
 - They are less accurate

•Bedplate

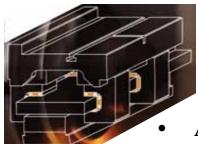
Block

- The axis of rotation position varies with load & speed
- However, they can last "forever" if they are never stopped

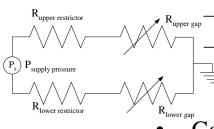




Albert Kingsbury 1863-1943



Weldon's 1632 Gold grinding machine carriage





US Patents 5,488,771 & 6,150,740

Non-Contact Bearings: Aerostatic & Hydrostatic

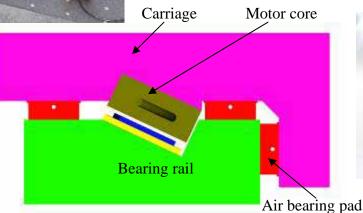


Dr. Kevin Wasson &

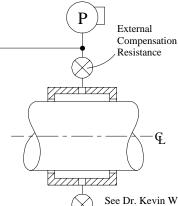
David Gessel, Aesop, Inc.

Aerostatic & hydrostatic bearings rely on an external pressure source to supply gas or liquid through an inlet restrictor to a bearing pad

- The bearing pad has resistance to flow to atmosphere-
- This forms a resistance network where pressure in the bearing is a function (nonlinear, gap cubed) of the gap between the bearing and the rail on which it runs
- Gas bearings do not require collection systems
 - Pressures are typically limited to 6 atm
 - Liquid bearings typically use collection systems unless cutting fluid (e.g., water for ceramics) can be used
 - Pressures are typically 40 atm, but can be 200 atm





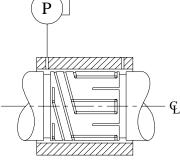


Conventional



Self-Compensation

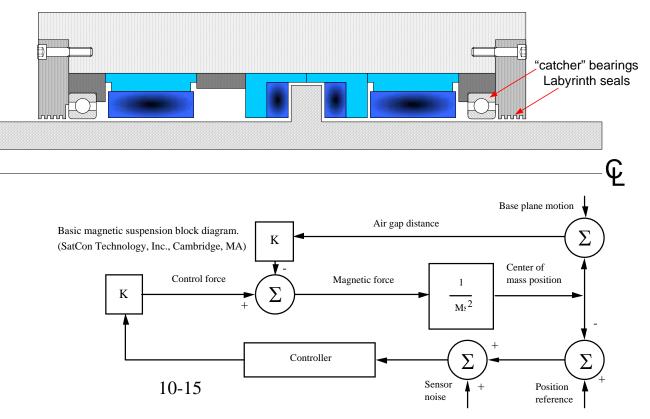




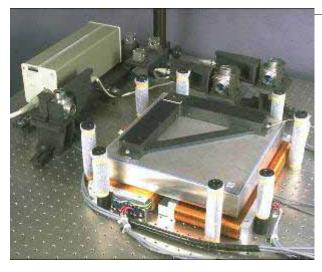
See Dr. Kevin Wasson's Ph.D. thesis: "High Speed Hydrostatic Spindle Design" MIT, Mech. Eng 1994.

Non-Contact Bearings: Magnetic

- Magnetic bearings have NO mechanical contact with the supported component
 - No speed limits: heat is only generated by shearing of the air between the coils and component
- Linear, rotary, or combined motions can be supported
 - Mechanical *catcher* bearings are also often used in case the power fails
- Sophisticated position feedback measurement and control systems are required
- First-order estimates of load capacity can be made by assuming a maximum "bearing pressure" (see page 7-10) on the order of 0.5 atm.

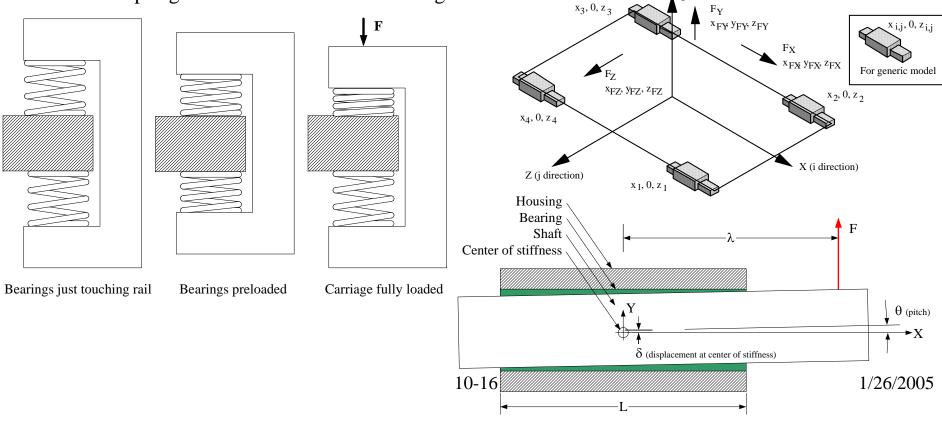


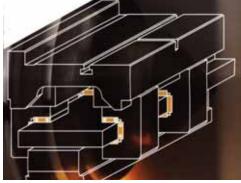
Magnetic bearing levitated stage from Prof. David Trumper's lab: http://web.mit.edu/pmc/www/Projects/ Planar/planar.html



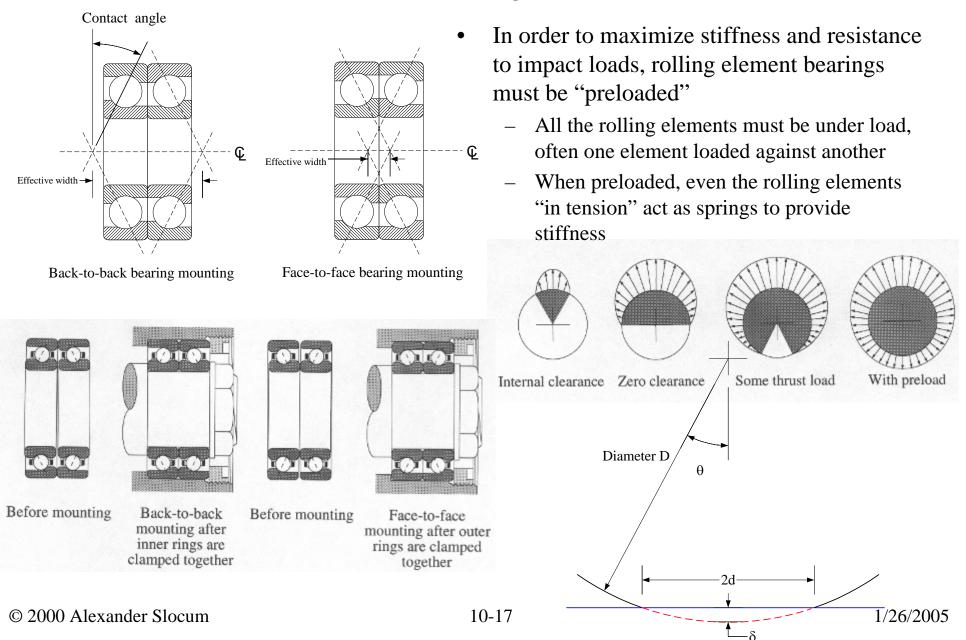
Preload

- Preload allows for bi-directional loading
 - If not careful, it can lead to over-constraint
- Preload maximizes stiffness
- Preload deflection is small, so preload can be lost by manufacturing error or wear
 - Preload loss via wear is avoided with the use of spring loaded preload systems
- Spring preloading allows dimension variations without a large change in preload force
 - Use springs or deformation of the bearings and/or structure



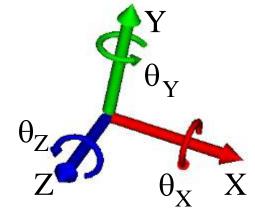


Preload: Rolling Elements

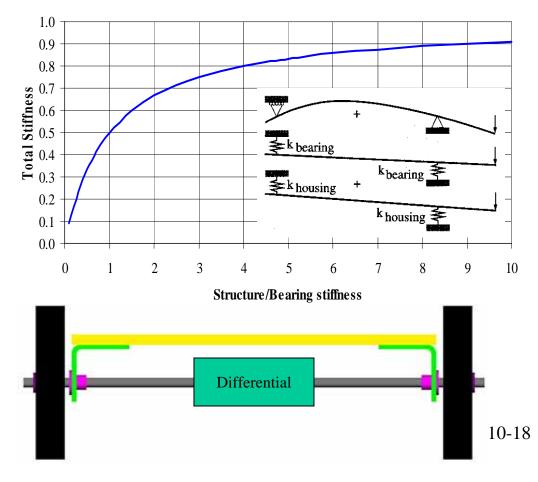


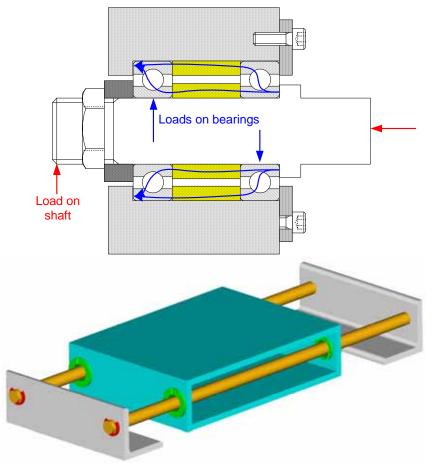


- *Exact Constraint Design:* The number constraint points should be equal to the number of degrees of freedom to be constrained
 - If deformations occur in your machine, will the bearings be overloaded?



• Do a sensitivity analysis and base design decisions on analysis or experiments





Mounting: System Stiffness

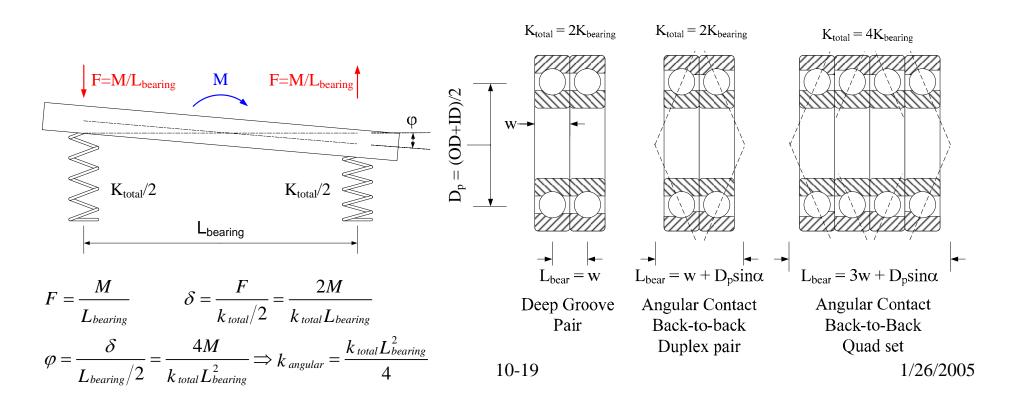
P_{max}

Μ

F_{resultant}

 \simeq

- Angular (tilt) stiffness can be estimated from lateral stiffness and bearing spacing
 - Angular misalignments are the most troublesome
 - Small misalignments can create very large bearing loads in stiff systems
- Springs modeling the system components are loaded by misalignment displacements
 - The resulting forces are added to the component loads for life calculations

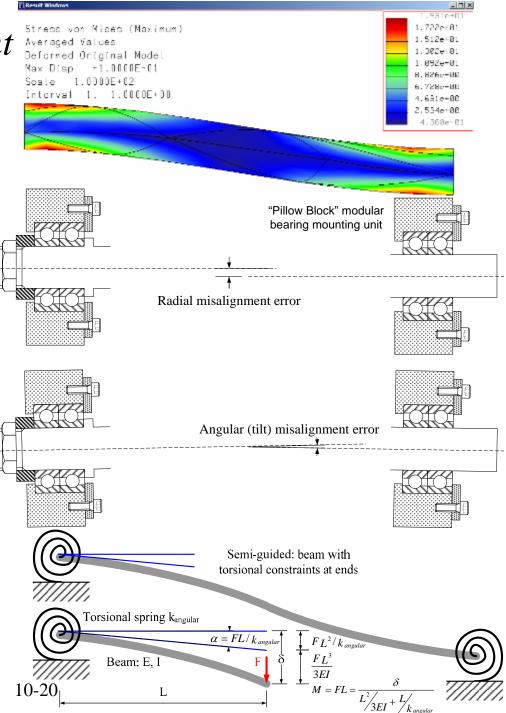


Mounting: Shaft Misalignment

- Radial and angular misalignment errors can be major contributors to total bearing loading!
 - Springs-in-series models can be used to determine bearing loads caused by misalignment displacements, ala $F = k\delta$
 - See the spreadsheets:
 - Bearing_stiffness_alignment.xls
 - $Misalignment_induced_beam_stress.xl\bar{s}^-$

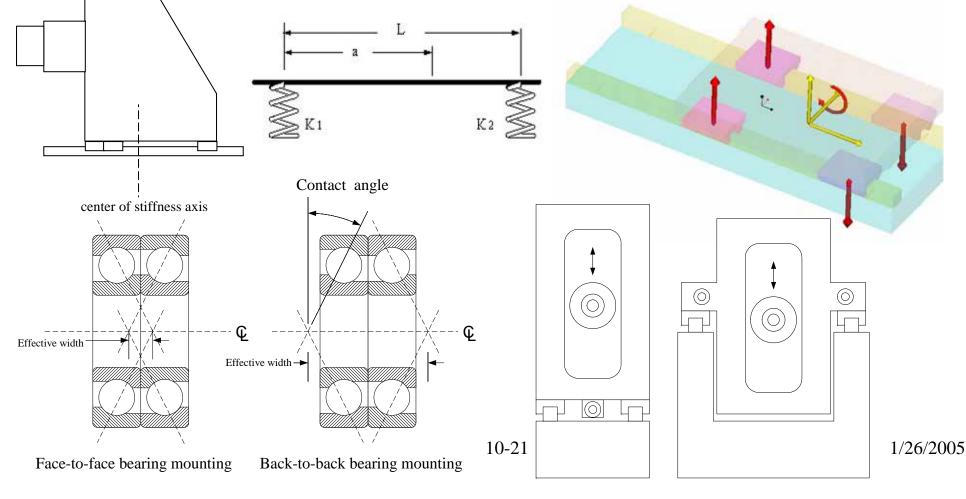
Case 1, simply supported beam (typically Nbear = Nbear2	= 1)
Resulting moment, Mresultss (N-m)	0.360
Resulting radial forces due to misalignment	
First bearing set (N)	30
Second bearing set	30
Case 2, beam ends guided but with bearing angular compl	iance
Resulting moment, Mresultbeg (N-m)	0.529
Resulting radial forces due to misalignment	
First bearing set (N)	44
Second bearing set	44
Case 3, beam ends guided but assume ZERO bearing ang	ular compliance
Resulting moment, Mresultberg (N-m)	12.0
Resulting radial forces due to misalignment	
First bearing set (N)	997
Second bearing set	997

Misalignment (displacement) delta only	
Both ends guided	
Force at ends, F (N)	40.6
Moment at ends, M (N-mm)	2031
Stress at ends (N/mm ²)	20.7
Cantilevered	
Force at ends, Fc (N)	10.2
Moment at base, Mc (N-mm)	1015
Stress at base (N/mm ²)	10.3

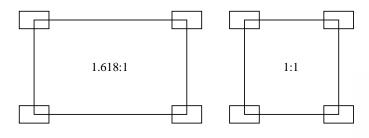


Mounting: Centers of Action

- A body behaves as if all its mass is concentrated at its *center of mass*
- A body supported by bearings, acts about its *center of stiffness* (there can be several in an axis...)
 - The point at which when a force is applied to a axis, no angular motion occurs
 - The point about which angular motion occurs when forces are applied elsewhere
 - Found using a center-of-mass type of calculation (K is substituted for M)



Barré de Saint-Venant 1797-1886

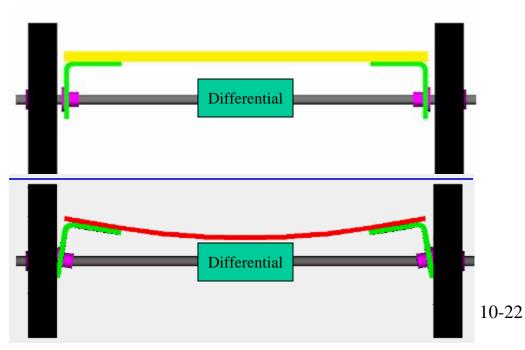


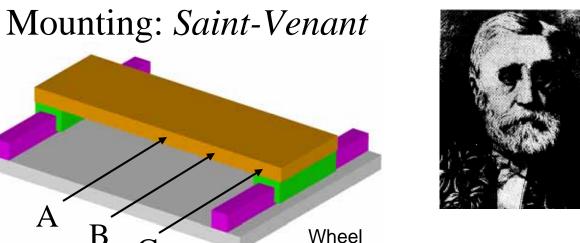
St. Venant: Linear Bearings:

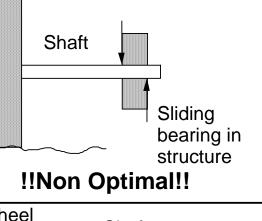
- L/D>1
- 1.6:1 very good
- 3:1 as good as it gets •
- St. Venant: Rotary Bearings:
 - $L_{\text{shaft}}/L_{\text{bearing spacing}} < 1$ and the shaft can be cantilevered
 - $L_{shaft}/L_{bearing spacing} > 3-5$ and the slope from shaft bending might overload the bearings, so provide adequate clearance

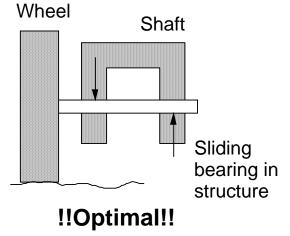
A

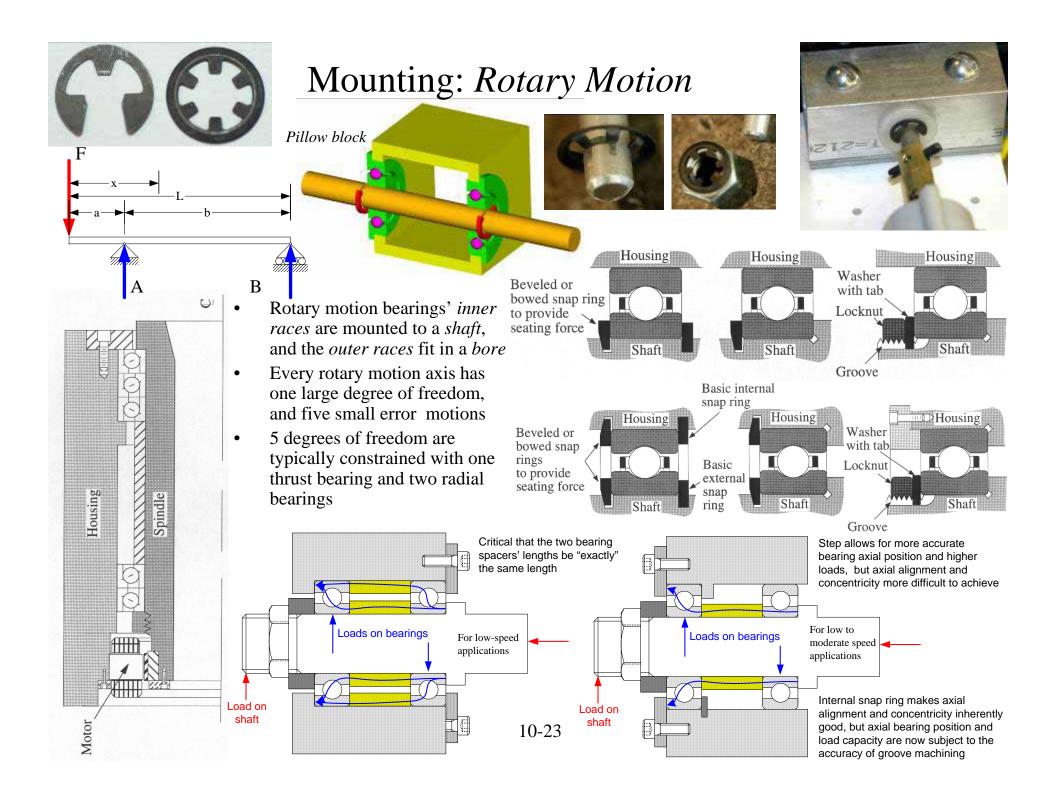
Β











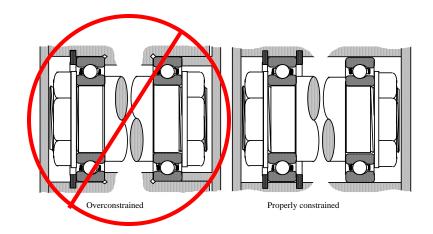
Mounting: Thermocentric Design

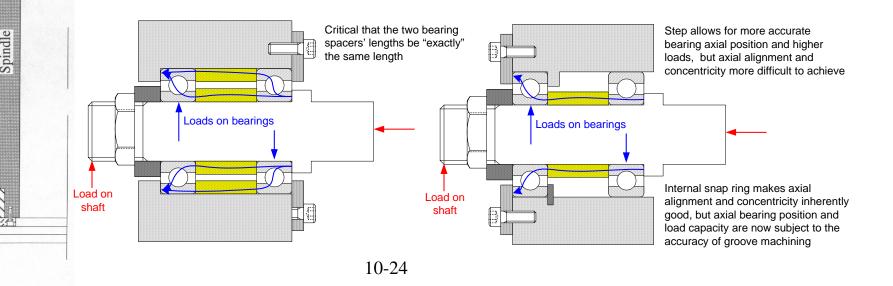
- Thermal growth can cause overconstarint and overloading
- primarily a rotary motion bearing issue
- Linear bearings, particular in large systems such as cranes and big machine tools, can also be affected
- When is a design thermally stable?
- Can deep groove bearings be mounted in a back-to-back configuration?
- What does this do to the load path?

Housing

<u>{||||}</u>

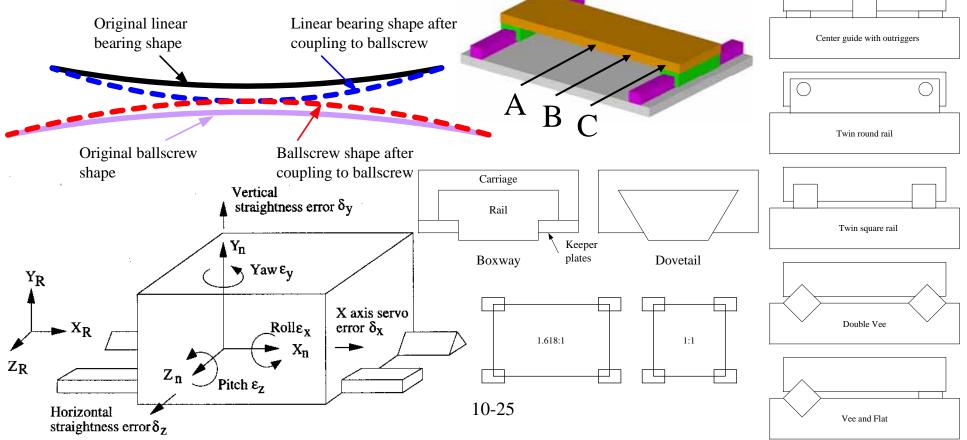
Motor







- Every linear motion axis has one large degree of freedom, and five small error motions
 - 5 degrees of freedom are typically constrained with various forms of bearing surfaces
 - Typical preloaded machine tool carriages have pairs of preloaded bearing pads in vertical and horizontal directions at each of 4 corners



Loads, Lube & Life

Loading: •

μ 0.8

0.6

0.4

0.2

10-5

None (clean)

None applied

Poor (once oiled)

Fair (passive)

Good (active)

 10^{-4}

- The maximum load is the load the bearing can withstand for short periods
- Longer life is achieved with lower loads
- Lubrication: *Tribology* is the study of lubrication and wear •
 - Separates the structural materials, and prevents chemical bonding
 - Allows for viscous shear of a fluid thereby reducing material wear
 - Oil is common; Grease is soap that holds oil and releases it as it warms
 - Lubricants attract dirt, so less is typically better, and use seals if possible

Valle

Boundary

Mixed

Full film

10-26

(Hydrodynamic)

Velocity

Surface finish is critical!

 10^{-2}

 10^{-1}

 10^{-3}

- Oil impregnated bearings release lubricant as they get warm-٠
- Some materials are inherently lubricious and function "dry" •

Friction

m/s



Claude Louis Marie Henri Navier (1785 - 1836)

 $mgcos(\theta)$

 $mgsin(\theta)$

θ

 $\mu = tan\theta$

 \mathbf{F}

 μ mgcos(θ)



George Gabriel Stokes (1819 - 1903)



(1842 - 1912)

Hydrodynamic lift is generated by fluid being dragged into gap by viscous shear

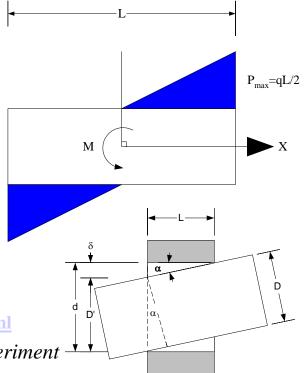
Circumferential pressure profile



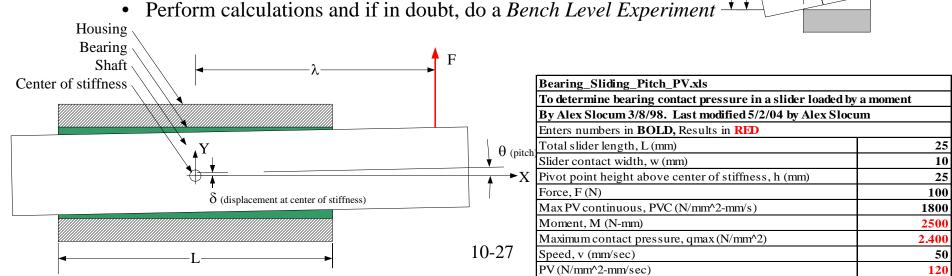
Loads, Lube & Life: Sliding Contact

- The PV value is the product of the pressure and the velocity
- Sliding contact bearings have a maximum allowable pressure and a maximum PV value`
 - The allowable product of pressure (F/(D*L)) and velocity
 - The stiffness of the bearing
 - Delrin bearing used as a bushing (Nylon has ¹/₂ these values)

Maximum Pressure (N/mm^2, psi)	140	19,895
PV continuous (N/mm^2-mm/s, psi-ips)	1800	9,791
PV short periods (N/mm^2-mm/s, psi-ips)	3500	19,581
Compressive Modulus (GPa, psi)	4	579,710

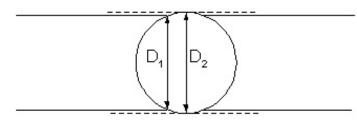


– <u>http://www.dupont.com/enggpolymers/americas/products/deldata.html</u>

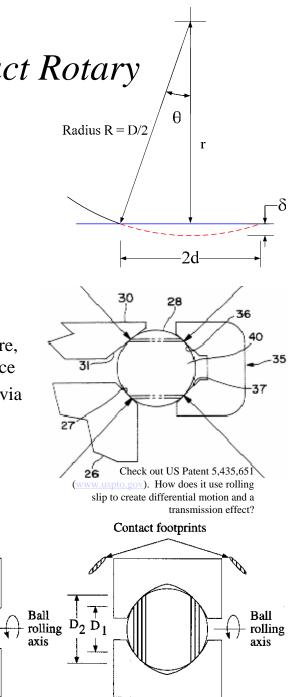


Loads, Lube & Life: Rolling Contact Rotary

• Rolling contacts have friction because the elements deform under load and cause rolling across different effective diameters (slip)



- The rolling bearing pulls in lubricant, whose viscosity increases with pressure, to form an *elastohydrodynamic* lubrication layer between the ball and the race
 - The EHD layer accommodates the differential slip, but generates heat via viscous shear
- The rolling contact interface geometry also plays a significant role



Circular arch groove

 $\dot{D}_2 \dot{D}_1$

10-28

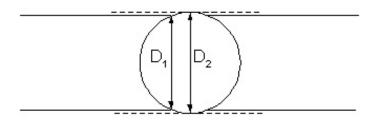
Contact footprint

Image: Construction

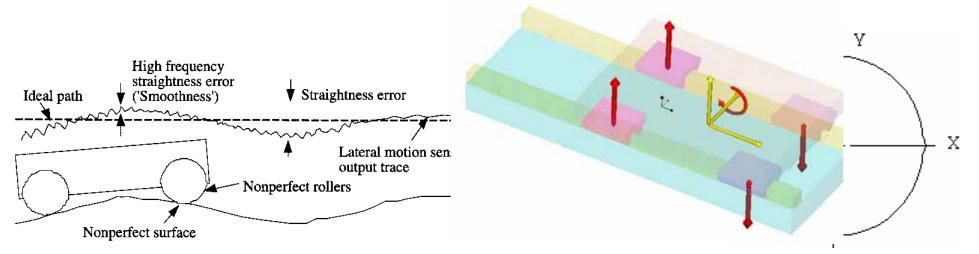
Gothic arch groove

Loads, Lube & Life: Rolling Contact Linear

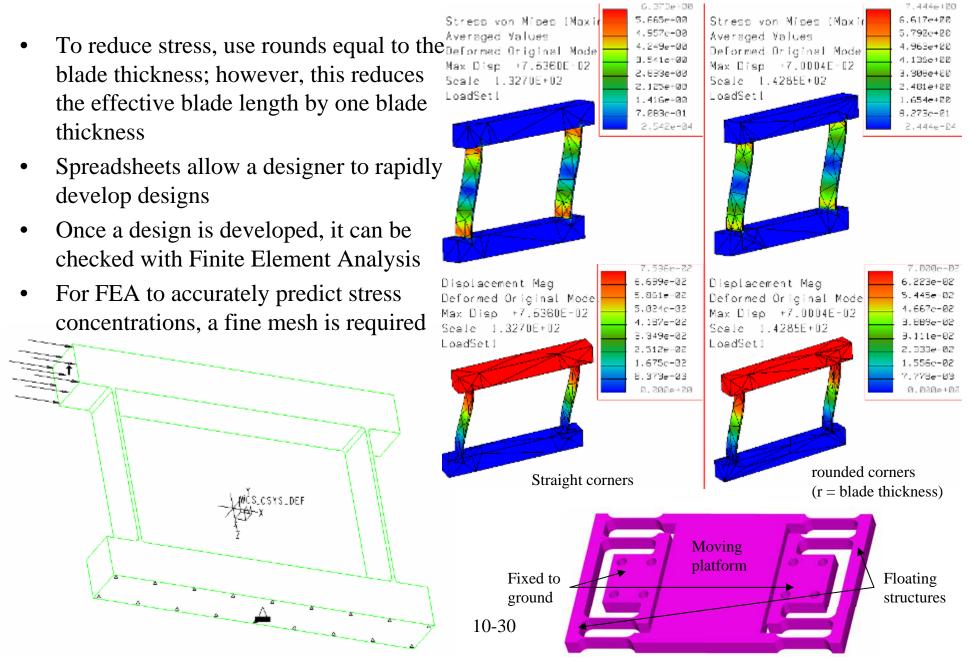
• Rolling contacts have friction because the elements deform under load and cause rolling across different effective diameters (slip)



- The rolling bearing pulls in lubricant, whose viscosity increases with pressure, to form an *elastohydrodynamic* lubrication layer between the ball and the race
 - The EHD layer accommodates the differential slip, but generates heat via viscous shear
- The rolling contact interface geometry also plays a significant role



Loads, (no) Lube & Life : Flexures



http://nmml.afsc.noaa.gov/education/pinnipeds/seals.htm

Folks, use good seals and

keep the environment clean! Initial installation compression of O-ring

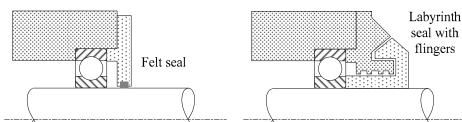


"Extrusion" of O-ring forming tight seal

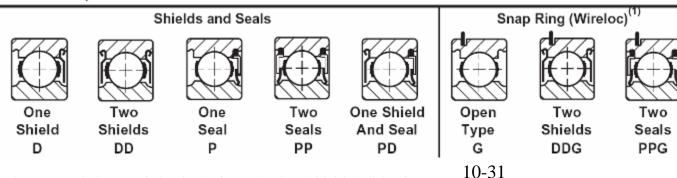


Dynamic Seals

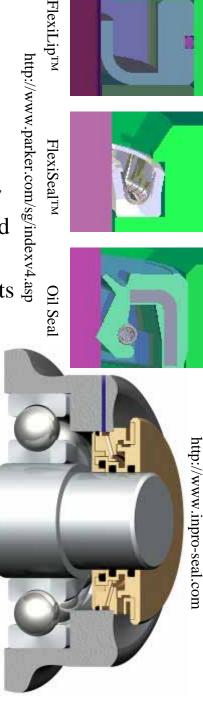
- Keeping dirt out of a bearing is of utmost importance for long bearing life
- The simplest seals are shields that keep dirt out using a labyrinth path
 - Internally supplied air pressure create a net outflow _
- A mechanical contact seal is the best for low speed sealing, but it generates friction
- *Flingers* use centrifugal force to keep contaminants out and lubricants in



SHIELDS, SEALS AND SNAP RING COMBINATIONS

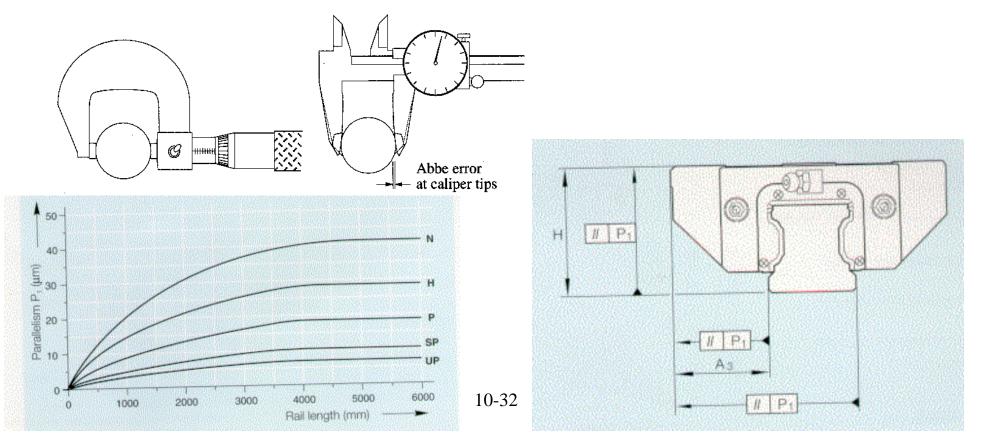


http://www.timken.com/industries/torrington/catalog/pdf/fafnir/radial.pdf



Error Motions

- Bearings are not perfect, and when they move, errors occur in their motion
 - Accuracy standards are known as *ABEC* classes as set by the Annular Bearing Engineers Committee of the Anti-Friction Bearing Manufacturers Association, Inc. (AFBMA)
 - ABEC 3 rotary motion ball bearings are common and low cost
 - ABEC 9 rotary ball bearings are used in the highest precision machines
 - The International Standards organization (ISO) has similar standards
- Remember Abbe and sine errors and how they can amplify bearing angular errors!



Error Motions: Rotary Bearings

- Disc drives exist because of accurate repeatable rotary motion bearings
 - Radial, Axial, and Tilt error motions are of concern
- Precision Machine Designers measure error motions and use *Fourier transforms* to determine what is causing the errors...
- Standards exist for measuring the errors of an *axis of rotation:*
 - Axis of Rotation: Methods for Specifying and Testing, ANSI Standard B89.3.4M-1985

