National Aviation University

MACHINE ELEMENTS

COURSE PROJECT DESIGN

Manual

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The manual includes recommendations for carrying out the course project on the subject “Machine Elements” and examples of analysis and design of double stage speed reducers.

The manual is intended for students of direction 6.070103 “Aircraft Maintenance”.

INTRODUCTION

The course project on the subject “*Machines Elements”* is one of the basic kinds of the students individual work. The purpose of the course project is to enhance the knowledge acquired by the student at the lectures, practical classes and laboratory sessions as well as to develop the skills of making research and design of present-day speed reducers.

The course project is to include the following parts:

1. Determination of speed reducer elements geometrical parameters and carrying out their strength analysis.
2. Designing a speed reducer.
3. Designing a mechanical drive.

All calculations are to be presented at the explanatory note that should be carried out according to requirements of State Standard «ДСТУ 3008-95. Державний стандарт України. Документація. Звіти в сфері науки і техніки. Структура і правила оформлення». The explanatory note should be either typed or hand written in blue or black ink on one side of size A4 paper. Every sheet is to be paginated and have the following margins: top – 5 mm, bottom – 5 mm, right – 5 mm, and left – 20 mm.

Besides calculations the explanatory note should have the contents table, the assignment, the reference literature used for making the course project, specifications. Each new part should be begun with a new page.

Each part must be subdivided into items marked with numerals separated by a point. The first numeral represents the number of the part, the second one shows the number of the item.

All magnitudes that are the part of formulas should be explained. Besides, it is necessary to denote measurement units of parameters being calculated.

The graphical part consists of 4 drawings: the first drawing is a speed reducer (two projections); the second drawing is a mechanical drive (two projections); the third drawing is shop drawing of a speed reducer shaft; the forth drawing is shop drawing of a speed reducer gear. The first and the second drawings are made on A1 whatman paper; the third and the forth drawings are made on A3 whatman paper. The title block should be drawn in the bottom right hand corner.

1. KINEMATIC AND FORCE ANALYSIS OF A MECHANICAL DRIVE

Let us determine the basic parameters of the mechanical drive (Fig. 1.1) if pull of the belt F_t=3 kN; belt speed V=1.4 m/sec; drum diameter D=350 mm.

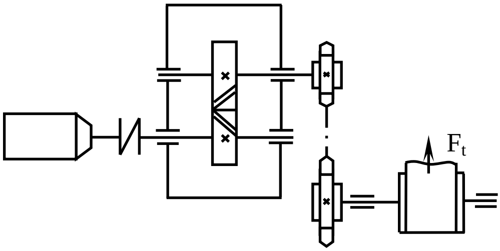


Fig. 1.1. Diagram of single stage speed reducer with chain drive

1.1. Determine the output power of the drive

$$P_{out} = F_t \cdot V = 3 \cdot 1.4 = 4.2 \text{ kW}$$

1.2. Determine the total efficiency of the drive

In general

$$\eta = \eta_1 \cdot \eta_2 \cdot \ldots \cdot \eta_n ,$$

where $\eta_1, \eta_{2,\ldots}\eta_n$ are efficiencies of all kinematic pairs and links where the input power is lost.

For our case

$$\eta = \eta_c \cdot \eta_{hsg} \cdot \eta_{cd} \cdot \eta_b^3,$$

where η_c is the efficiency of the coupling;

η_{hsg} is the efficiency of helical spur gears;

η_{cd} is the efficiency of the chain drive;

η_b takes into account losses in one pair of bearings.

The magnitudes of all efficiencies are given in table 1.1.

The following components are recommended to use for mechanical drives being analyzed:

- belt drive with flat belt;
- chain drive with roller chain;
- rolling bearings;
- coupling with rubber bushed studs;

Table 1.1

The magnitudes of efficiencies of the drives

Name	Efficiency	
	Closed drive	Opened drive
Gearings:		
- straight spur gears	0.98 - 0.99	0.94 - 0.96
- helical spur gears	0.97 - 0.98	0.94 - 0.95
- bevel gears	0.96 - 0.98	0.92 - 0.94
Worm gearing:		
-one thread worm	0.7 - 0.75	
-two thread worm	0.75 - 0.82	
-four thread worm	0.82 - 0.92	
Belt drives:		
- flat belt drive		0.96 - 0.98
- V-belt drive		0.95 - 0.97
- **Chain drives:**		
- roller chain		0.94 - 0.96
- toothed chain		0.96 - 0.97
Couplings:		
- with rubber bushed studs	0.996	
- flexible coupling	0.985 - 0.995	
- rigid coupling	1	
Bearings:		
- rolling bearings	0.99 - 0.995	
- sliding bearings	0.98 - 0.985	

Let us assume that η_c = 0.996, η_{hsg}= 0.97, η_{cd} = 0.94, η_b= 0.99. Then

$$\eta = 0.996 \cdot 0.97 \cdot 0.94 \cdot 0.99^3 = 0.881.$$

Pay attention that the magnitude of the total efficiency must be rounded off to thousandth or ten thousandth.

1.3. Determine the input power.

In general the efficiency is determined as ratio of the output power to the input one

$$\eta = \frac{P_{out}}{P_{inp}}$$

That is why we can find needed power of the electrical motor

$$P_{inp} = \frac{P_{out}}{\eta} = \frac{4.2}{0.881} = 4.767 kW \cdot$$

1.4. Select the electrical motor.

For given mechanical drives we will use asynchronous electrical motor. It is explained by the fact that in comparison with the other types of motors asynchronous electrical motors are simpler in design and maintenance, more reliable and less expensive. The most widely spread asynchronous motors are series 4A squirrel cage induction motors.

Asynchronous motors are chosen by means of table 1.2 depending on the input power P_{inp} of a mechanical drive and the synchronous rotational speed n_s (rotational speed of a magnetic field which characterizes operation of the motor without load). For given mechanical drives asynchronous motors are used either synchronous rotational speed n_s= 1500 rpm or n_s= 1000 rpm.

Table 1.2.

Parameters of asynchronous motors

Rated power P_r, kW	Synchronous rotational speed n_s, rpm					
	1500		1000		750	
	Type designation	S,%	Type designation	S,%	Type designation	S,%
0.55	71A4	7.3	71B6	10	80B8	9
0.75	71B4	7.5	80A6	8.4	90LA8	8.4
1.1	80A4	5.4	80B6	8.0	90LB8	7.0
1.5	80B4	5.8	90L6	6.4	100L8	7.0
2.2	90L4	5.1	100L6	5.1	112MA8	6.0
3.0	100S4	4.4	112MA6	4.7	112MB8	5.8
4.0	100L4	4.7	112MB6	5.1	132S8	4.1
5.5	112M4	3.7	132S6	3.3	132M8	4.1
7.5	132S4	3.0	132M6	3.2	160S8	2.5
11.0	132M4	2.8	160S6	2.7	160M8	2.5
15	160S4	2.3	160M6	2.6	180M8	2.5
18.5	160M4	2.2	180M6	2.7	200M8	2.3

For our mechanical drive we select 4A132S6 Induction Motor (P_r = 5.5 kW, n_s = 1000rpm).

1.5. Determine the motor rated rotational speed n_r

$$n_r = n_s(1 - \frac{S}{100}),$$

where S is relative speed loss that is determined according to table 1.2. In our case S = 3.3 %. After substituting corresponding magnitudes we obtain

$$n_r = 1000 \cdot (1 - \frac{3.3}{100}) = 967 \text{ rpm}.$$

1.6. Determine the output rotational speed

$$n_{out} = \frac{60 \cdot V}{\pi \cdot D} = \frac{60 \cdot 1.4}{3.14 \cdot 0.35} = 76.43 \text{ rpm}.$$

1.7. Determine the total velocity ratio of the mechanical drive

$$u = \frac{n_{inp}}{n_{out}} = \frac{967}{76.43} = 12.65 \cdot$$

1.8. Distribute the total velocity ratio between mechanical drive steps. The total velocity ratio can be found by the formula

$$u = u_{red} \cdot u_{cd} ,$$

where u_{red} is the speed reducer velocity ratio; u_{cd} is the chain drive velocity ratio.

First, determine the velocity ratio of the speed reducer.

For straight spur gears, helical spur gears and bevel gears speed reducers the velocity ratio should be chosen from the following standard series u_{red}=1.25;1.4;1.6;1.8;2;2.24;2.5;2.8;3.15;3.55;4;4.5;5;5.6.

For worm gear speed reducers u_{red} is taken from the following standard series u_{red} = 8;10;12.5;16;20;25;31.5;40;50;63;80.

In our case we have helical spur gears speed reducer. Let us take $u_{red}=u_{hsg}= 4$.

Determine the velocity ratio of the open drive. In our case it is chain drive

$$u_{cd} = \frac{u}{u_{red}} = \frac{12.65}{4} = 3.16.$$

Obtained value of the velocity ratio of the open drive should satisfy to the following condition. For chain drives u_{cd} is to be ranged from 1.5 to 4, for belt drives u_{bd} is to be ranged from 2 to 4, for straight spur gears u_{ssg} is to be ranged from 2 to 5. If this condition is not satisfied we take the other value of u_{red} from the standard series.

1.9. Determine the rotational speed of all shafts

$n_1 = n_r = 967$ rpm;

$$n_2 = \frac{n_1}{u_{hsg}} = \frac{967}{4} = 241.75 \text{ rpm};$$

$$n_3 = \frac{n_2}{u_{cd}} = \frac{241.75}{3.16} = 76.5 \text{ rpm}.$$

Obtained magnitude of n_3 must be equal to n_{out} calculated according to p. 1.6. Error ε must be not more than 1%. In our case ε=0.09%.

1.10. Determine the angular velocity of all mechanical drive shafts

$$\omega_1 = \frac{\pi n_1}{30} = \frac{3.14 \cdot 967}{30} = 101.21 \sec^{-1};$$

$$\omega_2 = \frac{\omega_1}{u_{hsg}} = \frac{101.21}{4} = 25.3 \sec^{-1};$$

$$\omega_3 = \frac{\omega_2}{u_{cd}} = \frac{25.3}{3.16} = 8.007 \sec^{-1}.$$

1.11. Determine the power at mechanical drive shafts.

Calculation is carried out for P_{inp}, determined in p.1.3.

$P_1 = P_{inp} \cdot \eta_c \cdot \eta_b = 4.767 \cdot 0.996 \cdot 0.99 = 4.7$ kW;

$P_2 = P_1 \cdot \eta_{hsg} \cdot \eta_b = 4.7 \cdot 0.97 \cdot 0.99 = 4.514$ kW;

$P_3 = P_2 \cdot \eta_{cd} \cdot \eta_b = 4.514 \cdot 0.94 \cdot 0.99 = 4.201$ kW;

Obtained magnitude of P_3 must be equal to P_{out} calculated according to the p.1.1. Error should not be greater than 1%. In our case ε=0.02%.

1.12. Determine the torques at all shafts.

$$T_1 = \frac{P_1}{\omega_1} = \frac{4.7 \cdot 10^3}{101.21} = 46.438 \text{ N}\cdot\text{m};$$

$$T_2 = \frac{P_2}{\omega_2} = \frac{4.514 \cdot 10^3}{25.3} = 178.419 \text{ N}\cdot\text{m};$$

$$T_3 = \frac{P_3}{\omega_3} = \frac{4.201 \cdot 10^3}{8.007} = 524.666 \text{ N}\cdot\text{m}.$$

<u>Checking.</u>

The output torque T_{out} can also be found as

$$T_{out} = F_t \frac{D}{2} = \frac{3 \cdot 10^3 \cdot 0.35}{2} = 525 \text{ N}\cdot\text{m}.$$

Determine the error. It should be less than 1%.

$$\varepsilon = \left| \frac{524.666 - 525}{525} \right| \cdot 100\% = 0.063 \%.$$

2. ANALYSIS OF ALLOWABLE STRESSES

Let us analyse the speed reducer of the mechanical drive when: n^p = 967 rpm; n^g = 241.75 rpm.

We will begin from the selection of the material of gears and determination of their allowable contact and bending stresses.

2.1. Select the material of toothed wheels.

The main material of toothed wheels is carbon or alloy steels. Depending on material's hardness toothed wheels are subdivided into two groups:

- toothed wheels with surface hardness $H \leq 350\,\text{BHN}$;
- toothed wheels with surface hardness $H > 350\,\text{BHN}$.

For general purpose speed reducers the following alternatives are possible:

1. A pinion and a gear are produced from identical carbon or alloy steel, such as Steel 45 (0.45C), Steel 40X (0.40C-Cr), Steel 40XH (0.40C-Cr-Ni). Heat treatment of both the gear and the pinion is martempering. The pinion hardness is ranged from 269 to 302 BHN and the gear hardness is ranged from 235 to 262 BHN.
2. A pinion and a gear are produced from identical alloy steel, such as Steel 40X (0.40C-Cr), Steel 40XH (0.40C-Cr-Ni), Steel 35XM (0.35C-Cr-Mo). Heat treatment of the gear is martempering to hardness ranged from 269 to 302 BHN. Heat treatment of the pinion is martempering and surface (induction) hardening to hardness ranged from 45 to 50 HRC.

Toothed wheels of the straight spur gears and helical spur gears are recommended to produce according to the 1st alternative. If we deal with bevel gears we can use either the 1st or the 2nd alternative.

2.2. Determine the mean magnitude of the hardness of the gear and the pinion:

- for the pinion $$H_m^p = \frac{H_{min}^p + H_{max}^p}{2};$$
- for the gear $$H_m^g = \frac{H_{min}^g + H_{max}^g}{2}.$$

In our case a pinion and a gear are produced from identical alloy steel of grade Steel 40XH and we use the 1st alternative (heat treatment of the gear is martempering to hardness ranged from 235 to 262 BHN; heat treatment of the pinion is martempering to hardness ranged from

269 to 302 BHN):

$$H_m^p = \frac{269+302}{2} = 285{,}5 \text{ BHN}; \qquad H_m^g = \frac{235+262}{2} = 248.5 \text{ BHN}.$$

2.3. Determine the allowable contact stress for the pinion and for the gear.

2.3.1.Determine the limit of contact endurance for the pinion $\sigma_{H\lim}^p$ and for the gear $\sigma_{H\lim}^g$ according to the table 2.2.

$$\sigma_{H\lim}^p = 2 \cdot H_m^p + 70 = 2 \cdot 285.5 + 70 = 641 MPa$$

$$\sigma_{H\lim}^g = 2 \cdot H_m^g + 70 = 2 \cdot 248.5 + 70 = 567 MPa$$

2.3.2.Determine the base number of stress cycles for the pinion N_{H0}^p and for the gear N_{H0}^g. For this purpose we use table 2.1.

Table 2.1

Base number of stress cycles

BHN_m	up to 200	250	300	350	400	450	500	550	600
HRC_m	-	25	32	38	43	47	52	56	60
$N_{H0}\cdot 10^6$	10	16.5	25	36.4	50	68	87	114	143

$N_{H0}^p = 22.5 \cdot 10^6$ stress cycles;

$N_{H0}^g = 16.3 \cdot 10^6$ stress cycles.

2.3.3. Determine the service life in hours for the gearing:

$$t = L \cdot 365 \cdot K_a \cdot 24 \cdot K_d,$$

where *L* is the service life in years; K_a is the annual utilization factor which is used to take into account use of the gearing during a year; K_d is the daily utilization factor which is used to take into account use of the gearing for 24 hours. These parameters should be given in the specification for the term paper.

In our case the service life of the gearing is 7 years, $K_a = 0.5$, $K_d = 0.3$

$$t = 7 \cdot 365 \cdot 0.5 \cdot 24 \cdot 0.3 = 9198 \text{ hours}.$$

2.3.4. Determine the design number of stress cycles for the pinion and the gear.

$$N_{Hi}^p = 60 \cdot n^p \cdot c \cdot t;$$

$$N_{Hi}^g = 60 \cdot n^g \cdot c \cdot t$$

where n^p and n^g are correspondingly rotational speeds of the pinion and the gear; c is the number of gears meshing with the gear being analysed.

In our case c = 1, n^p = 967 rpm; n^g = 241.75 rpm.

$$N^p_{Hi} = 60 \cdot 967 \cdot 1 \cdot 9198 = 533{,}668 \cdot 10^6;$$

$$N^g_{Hi} = 60 \cdot 241{,}75 \cdot 1 \cdot 9198 = 133{,}417 \cdot 10^6 .$$

Table 2.2

Contact and bending limits of endurance

Heat treatment	Tooth hardness		Gear material	$\sigma_{H\,lim}$, MPa	$\sigma_{b\,lim}$, MPa
	case	core and root			
Normalizing, martempering	Brinell 180 to 350		Carbon and alloy steels, such as 45 (0.45C), 40X (0.40C-Cr), 40XH (0.40C-Cr-Ni), 50XH (0.50C-Cr-Ni), and 35XM (0.35C-Cr-Mo)	$2H_m + 70$	$1.8H_m$
Full hardening	Rockwell C, 40 to 55		Carbon and alloy steels, such as 45 (0.45C), 40X (0.40C-Cr), 40XH (0.40C-Cr-Ni), and 35XM (0.35C-Cr-Mo)	$18H_m + 150$	500
Surface hardening	Rockwell C, 40 to 58	Rockwell C, 25 to 35	Alloy steels, such as 40X (0.40C-Cr), 40XH (0.40C-Cr-Ni), 50XH (0.50C-Cr-Ni), and 35XM (0.35C-Cr-Mo)	$17H_m + 200$	650
Case hardening	Rockwell C, 54 to 64	Rockwell C, 30 to 45	Alloy steels, such as 20XH2M (0.20C-Cr-2Ni-Mo)	$23H_m$	950
Nitriding	Rockwell C, 50 to 60	Rockwell C, 24 to 40	Alloy steels, such as 40XH2MA (0.40C-Cr-2Ni-Mo, quality)	1050	$300 + 1.2H_m$ (of tooth core)

2.3.5. Determine the durability factor for the pinion and for the gear.

if $N_{Hi} \geq N_{HO}$ then K_{HL}=1,

if $N_{Hi} < N_{HO}$ then $K_{HL} = \sqrt[6]{\dfrac{N_{H0}}{N_{Hi}}}$.

In our case

$N^p_{H0} = 22.5 \cdot 10^6$, $N^p_{Hi} = 533{,}668 \cdot 10^6$, $N^p_{Hi} > N^p_{H0}$,

consequently $K^p_{HL} = 1$;

$N^g_{H0} = 16.3 \cdot 10^6$, $N^9_{Hi} = 133{,}417 \cdot 10^6$, $N^p_{Hi} > N^p_{H0}$,

consequently $K^g_{HL} = 1$.

2.3.6. Determine the safety factor S_H for the pinion and for the gear.

- for homogeneous structure of the material (heat treatment is normalizing, martempering and full hardening) S_H = 1.1;
- for heterogeneous structure of the material (heat treatment is surface hardening, case hardening, nitriding) S_H = 1.2.

2.3.7. Determine the contact allowable stresses for the gear and for the pinion

$$\left[\sigma^p_H\right] = \frac{\sigma^p_{H\lim} \cdot K_{HL}}{S^p_H}, \qquad \left[\sigma^g_H\right] = \frac{\sigma^g_{H\lim} \cdot K_{HL}}{S^g_H}.$$

In our case: $S^p_H = S^g_H = 1.1$;

$$\left[\sigma^p_H\right] = \frac{641 \cdot 1}{1.1} = 582.73\text{MPa}; \qquad \left[\sigma^g_H\right] = \frac{567 \cdot 1}{1.1} = 515.455\text{MPa}.$$

If H^p-$H^g \leq$ 70BHN, we assume as the design allowable contact stress the less magnitude of above calculated stresses, where H^p and H^g are correspondingly hardness of the pinion and gear materials.

Otherwise, the design allowable contact stress is determined by the following formula

$$[\sigma_H] = 0.45 \cdot \left(\left[\sigma^p_H\right] + \left[\sigma^g_H\right]\right) \leq 1.23 \cdot \left[\sigma^g_H\right].$$

In our case H^p-H^g < 70BHN. That is why for further calculations we take as the design allowable contact stress $[\sigma_H] = 515.455\text{MPa}$.

2.4. Determine the allowable bending stresses of the pinion and the gear.

2.4.1 . Determine the limits of the bending endurance for the pinion $\sigma^{p}_{b\,lim}$ and for the gear $\sigma^{g}_{b\,lim}$. For this purpose we use table 2.1.

$\sigma^{p}_{b\,lim} = 1.8 \cdot 285.5 = 513.9\text{MPa}$. $\sigma^{g}_{b\,lim} = 1.8 \cdot 248.5 = 447{,}3\text{MPa}$

2.4.2. Determine the base number of stress cycles N_{b0}.

For steels $N_{b0} = 4{\cdot}10^{6}$.

2.4.3. Determine the design number of stress cycles for the pinion and the gear.

$N^{p}_{bi} = 60 \cdot n_{p} \cdot c \cdot t;$

$N^{g}_{bi} = 60 \cdot n_{g} \cdot c \cdot t\,;$

$N^{p}_{bi} = N^{p}_{Hi} = 533{,}668 \cdot 10^{6};$

$N^{g}_{bi} = N^{g}_{Hi} = 133{,}417 \cdot 10^{6}.$

2.4.4. Determine the durability factor for the pinion and for the gear.

if $N_{bi} \geq N_{b0}$ then $K_{bL}=1$,

if $N_{bi} < N_{b0}$ then $K_{bL} = \sqrt[m]{\dfrac{N_{b0}}{N_{bE}}}$,

where m=3 for toothed wheels with hardness H $\leq$ 350 BHN and m=9 if H > 350 BHN.

In our case: $N^{p}_{bi} > N^{p}_{b0}$, consequently $K^{p}_{bL} = 1;$

$N^{g}_{bi} > N^{g}_{b0}$, consequently $K^{g}_{bL} = 1.$

2.4.5. Determine the safety factor S_b for the pinion and for the gear.

- for wheels made of forged blanks (our case) $S_b = 1.75$;
- for wheels made of cast blanks $S_b = 2.3$.

2.4.6. Determine the bending allowable stresses for the gear and for the pinion

$$\left[\sigma^{p}_{b}\right] = \frac{\sigma^{p}_{b\,lim} \cdot K_{bL}}{S^{p}_{b}}, \qquad \left[\sigma^{g}_{b}\right] = \frac{\sigma^{g}_{b\,lim} \cdot K_{bL}}{S^{g}_{b}}.$$

In our case: $S^{p}_{b} = S^{g}_{b} = 1.75;$

$$\left[\sigma^{p}_{b}\right] = \frac{513{,}9 \cdot 1}{1.75} = 293.66\text{MPa}; \quad \left[\sigma^{g}_{b}\right] = \frac{447{,}3 \cdot 1}{1.75} = 255.6\text{MPa}$$

For further calculations, we assume as the design allowable bending stress the less magnitude of above calculated stresses $\left[\sigma_{b}\right] = 255.6\text{MPa}$.

3. ANALYSIS OF THE STRAIGHT SPUR GEARS FOR STRENGTH

Let us carry out the analysis of the straight spur gears for strength if torque at the pinion shaft T^p =74 N·m; torque at the gear shaft T^g =370 N·m; velocity ratio of the gearing u=5; allowable contact stress $[\sigma_H]$=515,455 MPa; allowable bending stress $[\sigma_b]$=255,6 MPa; hardness of the gear material H^g=285 BHN, angular velocity of the gear shaft ω^g= 40 rad/sec.

3.1. Determine the centre distance of the straight spur gears

$$a_w = 0.85 \cdot (u \pm 1) \cdot \sqrt[3]{\frac{T^g \cdot K_{H\beta} \cdot E_{tr}}{[\sigma_H]^2 \cdot u^2 \cdot \psi_{ba}}},$$

where upper sign ("+") is right for gears with external toothing and down sign ("-") is right for gears with internal toothing; u is the velocity ratio of the gearing; T^g is the torque at the gear shaft in N·mm; $[\sigma_H]$ is the allowable contact stress in MPa; E_{tr} is the transformed modulus of elasticity in MPa; $K_{H\beta}$ is the load concentration factor; $\psi_{ba}= b^g/a_w$ is the gear face width factor.

Transformed modulus of elasticity E_{tr} is determined as

$$E_{tr} = \frac{2 \cdot E^p \cdot E^g}{E^p + E^g},$$

where E^p and E^g are correspondingly moduli of elasticity of pinion and gear materials. Since the pinion and the gear are made of steel we can make the conclusion that $E_{tr} = E^p = E^g = 2.1 \cdot 10^5$ MPa.

Load concentration factor $K_{H\beta}$ is determined by means of table 3.2 depending upon disposition of toothed wheels with respect to bearings and factor $\psi_{bd}= b^g/d^p$. Since b^g and d^p were not determined we find this factor by the following formula

$$\psi_{bd} = \frac{b^g}{d^p} = \frac{0.5 \cdot b^g}{a_w} \cdot (u \pm 1) = 0.5 \cdot \psi_{ba} \cdot (u \pm 1),$$

where the gear face width factor ψ_{ba} is determined from table 3.1 depending upon the disposition of the gear relative to bearings and taking into account that the value of ψ_{ba} should correspond to standard. The greater ψ_{ba} corresponds to the less overall dimensions of the gearing.

In our case the gear is located symmetrically with respect to supports. That is why ψ_{ba}=0,5, $\psi_{bd} = 0.5 \cdot 0.5 \cdot (5+1) = 1.5$ and $K_{H\beta}$=1.11.

$$a_w = 0.85 \cdot (5+1) \cdot \sqrt[3]{\frac{370 \cdot 10^3 \cdot 1.11 \cdot 2.1 \cdot 10^5}{515,455^2 \cdot 5^2 \cdot 0.5}} = 151\text{mm}$$

We round off obtained magnitude of a_w to the nearest greater side according to the series given in table 3.3. We assume a_w=160 mm.

Table 3.1

Recommended values of the gear face width factor ψ_{ba}

Gear arrangement with respect to bearings	Tooth hardness	ψ_{ba}
Symmetrical	Any	0.315; 0.4; 0.5
Non-symmetrical	Brinell BHN, up to 350 Rockwell C, 40 upwards	0.315; 0.4 0.25; 0.315
On shaft cantilevers	Brinell BHN, up to 350 Rockwell C, 40 upwards	0.25 0.2
For herringbone gears	Any	0.4 ; 0.5; 0.63
For internal gears	Any	0.2

Table 3.2

Approximate values of $K_{H\beta}$

Gear arrangement with respect to bearings	Tooth surface hardness, BHN	$\psi_{bd} = \frac{b^g}{d^p}$					
		0.2	0.4	0.6	0.8	1.2	1.6
On cantilevers, ball bearings	up to 350 over 350	1.08 1.22	1.17 1.44	1.28 -	- -	- -	- -
On cantilevers, roller bearings	up to 350 over 350	1.06 1.11	1.12 1.25	1.19 1.45	1.27 -	- -	- -
Symmetrical	up to 350 over 350	1.01 1.01	1.02 1.02	1.03 1.04	1.04 1.07	1.07 1.16	1.11 1.26
Nonsymmetrical	up to 350 over 350	1.03 1.06	1.05 1.12	1.07 1.20	1.12 1.29	1.19 1.48	1.28 -

Table 3.3

Standard values of the centre distance a_w

Series 1	63	80	100	125	160	200	250	315	400	500
Series 2	71	90	112	140	180	224	280	355	450	560

3.2. Determine the nominal pitch circle diameter of the gear

$$d^g = \frac{2 \cdot a_w \cdot u}{u \pm 1} = \frac{2 \cdot 160 \cdot 5}{5+1} = 266,67\text{mm} .$$

3.3. Determine the face width of the gear

$$b^g = \psi_{ba} \cdot a_w = 0.5 \cdot 160 = 80 \text{ mm.}$$

3.4. Determine the module according to the strength condition for bending

$$m \geq \frac{2 \cdot K_m \cdot T^g}{d^g \cdot b^g \cdot [\sigma_b]} = \frac{2 \cdot 6.8 \cdot 370 \cdot 10^3}{266{,}67 \cdot 80 \cdot 255{,}6} = 0.93\text{mm},$$

where K_m is taken as 6.8 for straight spur gears.

Obtained magnitude of the module should be rounded off to the greater side according to the standard series given in table 3.4. It is necessary to note that for general-purpose speed reducers the minimum value of the module is m_{min} = 2 mm. In our case we assume that m = 2 mm.

Table 3.4

Standard values of m_n

Series 1	1.0	1.25	1.5	2.0	2.5	3.0	4.0	5.0	6.0	8.0	10.0	12.0
Series 2	1.125	1.375	1.75	2.25	2.75	3.5	4.5	5.5	7.0	9.0	11.0	14.0

Note. Series 1 should be preferred to Series 2

3.5. Determine the total number of teeth

$$z_\Sigma = \frac{2 \cdot a_w}{m} = \frac{2 \cdot 160}{2} = 160.$$

Obtained value of z_Σ should be rounded off to the nearest integer numeral.

3.6. Determine the number of teeth of the pinion

$$z^p = \frac{z_\Sigma}{u \pm 1} \geq z_{min},$$

where z_{min}=17 for straight spur gears.

Obtained value of z^p should be rounded off to the nearest integer numeral. If z^p <17 it is necessary to decrease the module or to use nonstandard toothed wheels. For our case

$$z^p = \frac{z_\Sigma}{u \pm 1} = \frac{160}{6} = 26{,}67 \geq z_{min} = 17.$$

Round off z^p to the nearest integer numeral. Assume z^p=27.

3.7. Determine the number of teeth of the gear

$$z^g = z_\Sigma \mp z^p = 160 - 27 = 133.$$

Upper sign is right for gears with external toothing and down sign is used for gears with internal toothing.

3.8. Specify the velocity ratio of the gearing

$$u_{act} = \frac{z^g}{z^p} = \frac{133}{27} = 4{,}93.$$

The error $\varepsilon = \left|\frac{u_{act} - u}{u}\right| \cdot 100\%$ should be less or equal to 4%. Otherwise the number of teeth z^p, z^g and z_Σ must be rounded off to the other side.

In our case condition is satisfied, because

$$\varepsilon = \left|\frac{4.93 - 5}{5}\right| \cdot 100\% = 1.4 < 4\%$$

3.9. Determine the nominal pitch circles diameters for the pinion and the gear

$$d^p = m \cdot z^p = 2 \cdot 27 = 54 \text{ mm},$$

$$d^g = 2 \cdot a_w \mp d^p = 2 \cdot 160 - 54 = 266 \text{ mm}.$$

3.10. Determine the addendum circles diameters for the pinion and the gear

$$d_a^p = d^p + 2 \cdot m = 54 + 2 \cdot 2 = 58 \text{ mm},$$

$$d_a^g = d^g \pm 2 \cdot m = 266 + 2 \cdot 2 = 270 \text{ mm}.$$

3.11. Determine the dedendum circles diameters for the pinion and the gear

$$d_f^p = d^p - 2.5 \cdot m = 54 - 2.5 \cdot 2 = 49 \text{ mm},$$

$$d_f^g = d^g \mp 2.5 \cdot m = 266 - 2.5 \cdot 2 = 261 \text{ mm}.$$

3.12. Determine forces that act in the engagement of straight spur gears:

- turning force $F_t = \frac{2 \cdot T^g}{d^g} = \frac{2 \cdot 370}{0.266} = 2781{,}96\text{N}$;

- radial force $F_r = F_t \cdot tg\alpha_w = 2781{,}96 \cdot tg 20° = 1012{,}55\text{N}$,

where $\alpha_w = 20^\circ$ is the pressure angle for the pitch circle.

3.13. Determine the maximum contact stress that develops in the contact zone of teeth

$$\sigma_H = 1.18 \cdot \sqrt{\frac{T^p \cdot K_H \cdot E_{tr}}{\left(d^p\right)^2 \cdot b^g \cdot \sin 2\alpha_w} \cdot \left(\frac{u_{act} \pm 1}{u_{act}}\right)} =$$

$$= 1.18 \cdot \sqrt{\frac{74 \cdot 10^3 \cdot 1.11 \cdot 1.24 \cdot 2.1 \cdot 10^5}{54^2 \cdot 80 \cdot \sin 40°} \cdot \left(\frac{4{,}93 + 1}{4{,}93}\right)} = 488{,}78\text{MPa},$$

where T^p is the torque at the pinion shaft in N·mm; K_H is the design load factor that is determined as $K_H = K_{H\beta} \cdot K_{HV}$, where $K_{H\beta}$ is the load concentration factor; K_{HV} is the dynamic load factor.

The load concentration factor $K_{H\beta}$ is specified by table 3.2 depending upon $\psi_{bd} = \frac{b^g}{d^p} = \frac{80}{54} = 1.48$. That is why $K_{H\beta}$=1.11.

In order to determine K_{HV} it is necessary to find the peripheral speed V^g of the gear

$$V^g = \frac{\omega^g \cdot d^g}{2} = \frac{40 \cdot 0.266}{2} = 5{,}32 \text{ m/sec},$$

where ω^g is the angular velocity of the gear and the gearing accuracy of manufacturing (table 3.5).

The dynamic load factor K_{HV} is determined by table 3.6. In our case K_{HV}=1,24

Table 3.5

Gearing accuracy of manufacturing

Types of gear drives	Peripheral speed V, m/sec			
	under 5	5 - 8	8 – 12.5	over 12.5
Straight spur gears	9	8	7	6
Helical spur gears	9	9	8	7
Straight bevel gears	8	7	-	-
Spiral bevel gears	9	9	8	7

Table 3.6

Dynamic load factor K_{HV}

Gearing accuracy of manufacturing	Tooth surface hardness, BHN	Peripheral speed V, m/sec					
		1	2	4	6	8	10
7	up to 350	1.04/1.02	1.07/1.03	1.14/1.05	1.21/1.06	1.29/1.07	1.36/1.08
	over 350	1.03/1.00	1.05/1.01	1.09/1.02	1.14/1.03	1.19/1.03	1.24/1.04
8	up to 350	1.04/1.01	1.08/1.02	1.16/1.04	1.24/1.06	1.32/1.07	1.40/1.08
	over 350	1.03/1.01	1.06/1.01	1.10/1.02	1.16/1.03	1.22/1.04	1.26/1.05
9	up to 350	1.05/1.01	1.10/1.03	1.20/1.05	1.30/1.07	1.40/1.09	1.50/1.12
	over 350	1.04/1.01	1.07/1.01	1.13/1.02	1.20/1.03	1.26/1.04	1.32/1.05

Note: The figures in the numerators refer to straight spur gears and those in the denominators, to helical spur gears.

Obtained value of σ_H should correspond to the condition:

$$\sigma_H = (0.8\ldots1.1)\cdot[\sigma_H].$$

Otherwise it is necessary to change the center distance a_w and recalculate the gearing.

In our case 412,4≤488,78≤567. Condition is satisfied.

3.14. Determine the maximum bending stress

$$\sigma_b = \frac{F_t \cdot K_{b\beta} \cdot K_{bV} \cdot Y_b}{m \cdot b^g} = \frac{2781,96 \cdot 1.26 \cdot 1.58 \cdot 3.6}{2 \cdot 80} = 124.61\text{MPa} \le [\sigma_b] = 255,6\text{MPa}$$

where $K_{b\beta}$ is the load concentration factor that is determined by table 3.7; K_{bv} is the dynamic load factor determined from table 3.8; Y_b is the tooth form factor that is determined by means of table 3.9 depending upon the number of teeth of the gear for the case when the offset factor x=0.

If obtained magnitude of σ_b>[σ_b] it is necessary to increase the module.

Table 3.7

Approximate values of $K_{b\beta}$

Gear arrangement with respect to bearings	Tooth surface hardness, BHN	$\psi_{bd} = \frac{b^g}{d^p}$					
		0.2	0.4	0.6	0.8	1.2	1.6
On cantilevers, ball bearings	up to 350	1.16	1.37	1.64	-	-	-
	over 350	1.33	1.70	-	-	-	-
On cantilevers, roller bearings	up to 350	1.10	1.22	1.38	1.57	-	-
	over 350	1.20	1.44	1.71	-	-	-
Symmetrical	up to 350	1.01	1.03	1.05	1.07	1.14	1.26
	over 350	1.02	1.04	1.08	1.14	1.30	-
Nonsymmetrical	up to 350	1.05	1.10	1.17	1.25	1.42	1.61
	over 350	1.09	1.18	1.30	1.43	1.73	-

Table 3.8

Dynamic load factor K_{bV}

Gearing accuracy of manufacturing	Tooth surface hardness, BHN	Peripheral speed V, m/sec					
		1	2	4	6	8	10
7	up to 350	1.08/1.03	1.16/1.06	1.33/1.11	1.50/1.16	1.62/1.22	1.80/1.27
	over 350	1.03/1.01	1.05/1.02	1.09/1.03	1.13/1.05	1.17/1.07	1.22/1.08
8	up to 350	1.10/1.03	1.20/1.06	1.38/1.11	1.58/1.17	1.78/1.23	1.96/1.29
	over 350	1.04/1.01	1.06/1.02	1.12/1.03	1.16/1.05	1.21/1.05	1.26/1.08
9	up to 350	1.13/1.04	1.28/1.07	1.50/1.14	1.72/1.21	1.98/1.28	1.25/1.35
	over 350	1.04/1.01	1.07/1.02	1.14/1.04	1.21/1.06	1.27/1.08	1.34/1.09

Note: The figures in the numerators refer to straight spur gears and those in the denominators, to helical spur gears.

Table 3.9

Tooth form factor Y_b

z or z_v	17	20	22	24	26	28	30	35	40	45	50	65	80	100
Y_b	4.27	4.07	3.98	3.92	3.88	3.81	3.8	3.75	3.7	3.66	3.65	3.62	3.61	3.6

4. ANALYSIS OF THE HELICAL SPUR GEARS FOR STRENGTH

4.1. Determine the center distance of the helical spur gears

$$a_w = 0.75 \cdot (u+1) \cdot \sqrt[3]{\frac{T^g \cdot K_{H\beta} \cdot E_{tr}}{[\sigma_H]^2 \cdot u^2 \cdot \psi_{ba}}},$$

where u is the velocity ratio of the gearing; T^g is the torque at the gear shaft in $N{\cdot}mm$; $[\sigma_H]$ is the allowable contact stress in MPa; E_{tr} is the transformed modulus of elasticity in MPa; $K_{H\beta}$ is the load concentration factor; $\psi_{ba} = b^g/a_w$ is the gear face width factor.

Transformed modulus of elasticity E_{tr} is determined as

$$E_{tr} = \frac{2 \cdot E^p \cdot E^g}{E^p + E^g},$$

where E^p and E^g are correspondingly modules of elasticity of pinion and gear materials. Since the pinion and the gear are made of steel we can make the conclusion that $E_{tr} = E^p = E^g = 2.1 \cdot 10^5$ MPa.

Load concentration factor $K_{H\beta}$ is determined by means of table 3.2 depending on disposition of toothed wheels with respect to bearings and factor $\psi_{bd} = b_g/d^p$. Since b_g and d^p were not determined we find this factor by the following formula

$$\psi_{bd} = \frac{b^g}{d^p} = \frac{0.5 \cdot b^g}{a_w} \cdot (u \pm 1) = 0.5 \cdot \psi_{ba} \cdot (u \pm 1),$$

where gear face width factor ψ_{ba} is determined from table 3.1 depending on the disposition of the gear relative to bearings taking into account that the value of this factor should correspond to standard. The greater ψ_{ba} corresponds to the less overall dimensions of the gearing. That is why we select the greater magnitude of ψ_{ba}.

Obtained magnitude of a_w should be rounded off to the nearest greater side according to the series given in table 3.3.

In our case: T^g = 464.3 N·m; T^p = 119.67 N·m; u = 4; $[\sigma_H]$ = 515,5 MPa**;** $E_{tr} = 2.1 \cdot 10^5$ MPa**;** $[\sigma_b]$ = 255.6 MPa, symmetrical disposition of gears with respect to supports.

From table 3.1 we take ψ_{ba} = 0.5; then $\psi_{bd} = 0.5 \cdot 0.5 \cdot (4+1) = 1.25$,

From table 3.2 we take $K_{H\beta}$ = 1.07 (for symmetrical gear arrangement and tooth surface hardness up to 350).

Then

$$a_w = 0.75 \cdot (4+1) \cdot \sqrt[3]{\frac{464300 \cdot 1.07 \cdot 2.1 \cdot 10^5}{515.5^2 \cdot 4^2 \cdot 0.5}} = 137.29\text{mm}$$

Round off obtained magnitude to the nearest greater side according to table 3.3. That is why we take a_w = 140 *mm* for further calculations.

4.2. Determine the nominal pitch circle diameter of the gear

$$d^g = \frac{2 \cdot a_w \cdot u}{u+1} = \frac{2 \cdot 140 \cdot 4}{4+1} = 224\text{mm}.$$

4.3. Determine the face width of the gear

$$b^g = \psi_{ba} \cdot a_w = 0.5 \cdot 140 = 70 \text{ mm}.$$

4.4. Determine the normal module according to the strength condition for bending

$$m_n \geq \frac{2 \cdot K_m \cdot T^g}{d^g \cdot b^g \cdot [\sigma_b]},$$

where K_m is taken as 5.8 for helical spur gears.

Obtained magnitude of the module should be rounded off to the greater side according to the standard series given in table 3.4. It is necessary to note that for general-purpose speed reducers the minimum value of the module is m_{min} = 2 mm. In our case

$$m_n = \frac{2 \cdot 5.8 \cdot 464300}{224 \cdot 70 \cdot 255.6} = 1.344\text{mm},$$

we take $m_n = 2$ mm for further calculations.

4.5. Determine the helix angle

$$\beta = \arcsin\left(\frac{3{,}5 \cdot m_n}{b^g}\right) = \arcsin\left(\frac{3{,}5 \cdot 2}{70}\right) = 5.73°.$$

For helical spur gears this angle should be ranged from 8 to 18°. Otherwise, it is necessary to change the normal module m_n. As in our case $\beta = 5.73°$ that is less than $8°$, we take m_n=3 mm. Then

$$\beta = \arcsin\left(\frac{3.5 \cdot 3}{70}\right) = 8.62°.$$

4.6. Determine the total number of teeth

$$z_\Sigma = \frac{2 \cdot a_w \cdot \cos\beta}{m_n} = \frac{2 \cdot 140 \cdot \cos 8.62^\circ}{3} = 92.28.$$

Obtained value of z_Σ should be rounded off to the nearest integer numeral, assume $z_\Sigma = 92$.

4.7. Specify the helix angle according to the integer number of z_Σ

$$\beta = \arccos\left(\frac{m_n \cdot z_\Sigma}{2 \cdot a_w}\right) = \arccos\left(\frac{3 \cdot 92}{2 \cdot 140}\right) = 9.69^\circ$$

Obtained value of this angle is ranged from 8 to 18°. Condition is satisfied.

4.8. Determine the number of teeth of the pinion

$$z^p = \frac{z_\Sigma}{u \pm 1} \geq z_{min},$$

where for helical spur gears $z_{min} = 17 \cdot \cos^3\beta$.

Obtained value of z^p should be rounded off to the nearest integer numeral. If $z^p < 17 \cdot \cos^3\beta$ it is necessary to decrease the module or to use nonstandard toothed wheels.

In our case

$$z^p = \frac{92}{4 \pm 1} = 18.4 \Rightarrow z^p = 18 > z_{min} = 17 \cdot \cos^3 9.69^\circ = 16.28.$$

4.9. Determine the number of teeth of the gear

$$z^g = z_\Sigma - z^p = 92 - 18 = 74.$$

4.10. Specify the velocity ratio of the gearing

$$u_{act} = \frac{z^g}{z^p}.$$

The error $\varepsilon = \left|\frac{u_{act} - u}{u}\right| \cdot 100\%$ should be less or equal to 4%. Otherwise the number of teeth z^p, z^g and z_Σ must be rounded off to the other side.

In our case condition is satisfied, since

$$u_{act} = \frac{74}{18} = 4.11; \qquad \varepsilon = \left| \frac{4.11 - 4}{4} \right| \cdot 100\% = 2.75 < 4\%$$

4.11. Determine the nominal pitch circle diameters for the pinion and the gear

$$d^p = \frac{m_n}{\cos\beta} \cdot z^p = \frac{3}{\cos 9,69^\circ} \cdot 18 = 54.78\text{mm},$$

$$d^g = 2 \cdot a_w - d^p = 2 \cdot 140 - 54.78 = 225.22 \text{ mm}.$$

4.12. Determine the addendum circle diameters for the pinion and the gear

$$d_a^p = d^p + 2m_n = 54.78 + 2 \cdot 3 = 60.78\text{mm},$$

$$d_a^g = d^g + 2m_n = 225.22 + 2 \cdot 3 = 231.22\text{mm}.$$

4.13. Determine the dedendum circle diameters for the pinion and the gear

$$d_f^p = d^p - 2.5 \cdot m_n = 54.78 - 2.5 \cdot 3 = 47.28\text{mm},$$

$$d_f^g = d^g - 2.5 \cdot m_n = 225.22 - 2.5 \cdot 3 = 217.72\text{mm}.$$

4.14. Determine forces that act in the engagement of the helical spur gears:

- turning force $F_t = \frac{2 \cdot T^g}{d^g} = \frac{2 \cdot 464300}{225.22} = 4123.08\text{N}$;
- radial force $F_r = \frac{F_t}{\cos\beta} \cdot tg\alpha_w = \frac{4123.08}{\cos 9.69^\circ} \cdot tg 20^\circ = 1522.4\text{N}$;
- axial force $F_a = F_t \cdot tg\beta = 4123.08 \cdot tg 9.69^\circ = 704.03\text{N}$,

where α_w=20° is the pressure angle for the pitch circle.

4.15. Determine the maximum contact stress that develops in the contact zone of teeth

$$\sigma_H = 1.18 \cdot Z_{H\beta} \cdot \sqrt{\frac{T^p \cdot K_H \cdot E_{tr}}{\left(d^p\right)^2 \cdot b^g \cdot \sin 2\alpha_w} \cdot \left(\frac{u_{act} \pm 1}{u_{act}} \right)},$$

where $Z_{H\beta}$ is a factor which is used to take into account rising the contact strength of the helical spur gears in comparison with the straight spur gears; T^p is the torque at the pinion shaft in *N·mm*; K_H is the design load factor that is determined as

$$K_H = K_{H\beta} \cdot K_{HV},$$

where $K_{H\beta}$ is the load concentration factor; K_{HV} is the dynamic load factor.

The load concentration factor $K_{H\beta}$ is specified by table 3.2 depending upon $\psi_{bd} = \frac{b^g}{d^p}$.

In order to determine K_{HV} it is necessary to find the peripheral speed V^g of the gear

$$V^g = \frac{\omega^g \cdot d^g}{2}$$

where ω^g is the angular velocity of the gear and the gearing accuracy of manufacturing (table 3.5),.

The dynamic load factor K_{HV} is determined by table 3.6.

Factor $Z_{H\beta}$ is determined in the following way

$$Z_{H\beta} = \sqrt{\frac{K_{H\alpha} \cdot \cos^2\beta}{\varepsilon_\alpha}},$$

where $K_{H\alpha}$ takes into account non-uniform load distribution between several pairs of teeth; ε_α is the contact ratio.

Table 4.1

Factors $K_{H\alpha}$, $K_{b\alpha}$ which are used to take into account non-uniform load distribution between some pairs

Peripheral speed V, m/sec	Accuracy of manufacturing	$K_{H\alpha}$	$K_{b\alpha}$
To 5	7	1.03	1.07
	8	1.07	1.22
	9	1.13	1.35
From 5 to 10	7	1.05	1.2
	8	1.10	1.3
From 10 to 15	7	1.08	1.25
	8	1.15	1.40

$K_{H\alpha}$ depends upon the accuracy of manufacturing and the peripheral speed and is determined according to table 4.1.

Contact ratio ε_α is found by the following formula

$$\varepsilon_\alpha = \left[1.88 - 3.2 \cdot \left(\frac{1}{z^p} + \frac{1}{z^g}\right)\right] \cdot \cos\beta .$$

Let us determine the contact stress σ_H for our case: $\psi_{bd} = \frac{70}{54.78} = 1.27$; $K_{H\beta} = 1.07$;

$$V^g = \frac{19.19 \cdot 0.22522}{2} = 2.16 \mathrm{m/sec} \Rightarrow K_{HV} = 1.01;$$

Accuracy of manufacturing of the gearing is 9; $K_H = 1.07 \cdot 1.01 = 1.0807$;

$$\varepsilon_\alpha = \left[1.88 - 3.2 \cdot \left(\frac{1}{18} + \frac{1}{74}\right)\right] \cdot \cos 9.69^\circ = 1.635;\ K_{H\alpha} = 1.13;$$

$$Z_{H\beta} = \sqrt{\frac{1.13 \cdot \cos^2 9.69^\circ}{1.635}} = 0.819;$$

$$\sigma_H = 1.18 \cdot 0.819 \cdot \sqrt{\frac{119670 \cdot 1.0807 \cdot 210000}{54.78^2 \cdot 70 \cdot \sin(2 \cdot 20^\circ)} \cdot \left(\frac{4.11+1}{4.11}\right)} = 483.287 \mathrm{MPa};$$

Obtained value of σ_H should correspond to the following condition:

$$\sigma_H = (0.8 \ldots 1.1) \cdot [\sigma_H].$$

Otherwise it is necessary to change the center distance a_w and recalculate the gearing.

In our case 412,4≤483,287≤567. Condition is satisfied.

4.16. Determine the maximum bending stress

$$\sigma_b = \frac{F_t \cdot K_{b\beta} \cdot K_{bV} \cdot Z_{b\beta} \cdot Y_b}{m_n \cdot b^g} \le [\sigma_b],$$

where $K_{b\beta}$ is the load concentration factor that is determined by table 3.7; K_{bv} is the dynamic load factor determined from table 3.8; Y_b is the tooth form factor that is determined by means of table 3.9 depending on the number of teeth of the equivalent straight spur gear $z_v^g = \frac{z^g}{\cos^3\beta}$ for the case when the shift factor x=0.

Factor $Z_{b\beta}$ is the analogy of $Z_{H\beta}$ and is determined as

$$Z_{b\beta} = \frac{K_{b\alpha} \cdot Y_{\beta}}{\varepsilon_{\alpha}},$$

where $K_{b\alpha}$ is chosen from table 4.1; $Y_{\beta} = 1 - \frac{\beta^{\circ}}{140}$ is the correction factor.

If obtained magnitude of $\sigma_b > [\sigma_b]$ it is necessary to increase the module.

In our case: $K_{b\beta} = 1.14$; $K_{bv} = 1.07$; $z_v^g = \frac{74}{\cos^3 9.69^{\circ}} = 77.26$;

$Y_b = 3.61$; $K_{b\alpha} = 1.35$; $Y_{\beta} = 1 - \frac{9.69^{\circ}}{140} = 0.93$; $Z_{b\beta} = \frac{1.35 \cdot 0.93}{1.635} = 0.768$;

$$\sigma_b = \frac{4123.08 \cdot 1.14 \cdot 1.07 \cdot 0.768 \cdot 3.61}{3 \cdot 70} = 66.4\text{MPa} < [\sigma_b] = 255.6\text{MPa}.$$

Strength condition is satisfied.

5. ANALYSIS OF THE BEVEL GEARS FOR STRENGTH

Let us analyse the bevel gears for strength if torque at the pinion shaft T^p =460 N·m; torque at the gear shaft T^g =153 N·m velocity ratio of the gearing u=3.15; allowable contact stress $[\sigma_H]$=640 MPa; allowable bending stress $[\sigma_b]$=293 MPa, hardness of the gear material H^g=285 BHN.

5.1. Determine the external pitch diameter of the gear

$$d_e^g = 1.7 \cdot \sqrt[3]{\frac{T^g \cdot K_{H\beta} \cdot E_{tr} \cdot u}{\nu_H \cdot [\sigma_H]^2 \cdot \psi_{bR} \cdot (1-\psi_{bR})}},$$

where T^g is the torque at the gear shaft in N·mm; E_{tr} is the transformed modulus of elasticity; $K_{H\beta}$ is the load concentration factor; u is the velocity ratio; ν_H = 0.85 is the correction factor that takes into account reducing bevel gears strength in comparison with spur gears; $[\sigma_H]$ is the allowable contact stress; $\psi_{bR}=b^g/R_e$ is the gear face width factor that determines proportions of the face width of the gear with respect to the external cone distance. Factor ψ_{bR} must be less than 0.3. Recommended value of ψ_{bR} = 0.285.

Since both pinion and gear are made of steel, the transformed modulus of elasticity E_{tr} =2.1·10^5 MPa.

Load concentration factor $K_{H\beta}$ depends upon the hardness of the gear material. If $H^g \le 350$ BHN $K_{H\beta}$ is ranged from1.23 to 1.35. Otherwise (H^g>350 BHN) $K_{H\beta}$ is ranged from 1.25 to 1.45. It is necessary to note that greater values of $K_{H\beta}$ are assumed for the case when one of toothed wheels is on the cantilever shaft.

$$d_e^g = 1.7 \cdot \sqrt[3]{\frac{T^g \cdot K_{H\beta} \cdot E_{tr} \cdot u}{\nu_H \cdot [\sigma_H]^2 \cdot \psi_{bR} \cdot (1-\psi_{bR})}} = 1{,}7 \cdot \sqrt[3]{\frac{460 \cdot 10^3 \cdot 1.3 \cdot 2.1 \cdot 10^5 \cdot 3.15}{0.85 \cdot 640^2 \cdot 0.285 \cdot (1-0.285)}} = 301.45\text{mm}.$$

After calculation the obtained magnitude of d_e^g should be rounded off to the greater side according to standard series given in table 5.1. In our case we assume d_e^g =315 mm.

Table 5.1

Standard values of the external pitch diameter d_e^g

Series 1	40	50	63	80	100	125	160	200	250	315	400	500
Series 2	-	-	71	90	112	140	180	224	280	355	450	560

5.2. Determine pitch angles for the pinion and for the gear.

δ_2 = arctg u= arctg 3.15=72.38°, δ_1 = 90°- δ_2=90-72.38=17.62°.

5.3. Determine the external cone distance

$$R_e = \frac{d_e^g}{2 \cdot \sin \delta_2} = \frac{315}{2 \cdot \sin 72.38°} = 165.25\text{mm}.$$

5.4. Determine the face width of the gear

$$b^g = \psi_{bR} \cdot R_e = 0.285 \cdot 165.25 = 47.1 \text{ mm}.$$

5.5. Determine the external module

$$m_e = \frac{14 \cdot T^g \cdot K_{b\beta}}{\nu_b \cdot d_e^g \cdot b^g \cdot [\sigma_b]} = \frac{14 \cdot 460 \cdot 10^3 \cdot 1{,}35}{0.85 \cdot 315 \cdot 47.1 \cdot 293} = 2.35\text{mm},$$

where ν_b = 0.85 is the correction factor; $K_{b\beta}$ is the load concentration factor that is determined according to table 3.7 depending upon ψ_{bd} factor, where the latter is found as

$$\psi_{bd} = \frac{b^g}{d_m^p} = 0.166 \cdot \sqrt{u^2 + 1} = 0.166 \cdot \sqrt{3.15^{2\cdot} + 1} = 0.55.$$

5.6. Determine the number of teeth of the gear

$$z^g = \frac{d_e^g}{m_e} = \frac{315}{2.35} = 134.04$$

and round off z^g to the integer numeral. Assume $z^g = 134$.

5.7. Determine the number of teeth of the pinion

$$z^p = \frac{z^g}{u} = \frac{134}{3.15} = 42.54$$

and round off z^p to the integer numeral too. In our case $z^p = 43$.

5.8. Specify the velocity ratio of the gearing

$$u_{act} = \frac{z^g}{z^p} = \frac{134}{43} = 3.12.$$

The error $\varepsilon = \left|\frac{u_{act} - u}{u}\right| \cdot 100\%$ should be less or equal to 4%. Otherwise, we should round off values of z^p and z^g to the other side.

In our case $\varepsilon = \left|\frac{u_{act} - u}{u}\right| \cdot 100\% = \left|\frac{3.12 - 3.15}{3.15}\right| \cdot 100\% = 0.95 < 4\%.$

5.9. Specify pitch angles for the pinion and the gear

$$\delta_2 = \text{arctg } u_{act} = \text{arctg } 3.12 = 72.23°, \quad \delta_1 = 90° - \delta_2 = 17.77°$$

5.10. Determine external pitch diameters of the pinion and the gear.

$$d_e^p = m_e \cdot z^p = 2.35 \cdot 43 = 101.05 \text{mm},$$

$$\mathrm{d_e^g} = m_e \cdot z^g = 2.35 \cdot 134 = 314.9 \text{mm}.$$

5.11. Determine diameters of addendum circles at the outer section for the pinion and the gear

$$d_{ae}^p = d_e^p + 2 \cdot m_e \cdot \cos\delta_1 = 101.05 + 2 \cdot 2.35 \cdot \cos 17.77° = 105.53 \text{ mm},$$
$$d_{ae}^g = d_e^g + 2 \cdot m_e \cdot \cos\delta_2 = 314.91 + 2 \cdot 2.35 \cdot \cos 72.23° = 316.33 \text{ mm}.$$

5.12. Determine diameters of dedendum circles at the outer section for the pinion and the gear.

$$d_{fe}^p = d_e^p - 2.4 \cdot m_e \cdot \cos\delta_1 = 101.05 – 2.4 \cdot 2.35 \cdot \cos 17.77° = 95.68 \text{ mm},$$
$$d_{fe}^g = d_e^g - 2.4 \cdot m_e \cdot \cos\delta_2 = 314.9 – 2.4 \cdot 2.35 \cdot \cos 72.23° = 313.18 \text{ mm}.$$

5.13. Specify the external cone distance

$$R_e = 0.5 \cdot m_e \cdot \sqrt{\left(z^p\right)^2 + \left(z^g\right)^2} = 0.5 \cdot 2.35 \cdot \sqrt{43^2 + 134^2} = 165.36 \text{mm}.$$

5.14. Specify the face width of the gear

$$b^g = \psi_{bR} \cdot R_e = 0.285 \cdot 165.36 = 47.28 \text{ mm}.$$

5.15. Determine mean pitch diameters for the pinion and for the gear

$$d_m^p = \frac{d_e^p \cdot (R_e - 0.5 \cdot b^g)}{R_e} = d_e^p \cdot \left(1 - 0.5 \cdot \psi_{bR}\right) = 101.05 \cdot (1 - 0.5 \cdot 0.285) = 86.65\,\text{mm},$$

$$d_m^g = \frac{d_e^g \cdot (R_e - 0.5 \cdot b^g)}{R_e} = d_e^g \cdot \left(1 - 0.5 \cdot \psi_{bR}\right) = 314.9 \cdot (1 - 0.5 \cdot 0.285) = 270.03\,\text{mm}.$$

5.16. Determine forces that act in the engagement of the bevel gears

- turning force

$$F_t = \frac{2 \cdot T^g}{d_m^g} = \frac{2 \cdot 460 \cdot 10^3}{270.03} = 3407.03\,\text{N};$$

- radial force at the gear

$$F_r^g = F_t \cdot tg\,\alpha_w \cdot \cos\delta_2 = 3407.03 \cdot \text{tg}20° \cdot \cos 72.23° = 378.46 \text{ N};$$

- axial force at the gear

$$F_a^g = F_t \cdot tg\,\alpha_w \cdot \sin\delta_2 = 3407.03 \cdot \text{tg}20° \cdot \sin 72.23° = 1180.89 \text{ N}.$$

5.17. Determine the maximum contact stress that develops in the contact zone of teeth:

$$\sigma_H = 1.18 \cdot \sqrt{\frac{T^p \cdot K_H \cdot E_{tr}}{\nu_H \cdot \left(d_m^p\right)^2 \cdot b^g \cdot \sin 2\alpha_w} \cdot \left(\frac{\sqrt{u_{act}^2 + 1}}{u_{act}}\right)} =$$

$$= 1.18 \cdot \sqrt{\frac{153 \cdot 10^3 \cdot 1.29 \cdot 2.1 \cdot 10^5}{0.85 \cdot 86.65^2 \cdot 47.28 \cdot \sin 40°} \cdot \left(\frac{\sqrt{3.12^2 + 1}}{3.12}\right)} = 558.98\,\text{MPa},$$

where T^p is in N·mm; K_H is the design load factor determine as

$$K_H = K_{H\beta} \cdot K_{HV}.$$

Load concentration factor $K_{H\beta}$ is specified by means of table 3.2 depending upon factor $\psi_{bd} = \frac{b^g}{d_m^p}$.

Dynamic load factor K_{HV} is determined according to table 3.6 depending upon the peripheral speed of the gear ($V^g = \frac{\omega^g \cdot d_m^g}{2}$) and the accuracy of manufacturing (table 3.5). In order to use table 3.6 for bevel gears we should reduce the degree of accuracy by 1.

In our case $\psi_{bd}=\dfrac{b^g}{d_m^p}=\dfrac{47.28}{86.65}=0.55$, $V^g=\dfrac{\omega^g\cdot d_m^g}{2}=\dfrac{25\cdot 0.27}{2}=3.4$ m/sec.

$K_H=K_{H\beta}\cdot K_{HV}=1.16\cdot 1.11=1.29$.

Obtained value of σ_H should correspond to the following condition

$$\sigma_H=(0.8\ldots1.1)\cdot[\sigma_H]=(0.8\ldots1.1)\cdot 640=512\ldots704 \text{ MPa}.$$

Otherwise it is necessary to change the external pitch diameter and recalculate the gearing. In our case strength condition is satisfied.

5.18. Determine the maximum bending stress

$$\sigma_b=\frac{F_t\cdot K_{b\beta}\cdot K_{bV}\cdot Y_b}{\nu_b\cdot m_m\cdot b^g}=\frac{3407.03\cdot 1.32\cdot 1.27\cdot 3.6}{0.85\cdot 2.02\cdot 47.28}=253.28\,\text{MPa}\le[\sigma_b]=293\,\text{MPa}$$

where $K_{b\beta}$ is the load concentration factor that is determined by table 3.7; K_{bV} is the dynamic load factor determined from table 3.8 (for bevel gears we should reduce the accuracy of manufacturing by 1); Y_b is the tooth form factor that is determined by means of table 3.9 depending upon the number of teeth of the equivalent straight spur gear $z_v^g=\dfrac{z^g}{\cos\delta_2}=\dfrac{134}{\cos 72.23°}=439$ for the case when the offset factor x=0;

ν_b = 0.85 is the correction factor; $m_m=\dfrac{d_m^g}{z^g}=\dfrac{270.03}{134}=2.02\,\text{mm}$ is the mean module.

6. ANALYSIS OF THE WORM GEARING

Let us carry out the analysis of the worm gearing for strength if torque at the worm shaft T^w=*105* N·m; torque at the gear shaft T^g = *1750* N·m; rotational speed of the worm shaft n^w = 441.75 rpm, rotational speed of the gear shaft n^g = 22.1 rpm; velocity ratio of the gearing *u*=20.

6.1. Determine approximately the slippage speed in the worm gearing

$$V_{sl} = 4.5 \cdot 10^{-4} \cdot n^{w} \cdot \sqrt[3]{T^{g}},$$

where n^w is the rotational speed of the worm in rpm; T^g is the torque at the worm gear shaft in N·m.

$$V_{sl} = 4.5 \cdot 10^{-4} \cdot 441.75 \cdot \sqrt[3]{1750} = 2.4 \mathrm{m/sec}$$

6.2. Select the material of the worm and the worm gear.

Worm

The best performance is obtained when worms are made of carbon or alloy steels of grade Steel 45 (0.45 C) and Steel 40XH (0.40-C-Cr-Ni) surface-hardened to hardness ranged from 50 to 55 HRC or of grade Steel 20X (0.20 C-Cr) and Steel 18XГТ (0.18 C-Cr-Mn-Ti) case-hardened to hardness ranged from 58 to 63 HRC. The immunity to seizure improves with increasing hardness of the working surfaces of threads. Also, the surface roughness of the threads should be kept to a minimum (usually *Ra 0.2*). For this purpose the threads are ground and polished.

Worm gear

Material of the worm gear depends on the slippage speed.

If V_{sl}>5 m/sec, the worm gear is made of tin bronzes such as Bronze10Sn-1Ni-1P, Bronze10Sn-1P.

If V_{sl} is ranged from 2 to 5 m/sec, the worm gear is made of tinless (aluminum-iron) bronzes such as Bronze9Al-4Fe.

If V_{sl}<2 m/sec, the worm gear is produced from cast irons such as Grey cast iron 12 or Grey cast iron 18.

Mechanical characteristics of materials of the worm gear are given in table 6.1. It is recommended to choose the material of the worm gear with higher mechanical characteristics.

It is necessary to note that calculation of the worm gearing is carried out by the material of the worm gear because the latter has less strength in comparison with the material of the worm.

In our case: worm is made of carbon steels of grade Steel 45 (0.45 C) and surface-hardened to hardness ranged from 50 to 55 HRC; the worm gear is made of tinless (aluminum-iron) bronzes such as Bronze 9Al-4Fe with chill casting to σ_y = 195 MPa, ultimate strength in tension σ_{ult} = 490 MPa.

Table 6.1

Mechanical characteristics of materials of the worm gear ring

Material	Slippage speed Vs, m/sec	Casting method	Mechanical characteristics, MPa		
			Yield point σ_y	Ultimate strength in tension $\sigma_{ul\ t}$	Ultimate strength in bending $\sigma_{ul\ b}$
Tin bronzes					
Bronze(10Sn-1Ni-1P)	Over 5	Centrifugal casting	165	285	
Bronze(10Sn-1P)	Over 5	Chill casting	195	245	
Bronze(10Sn-1P)	Over 5	Sand casting	132	215	
Tinless bronzes					
Bronze(9Al-4Fe)	2…5	Centrifugal casting	200	500	
Bronze(9Al-4Fe)	2…5	Chill casting	195	490	
Bronze(9Al-4Fe)	2…5	Sand casting	195	392	
Cast-irons					
Grey cast iron 12	Up to 2	Sand casting	-		280
Grey cast iron 18	Up to 2	Sand casting	-		360

6.3. Determine the allowable contact stress.

a) For the worm gear made of tin bronzes the allowable contact stress is determined from the condition to prevent fatigue pitting

$$[\sigma_H] = \sigma_{lim} \cdot C_v \cdot K_{HL},$$

where σ_{lim} is the limit of contact endurance that is determined as $\sigma_{lim} = 0.9 \cdot \sigma_{ult}$; σ_{ult} is the ultimate strength in tension (table 6.1); C_v is the factor that is used to take into account the wear rate of a worm gear tooth depending upon the slippage speed (table 6.2); K_{HL} is the durability factor.

Table 6.2

Values of C_v

Slippage speed V_{sl}, m/sec	5	6	7	8
C_v	0.95	0.88	0.83	0.8

Durability factor K_{HL} is found in the following way:

$$K_{HL} = \sqrt[8]{\frac{N_{H0}}{N_{Hi}}},$$

where $N_{HO} = 10^7$ is the base number of cycles;

$N_{Hi} = 60 \cdot n^g \cdot t$ is the design number of stress cycles;

n^g is the rotational speed of the worm gear;

$t = L \cdot 365 \cdot K_a \cdot 24 \cdot K_d$ is the service life in hours;

L is the service life in years; K_a is the annual utilization factor; K_d is the daily utilization factor;

Obtained magnitude of K_{HL} should satisfy the following condition:

$$0.67 \le K_{HL} \le 1.15.$$

Otherwise, for further calculations we take the extreme values of the mentioned above inequality.

b) For the worm gear made of either tinless bronzes or cast irons, the allowable contact stress is determined to avoid seizure:

- for tinless bronzes $[\sigma_H] = 300 - 25 \cdot V_{sl}$;
- for cast iron $[\sigma_H] = 175 - 35 \cdot V_{sl}$.

In our case: $[\sigma_H] = 300 - 25 \cdot 2.4 = 240$ MPa

6.4. Determine the allowable bending stress.

For this purpose we use table 6.3, where $\sigma_{ul\,t}$ is the ultimate strength in tension; $\sigma_{ul\,b}$ is the ultimate strength in bending; σ_y is the yield point; K_{bL} is the durability factor.

Table 6.3

Allowable bending stresses

Material	Non-reversed transmission	Reversed transmission
Bronze	$[\sigma_b] = (0.08 \cdot \sigma_{ul\,t} + 0.25 \cdot \sigma_y) \cdot K_{bL}$	$[\sigma_b] = 0.16 \cdot \sigma_{ul\,t} \cdot K_{bL}$
Cast-iron	$[\sigma_b] = 0.12 \cdot \sigma_{ul\,b} \cdot K_{bL}$	$[\sigma_b] = 0.075 \cdot \sigma_{ul\,b} \cdot K_{bL}$

Mechanical characteristics of the worm gear material are given in table 6.1.

Durability factor K_{bL} is determined as

$$K_{bL} = \sqrt[9]{\frac{N_{b0}}{N_{bi}}},$$

where $N_{b0} = 1 \cdot 10^6$ is the base number of cycles;

$N_{bi} = 60 \cdot n^g \cdot t \cdot K_{bi}$ is the design number of stress cycles;

n^g is the rotational speed of the worm gear;

$t = L \cdot 365 \cdot K_a \cdot 24 \cdot K_d$ is the service life in hours;

L is the service life in years; K_a is the annual utilization factor; K_d is the daily utilization factor;

Obtained magnitude of K_{bL} should satisfy the following condition:

$$0.543 \le K_{bL} \le 1.$$

Otherwise, for further calculations we take the extreme values of the mentioned above inequality.

In our case the service life of the gearing is 8 years, $K_a = 0.7$, $K_d = 0.3$,

$$t = 8 \cdot 365 \cdot 0.7 \cdot 24 \cdot 0.3 = 14716.8 \text{hours}.$$

$N_{bi} = 60 \cdot 22.1 \cdot 14716.8 = 19.144 \cdot 10^6$; $N_{b0} = 1 \cdot 10^6$;

$K_{bL} = \sqrt[9]{\frac{1 \cdot 10^6}{19.144 \cdot 10^6}} = 0.719$ Condition $0.543 \le K_{bL} \le 1$ is satisfied.

For bronze and non-reversed transmission

$[\sigma_b] = (0.08 \cdot 490 + 0.25 \cdot 195) \cdot 0.719 = 63.24$ MPa

6.5.Calculate the worm gear for strength.

6.5.1. Determine the center distance of the worm gearing

$$a_w = 0.625 \cdot \left(\frac{q^w}{z^g} + 1 \right) \cdot \sqrt[3]{\frac{T^g \cdot E_{tr}}{[\sigma_H]^2 \cdot \left(\frac{q^w}{z^g} \right)}},$$

where T^g is the torque at the worm gear shaft in $N \cdot mm$; $z^g = z^w \cdot u \ge 28$ is the number of teeth of the worm gear (it should be rounded off to the nearest integer numeral); z^w is the number of threads of the worm that is determined according to table 6.4; q^w is the worm diameter factor whose minimum value is found as $q^w_{min} = 0.212 \cdot z^g$ (obtained magnitude of q^w

must be rounded off to the greater side according to the following standard series 8; 10; 12.5; 14; 16; 20); E_{tr} is the transformed modulus of elasticity that is determined by the formula

$$E_{tr} = \frac{2 \cdot E^w \cdot E^g}{E^w + E^g}.$$

where E^w is the worm material modulus of elasticity (for steels E = $2.1 \cdot 10^5$ MPa); E^g is the worm gear material modulus of elasticity (for bronzes and cast irons $E \approx 0.9 \cdot 10^5$ MPa).

Table 6.4

Number of threads of the worm

Velocity ratio *u*	8 to 14	over 14 to 30	over 30
Number of threads z^w	4	2	1

Obtained value of a_w should be rounded off to the greater side according to standard series given in table 6.5.

Table 6.5

Standard values of the centre distance a_w of the worm gearing

Series 1	40	50	63	80	100	125	160	200	250	315	400	500
Series 2	-	-	-	-	-	140	180	225	280	355	450	-

In our case: $u = 20$, $z^w = 2$, $z^g = 2 \cdot 20 = 40 \geq 28$

$q^w_{min} = 0.212 \cdot 40 = 8.48$ round off to the $q^w_{min} = 10$

$$E_{tr} = \frac{2 \cdot 2.1 \cdot 10^5 \cdot 0.9 \cdot 10^5}{2.1 \cdot 10^5 + 0.9 \cdot 10^5} = 1.26 \cdot 10^5.$$

$$a_w = 0.625 \cdot \left(\frac{10}{40} + 1\right) \cdot \sqrt[3]{\frac{1750 \cdot 10^3 \cdot 1.26 \cdot 10^5}{240^2 \cdot \left(\frac{10}{40}\right)}} = 194\text{mm}$$

Round off the obtained value of a_w to the 200 mm.

6.5.2. Determine the axial module

$$m = \frac{2 \cdot a_w}{q^w + z^g}$$

and round off obtained value according to standard series given in table 6.6.

Table 6.6

Standard values of module m for worm gearing

m ,mm	2.5; 3.15; 4; 5	6.3; 8; 10; 12.5
q^w	8; 10; 12.5; 16; 20	8; 10; 12.5; 14; 16; 20

In our case: $m = \frac{2 \cdot 200}{10 + 40} = 8mm$

6.5.3. In order to ensure standard value of the centre distance we use modified worm gear with offset factor x determined as

$$x = \frac{a_w}{m} - 0.5 \cdot (q^w + z^g).$$

To avoid undercutting the condition $-1 \le x \le 1$ should be carried out. Otherwise, it is necessary to change a_w, q^w or z^g.

In our case: $x = \frac{200}{8} - 0.5 \cdot (10 + 40) = 0$

6.5.4. Specify the velocity ratio of the worm gearing

$$u_{act} = \frac{z^g}{z^w}$$

and determine the error $\varepsilon = \left| \frac{u_{act} - u}{u} \right| \cdot 100\%$ that must be less or equal to 4%.

$$u_{act} = \frac{40}{2} = 20; \quad \varepsilon = 0\%$$

6.5.5. Determine the pitch diameter of the worm

$$d^w = m \cdot q^w = 8 \cdot 10 = 80 \text{ mm}.$$

6.5.6. Determine the addendum circle diameter of the worm

$$d_a^w = d_w + 2 \cdot m = 80 + 2 \cdot 8 = 96mm.$$

6.5.7. Determine the dedendum circle diameter of the worm

$$d_f^w = d^w - 2.4 \cdot m = 80 - 2.4 \cdot 8 = 60.8mm.$$

6.5.8. Determine the threaded length of the worm by means of table 6.7.

Table 6.7

Threaded length of the worm b^w

Shift factor x	Number of threads of the worm z^w 1; 2	4
0	$b^w \geq (11+0.06 \cdot z^g) \cdot m$	$b^w \geq (12.5+0.09 \cdot z^g) \cdot m$
-0.5	$b^w \geq (8+0.06 \cdot z^g) \cdot m$	$b^w \geq (9.5+0.09 \cdot z^g) \cdot m$
-1.0	$b^w \geq (10.5+z^w) \cdot m$	$b^w \geq (10.5+z^w) \cdot m$
+0.5	$b^w \geq (11+0.1 \cdot z^g) \cdot m$	$b^w \geq (12.5+0.1 \cdot z^g) \cdot m$
+1.0	$b^w \geq (12+0.1 \cdot z^g) \cdot m$	$b^w \geq (13+0.1 \cdot z^g) \cdot m$

Note. From manufacturing consideration, the threaded length of hobbed and ground worms is increased by 25 mm at m <10 mm, by 35 to 40 mm at m =10 mm to 16 mm and by 50 mm at m>16 mm.

$$b^w \geq (11+0.06 \cdot 40) \cdot 8 = 107.2 \text{ mm}$$

Assume $b^w = 107.2 + 25 \approx 132 mm$

6.5.9. Determine the lead angle of the worm

$$\gamma = \operatorname{arctg}\left(\frac{z^w}{q^w}\right) = \operatorname{arctg}\left(\frac{2}{10}\right) = 11.3^\circ$$

6.5.10. Determine the pitch diameter of the worm gear

$$d^g = m \cdot z^g = 8 \cdot 40 = 320 \text{ mm.}$$

6.5.11. Determine the addendum circle diameter of the worm gear

$$d_a^g = d^g + 2 \cdot m \cdot (1 + x) = 320 + 2 \cdot 8 \cdot (1 + 0) = 336 mm$$

6.5.12. Determine the dedendum circle diameter of the gear

$$d_f^g = d^g - 2 \cdot m \cdot (1.2 - x) = 320 - 2 \cdot 8 \cdot (1.2 - 0) = 300.8 mm$$

6.5.13. Determine the maximum diameter of the worm gear

$$d_{a\max}^g = d_a^g + \frac{6 \cdot m}{z^w + 2} = 336 + \frac{6 \cdot 8}{2 + 2} = 348 mm$$

6.5.14. Determine the face width of the worm gear

$$b^g \leq 0.75 \cdot d_a^w \quad \text{for} \quad z^w = 1;\ 2$$

$$b^g \leq 0.67 \cdot d_a^w \quad \text{for} \quad z^w = 4.$$

$$b^g \leq 0.75 \cdot 96 = 72 mm$$

6.5.15. Determine the peripheral speed at the worm and the worm gear

$$V^w = \frac{\pi \cdot d^w \cdot n^w}{60} = \frac{\pi \cdot 80 \cdot 10^{-3} \cdot 441.75}{60} = 1.85 m/sec;$$

and

$$V^g = \frac{\pi \cdot d^g \cdot n^g}{60} = \frac{\pi \cdot 320 \cdot 10^{-3} \cdot 22.1}{60} = 0.37 m/sec$$

6.5.16. Specify the slippage speed

$$V_{sl} = \frac{V^w}{\cos\gamma} = \frac{1.85}{\cos 11.3^\circ} = 1.89 m/sec$$

6.5.17. Determine the efficiency of the worm gearing

$$\eta = \frac{tg\,\gamma}{tg\,(\gamma + \rho')},$$

where ρ' is the friction angle determined by means of table 6.8.

Table 6.8

Angle of friction ρ'

Slippage speed V_{sl}, m/s	Angle of friction, ρ'	Slippage speed V_{sl}, m/s	Angle of friction, ρ'
0.1	4°30′ - 5°10′	2.5	1°40′ - 2°20′
0.5	3°10′ - 3°40′	3	1°30′ - 2°10′
1.0	2°30′ - 3°10′	4	1°20′ - 1°40′
1.5	2°20′ - 2°50′	7	1°00′ - 1°30′
2.0	2°00′ - 2°30′	10	0°55′ - 1°20′

Note. Greater values of ρ' correspond to tinless worm gears.

In our case: $\rho' = 2°10'$; $\eta = \frac{tg 11^\circ 18'}{tg\,(11^\circ 18' + 2^\circ 10')} = 0.834$

6.5.18. Determine forces in the engagement of the worm gearing

- turning force at the worm F_t^w and axial force at the worm gear F_a^g :

$$F_t^w = F_a^g = \frac{2 \cdot T^w}{d^w} = \frac{2 \cdot 105 \cdot 10^3}{80} = 2625 N;$$

- axial force at the worm F_a^w and turning force at the worm gear F_t^g :

$$F_a^w = F_t^g = \frac{2 \cdot T^g}{d^g} = \frac{2 \cdot 1750 \cdot 10^3}{320} = 10937{,}5 N;$$

- radial force Fr :

$$F_r = F_t^g \cdot tg\,\alpha_w = 10937.5 \cdot tg 20^\circ = 3980.9 N.$$

6.5.19. Determine the maximum contact stress

$$\sigma_H = 1.18 \cdot \sqrt{\frac{T^g \cdot K_H \cdot E_{tr} \cdot \cos^2 \gamma}{\left(d^g\right)^2 \cdot d^w \cdot \varepsilon_\alpha \cdot \xi \cdot \delta \cdot \sin 2\alpha_w}},$$

where T^g is in *N·mm*; $\xi = 0.75$ is the factor which is used to take into account the fact that contact of the worm and the worm gear occurs not along the whole arc of contact defined by the gear face angle 2δ ($2\delta \approx 100^o = 1.75$ rad); ε_α is the contact ratio determined as

$$\varepsilon_\alpha = \left(\sqrt{0.03 \cdot \left(z^g\right)^2 + z^g + 1} - 0.17 \cdot z^g + 2.9\right) / 2.95;$$

$K_H = K_{H\beta} \cdot K_{HV}$ is the design load factor.

Table 6.9

Worm deformation factor Θ

Number of threads of the worm z^w	Worm deformation factor at q of					
	8	10	12.5	14	16	20
1	72	108	157	176	225	248
2	57	86	125	152	171	197
3	51	76	110	134	148	170
4	47	70	101	123	137	157

$K_{H\beta} = 1 + \left(\frac{z^g}{\Theta}\right)^3 \cdot \left(1 - x_1\right)$ is the load concentration factor; Θ is the worm deformation factor (table 6.9); x_1 is used to take into account load nature (for constant load x_1=0.6); K_{HV} is the dynamic load factor determined by means of table 6.10 (for worm gearings we take 7 or 8 accuracy of manufacturing).

Table 6.10

Dynamic load factor K_{HV}

Degree of accuracy	Dynamic load factor K_{HV} at V_{sl} (m/sec) of			
	up to 1.5	1.5 - 3	3 - 7.5	7.5 - 12
7	1.0	1.0	1.1	1.2
8	1.15	1.25	1.4	-
9	1.25	-	-	-

Obtained value of σ_H should correspond to the following condition

$$\sigma_H = (0.8\ldots1.1)\cdot[\sigma_H].$$

Otherwise it is necessary to change the center distance a_w and recalculate the gearing.

In our case: $\varepsilon_\alpha = \left(\sqrt{0.03\cdot(40)^2 + 40 + 1} - 0.17\cdot 40 + 2.9\right)/2.95 = 1{,}876$;

$K_{H\beta} = 1 + \left(\dfrac{40}{86}\right)^3 \cdot (1 - 0{,}6) = 1{,}04$; $K_{HV} = 1.25$;

$K_H = 1.04 \cdot 1.25 = 1.37$; $\xi = 0.75$; $2\delta \approx 100^o$;

$$\sigma_H = 1.18\cdot\sqrt{\frac{1750\cdot10^3\cdot1.3\cdot1.26\cdot10^5\cdot\cos^2 11.3°}{(320)^2\cdot 80\cdot1.876\cdot0.75\cdot{}^{1.75}\!/_{2}\cdot\sin 2\cdot 20°}} = 243.32\text{MPa}$$

$$\sigma_H=(0.8\ldots1.1)\cdot[\sigma_H]=(0.8\ldots1.1)\cdot240=192\ldots264 \text{ MPa}.$$

Strength condition is satisfied.

6.5.20. Determine the maximum bending stress

$$\sigma_b = 0.7\cdot\frac{F_t^g\cdot K_b\cdot Y_b}{b^g\cdot m_n} \le [\sigma_b],$$

where K_b is the design load factor ($K_b = K_H$); $m_n = m\cdot\cos\gamma$ is the module at the normal section; Y_b is the tooth form factor determined by means of table 6.11 depending on the number of teeth of the equivalent straight spur gear

$$z_v^g = \frac{z^g}{\cos^3\gamma}.$$

Table 6.11

Tooth form factor Y_b

z_v	28	30	32	35	40	45	50	60	80	100	150	300
Y_b	1.8	1.76	1.71	1.61	1.55	1.48	1.45	1.4	1.34	1.3	1.27	1.24

In our case: $m_n = 8\cdot\cos 11.3^0 = 7.846$; $K_b = 1.297$;

$$z_v^g = \frac{40}{\cos^3 11.3°} = 42{,}397 \Rightarrow 42;$$

From table 6.11 tooth form factor $Y_b = 1.52$;

$$\sigma_b = 0.7 \cdot \frac{10937.5 \cdot 1.297 \cdot 1.52}{72 \cdot 7.846} = 26.72\text{MPa} < [\sigma_b]$$

Strength condition is satisfied.

6.6. Determine the temperature of the oil containing in the casing

$$t_{oil} = t_{air} + \frac{P^w \cdot (1-\eta)}{K_t \cdot A} \le [t_{oil}],$$

where t_{air} = 20°C is the temperature of the air; P^w is the power at the worm in *W*; η is the efficiency of the worm gearing; K_t is the heat transfer factor (for cast iron casings K_t =15…18 W/m^2·C°); *A* is the area of the cooling surface determined approximately depending upon the center distance a_w by means of table 6.12; [t_{oil}] is the allowable temperature of the oil (for industrial oils [t_{oil}] = 80…95°C).

Table 6.12

Cooling surface area A of the worm gear speed reducer

a_w, mm	80	100	125	140	160	180	200	225	250	280
A, m^2	0.19	0.24	0.36	0.43	0.54	0.67	0.8	1.0	1.2	1.4

In our case: $P^w = \frac{T^g \cdot \omega^g}{\eta} = \frac{1750 \cdot 1.92}{0.834} = 4.03 \cdot 10^3 W$;

Assume that K_t = 17; the area of cooling surface *A* = 0.8 m^2(table 6.12)

Thus $t_{oil} = 20 + \frac{4.03 \cdot 10^3 \cdot (1-0.834)}{17 \cdot 0.8} = 69.19^\circ\text{C} < [t_{oil}]$.

Condition is satisfied.

7. ANALYSIS OF THE FLAT BELT DRIVE

Let us carry out the analysis of the flat belt drive if input power P_1=6.6 kW; torque at the driving pulley T_1=42 N·m; velocity ratio of the belt drive u_{bd}=2.15; rotational speed of the driving pulley n_1=1555 rpm.

7.1. Determine the diameter of the smaller(driving) pulley

$$d_1 \approx 6 \cdot \sqrt[3]{T_1} = 6 \cdot \sqrt[3]{42 \cdot 10^3} = 208.6\,\mathrm{mm}\ ,$$

where T_1 is in N·mm.

Round off the diameter to the nearest standard value according to the following series: 63, 71, 80 90, 100, 112, 125, 140, 160, 180, 200, 224, 250, 280, 315, 355, 400, 450, 500, 560, 630, 710, 800, 900, 1000, 1120.

Assume d_1=224 mm.

7.2. Determine the diameter of the larger pulley taking into account a relative speed loss ε = 0.01%

$$d_2 = d_1 \cdot u_{bd} \cdot (1-\varepsilon) = 224 \cdot 2.15 \cdot (1-0.0001) = 481.55\mathrm{mm}.$$

and round off obtained magnitude according to the series of standard values.

Assume d_2=500 mm.

7.3. Specify the velocity ratio of the belt drive

$$u_{bd} = \frac{d_2}{d_1 \cdot (1-\varepsilon)} = \frac{500}{224 \cdot (1-0.0001)} = 2.232\ .$$

Error should be $\varepsilon \le 4$ %.

$$\varepsilon = \left| \frac{2.232 - 2.15}{2.15} \right| \cdot 100\% = 3.6\% < 4\ \%.$$

7.4. Determine the center distance

$$a = 2 \cdot (d_1 + d_2) = 2 \cdot (224 + 500) = 1448\mathrm{mm}.$$

7.5. Compute the contact angle

$$\alpha_1 = 180 - 60 \cdot \frac{d_2 - d_1}{a} = 180 - 60 \cdot \frac{500 - 224}{1448} = 168.56°\ .$$

7.6. Determine the belt length

$$L = 2 \cdot a + 0.5 \cdot \pi \cdot (d_1 + d_2) + \frac{(d_2 - d_1)^2}{4 \cdot a} = 2 \cdot 1448 + 0.5 \cdot 3.14 \cdot 724 + \frac{276^2}{4 \cdot 1448} = 4032.7\,\mathrm{mm}\ .$$

7.7. Determine the belt speed

$$V = \frac{\pi \cdot d_1 \cdot n_1}{60} = \frac{3.14 \cdot 0.224 \cdot 1455}{60} = 17.056 \text{ m/sec}.$$

7.8. Determine the turning (tangential) force

$$F_t > \frac{P_1}{V} = \frac{6.6}{17.056} = 388.06 \text{ N}.$$

7.9. Choose the rubberized fabric belt according to table 7.1.

In our case we take the rubberized fabric belt Б 800 with the number of plies z = 3 and thickness of each δ_0 = 1.5 mm (including the rubber interlayers); the maximum allowable load to the ply p_0 = 3 N/mm of width.

Table 7.1

Rubberized fabric belts (GOST 23831-79)

	Fabric plies			
	Б 800	БКНЛ	ТА-150	ТК-20
Nominal strength in N per mm of width	55	55	150	200
Maximum allowable load p_0 to a ply in N per mm of width	3	3	10	13
Design thickness δ_0 of fabric plies with rubber interlayers, mm	1.5	1.2	1.2	1.3
Number of plies if belt width b, mm				
20-71	3-5	3-5	--	--
80-112	3-6	3-6	--	--
125-560	3-6	3-6	3-4	3-4

Check the requirement

$$\delta = \delta_0 \cdot z \le 0.025 \cdot d_1;$$

$1.5 \cdot 3 \le 0.025 \cdot 224$; $4.5 \le 5.6$mm.   Condition is satisfied.

7.10. Determine contact angle factor C_α

$$C_\alpha = 1 - 0.003 \cdot (180 - \alpha_1) = 1 - 0.003 \cdot (180 - 168.56) = 0.966.$$

7.11. Determine factor C_v, which is used to take into account the effect of the belt speed

$C_v = 1.04 - 0.0004 \cdot V^2 = 1.04 - 0.0004 \cdot 17.056^2 = 0{,}9236$.

7.12. Determine service factor C_s:

- C_s = 1 for steady operation (belt conveyers, lathes and grinding machines);

- C_s=0.9 in the case of moderate vibration (chain conveyers and milling machines);

- C_s=0.8 in the case of considerable vibration (flight conveyers, planing machines).

The value of C_s is to be reduced by 0.1 in two-shift operation and by 0.2 in three-shift operation.

Let us assume that we have moderate vibration. That is why C_s=0.9.

7.13. Determine factor C_Θ, which is used to take into account the belt position in the space.

- $C_\Theta = 1$ for horizontal drives and inclined at up to 60°;
- $C_\Theta = 0.9$ for drives inclined at over 60° to 80°;
- $C_\Theta = 0.8$ for drives inclined at over 80° to 90°.

In our case we assume $C_\Theta = 1$.

7.14. Determine the allowable load to 1mm of ply width, N/mm

$$[p]=p_0 \cdot C_\alpha \cdot C_V \cdot C_s \cdot C_\Theta=3 \cdot 0.966 \cdot 0.9236 \cdot 0.9 \cdot 1=2.409 \text{ N/mm}.$$

7.15. Find the belt width

$$b \geq \frac{F_t}{z \cdot [p]} = \frac{388.06}{3 \cdot 3} = 43.12 \, \text{mm}$$

and round off obtained magnitude according to series of standard values: 20; 25; 32; 40; 50; 63; 71; 80; 90; 100; 112; 125; 140; 160; 180; 200 and so on. Assume b=50 mm.

7.16. Determine the pulley width B according to table 7.2.

Table 7.2

Determining the pulley width *B*

Belt width b, mm	20	25	32	40	50	63	71	80	90	100	112	125	140	160
Pulley width B, mm	25	32	40	50	63	71	80	90	100	112	125	140	160	180

In our case we assume $B = 63$ mm.

7.17. Determine the pretension in the belt

$$F_0 = \sigma_0 \cdot b \cdot \delta = 1.8 \cdot 50 \cdot 4.5 = 405 \text{ N},$$

where σ_0 =1.8 MPa- tensile prestress.

7.18. Determine tension of the belt

on the tight side $F_1=F_0 + 0.5 \cdot F_t$=405+0.5·388.06=599.03 N,

on the slack side $F_2=F_0 - 0.5 \cdot F_t$=405-0.5·388.06=270.97 N

7.19. Calculate the force acting on the shaft and bearings

$$F_b = 3 \cdot F_0 \cdot \sin\frac{\alpha_1}{2} = 3 \cdot 405 \cdot \sin\frac{168.56}{2} = 1208.9\,\text{N}.$$

7.20. Determine tensile stress

$$\sigma_1 = \frac{F_1}{b \cdot \delta} = \frac{599.03}{50 \cdot 4.5} = 2.662\,\text{MPa}.$$

7.21. Determine bending stress

$$\sigma_b = E \cdot \frac{\delta}{d_1} = 100 \cdot \frac{4.5}{224} = 2.009\,\text{MPa},$$

where E is modulus of elasticity of the belt material. For rubberized fabric belts E =100÷200 MPa.

7.22. Determine tensile stress due to action of centrifugal force F_c

$$\sigma_c = \rho \cdot V^2 \cdot 10^{-6} = 1100 \cdot 17.056^2 \cdot 10^{-6} = 0.32\,\text{MPa},$$

where ρ is density of belts. For rubber-impregnated flat belts ρ = 1100 ÷ 1200 kg /m^3.

7.23. Determine the maximum stress

$$\sigma_{max} = \sigma_1 + \sigma_b + \sigma_c \le [\sigma].$$

For rubberized fabric belts [σ] = 7 MPa.

$$\sigma_{max} = \sigma_1 + \sigma_b + \sigma_c = 2.662 + 2.009 + 0.32 = 4.991\,\text{MPa} < [\sigma] = 7\,\text{MPa}.$$

Condition is satisfied.

7.24. Determine the service life of the belt

$$H_0 = \frac{\sigma_{-1}^6 \cdot 10^7 \cdot C_i \cdot C_l}{\sigma_{max}^6 \cdot 2 \cdot 3600 \cdot \lambda} \ge 2000\ \text{hours},$$

where σ_{-1} is limit of endurance (for rubberized belts σ_{-1}=7 MPa); $\lambda = \frac{V}{L} = \frac{17.056}{4032.7} = 4.229$ is the number of belt runs per second; $C_i \approx 1.5 \cdot \sqrt[3]{u_{bd}} - 0.5 = 1.5 \cdot \sqrt[3]{2.232} - 0.5 = 1.44$ takes into account the velocity ratio; C_l is used to take into account the nature of the load (for constant load C_l =1; for variable load C_l=2). We assume that load is variable.

$$H_0 = \frac{\sigma_{-1}^6 \cdot 10^7 \cdot C_i \cdot C_l}{\sigma_{max}^6 \cdot 2 \cdot 3600 \cdot \lambda} = \frac{7^6 \cdot 10^7 \cdot 1.44 \cdot 2}{4.991^6 \cdot 2 \cdot 3600 \cdot 4.229} = 5568.2 > 2000\ \text{hours}.$$

Condition is satisfied.

8. ANALYSIS OF THE CHAIN DRIVE

Let us carry out the analysis of the chain drive for strength if torque at the driving sprocket T_1 = 464.5 N·m; torque at the driven sprocket T_2 = 1105 N·m; rotational speed of the driving sprocket n_1 = 122.25 rpm, rotational speed of the driven sprocket n_2 = 48.9 rpm; velocity ratio of the chain drive u_{cd} = 2.5; input power of the chain drive P_1 = 5.947 kW.

8.1. Determine the number of teeth of the driving sprocket

$$z_1 = 31 - 2 \cdot u_{cd} \geq 17$$

and round off obtained magnitude to the nearest integer numeral.
In our case $z_1 = 31 - 2 \cdot 2.5 = 26$
Assume $z_1 = 26 > 17$.

8.2. Determine the number of teeth of the driven sprocket

$$z_2 = z_1 \cdot u_{cd} \leq 120$$

and round off to the nearest integer numeral

$$z_2 = 26 \cdot 2.5 = 65$$

Assume $z_2 = 65 < 120$.

8.3. Specify the velocity ratio and determine the error

$$u_{cd} = \frac{z_2}{z_1} = \frac{65}{26} = 2.5 .$$

The error should be $\varepsilon \leq 4$ %.
In our case $\varepsilon = 0$ %.

8.4. Determine the service factor K_s

$$K_s = K \cdot K_a \cdot K_{lub} \cdot K_\gamma \cdot K_d \cdot K_{ten},$$

where K is used to take into account the load nature and taken as 1 in quiet operation and as 1.2 to 1.5 in the case of shocks and impacts; K_a is the center distance factor assumed as K_a=1 for a = 30·t to 50·t and K_a=0.8 for a = 60·t to 80·t; K_{lub} is lubrication factor (K_{lub}=0.8 for immersion lubrication, K_{lub}=1 for drop-feed lubrication and K_{lub}=1.5 for periodic greasing); K_γ accounts for the angle that the shaft centre line makes with the horizontal (K_γ=1 for $\gamma \leq 60^\circ$ and K_γ=1.25 for $\gamma > 60^\circ$); K_d is a duty factor (K_d=1 for one-shift operation, K_d=1.25 for two-shift operation and K_d=1.5 for three-shift operation); K_{ten} accounts for the manner of tension control (K_{ten}=1 for drives with chain tighteners, K_{ten}=1.15 for drives with adjustable bases, and K_{ten}=1.25 for fixed-base drives).

In our case we have small shocks and impacts (K=1.2); the center distance is a = 40·t (K_a=1); periodic greasing ($K_{lub}=1.5$); $\gamma \le 60^\circ$ and (K_γ=1); one-shift operation (K_d=1); fixed base drive (K_{ten}=1.25).

$$K_s = 1.2 \cdot 1 \cdot 1.5 \cdot 1 \cdot 1 \cdot 1.25 = 2.25$$

8.5. Approximately determine the allowable mean pressure on the hinges by means of table 8.1 depending on the rotational speed of the smaller sprocket.

In our case for rotational speed n_1=122.25 rpm, $\left[p\right] \approx 29$ MPa.

Table 8.1

Allowable mean pressure [p], in MPa

n_1, rpm	Chain pitch, mm							
	12.7	15.875	19.05	25.4	31.75	38.1	44.45	50.8
50	46	43	39	36	34	31	29	27
100	37	34	31	29	27	25	23	22
200	29	27	25	23	22	19	18	17
300	26	24	22	20	19	17	16	15
500	22	20	18	17	16	14	13	12
750	19	17	16	15	14	13	-	-
1000	17	16	14	13	13	-	-	-
1250	16	15	13	12	-	-	-	-

8.6. Determine the chain pitch

$$t \ge 2.8 \cdot \sqrt[3]{\frac{T_1 \cdot K_s}{z_1 \cdot [p]}} = 2.8 \cdot \sqrt[3]{\frac{464.5 \cdot 10^3 \cdot 2.25}{26 \cdot 29}} = 31.22\text{mm},$$

where T_1 is in $N \cdot mm$.

Round off the pitch to the nearest standard value according to the table 8.1. In our case assume t = 31.75 mm.

8.7. Specify the allowable mean pressure according to table 8.1 by interpolation [p]. On multiplying it by

$K_p = 1 + 0.01 \cdot (z_1 - 17) = 1 + 0.01 \cdot (26-17) = 1.09$ we get finite magnitude of $[p] = 29 \cdot 1.09 = 31.61$MPa

8.8. Determine the effective mean pressure.

For that we

- find chain speed

$$V = \frac{z_1 \cdot t \cdot n_1}{60 \cdot 10^3} = \frac{26 \cdot 31.75 \cdot 122.25}{60 \cdot 10^3} = 1.68 \text{m/sec};$$

- find turning (tangential) force

$$F_t = \frac{P_1}{V} = \frac{5.947 \cdot 10^3}{1.68} = 3539.9\text{N};$$

- look up the projected hinge area S_h using table 8.2. In our case S_h=262 mm^2

Then the effective mean pressure

$$p = \frac{F_t \cdot K_s}{S_h} \le [p].$$

If this inequality is not right it is necessary to increase the pitch t.

$$p = \frac{3539.9 \cdot 2.25}{262} = 30.4\text{MPa} < [p].$$

In our case the inequality is right.

8.9. Determine the number of links in the chain

$$L_t = 2 \cdot a_t + 0.5 \cdot z_\Sigma + \frac{\Delta^2}{a_t},$$

where $L_t = \frac{L}{t}$ is the chain length in pitches; $a_t = \frac{a}{t}$; $a \approx (30 \ldots 50) \cdot t$; $z_\Sigma = z_1 + z_2$; $\Delta = \frac{z_2 - z_1}{2 \cdot \pi}$. Round off obtained magnitude to even integer numeral.

In our case: $a_t = 45$; $z_\Sigma = 26 + 65 = 91$; $\Delta = \frac{62 - 26}{2 \cdot \pi} = 6.21$;

$$L_t = 2 \cdot 45 + 0.5 \cdot 91 + \frac{6.21^2}{45} = 136.36 \Rightarrow 136$$

8.10. Specify the centre distance

$$a = 0.25 \cdot t \cdot (L_t - 0.5 \cdot z_\Sigma + \sqrt{(L_t - 0.5 \cdot z_\Sigma)^2 - 8 \cdot \Delta^2}) =$$

$$= 0.25 \cdot 31.75 \cdot (136 - 0.5 \cdot 91 + \sqrt{(136 - 0.5 \cdot 91)^2 - 8 \cdot 6.21^2}) = 1423.03\text{mm}$$

The slack side of the chain should have a slight sag f ≈ 0.01·a, for which purpose the design centre distance is reduced by 0.2 to 0.4 %.

Assume that a = 1418.76 mm.

8.11. Determine the pitch diameters

- of the driving sprocket $d_{p1} = \dfrac{t}{\sin\left(\dfrac{180^\circ}{z_1}\right)} = \dfrac{31.75}{\sin\left(\dfrac{180}{26}\right)} = 263.41\text{mm}$;
- of the driven sprocket $d_{p2} = \dfrac{t}{\sin\left(\dfrac{180^\circ}{z_2}\right)} = \dfrac{31.75}{\sin\left(\dfrac{180}{65}\right)} = 657.17\text{mm}$.

8.12. Determine the addendum diameters

$$D_{e_1} = t \cdot (\text{ctg}\left(\frac{180}{z_1}\right) + 0.7) - 0.31 \cdot d_1 =$$

$$= 31.75 \cdot (\text{ctg}\left(\frac{180}{26}\right) + 0.7) - 0.31 \cdot 19.05 = 277.81\text{mm}$$

$$D_{e_2} = t \cdot (\text{ctg}\left(\frac{180}{z_2}\right) + 0.7) - 0.31 \cdot d_1 =$$

$$= 31.75 \cdot (\text{ctg}\left(\frac{180}{65}\right) + 0.7) - 0.31 \cdot 19.05 = 672.77\text{mm}$$

where d_1 is the roller diameter (table 8.2).

8.13. Determine the dedendum diameter

$$D_{i_1} = d_{p_1} - (d_1 + 0.175 \cdot \sqrt{d_{p_1}}) = 263.41 - (19.05 + 0.175 \cdot \sqrt{263.41}) = 241.52\text{mm},$$

$$D_{i_2} = d_{p_2} - (d_1 + 0.175 \cdot \sqrt{d_{p_2}}) = 657.17 - (19.05 + 0.175 \cdot \sqrt{657.17}) = 633.63\text{mm}.$$

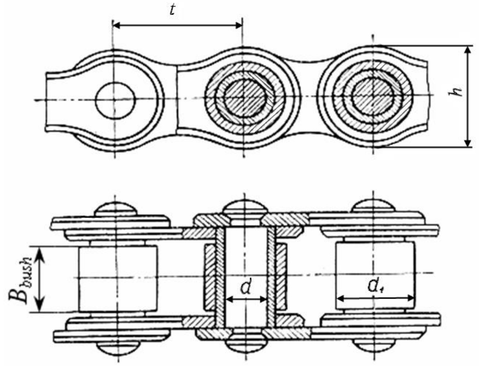
8.14. Determine the web thickness of sprocket

$$C = 0.93 \cdot B_{bush} = 0.93 \cdot 19.05 = 17.72\text{mm}$$

where B_{bush} is determined according to table 8.2.

Table 8.2

Leading particulars of Soviet-made roller chains PR (GOST 13568-75)



Pitch *t*	B_{bush}, mm	Pin diameter d	Roller diameter d_1	h, max	b, max	Breaking load F_{br}, kN	Mass per meter run q, kg	Projected hinge area S_h, mm^2
9.525	5.72	3.28	6.35	8.5	17	9.1	0.45	28.1
12.7	7.75	4.45	8.51	11.8	21	18.2	0.75	39.6
15.875	9.65	5.08	10.16	14.8	24	22.7	1.0	54.8
19.05	12.7	5.96	11.91	18.2	33	31.8	1.9	105.8
25.4	15.88	7.95	15.88	24.2	39	60.0	2.6	179.7
31.75	19.05	9.55	19.05	30.2	46	88.5	3.8	262
38.1	25.4	11.12	22.23	36.2	58	127.0	5.5	394
44.45	25.4	12.72	25.4	42.4	62	172.4	7.5	473
50.8	31.75	14.29	28.58	48.3	72	226.8	9.7	646

8.15. Determine forces acting to the links

- turning force $F_t = \frac{P_1}{V} = \frac{5.947 \cdot 10^3}{1.68} = 3539.88\text{N}$;

- centrifugal force $F_c = q \cdot V^2 = 3.8 \cdot 1.68^2 = 10.73$ N, where q is the mass per meter run of the chain in *kg* (table 8.2);

- load due to chain deflection $F_f = 9.81 \cdot K_f \cdot q \cdot a$, where $K_f = 1$ for vertical centre line arrangements, $K_f = 6$ for horizontal centre line arrangements and $K_f = 1.5$ for the centre line arrangement on the angle 45^o.

In our case centre line is arranged on the angle 45^o, thus $K_f = 1.5$

$$F_f = 9.81 \cdot 1.5 \cdot 3.8 \cdot 1.423 = 79.57 \text{ N}.$$

8.16. Determine the design load on the shaft

$$F_{shaft} = F_t + 2 \cdot F_f = 3539.88 + 2 \cdot 79.57 = 3699.02 \text{ N}.$$

8.17. Determine the safety factor

$$S = \frac{F_{br}}{F_t \cdot K + F_c + F_f} \geq [S],$$

where F_{br} is the breaking load in N(table 8.2); K is the dynamic factor taking into account the load nature (p.8.4); [S] is standard safety factor (table 8.3).

Table 8.3

Standard factors of safety [S] for PR Roller chains

n1, rpm	Chain pitch t, mm							
	12.7	15.875	19.05	25.4	31.75	38.1	44.45	50.8
50	7.1	7.2	7.2	7.3	7.4	7.5	7.6	7.6
100	7.3	7.4	7.5	7.6	7.8	8.0	8.1	8.3
300	7.9	8.2	8.4	8.9	9.4	9.8	10.3	10.8
500	8.5	8.9	9.4	10.2	11.0	11.8	12.5	-
750	9.3	10.0	10.7	12.0	13.0	14.0	-	-
1000	10.0	10.8	11.7	13.3	15.0	-	-	-
1250	10.6	11.6	12.7	14.5	-	-	-	-

In our case:

F_{br} = 88.5 kN, K = 1.2, [S] = 7.9

$$S = \frac{88.5 \cdot 10^3}{3539.88 \cdot 1.2 + 10.73 + 79.57} = 20.4 > [S].$$

Condition is satisfied.

9. ANALYSIS OF SHAFTS

Let us design the shafts construction and carry out strength analysis of the output shaft if torque at the output shaft T is equal to 400 N·m.

9.1 Determine the minimum diameter of speed reducer shafts

$$d_{min} = \sqrt[3]{\frac{T}{0.2 \cdot [\tau]}},$$

where T is the torque at the shaft in N·mm; [τ] is the allowable tangential stress due to torsion in MPa.

In order to compensate action of bending stresses the allowable tangential stress due to torsion is assumed as down rated. For steels [τ]=15…20 MPa.

Obtained magnitude of d_{min} is rounded off to the greater side according to the following standard series: 20, 21, 22, 23, 24, 25, 26, 28, 30, 32, 34, 36, 38, 40, 42, 45, 48, 50, 52, 55, 58, 60, 65, 70, 75, 80, 85, 90, 95, 100,105, 110, 115, 120, 130, 140, 150.

If the speed reducer shaft is joined with the electrical motor shaft the following condition should be carried out

$$d_{motor} - d_{min} \leq 10 \text{ mm},$$

where d_{motor} is the diameter of the electrical motor shaft (table 9.1).

9.2. Design the construction of speed reducer shafts.

In general purpose speed reducers stepped shafts with solid cross-section are used as a rule.

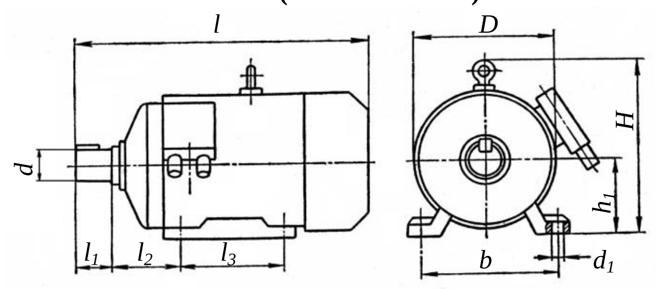
For the input shaft d_{min} is the diameter of the shaft cantilever portion where such elements as a half coupling, a pulley, a sprocket or a pinion may be mounted (Fig.9.1). In order to fix above mentioned elements in the axial direction we use a shoulder which height t_1 may be ranged from 2 to 5 mm depending on the shaft diameter. Recommended values of t_1 are given in table 9.2.

The next shaft portion of diameter $d_2=d_1+2 \cdot t_1$ (the value of d_2 must correspond to standard series) is for installing a seal. Seals are used to prevent bearing assemblies from finding dust and dirt and to remain lubrication of bearings. For general purpose speed reducer lip seals are used more frequently.

In order to reduce friction at the point of contact of the seal with the shaft corresponding portion should be polished. For this purpose this portion is additionally surface hardened to hardness 45-50 HRC.

Table 9.1

Overall and mounting dimensions of series 4A three-phase induction motors (GOST 19523-81)



Type designation	Number of poles	Overall dimensions			Mounting dimensions						
		L	H	D	d	h_1	l_1	l_2	l_3	b	d_1
4A90L	2;4;6;8	350	243	208	24	90	50	56	125	140	10
4A100S		365	265	235	28	100	60	63	132	160	12
4A100L		395	280						140		
4A112M		452	310	260	32	112	80	70	140	190	12
4A132S		480	350	302	38	132	80	89	178	216	12
4A132M		530									
4A160S	2	624	430	358	42	160	110	121	178	254	15
	4;6;8				48						
4A160M	2	667			42				210		
	4;6;8				48						

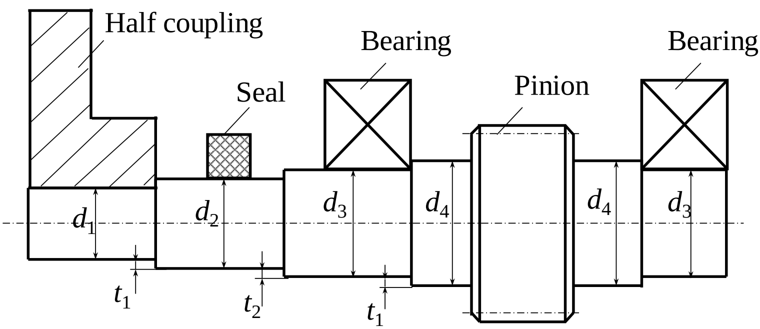


Fig.9.1. Input shaft

Table 9.2

Recommended values of t_1 and t_2

d, mm	20 - 50	55 - 120
t_1, mm	2; 2.5	5
t_2, mm	1; 1.5	2.5

The next portion of the shaft is for mounting a bearing. The diameter of this portion is determined as

$$d_3 = d_2 + 2 \cdot t_2,$$

where t_2 is the height of the shoulder that is used for differentiation of shaft surfaces by hardness and roughness. Recommended values of t_2 are given in table 9.2. It is necessary to note that t_2 should be chosen to obtain shaft diameter d_3 ended by 0 or 5. It is explained by the fact that bearings are standard elements with the inner ring diameter ended by 0 or 5.

Bearings must be fixed in the axial direction. That is why the diameter of the next portion of the shaft, where a pinion or gear is installed, is determined as

$$d_4 = d_3 + 2 \cdot t_1.$$

Obtained value of d_4 should correspond to standard series.

A pinion may be made either as solid with the shaft or as an individual part. In order to increase shaft strength and rigidity it is recommended to use pinion shafts.

The last portion of the shaft is for installing the second bearing. The diameter of this portion should be the same as for the first bearing. In our case it is d_3.

The output shaft has the same design as the input one. But in contrast to the latter a gear is mounted on the shaft portion of diameter d_4 (Fig.9.2). In order to fix the gear in the axial direction we should provide for the shoulder of height t_1. That is why the diameter of the next portion of the shaft is $d_5 = d_4 + 2 \cdot t_1$.

For our case we should design the output shaft where a helical spur gear is mounted. We will have the following diameters:

$$d_{min} = \sqrt[3]{\frac{400 \cdot 10^3}{0.2 \cdot [20]}} = 46.4 \text{ mm}.$$

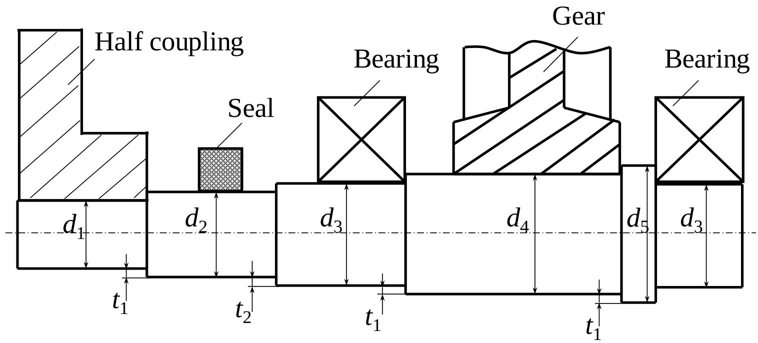


Fig.9.2. Output shaft

Let us assume $d_{min} = d_1 = 50$ mm (according to the standard series);

$d_2 = d_1 + 2{\cdot}t_1 = 50 + 2{\cdot}\ 2.5 = 55$ mm;

$d_3 = d_2 + 2{\cdot}t_2 = 55 + 2{\cdot}\ 1.5 = 58$ mm (should be chosen to obtain shaft diameter d_3 ended by 0 or 5);

$d_4 = d_3 + 2{\cdot}t_1 = 60 + 2{\cdot}\ 5 = 70$ mm;

$d_5 = d_4 + 2{\cdot}t_1 = 70 + 2{\cdot}5 = 80$ mm.

For bevel pinion shafts (Fig.9.3) and worm shafts (Fig.9.4) we should introduce the additional portion of diameter d_2' between portions of diameters d_2 and d_3. This portion is necessary to install a slotted nut for adjusting clearances in the bearing. Diameter d_2' should be chosen according to table 12.1.

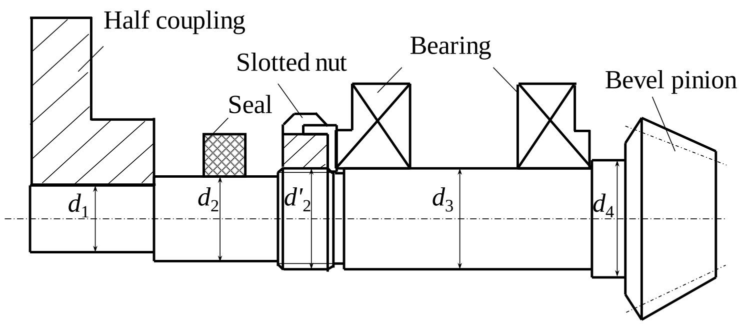


Fig.9.3. Bevel pinion shaft

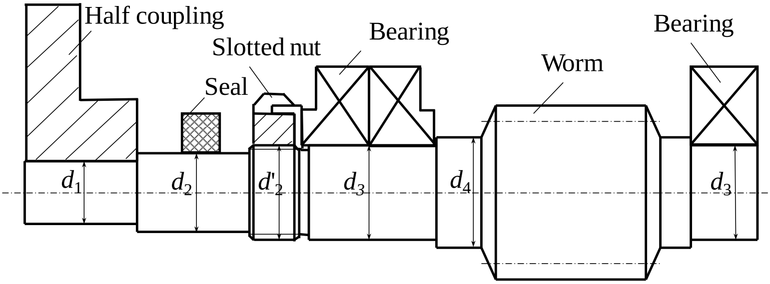


Fig.9.4. Worm shaft

9.3. Determine sizes of elements that are mounted on the shaft.
9.3.1. Pinion.
Face width of the pinion $b^p = b^g + 5$.
9.3.2. Spur and bevel gears (Fig.9.5, *a*, *b*)

- thickness of the rim $\delta = (3\ldots4)\cdot m$;
- thickness of the web $C = (0.2\ldots0.3)\cdot b^g$;
- diameter of the hub $d_{hub}=(1.5\ldots1.7)\cdot d_{shaft}$;
- length of the hub $l_{hub}=(1.2\ldots1.5)\cdot d_{shaft}$;
- diameter of the hole $d_{hole} = \dfrac{D_0 - d_{hub}}{4}$;
- diameter of the hole centre line $D_c = \dfrac{D_0 + d_{hub}}{2}$;
- fillet radii $R \geq 6$ mm and angle $\gamma \geq 7^{o}$.

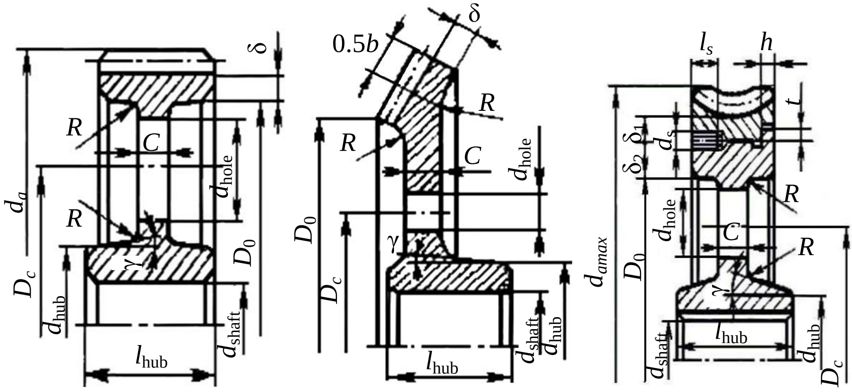


Fig.9.5. Spur gear (*a*), bevel gear (*b*), worm gear (*c*)

9.3.3. Worm gear (Fig 9.5, *c*).

- thickness of the bronze ring $\delta_1 = 2 \cdot m$;
- thickness of the steel rim $\delta_2 = 2 \cdot m$;
- thickness of the web $C = (0.2 \ldots 0.3) \cdot b^g$;
- diameter of the hub $d_{hub} = (1.5 \ldots 1.7) \cdot d_{shaft}$;
- length of the hub $l_{hub} = (1.2 \ldots 1.5) \cdot d_{shaft}$;
- diameter of the screw $d_s = (1.2 \ldots 1.4) \cdot m$;
- length of the screw $l_s = (0.3 \ldots 0.4) \cdot b^g$;
- diameter of the hole $d_{hole} = \dfrac{D_0 - d_{hub}}{4}$;
- diameter of the hole centre line $D_c = \dfrac{D_0 + d_{hub}}{2}$;

- width and height of the collar $h = 0.15 \cdot b^g$; $t = 0.8 \cdot h$
- fillet radii $R \geq 6$ mm and angle $\gamma \geq 7^o$.

9.3.4. Bearings.

The type of a bearing depends on the load it can withstand.

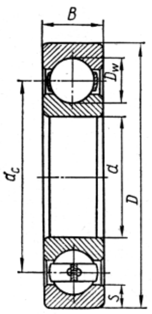
Shafts where **straight spur gears** are located should be installed in bearings that withstand radial load only. For this purpose we use radial ball bearings of lightweight series (table 9.3).

Shafts of **helical spur gears** should be mounted on angular contact ball bearings of lightweight series (table 9.4) because they can perceive both radial and axial loads. Shafts of **bevel gears** and a **worm gear** are mounted on tapered roller bearings of lightweight series (table 9.5). It is explained by the fact that they can withstand heavy axial loads.

Worm shafts are installed in two tapered roller bearings (table 9.5) and one radial ball bearing of lightweight series (table 9.3).

Table 9.3

Single - Row Radial Ball Bearings (GOST 8338-75). Lightweight series

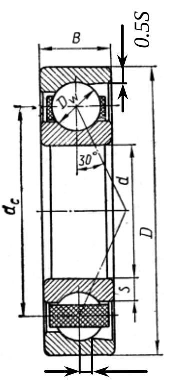


$d_c = 0.5\cdot(D+d)$
$D_w = 0.32\cdot(D-d)$
$S = 0.15\cdot(D-d)$

Type designation	d	D	B	r	Basic load rating C_r, kN	Static load rating C_0, kN
204	20	47	14	1.5	12.7	6.2
205	25	52	15	1.5	14.0	6.95
206	30	62	16	1.5	19.5	10.0
207	35	72	17	2	25.5	13.7
208	40	80	18	2	32.0	17.8
209	45	85	19	2	33.2	18.6
210	50	90	20	2	35.1	19.8
211	55	100	21	2.5	43.6	25.0
212	60	110	22	2.5	52.0	31.0
213	65	120	23	2.5	56.0	34.0
214	70	125	24	2.5	61.8	37.5
215	75	130	25	2.5	66.3	41.0
216	80	140	26	3	70.2	45.0
217	85	150	28	3	83.2	53.0
218	90	160	30	3	95.6	62.0
219	95	170	32	3.5	108.0	69.5
220	100	180	34	3.5	124.0	79.0

Table 9.4

Single-row angular-contact ball bearing (GOST 831-75). Lightweight narrow series (α=12° for 36000 and α=26° for 46000)



0.15B

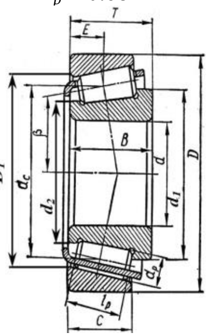
$d_c = 0.5\cdot(D+d)$
$D_w = 0.32\cdot(D-d)$
$S = 0.15\cdot(D-d)$

Type designation	d	D	B	T	r	r_1	Load rating, kN	
							C_r	C_0
36204	20	47	14	14	1.5	0.5	15.7	8.31
36205	25	52	15	15	1.5	0.5	16.7	9.10
36206	30	62	16	16	1.5	0.5	22.0	12.0
36207	35	72	17	17	2	1	30.8	17.8
36208	40	80	18	18	2	1	38.9	23.2
36209	45	85	19	19	2	1	41.2	25.1
36210	50	90	20	20	2	1	43.2	27.0
36211	55	100	21	21	2.5	1.2	58.4	34.2
36212	60	110	22	22	2.5	1.2	61.5	39.3
46213	65	120	23	23	2.5	1.2	69.4	46.8
36214	70	125	24	24	2.5	1.2	80.2	54.8
46215	75	130	25	25	2.5	1.2	78.4	53.8
36216	80	140	26	26	3	1.5	93.6	65.0
36217	85	150	28	28	3	1.5	101.0	70.8
36218	90	160	30	30	3	1.5	118.0	83.0
36219	95	170	32	32	3.5	2	134.0	95.0
36220	100	180	34	34	3.5	2	124	118
36222	110	200	38	38	3.5	2	146	137

Table 9.5

Single-row tapered-roller bearings (GOST 333-79). Lightweight series, α=12÷18°

$d_c = 0.5 \cdot (D+d)$
$d_p = 0.25 \cdot (D-d)$
$l_p = 0.68 \cdot B$



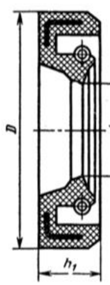
Type designation	d	D	T	B	C	d_1	d_2	D_1	Load rating, kN C_r	Load rating, kN C_0	e
7202	15	35	11.75	11	9	25	20	27	105	6.1	0.45
7203	17	40	13.25	12	11	27	22	32	14.0	9.0	0.31
7204	20	47	15.25	14	12	32	26	38	21.0	13.0	0.36
7205	25	52	16.25	15	13	37	31	43	24.0	17.5	0.36
7206	30	62	17.25	16	14	45	38	52	31.5	22.0	0.36
7207	35	72	18.25	17	15	52	44	60	38.5	26.0	0.37
7208	40	80	19.25	19	16	58	50	67	46.5	32.5	0.38
7209	45	85	20.75	20	16	63	55	72	50.0	33.0	0.41
7210	50	90	21.75	21	17	67	58	78	56.0	40.0	0.37
7211	55	100	22.75	21	18	75	65	85	65.0	46.0	0.41
7212	60	110	23.75	23	19	82	72	95	78.0	58.0	0.35
7214	70	125	25.25	26	21	95	83	108	96.0	82.0	0.37
7215	75	130	27.25	26	22	100	88	113	107.0	84.0	0.39
7216	80	140	28.25	26	22	110	97	121	112.0	95.2	0.42
7217	85	150	30.50	28	24	113	100	129	130.0	109.0	0.43
7218	90	160	32.50	31	26	121	107	138	158.0	125.0	0.38
7219	95	170	34.50	32	27	129	114	145	168.0	131.0	0.41
7220	100	180	37.00	34	29	137	122	154	185.0	146.0	0.41

9.3.5. Lip seal.

Dimensions of lip seals are given in table 9.6.

Table 9.6

Standard lip seals (*GOST* 8752-79)



d	D	h_1	d	D	h_1
20;21;22	40	10	55;56;58	80	12
24	41		60	85	
25	42		63;65	90	
26	45		70;71	95	
30;32	52		75	100	
35;36;38	58		80	105	
40	60		85	110	
42	62		90;95	120	
45	65		100	125	
48;50	70		105	130	
52	75		110	135	

9.3.6. Sprocket (Fig 9.6)

- diameter of the hub $d_{hub}=(1.5\ldots1.7)\cdot d_{shaft}$;
- length of the hub $l_{hub}=(1.2\ldots1.5)\cdot d_{shaft}$;
- thickness of the web $C = 0.93\cdot B_{bush}$,
  where B_{bush} is the bush width (table 8.2).

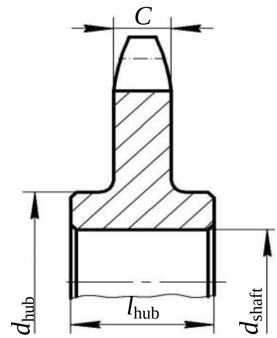


Fig.9.6.Sprocket

9.3.7. Pulley (Fig. 9.7)

- diameter of the hub $d_{hub}=(1.8\ldots2.2)\cdot d_{shaft}$;
- length of the hub $l_{hub}=(1.5\ldots2.2)\cdot d_{shaft} \le B$, where B is the pulley width;
- thickness of the rim $\delta=0.005\cdot d+3$ mm;
- thickness of the web $C=(1.0\ldots1.2)\cdot\delta$ (for pulleys of $d \le 300$ mm);
- number of arms z (for pulleys of $d \ge 300$ mm)
  if $300 < d \le 500$ mm than z=4
  if $d > 500$ mm than z=6
- design thickness of the arm

$$h = \sqrt[3]{\frac{38F_t d}{z[\sigma_b]}},$$

where F_t is turning force obtained in p.7.8; d is diameter of the pulley; z is number of arms; $[\sigma_b]$ is allowable bending stress (for cast irons $[\sigma_b]$=30 MPa)

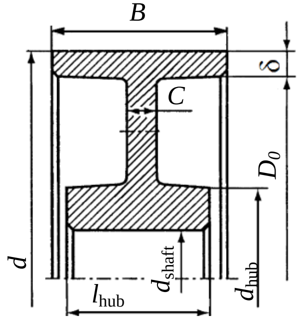


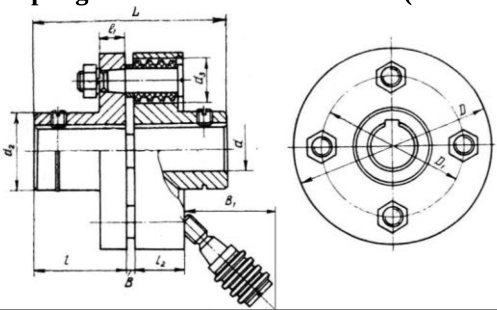
Fig.9.7.Pulley

9.3.8. Coupling.

In mechanical drives with single stage speed reducers we use a coupling with rubber-bushed studs. Dimensions of this coupling are given in table 9.7.

Table 9.7

Standard couplings with rubber bushed studs (GOST 21424 – 93)



<table>
<tr><th rowspan="3">Torque T, N·m</th><th rowspan="3">d</th><th rowspan="3">D, not more</th><th colspan="2">L</th><th colspan="2">l</th><th rowspan="3">D_1</th><th rowspan="3">l_1</th><th rowspan="3">l_2</th><th rowspan="3">d_2</th><th rowspan="3">d_3</th><th rowspan="3">B</th><th rowspan="3">B_1</th><th rowspan="3">d_1</th><th rowspan="3">Number of studs</th></tr>
<tr><th colspan="4">Modification</th></tr>
<tr><th>1</th><th>2</th><th>1</th><th>2</th></tr>
<tr><td rowspan="2">31.5</td><td>16</td><td rowspan="2">90</td><td rowspan="2">81</td><td rowspan="2">60</td><td rowspan="2">40</td><td rowspan="2">28</td><td rowspan="2">63</td><td rowspan="7">16</td><td rowspan="7">20</td><td>30</td><td rowspan="7">20</td><td rowspan="7">4</td><td rowspan="7">28</td><td rowspan="4">M8</td><td rowspan="4">4</td></tr>
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<tr><td rowspan="7">2000</td><td>63</td><td rowspan="7">250</td><td rowspan="4">288</td><td rowspan="4">218</td><td rowspan="4">140</td><td rowspan="4">105</td><td rowspan="4">170</td><td rowspan="7">30</td><td rowspan="7">48</td><td rowspan="4">130</td><td rowspan="7">48</td><td rowspan="7">8</td><td rowspan="7">70</td><td rowspan="7">M16</td></tr>
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<tr><td>85</td></tr>
<tr><td>90</td></tr>
</table>

SKETCH LAYOUT

After designing a shaft construction and determination of sizes of all elements mounted on a shaft it is necessary to find distances between elements which are located on a shaft. For this purpose a sketch layout of a speed reducer should be made. In this case a speed reducer is drawn in one projection (top or front view) to scale 1:1 on profile paper.

Let us consider as an example of plotting a sketch layout of single stage spur gear speed reducer.

1. Plot a spur gears taking into account dimensions which were determined during strength analysis and in p.9.3.1 and 9.3.2. We will begin from plotting the centre distance, pitch circle diameters, addendum and dedendum circle diameters of a pinion and a gear. The engagement of gears has to be represented as in Fig. 9.8.
2. Determine disposition of inner walls of a speed reducer. In order to eliminate contact of gears with a wall it is recommended to locate the inner wall by distance 10 mm with respect to a gear hub and by distance 20 mm with respect to gear face end.
3. Determine disposition of bearings. In this case we should take into account that inner surface of a bearing assembly has to be protected from grease washing out. For this purpose grease retaining rings are used (Fig.12.12). The width of these rings is ranged from 10 to 12 mm. That is why bearings are located by distance 10 mm with respect to speed reducer inner wall.
4. Plot bearings for input and output shafts using dimensions from tables 9.3-9.5.
5. Determine disposition of outer walls of a speed reducer. Outer wall is located by distance $0.5 \cdot B_{max}$, where B_{max} is the width of the largest bearing.
6. In a speed reducer bearing assemblies have to be protected by bearing caps from the side of speed reducer outer walls. The width of these caps is ranged from 8 to 12 mm. Let us draw straight lines by distance 10 mm with respect to speed reducer outer walls to determine approximate disposition of bearing caps.
7. Plot lip seals for input and output shafts using dimensions from table 9.6. A seal is located in a bearing cap by distance 3-4 mm with respect to bearing cap face end.

8. Make an arc along input and output shaft axes by distance 20 mm with respect to bearing caps to determine disposition of the first shoulder of a shaft.

9. Lay out length of an element mounted on the cantilever portion of the shaft along input and output shaft axes. In this case we obtain extreme points of the input and output shafts.

10. Draw speed reducer shafts taking into account their construction and diameters of corresponding portions

Examples of sketch layout of single stage speed reducers are shown in Fig. 9.8-9.10.

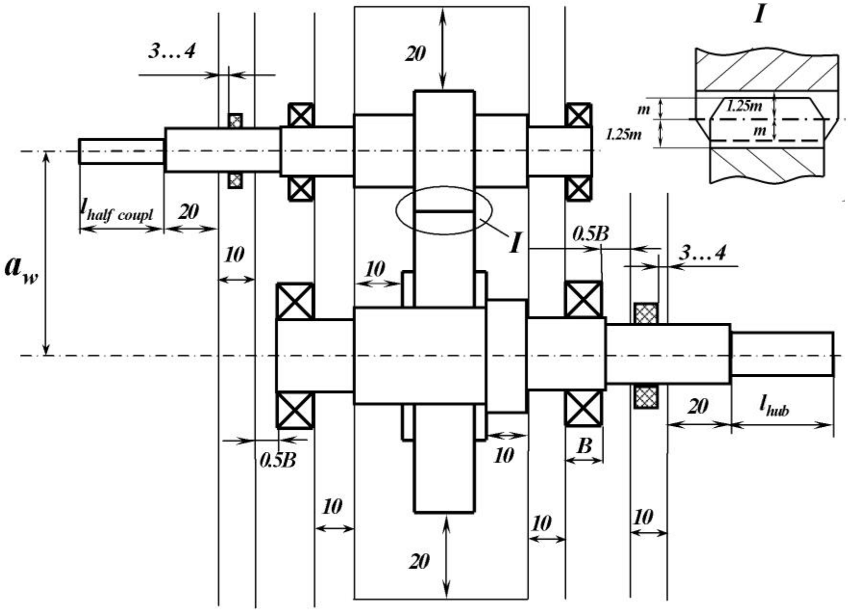


Fig. 9.8. Sketch layout of single stage spur gear speed reducer

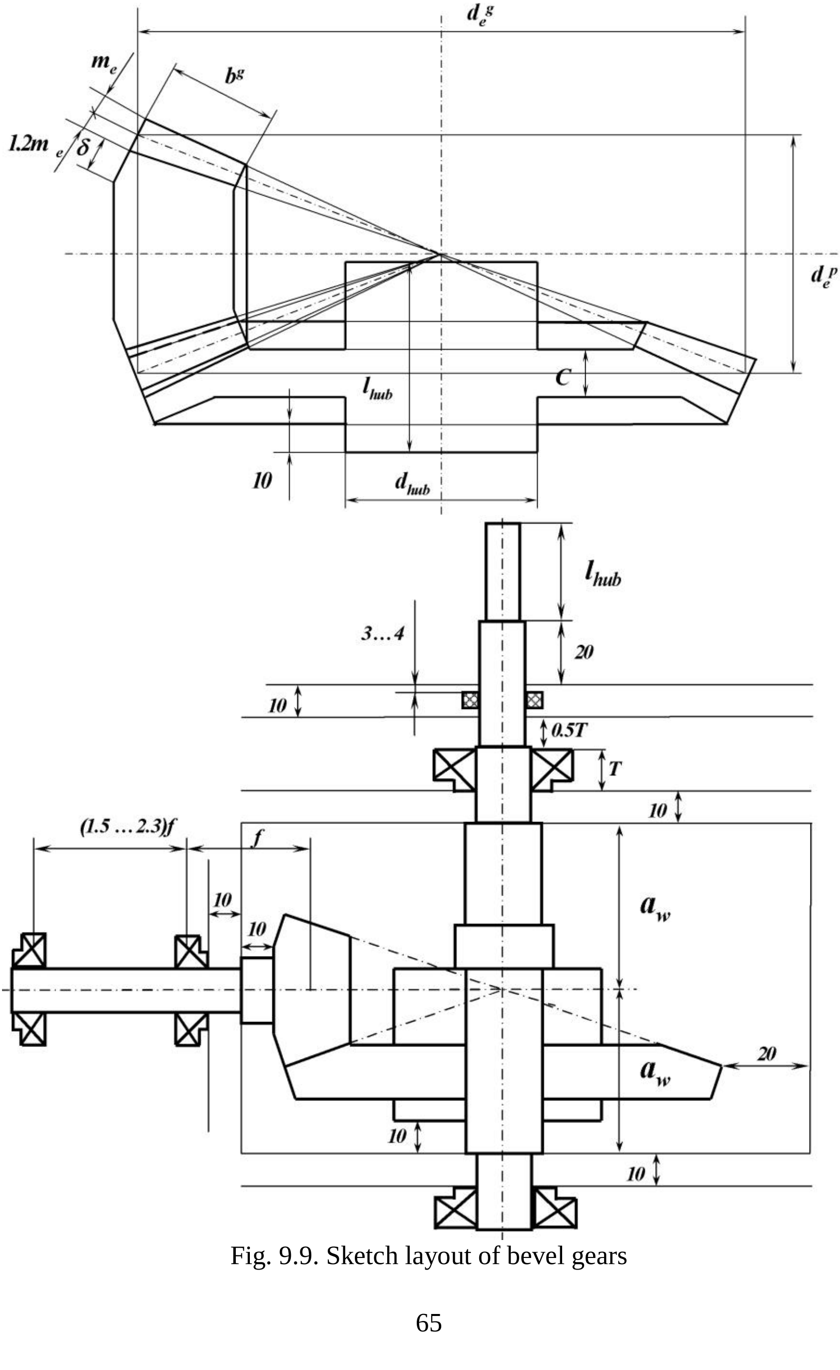


Fig. 9.9. Sketch layout of bevel gears

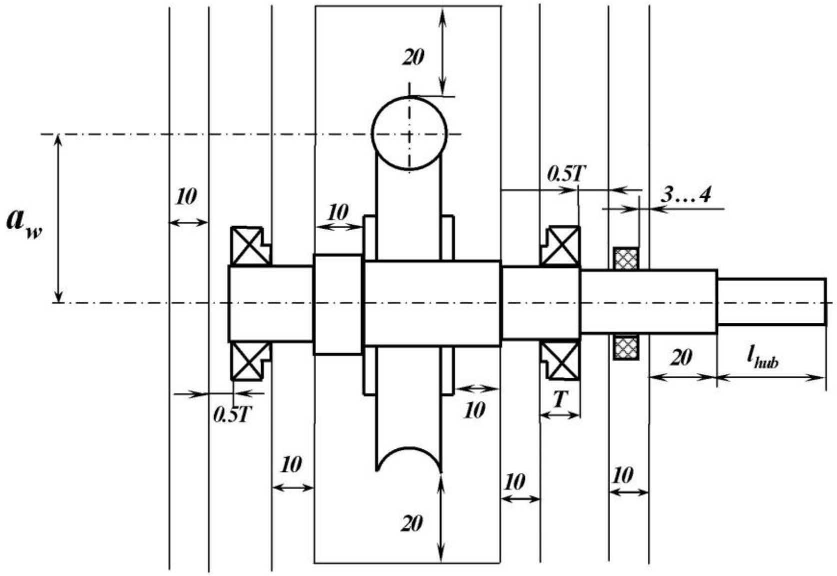


Fig. 9.10. Sketch layout of single stage worm gear speed reducer

10. SHAFT ANALYSIS FOR STRENGTH

Let us carry out the analysis of the shaft for strength if torque at the gear shaft T_g is equal to 370 N·m and from the previous analysis we have that turning (tangential) force F_t = 2467 N; F_r = 898 N; F_a = 346.7 N; d_g = 300 mm; d = 70 mm (the shaft portion diameter where the gear is mounted), and from the sketch layout a = 63 mm; b = 63 mm; c = 164 mm.

10.1. Select the material of the shaft.

The main material of shafts is medium-carbon or alloy steels of grade Steel 40 (0.4C), Steel 45 (0.45C), Steel 40X (0.4C-Cr) and others with hardness H ≥ 200 BHN.

Mechanical characteristics of steels are given in table 10.1.

Table 10.1

Mechanical Characteristics of Basic Shaft Materials

Steel grade	Blank diameter, mm(max)	Brinell hardness,	σ_{ul}	σ_y	Heat treatment
			MPa		
Steel 45 (0.45C)	160	170 to 217 BHN	600	340	Normalizing
Steel 45 (0.45C)	200	192 to 240 BHN	750	450	Martempering
Steel 40X (0.40C-Cr)	200	230 to 260 BHN	850	550	Martempering
Steel 40X (0.40C-Cr)	120	260 to 280 BHN	950	700	Martempering
Steel 40XH (0.40C-Cr-Ni)	200	230 to 300 BHN	850	600	Martempering
Steel 35XM (0.35C-Cr-Mo)	200	>240 BHN	900	800	Martempering
Steel 40XHM (0.40C-Cr-Ni-Mo)	160	>302 BHN	110 0	900	Martempering

For example, let us choose Steel 40X (0.4C-Cr) heat treated by martempering to hardness ranged from 230 to 260 BHN, σ_{ul} = 850 MPa, σ_y = 550 MPa.

10.2. Analyse a shaft for static strength.

10.2.1. Plot the analytical model of a shaft and apply all acting forces (Fig. 10.1). In this case a shaft is considered as a beam mounted on two supports, in particular on one immovable hinge support and one movable hinge support.

Let us analyse forces which act on a shaft.

It is necessary to remember that in the engagement of straight spur gears turning force F_t and radial force F_r develop (radial force is always directed to the centre of rotation of the gear). In the engagement of helical spur gears, bevel gears and worm gearing besides turning and radial forces axial force F_a develops. This force is parallel to the shaft axis. Values of mentioned above forces were found during of analysis corresponding gear drives for strength.

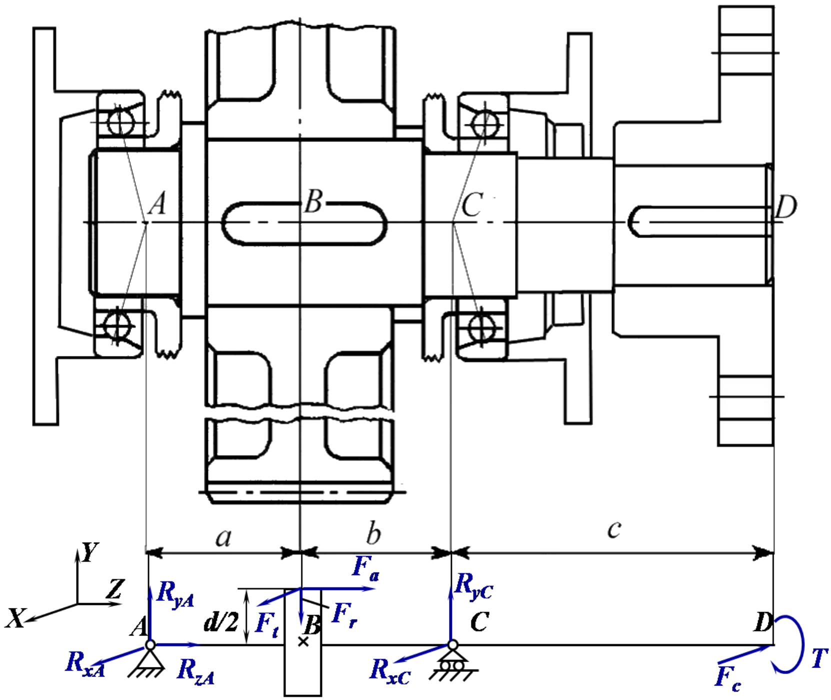


Fig. 10.1. Analytical model of the output shaft

On the cantilever portion of the shaft either a pulley, or a sprocket, or a pinion, or a half coupling may be mounted.

If a pulley or sprocket is installed on the shaft a force acting on the shaft from the side of the element is directed to side of the mating pulley (sprocket) along the centre line. The value of this force was determined during analysis of the corresponding mechanical drive.

If a half coupling is installed on the shaft, the first loads the shaft by the torque. Additionally, because of misalignment of shafts joined by the coupling the latter exerts upon the shaft an additional force F_c. This force may be directed to any side (with respect to turning force F_t). But for analytical models we will consider the worst case when this force is directed opposite to F_t. In this case the shaft deformations are maximum.

For single stage speed reducers the value of this force F_c is determined in the following way:

- $F_c = 125 \cdot \sqrt{T}$;

where T is the torque at the shaft in N·m.

10.2.2. Plot the analytical model of the shaft in the vertical plane and transfer all forces to the shaft (Fig. 10.2). It is necessary to note that according to the theoretical mechanics as a result of transferring parallel forces to any point the additional moment develops. In our case it is axial force F_a that is parallel to the shaft axis. That is why the additional moment is determined as

$$M_a = F_a \cdot \frac{d^g}{2},$$

where d^g is the pitch circle diameter of the gear.

So $M_a = 346.7 \cdot \dfrac{300}{2} = 52.005 \cdot 10^3\,\mathrm{N \cdot mm}$

$$F_c = 125 \cdot \sqrt{T} = 125 \cdot \sqrt{370} = 2404.4\mathrm{N}$$

10.2.3. Determine vertical support reacting R_{yA} and R_{yC}. For this purpose we should consider the equilibrium of the beam and set up equations of moments with respect to points A and C:

$$\sum M_A^v = 0, \quad \sum M_C^v = 0.$$

$$\sum M_A = 0: \quad -F_r \cdot a - M_a + R_{yC} \cdot (a+b) = 0;$$

$$R_{yC} = \frac{F_r \cdot a + M_a}{a+b} = \frac{898 \cdot 63 + 52.005 \cdot 10^3}{63+63} = 861.74\mathrm{N};$$

$$\sum M_c = 0: \quad -R_{yA} \cdot (a+b) + F_r \cdot b - M_a = 0;$$

$$R_{yA} = \frac{F_r \cdot b - M_a}{a+b} = \frac{898 \cdot 63 - 52.005 \cdot 10^3}{63+63} = 36.26\text{N};$$

For checking we set up equation of forces that act in the vertical plane of the shaft. The sum of these forces should give zero ($\sum F_i^v = 0$).

$$\sum F_{yi} = 0: \qquad R_{yA} - F_r + R_{yC} = 0.$$

$$36.26 - 898 + 861.74 = 0.$$

10.2.4. Plot the diagram of bending moments in the vertical plane (M_b^v) (Fig. 10.2).

$$0 \le x \le a; \qquad M_y = R_{yA} \cdot x;$$

$$M_y(0) = 0; \qquad M_y(a) = R_{yA} \cdot a = 36.26 \cdot 63 = 2.28 \cdot 10^3\,\text{N} \cdot \text{mm};$$

$$a \le x \le a+b; \qquad M_y = R_{yA} \cdot x + M_a - F_r \cdot (x-a);$$

$$M_y(a) = R_{yA} \cdot a + M_a = 36.26 \cdot 63 + 52.005 \cdot 10^3 = 54.29 \cdot 10^3\,\text{N} \cdot \text{mm};$$

$$M_y(a+b) = R_{yA} \cdot (a+b) + M_a - F_r \cdot b =$$

$$= 36.26 \cdot (63+63) + 52.005 \cdot 10^3 - 898 \cdot 63 = 0;$$

10.2.5. Plot the analytical model of the shaft in the horizontal plane and transfer all forces to the shaft (Fig. 10.2). In this case as a result of parallel transferring force F_t the torque T develops

$$\text{T} = \text{F}_\text{t} \cdot \frac{\text{d}^\text{g}}{2} = 2467 \cdot \frac{300}{2} = 370 \cdot 10^3\,\text{N} \cdot \text{mm}.$$

10.2.6. Determine horizontal support reacting forces R_{XA} and R_{XC}. For this purpose we should set up equations of moments with respect to points *A* and *C*:

$$\sum M_A^h = 0, \qquad \sum M_C^h = 0.$$

$$\sum M_A = 0: \qquad F_t \cdot a + R_{xC} \cdot (a+b) - F_c \cdot (a+b+c) = 0;$$

$$R_{xC} = \frac{-F_t \cdot a + F_c \cdot (a+b+c)}{a+b} =$$

$$= \frac{-2467 \cdot 63 + 2404.4 \cdot (63+63+164)}{63+63} = 4300.44N;$$

$$\sum M_c = 0: \qquad -R_{xA}\cdot(a+b) - F_t\cdot b - F_c\cdot c = 0;$$

$$R_{xA} = \frac{-F_t\cdot b - F_c\cdot c}{a+b} = \frac{-2467\cdot 63 - 2404.4\cdot 164}{63+63} = -4363.04\text{N};$$

For checking we find the sum of all forces that acts in the horizontal plane of the shaft. This sum should be equal to zero ($\sum F_i^h = 0$).

$$\sum F_{xi} = 0: \qquad R_{xA} + F_t + R_{xC} - F_c =$$
$$-4363.04 + 2467 + 4300.44 - 2404.4 = 0.$$

10.2.7. Plot the diagram of bending moments in the horizontal plane ($\mathrm{M_b^h}$) (Fig. 10.2).

$$0 \le x \le a; \qquad M_x = R_{xA}\cdot x; \qquad M_x(0) = 0;$$
$$M_x(a) = R_{xA}\cdot a = -4363.04\cdot 63 = -274.87\cdot 10^3\,\text{N}\cdot\text{mm};$$

$$a \le x \le a+b; \qquad M_x = R_{xA}\cdot x + F_t\cdot(x-a);$$
$$M_x(a) = R_{xA}\cdot a = -4363.04\cdot 63 = -274.87\cdot 10^3\,\text{N}\cdot\text{mm};$$
$$M_x(a+b) = R_{xA}\cdot(a+b) + F_t\cdot b =$$
$$= -4363.04\cdot(63+63) + 2467\cdot 63 = -394.32\cdot 10^3\,\text{N}\cdot\text{mm};$$
$$0 \le x \le c; \qquad M_x = F_c\cdot x; \qquad M_x(0) = 0;$$
$$M_x(c) = -F_c\cdot c = -2404.4\cdot 164 = -394.32\cdot 10^3\,\text{N}\cdot\text{mm}.$$

10.2.8. Plot the diagram of total bending moments (Fig. 10.2) taking into account that

$$M_\Sigma = \sqrt{(M_x)^2 + (M_y)^2}\,.$$
$$M_\Sigma(A) = 0;$$
$$M_\Sigma(B) = \sqrt{\left(2.28\cdot 10^3\right)^2 + \left(274.87\cdot 10^3\right)^2} = 274.88\cdot 10^3\,\text{N}\cdot\text{mm};$$
$$M_\Sigma(B) = \sqrt{\left(54.29\cdot 10^3\right)^2 + \left(274.87\cdot 10^3\right)^2} = 280.18\cdot 10^3\,\text{N}\cdot\text{mm};$$
$$M_\Sigma(C) = \sqrt{0 + \left(394.32\cdot 10^3\right)^2} = 394.32\cdot 10^3\,\text{N}\cdot\text{mm};$$
$$M_\Sigma(D) = 0$$

10.2.9. Plot the twisting moment diagram (Fig. 10.2).

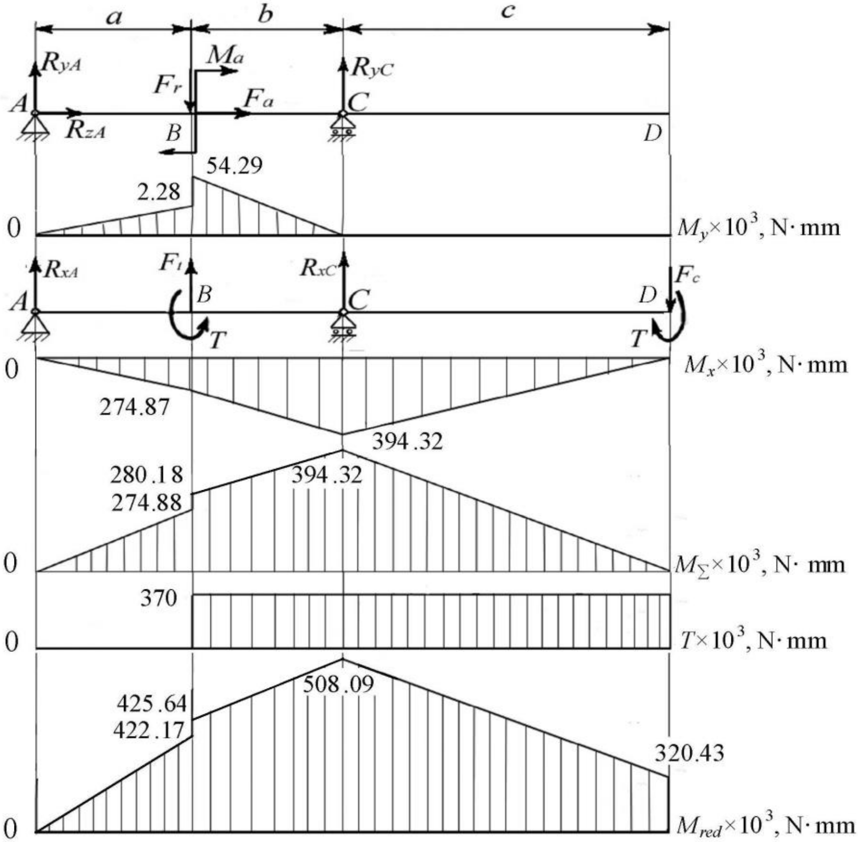


Fig. 10.2. Diagrams of moments for the shaft analytical model

10.2.10. Plot the reduced moments (Fig. 10.2) diagram taking into account that M_{red}

$$M_{red} = \sqrt{M_{\Sigma}^2 + 0.75 \cdot T^2}\ .$$

$$M_{red}(A) = 0\ ;$$

$$M_{red}(B) = \sqrt{(274.88 \cdot 10^3)^2 + 0.75 \cdot (370 \cdot 10^3)^2} = 422.17 \cdot 10^3\,\mathrm{N \cdot mm}\,;$$

$$M_{red}(B) = \sqrt{(280.18 \cdot 10^3)^2 + 0.75 \cdot (370 \cdot 10^3)^2} = 425.64 \cdot 10^3\,\mathrm{N \cdot mm}\,;$$

$$M_{red}(C) = \sqrt{(394.32 \cdot 10^3)^2 + 0.75 \cdot (370 \cdot 10^3)^2} = 508.09 \cdot 10^3\,\mathrm{N \cdot mm}$$

$$M_{red}(D) = \sqrt{0 + 0.75 \cdot (370 \cdot 10^3)^2} = 320.43 \cdot 10^3\,\mathrm{N \cdot mm}$$

10.2.11. For the critical section of the shaft (where the reduced moment is maximum) we check the shaft for static strength

$$\sigma_b = \frac{M_{rmax}}{0.1 \cdot d^3} \le [\sigma_b],\ \sigma_b = \frac{508.09 \cdot 10^3}{0.1 \cdot 60^3} = 23.52\mathrm{MPa}\ ,$$

$$23.52 \le 120\mathrm{MPa}$$

where d is the diameter of the shaft at the critical section; $[\sigma_b]$ is the allowable bending stress. For steels $[\sigma_b]$ = 120 MPa.

Condition is satisfied.

If $\sigma_b > [\sigma_b]$ we must increase the diameter of the shaft at the critical section.

10.3. Analyze the shaft for fatigue strength.

10.3.1. Determine the limit of endurance in bending and in torsion for the shaft material:

for carbon steels: $\sigma_{-1} = 0.43 \cdot \sigma_{ul}$,

for alloy steels: $\sigma_{-1} = 0.35 \cdot \sigma_{ul} + 120$,

$$\tau_{-1} = (0.2 \ldots 0.3) \cdot \sigma_{ul},$$

where σ_{ul} is the ultimate strength of the material (table 10.1).

In our case for Steel 40X (0.4C-Cr)

$$\sigma_{-1} = 0.35 \cdot 850 + 120 = 417.5\mathrm{MPa}$$

$$\tau_{-1} = 0.25 \cdot 850 = 212.5\mathrm{MPa}$$

10.3.2. Determine peak magnitudes of bending and torsion stresses (σ_p, τ_p) at the critical sections of the shaft.

Critical section is a section where the total moment M_Σ is maximum. It may be a section where a gear or a bearing is located.

$$\sigma_p = \frac{M_\Sigma}{0.1 \cdot d^3} = \frac{394.32 \cdot 10^3}{0.1 \cdot 60^3} = 18.25 \text{MPa},$$

$$\tau_p = 0.5 \cdot \frac{T}{0.2 \cdot d^3} = 0.5 \cdot \frac{370 \cdot 10^3}{0.2 \cdot 60^3} = 4.28 \text{MPa},$$

where d is the diameter of the shaft at the critical section.

10.3.3. Determine mean components of the bending and torsion stresses (σ_m, τ_m).

If axial force F_a<1000 N we assume $\sigma_m = 0$ and $\tau_m = \tau_p$.
Otherwise

$$\sigma_m = \frac{F_a}{\frac{\pi \cdot d^2}{4}}, \qquad \tau_m = \tau_p.$$

In our case F_a = 346.7 N < 1000 N, so $\sigma_m = 0$ and $\tau_m = \tau_p$ = 4.28 MPa.

10.3.4. Determine factors ψ_σ and ψ_τ of mean stress components

- for carbon steels $\psi_\sigma = 0.1$ and $\psi_\tau = 0.05$;
- for alloy steels $\psi_\sigma = 0.15$ and $\psi_\tau = 0.1$.

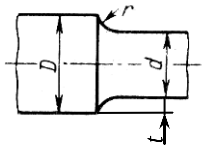
In our case $\psi_\sigma = 0.15$ and $\psi_\tau = 0.1$.

10.3.5. Determine effective stress concentration factors K_σ and K_τ. For this purpose we use table 10.2.

If the critical section of the shaft is a section where a bearing is mounted we will use as stress concentrator interference fit. If a gear is installed at the critical section a keyed portion is considered as the stress concentrator.

Table 10.2

Stress Concentration Factors for Shafts



A. *Filleted Transition Regions*

Values of fillet radius *r*

d	r_{max}
Over 18 to 30	1.6
Over 30 to 50	2.0
Over 50 to 80	2.5
Over 80 to 120	3.0

Values of K_σ and K_τ

t/r	r/d	K_σ at σ_{ul} (MPa) of				K_τ at σ_{ul} (MPa) of			
		500	700	900	1200	500	700	900	1200
2	0.01	1.55	1.6	1.65	1.7	1.4	1.4	1.45	1.45
	0.02	1.8	1.9	2.0	2.15	1.55	1.6	1.65	1.7
	0.03	1.8	1.95	2.05	2.25	1.55	1.6	1.65	1.7
3	0.01	1.9	2.0	2.1	2.2	1.55	1.6	1.65	1.75
	0.02	1.95	2.1	2.2	2.4	1.6	1.7	1.75	1.85
	0.03	1.95	2.1	2.25	2.45	1.65	1.7	1.75	1.9

B. Values of K_σ and K_τ for Keyed portions of Shafts

σ_{end}, MPa	K_σ for keyseats cut with		K_τ
	End mills	Side mills	
500	1.60	1.40	1.40
700	1.90	1.55	1.70
900	2.15	1.70	2.05
1200	2.50	1.90	2.40

C. Values of K_σ and K_τ for Splined and Threaded Portions of Shafts

σ_{end}, MPa	K_σ for		K_τ for		
	Splined portions	Threaded portions	Parallel-sides splines	Involute splines	Threaded portions
500	1.45	1.80	2.25	1.45	1.50
700	1.60	2.20	2.45	1.50	1.65
900	1.70	2.45	2.65	1.55	2.10
1200	1.75	2.90	2.80	1.60	2.39

D. Values of K_σ/K_d and K_τ/K_d at Interference-Fit Joints

Shaft diameter d, mm	K_σ/K_d at σ_{ul}, (MPa) of				K_τ/K_d at σ_{ul}, (MPa) of			
	500	700	900	1200	500	700	900	1200
30	2.5	3.0	3.5	4.25	1.9	2.2	2.5	3.0
50	3.05	3.65	4.3	5.2	2.25	2.6	3.1	3.6
100 up	3.3	3.95	4.6	5.6	2.4	2.8	3.2	3.8

In our case the critical section of the shaft is a section where a bearing is mounted. So we will use as stress concentrator interference fit. Then $\frac{K_\sigma}{K_d} = 4.35$; $\frac{K_\tau}{K_d} = 2.97$ from the table 10.2 D.

10.3.6. Determine the surface roughness factor K_F. For that we use Fig.10.3.

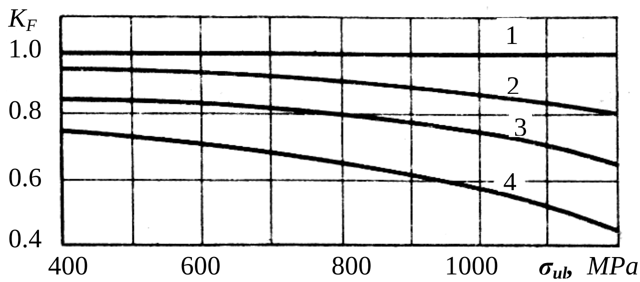


Fig. 10.3. Values of K_F: 1 - polished portions; 2 - ground portions; 3 - portions made with finish turning; 4 - portions made with rough turning

It is necessary to note that the portion of the shaft where a bearing is installed should be ground while the shaft portion for a toothed wheel is made with finish turning.

In our case the critical section is for the portion of the shaft where a bearing is installed. That is why we use curve 2 and K_F = 0.9.

10.3.7. Determine factor K_d, which is used to take into account absolute dimensions of the shaft cross-section. For this purpose we use

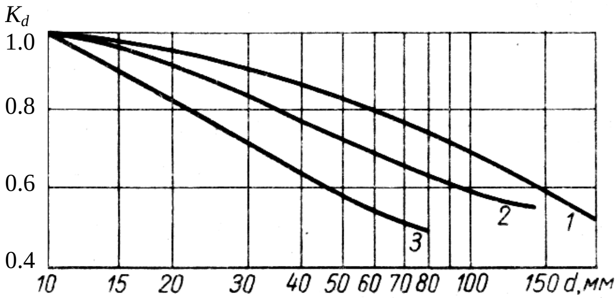


Fig.10.4.

Fig. 10.4. Values of K_d : 1- carbon steels without stress concentrators; 2 – alloy steels without stress concentrators or carbon steels with stress concentrators (K_σ>2); 3 - alloy steels with stress concentrators (K_σ>2).

If the critical section is in the place where bearing is mounted it is not necessary to determine K_d because the ratio K_σ/K_d was found before (p.10.3.5).

2 1

3

10.3.8. Determine safety factors in terms of bending and torsion

$$S_\sigma = \frac{\sigma_{-1}}{\dfrac{K_\sigma}{K_d \cdot K_F} \cdot \sigma_p + \psi_\sigma \cdot \sigma_m} = \frac{417.5}{\dfrac{4.35}{0.9} \cdot 18.25 + 0} = 4.73;$$

$$S_\tau = \frac{\tau_{-1}}{\dfrac{K_\tau}{K_d \cdot K_F} \cdot \tau_p + \psi_\tau \cdot \tau_m} = \frac{212.5}{\dfrac{2.97}{0.9} \cdot 4.28 + 0.1 \cdot 4.28} = 14.6.$$

10.3.9. Determine the safety factor of the shaft at the critical section

$$S = \frac{S_\sigma \cdot S_\tau}{\sqrt{S_\sigma^2 + S_\tau^2}} \geq [S];$$

$$S = \frac{S_\sigma \cdot S_\tau}{\sqrt{S_\sigma^2 + S_\tau^2}} = \frac{4.73 \cdot 14.6}{\sqrt{4.73^2 + 14.6^2}} = 4.5$$

Allowable values of the safety factor [*S*] are given in table 10.3.

Table 10.3

Values of [*S*]

Degree of accuracy of design loads, analytical models, and mechanical characteristics	[*S*]
High	1.2-1.5
Approximate (shafts of most general-purpose mechanisms)	1.5-1.8
Reduced(also for shafts with *d*>200 mm)	1.8-2.2

Condition is satisfied.

11. ANALYSIS OF THE ROLLING CONTACT BEARINGS

Let us analyse the rolling contact bearings for strength. Initial dates are:

– type designation of the bearing and its sizes (# and $d \times D \times B$);

– rotational speed n of the bearing inner ring;

– components of reacting forces in supports R_{xA}, R_{yA}, R_{xC}, R_{yC} and R_{zA};

– basic load rating C_r and static load rating C_0 for radial ball bearings and angular-contact bearings with pressure angle α≤18º (tables 9.3 and 9.4);

– basic load rating C_r and axial load parameter e for angular-contact bearings with pressure angle α>18º (tables 9.4 and 11.1);

– basic load rating C_r, axial load parameter e and axial load factor Y for tapered roller bearings (table 9.5).

In our case for the output shaft we will use angular-contact ball bearings 36212 (60×110×22); n = 93.6 rpm; R_{xA} = 4363.04 N, R_{yA} = 36.26 N, R_{xC} = 4385.93 N, R_{yC} = 861.74 N and $R_{zA} = F_a$ = 346.7 N; C_r =61.5 kN, C_0 = 39.3 kN.

11.1. Determine the total radial reacting forces which act on the bearings

$$F_{r1} = \sqrt{R_{xA}^2 + R_{yA}^2} = \sqrt{4363.04^2 + 36.26^2} = 4363.19 \text{ N};$$

$$F_{r2} = \sqrt{R_{xC}^2 + R_{yC}^2} = \sqrt{4300.44^2 + 861.74^2} = 4385.93 \text{ N}.$$

11.2. Determine the total axial forces acting on the bearings

11.2.1. Calculate additional axial forces S_1 and S_2 that develop as a result of action of radial forces F_{r1} and F_{r2}

$$S_1 = F_{r1} \cdot e'; \quad S_2 = F_{r2} \cdot e',$$

where – $e' = e$ for radial ball bearings and angular contact ball bearings; $e' = 0.83 \cdot e$ for tapered roller bearings.

It is necessary to note that for radial ball bearings and angular contact ball bearings with pressure angle α≤18º axial load parameter e is determined by table 11.1 depending upon ratio F_a/C_o.

In our case F_a/C_o=346.7/39300 = 0.0088; $e' = e$ = 0.3 (table 11.1); $S_1 = F_{r1} \cdot e'$=4363.19·0.3 = 1308.57 N; $S_2 = F_{r2} \cdot e'$ = 4385.93·0.3= 1315.78 N.

11.2.2. Plot the analytical model of the shaft and show all forces acting on the shaft in the axial direction (Fig. 11.1).

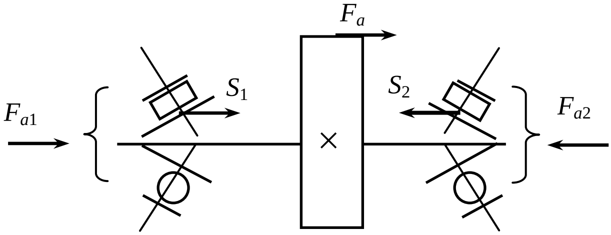


Fig. 11.1. Forces acting on the shaft in the axial direction.

Table 11.1

Values of X, Y and e for some types of bearings

Type of bearing	α°	F_a/C_o	$F_a/(VF_r)\le e$		$F_a/(VF_r)>e$		e
			X	Y	X	Y	
		0.014				2.30	0.19
		0.028				1.99	0.22
		0.056				1.71	0.26
		0.084				1.55	0.28
Single Row radial Ball Bearing	0	0.11	1	0	0.56	1.45	1.30
		0.17				1.31	0.34
		0.28				1.15	0.38
		0.42				1.04	0.42
		0.56				1.00	0.44
		0.014				1.81	0.30
		0.029				1.62	0.34
		0.057				1.46	0.37
		0.086				1.34	0.41
Single Row Angular Contact Ball Bearing	12	0.11	1	0	0.45	1.22	0.45
		0.17				1.13	0.48
		0.29				1.14	0.52
		0.43				1.01	0.54
		0.57				1.00	0.54
	26	–	1	0	0.41	0.87	0.68
	36	–	1	0	0.37	0.66	0.95
Single row Tapered Roller Bearing		–	1	0	0.4	0.4ctgα	1.5ctgα

11.2.3. Determine total axial forces F_{a1} and F_{a2}. For that we should find the sum $F_a + S_1$ and compare with force S_2. There are 3 possible cases:

– if $F_a + S_1 > S_2$ $F_{a1} = S_1$ and $F_{a2} = F_a + S_1$;

– if $F_a + S_1 = S_2$ $F_{a1} = S_1$ and $F_{a2} = S_2$;

– if $F_a + S_1 < S_2$ $F_{a1} = S_2 - F_a$ and $F_{a2} = S_2$.

In our case $F_a + S_1 = 346.7 + 1308.57 = 1655.27$ N > $S_2 = 1315.78$ N, therefore $F_{a1} = 1308.57$ N and $F_{a2} = 346.7 + 1308.57 = 1655.27$N.

11.3. Determine factor V which is used to take into account what ring of the bearing is movable.

– for bearings with movable inner ring $V = 1$;

– for bearings with movable outer ring $V = 1.2$.

In general purpose speed reducers bearings with movable inner ring are used only.

11.4. Determine safety factor K_s which allows for the load nature. It may be ranged from 1 to 2.5 depending upon the type of designing machine. For general purpose speed reducers the safety factor is assumed as 1.3.

11.5. Determine temperature factor K_t according to table 11.2.

Table 11.2

Values of temperature factor K_t

Temperature of the bearing t, ºC	100	125	150	175	200	225	250
K_t	1.0	1.05	1.1	1.15	1.25	1.35	1.4

As a rule in general purpose speed reducers the working temperature of bearings is less than 100 ºC.

11.6. Determine the radial force factor X and axial force factor Y for both supports. For this purpose it is necessary to find ratio $\frac{F_{ai}}{V \cdot F_{ri}}$ for every support and compare with axial load parameter e.

If $\frac{F_{ai}}{V \cdot F_{ri}} \le e$ then $X_i = 1$ and $Y_i = 0$. Otherwise X_i and Y_i are determined according to table 11.1.

In our case: V =1; K_s =1.3; K_t =1; $\dfrac{F_{a1}}{V \cdot F_{r1}} = \dfrac{1308.57}{1 \cdot 4363.19} = 0.3 = e$, then X_1 =1 and Y_1 = 0; $\dfrac{F_{a2}}{V \cdot F_{r2}} = \dfrac{1655.27}{1 \cdot 4385.93} = 0.377 > e$, then X_2 =0.45 and Y_2 = 1.81.

11.7. Determine the equivalent radial loads for both supports

$$P_{r1} = (X_1 \cdot V \cdot F_{r1} + Y_1 \cdot F_{a1}) \cdot K_s \cdot K_t = (1 \cdot 1 \cdot 4363.19 + 0 \cdot 1308.57) \cdot 1.3 \cdot 1 = 5672.15 \text{ N},$$

$$P_{r2} = (X_2 \cdot V \cdot F_{r2} + Y_2 \cdot F_{a2}) \cdot K_s \cdot K_t =$$
$$= (0.45 \cdot 1 \cdot 4385.93 + 1.81 \cdot 1655.27) \cdot 1.3 \cdot 1 = 6460.62 \text{ N}.$$

11.8. Determine the rated life in million revolutions for the most loaded support

$$L = \left(\frac{C_r}{P_{rmax}} \right)^m = \left(\frac{61500}{6460.62} \right)^3 = 862.59,$$

where m = 3 for ball bearings and $m = \dfrac{10}{3}$ for roller bearings.

11.9. Determine the rated life in hours

$$L_h = \frac{L \cdot 10^6}{60 \cdot n} > L_{h\,\min}.$$

For general purpose speed reducers $L_{h\,\min}$=12000 hours.

If the last inequality is not carried out it is necessary to reselect the bearing of more heavy series and make all calculations once more.

In our case $L_h = \dfrac{862.59 \cdot 10^6}{60 \cdot 93.6} = 153595.1$ hours $> L_{h\,\min}$. Condition is satisfied and we can use this type of bearings.

12. DESIGNING THE GEAR SPEED REDUCER

12.1. Design supports of the speed reducer shafts.

Normal operation of bearings depends upon the arrangement of bearings on the shaft as well as the method of fixation of the shaft in the axial direction.

According to fixation of the shaft in the axial direction there are fixed support and floating support.

Depending upon arrangement of bearings we will distinguish between inward (face to face) arrangement and arrangement with the fixed and the floating supports. Sometimes outward (back to back) arrangement of bearings is used too (for example, for bevel pinion shafts).

Let us consider features of all arrangements.

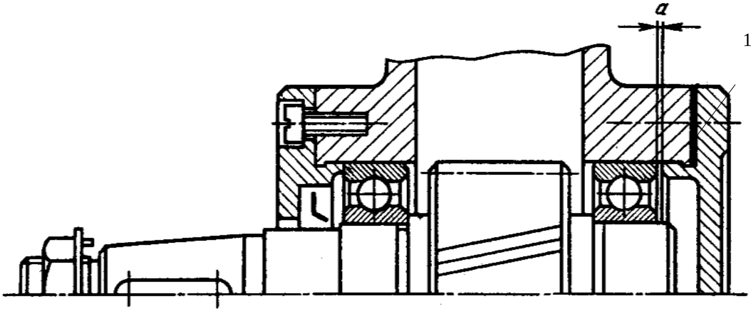
Inward arrangement of bearings.

This is the most popular arrangement according to which a shaft is fixed in the axial direction in both supports. Every support withstands one-sided axial load. The inner ring of both bearings rests against the shoulder made on the shaft or against the end face of other component installed on the shaft. In its turn, the outer ring of bearings rests against the end face of a cap or other part secured in the casing (Fig. 12.1).

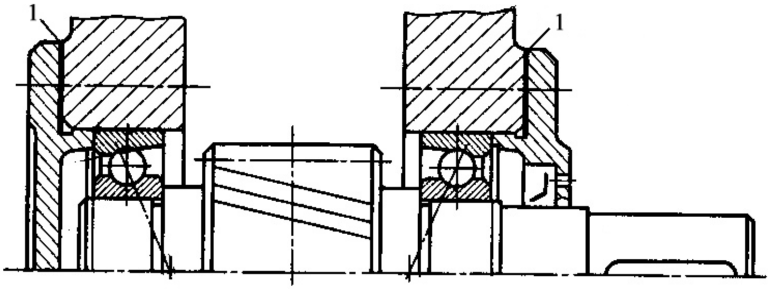
The inward arrangement is simple in construction and permits easy adjustment of bearings. But there exists a risk that the shaft can be seized at supports. It is explained by the fact that during operation of bearings, shafts and casings heat up. As a result, radial clearances in bearings decrease. Also, the shaft length increases on heating, which reduces the axial clearance in bearings.

For safeguard against seizure we should provide small clearance ***a*** at one end of the shaft between the outer ring of the bearing and the end face of the cap (Fig. 12.1, *a*). This clearance is very small (0.2…0.5 mm). That is why it is not shown in the drawing. In order to adjust this clearance we use either thin metal shims **1** placed between the casing and the flanged cap at one end of the shaft or a spacer ring installed between the end face of the embedded cap and the outer ring of the bearing.

In radial-thrust bearings (angular contact ball bearings and tapered roller bearings) there exist radial clearances between rolling elements and both rings that may be adjusted in assembly. We can achieve adjustment of these clearances by means of thin metal shims1 mounted between the casing and flanges of caps at both ends of the shaft (Fig. 12.1, *b*). If we have embedded caps needed adjustment is achieved by screw 1 and intermediate washer 2 (Fig. 12.2).



a)



b)

Fig 12.1 Inward arrangement of bearings: *a* – radial bearings; *b* – radial thrust bearings

In this case the threaded element simplifies adjustment because caps need not be removed to replace the shims but the bearing assembly becomes more elaborate.

Inward arrangement of bearings is used for shafts of straight spur gears, helical spur gears, bevel gear and worm gear.

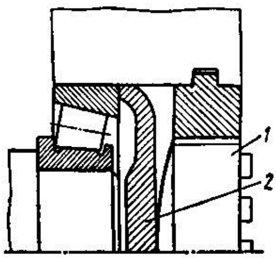


Fig.12.2. Adjustment of bearings by screw 1 and intermediate washer 2

Bearings of the worm shaft are arranged as fixed and floating supports (Fig. 12.3).

The fixed support consists of two inward facing radial thrust bearings (as a rule tapered roller bearings) mounted in the bearing housing. Outer and inner rings of the fixed support should be fixed in both axial directions. That is why the fixed support can withstand double-sided axial load. In order to adjust radial clearances in tapered roller bearings we use slotted nut (table 12.1.) and lock-washer (table 12.2).

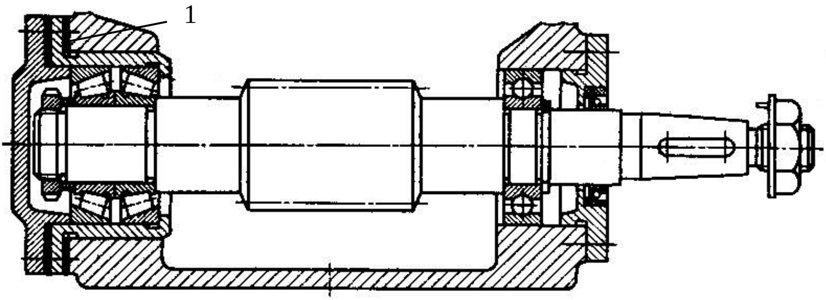


Fig.12.3. Arrangement with the fixed and floating supports of the worm shaft

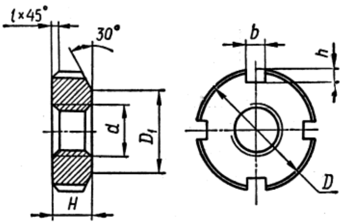
Floating support is used to compensate thermal deformations of the shaft and manufacturing errors. We use as floating support a radial ball bearing which inner ring is fixed in both axial directions and outer ring is left free. For fixation of the inner ring we employ either end plates (table 13.3, 13.4), or slotted nuts with lock washers, or spring ring.

The rightness of the worm engagement is adjusted by means of metal shims **1** (Fig. 12.3) mounted between the casing and the flange of the housing.

Supports of the bevel pinion shaft are installed in the housing according to outward arrangement (Fig. 12.4). In this case we obtain the minimum bending moment developing on the shaft. In order to adjust radial clearances in bearings we should use a slotted nut with a lock-washer. Rightness of the bevel gear engagement is adjusted by metal shims **1** (Fig. 12.4) mounted between the casing and the housing flange.

Table 12.1

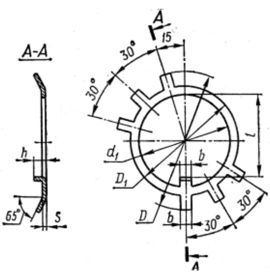
Standard slotted nuts (GOST 11871-88)



Thread diameter, d	Thread pitch	D	D_1	H	b	h
20	1.5	34	27	8	5	2.5
22		39	30	10		
24		42	33			
27		45	36			
30		48	39			
33		52	42			
36		56	45		6	3
39		60	48			
42		65	52			
45		70	56			
48		75	60	12	8	4
52		80	65			
56	2	85	70			
60		90	75			
64		95	80			
68		100	85	15	10	5
72		105	90			
76		110	95			
80		115	100			

Table 12.2

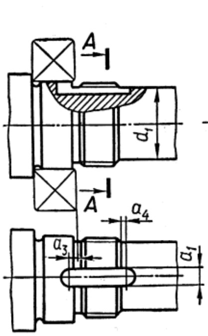
Standard lock washers (GOST 11872-80)



Thread diameter	d_1	d_2	d_3	b	S	l	h	
							Not less	Not more
20	20.5	37	27	4.8	1.0	17	3.5	6.0
22	22.5	40	30			19		
24	24.5	44	33			21		
27	27.5	47	36			24	4.5	8.0
30	30.5	50	39			27		
33	33.5	54	42	5.8	1.6	30		
36	36.5	58	45			33		
39	39.5	62	48			36		
42	42.5	67	52			39		
45	45.5	72	56			42		
48	48.5	77	60	7.8		45		
52	52.5	82	65			49	5.5	10.0
56	57	87	70			53		
60	61	92	75			57		
64	65	97	80			61		
68	69	102	85	9.5		65	6.5	13.0
72	73	107	90			69		
76	77	112	95			73		
80	81	117	100			76		

Table 12.3

Dimensions of Slots Receiving Lock Washer Tabs, mm



Thread diameter *d, mm*	a_1	a_{2min}	a_{3min}	a_{4min}	d_{1min}
20	6	2	3.5	1.0	16.5
22	6	2	3.5	1.0	18.5
27	6	3	4.0	1.5	23.5
30	6	3	4.0	1.5	26.5
33	6	3	4.0	1.5	29.5
36	6	3	4.0	1.5	32.5
39	6	3	4.0	1.5	35.5
42	8	3	5.0	1.5	38.5

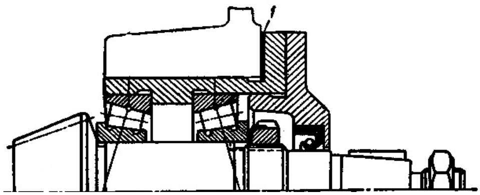


Fig 12.4. Outward arrangement of bearings of the bevel pinion shaft

12.2. Determine dimensions of elements that are a part of the support assemblies.

12.2.1. Bearing caps.

Bearing caps may be made with screws or embedded in the casing. Construction of the screw cap and its dimensions are given in Fig. 12.5 *a*, where d_k is determined according to table 12.4. If bearings are held in place with nuts or spring washers, convex caps are used (Fig. 12.5, c).

If the length of the cap sleeve permits, a groove is made in the sleeve, in which a round-section packing ring of gasoline- or oil-resistant rubber is fitted (Fig. 12.5, b). The groove profile is shown in Fig. 12.5, b and the dimensions of its basic elements are taken as follows: b = 5.6 mm and $d_1 = D - 7.4$ mm. The cross-section diameter is assumed as d = 4.6 mm.

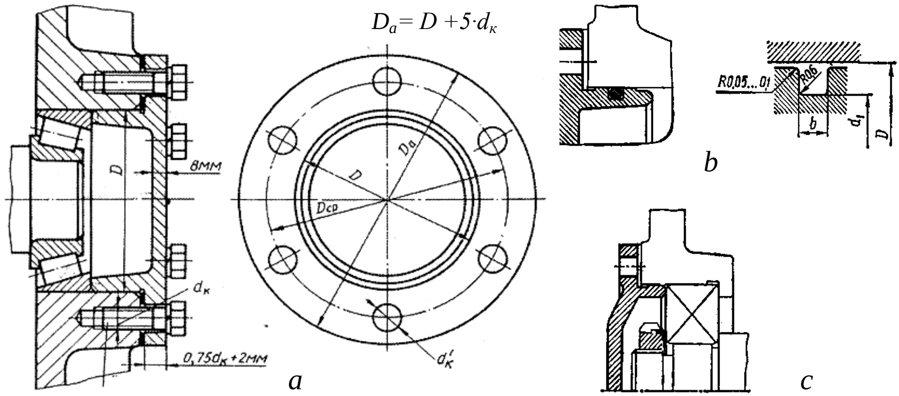


Fig.12.5. Bearing screw caps

Table 12.4

Screws for fastening bearing caps

D, mm	d_k	Number of screws
To 75	M8	4
80…95	M10	4
100…140	M10	6
150…215	M12	6
225…360	M16	6

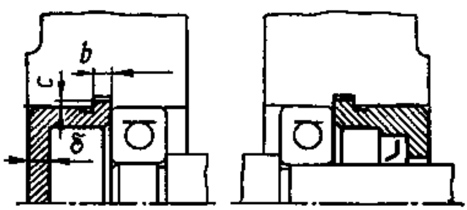


Fig.12.6. Embedded caps

Constructions of embedded caps are given in Fig. 12.6 where δ is determined according to table 12.5, $b \approx \delta$, $c \approx 0.5{\cdot}\delta$. These caps require no special attachment to the casing, so no holes in the caps, threaded holes in the casing, or screws are needed. However, caps of this construction may only be used where the joint between the casing and the cover lies in the plane of the shaft axis. Besides, bearing assemblies with embedded caps become more elaborate in shape. It is explained by necessity to adjust radial clearances in the bearing.

Table12.5

Thickness of the embedded cap

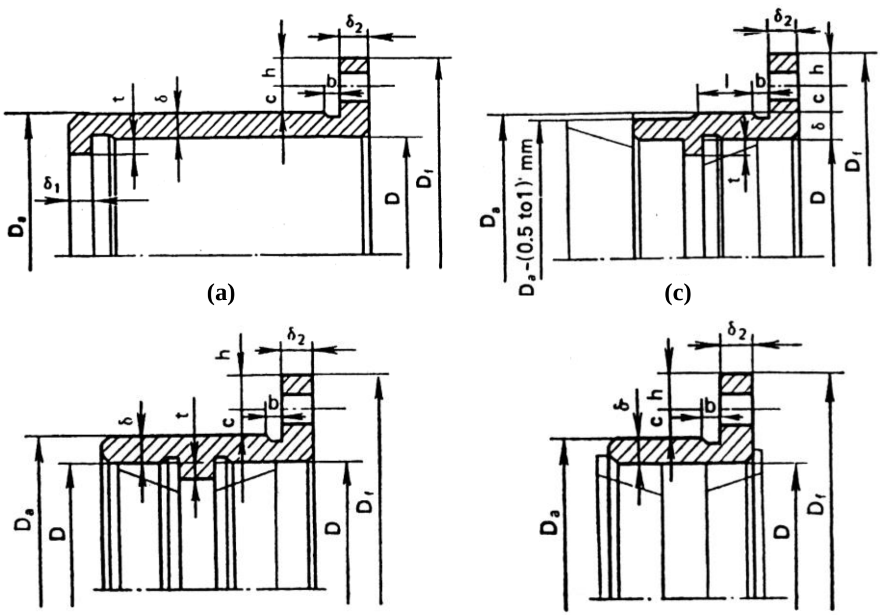
D, mm	50…62	63…95	100…145	150…220
δ, mm	5	6	7	8

12.2.2.Bearing housing

Constructions of bearing housings and their dimensions are given in table 12.6.

Table 12.6

Bearing housings



(a) (c)

(b) (d)

D, mm	<50	50…80	80…120	120…170
δ, mm	4…5	6…8	8…10	10…12.5
b, mm	3	5	5	8

$D_1 = D_a + 5d_h$; $c \approx d_h$; $h = (1.0\ldots1.2)d_h$; $\delta_1 \approx \delta$; $\delta_2 \approx 1.2\delta$, where d_h is diameter of the hole for a screw from table 12.7

Table 12.7

Diameters of holes for bolts, mm

Bolt diameter	M10	M12	M16	M20	M24	M30	M36
Hole diameters for anchor bolts	-	15	19	24	28	35	42
Hole diameter for tie bolts	11	14	18	22	26	33	-

12.3. Designing casings.

Casings are used to support torque-transmitted elements in design position and take up loads developed in speed reducers during operation. The main material of casings is cast-iron.

A casing must be rigid to prevent shaft misalignment under internal and external loads. This can be achieved by using stiffening ribs that also carry out the function of cooling fins.

Casing may have split or single-peace construction. For split constructions the joint between a casing and a cover is usually provided in the plane parallel to the base and that passes through the axis of rotation of corresponding gears.

The main dimensions of the casing (Fig. 12.7):

12.3.1. Casing and cover wall thickness:

- for single stage spur gear speed reducer $\delta = 0.025 \cdot a_w + 1 \geq 8$ mm;
- for single stage bevel gear speed reducer $\delta = 0.05 \cdot R_e + 1 \geq 8$ mm;
- for single stage worm gear speed reducer $\delta = 0.04 \cdot a_w + 4 \geq 8$ mm,

where a_w is the centre distance, R_e is outer cone distance.

12.3.2. Flange thickness at the joint plane

$$b = 1.5 \cdot \delta.$$

12.3.3. Thickness of the flange for connection to a frame

$$p = 2.35 \cdot \delta.$$

12.3.4. Thickness of the rib

$$m = (0.8 \ldots 1.0) \cdot \delta.$$

12.3.5. Diameter of the anchor bolt

$$d_1 = (0.03 \ldots 0.036) \cdot a_w + 12,$$

$$d_1 = 0.072 \cdot R_e + 12.$$

Obtained magnitude of d_1 should be rounded off to the nearest greater side according to standard series given in table 12.9.

12.3.6. Number of anchor bolts

$$z = 0.005\cdot(L_0+B_0) \geq 4,$$

where B_0 is the width of the speed reducer base; L_0 is the length of the speed reducer base. It is necessary to note that the number of anchor bolts should be always even.

12.3.7. Diameter of the tie-bolt near bearings

$$d_2 = (0.7\ldots0.75)\cdot d_1.$$

Obtained value of d_2 should correspond to standard value (table 12.9).

12.3.8. Diameter of tie bolts that connect the casing and the cover flanges

$$d_3 = (0.5\ldots0.6)\cdot d_1.$$

Round off obtained value of d_3 to the greater side according to standard series (table 12.9).

12.3.9. Distance between tie-bolts of diameter d_3

$$l = (10\ldots12)\cdot d_3.$$

12.3.10. Disposition of bolts on the flange (Fig)

$$x = (1\ldots1.2)\cdot d_{\text{hole}},$$

$$y = \delta + e,$$

where d_{hole} is the diameter of the hole for fitting the bolt (table 12.7);
e is the distance that allows to grip the bolt head by a spanner (table12.8).

Table 12.8

Value of *e*

Diameter of the bolt	M10	M12	M16	M20	M24
e, mm	13	14	16	20	24

12.3.11. Height of the boss is determined from structural consideration taking into account the following requirement

$$q \geq 0.5\cdot d_2 + d_k,$$

where d_k is the diameter of the bolt, that connects the bearing cap with the casing (table12.4).

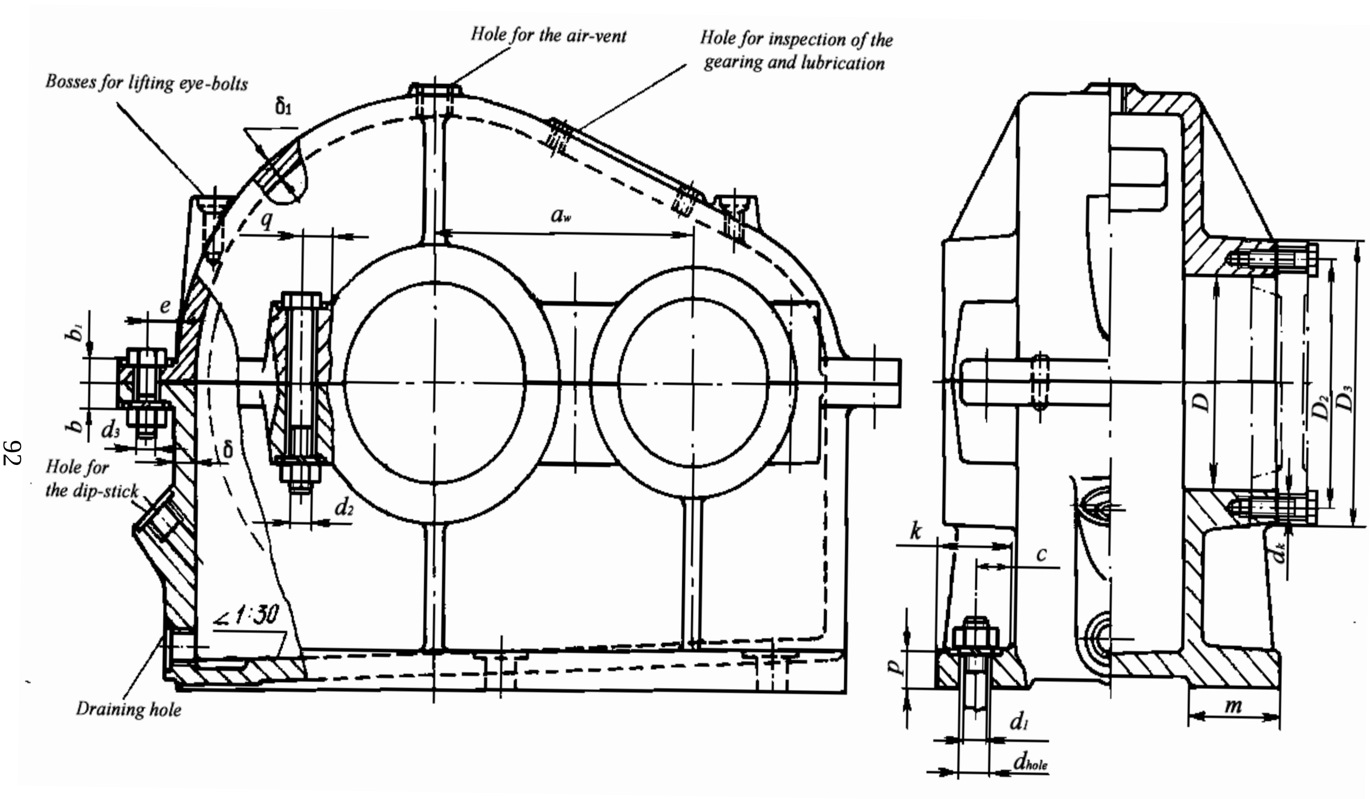
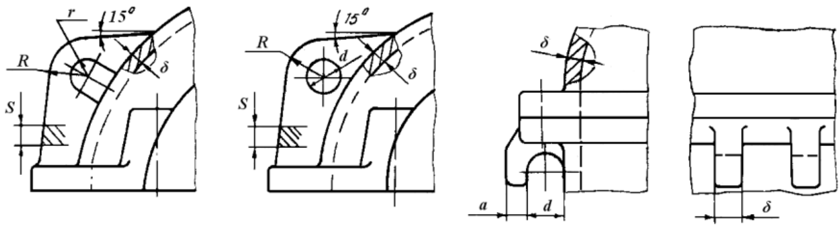


Fig.12.7.Constructive elements and their dimensions of the casing

12.3.12. Dimensions of bolts, nuts and washers are given in tables 12.9 -12.11. The length and threaded length of the bolt are given in table 12.12. Engaged length of the bolt, the depth of the hole and threaded length of the hole are determined according to table 12.13.

12.3.13. In order to hold together the casing and the cover and to prevent their relative movement in axial direction two pins are used. They are placed along the flange diagonal. The diameter of the pin is determined as $d_{pin} = 0.5 \cdot d_1$.

12.3.14. For transition and installation the cover and the casing should be made with lifting eye-bolts (table 12.14) or eyes and load hooks (Fig. 12.8).



$r = 1.5 \cdot \delta$; $R = 3 \cdot \delta$; $d = 3 \cdot \delta$; $a = (1.2 \ldots 1.5) \cdot \delta$; $s = (2 \ldots 3) \cdot \delta$

Fig.12.8. Load eyes and hooks

12.3.15. For gear inspection and lubrication an inspection hole is provided in the upper portion of the cover. The cover of the inspection hole is determined according to table 12.15.

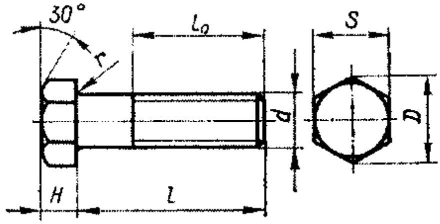
12.3.16. During operation, pressure inside a casing increases due to heating of the oil and air. As a result the lubricant is ejected outside through seals and joints. To avoid this fact air-vents are provided in the top portion of the casing for connection between the inner space and the environment. Possible constructions of air-vents are given in tables 12.16 and 12.17.

12.3.17. For draining the oil with grit and other debris a drain hole is made in the casing bottom, which is stopped with a plug with either straight or taper thread (table 12.18).

12.3.18. The level of the oil contained in the speed-reducer casing is checked with oil gauges of various constructions. Among them there are dip sticks (table 12.19) or transparent tube gauges. (table 12.20).

Table 12.9

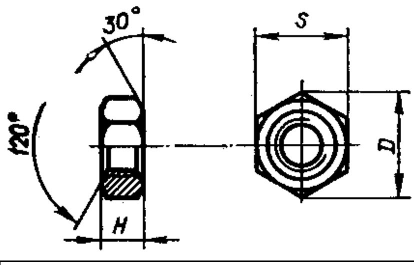
Standard bolts (GOST 7798-70)



Parameter	Thread diameter *d*, mm							
	6	8	10	12	16	20	24	30
Thread pitch, mm	1.0	1.25	1.5	1.75	2.0	2.5	3.0	3.5
Radius *r*, mm not more	0.6	1.1	1.1	1.6	1.6	2.2	2.2	2.5
Diameter *D*, mm	11	14.5	19	21	27	33.5	40.5	50.9
Span *S*, mm	10	13	17	19	24	30	36	46
Height *H*, mm	4.5	5.5	7	8	10	13	15	18.7

Table 12.10

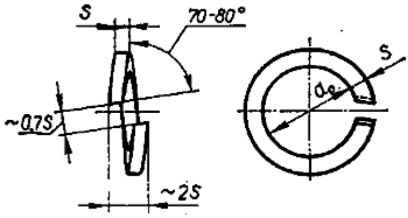
Standard nuts (GOST 5915-70)



Parameter	Thread diameter *d*, mm								
	6	8	10	12	16	20	24	30	36
Thread pitch, mm	1.0	1.25	1.5	1.75	2.0	2.5	3.0	3.5	4.0
Diameter *D*, mm near	11	14.5	19	21	27	33.5	40.5	51.5	62
Span *S*, mm	10	13	17	19	24	30	36	46	55
Height *H*, mm	5	6.5	8	10	13	16	19	24	29

Table 12.11

Standard spring washers (GOST 6402-70)



Parameter	Thread diameter d, mm								
	6	8	10	12	16	20	25	30	36
Diameter d_0, mm	6.1	8.2	10.2	12.2	16.3	20.5	24.5	30.5	36.5
Thickness s, mm	1.4	2.0	2.5	3.0	3.5	4.5	5.5	6.5	8.0

Table 12.12

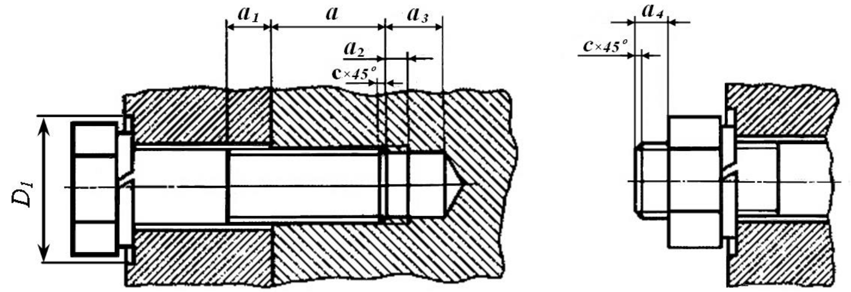
Bolt and screw length, mm

d	L / l_0	d	L / l_0
8	$\frac{8...25}{l_0}; \frac{30...100}{22}$	16	$\frac{20...40}{l_0}; \frac{48...150}{38}; \frac{160...300}{44}$
10	$\frac{10...30}{l_0}; \frac{35...150}{26}; \frac{160...200}{32}$	20	$\frac{25...50}{l_0}; \frac{55...150}{46}; \frac{160...300}{52}$
12	$\frac{14...30}{l_0}; \frac{35...150}{30}; \frac{160...260}{36}$	24	$\frac{35...60}{l_0}; \frac{65...150}{54}; \frac{160...300}{60}$

Bolt length should be chosen from the following standard series, mm: 8, 10, 12, 14, 16, 20, 25, 30, 35, 40, 45, 50, 55, 60, 65, 70, 75, 80, 90, 100, 110, 120, 130, 140, 150, 160, 170, 190, 200, 220, 240, 260, 300.

Table 12.13

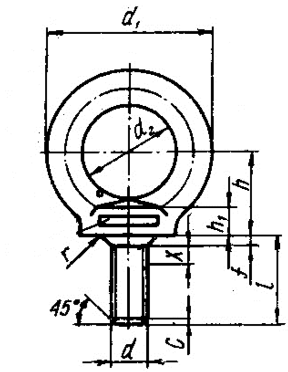
Dimensions of bolt joints



Parameter	Thread diameter d, mm						
	6	8	10	12	16	20	24
a, not less	1.25·d						
a_1, not less	3.5	4	4.5	5.5	6	7	8
a_2, not less	2	2.5	3	3.5	4	5	6
a_3, not less	6	8	9	11	12	15	18
a_4	1.5…	1.5	2…	2…	2.5…	2.5…	3…
c	1	1.6	1.6	1.6	2	2.5	2.5
D_1		15	18	22	30	35	42
D_2		18	22	25	30	38	45

Table 12.14

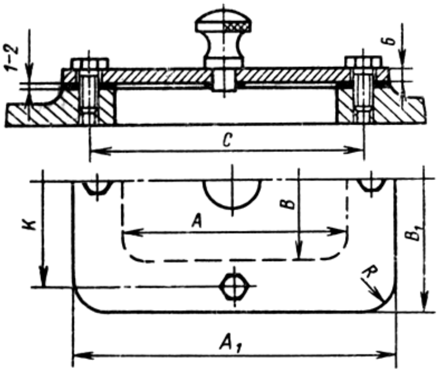
Lifting eye-bolts, mm (GOST 4751-73)



d	d_1	d_2	h	h_1	l	f	c	x
M8	36	20	18	6	18	2	1.2	2.5
M10	45	25	22	8	21		1.5	3
M12	54	30	26	10	25		1.8.	3.5
M16	63	35	30	12	32		2	4

Table 12.15

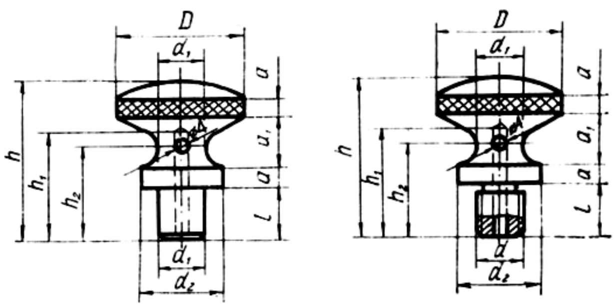
Inspection hole cover



A mm	*B* mm	A_1 mm	B_1 mm	*C* mm	C_1 mm	*K* mm	*R* mm	Dimensions of screw	Number of screws
100	75	150	100	125	-	100	12	M8x22	4
150	100	200	150	175	-	125	12	M8x22	4
200	150	250	200	230	130	182	15	M10x22	6

Table 12.16

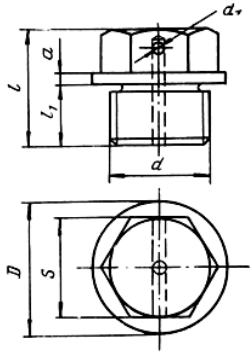
Air vent, mm



d	d_1	d_2	*D*	*h*	*l*	*a*	H_1	H_2	a_1
M12x1.75	12	20	32	40	12	5.5	29	24	13
M16x2	16	25	40	50	16	7	35	30	16

Table 12.17

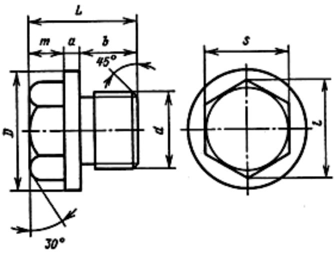
Air vent, mm



d	*D*	*l*	l_1	d_1	*a*	*s*
M12x1.25	16	19	10	4	2	17
M16x1.5	22	23	12	5	2	22
M20x1.5	30	28	15	6	4	22

Table 12.18

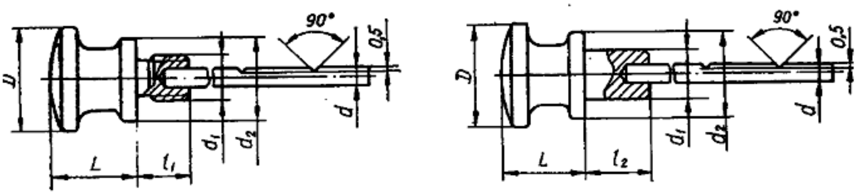
Plugs for drain holes, mm



<table>
<tr><th>d</th><th>b</th><th>m</th><th>a</th><th>L</th><th>D</th><th>s</th><th>l</th></tr>
<tr><td>M12x1.25</td><td>12</td><td>8</td><td rowspan="3">3</td><td>23</td><td>26</td><td>1.7</td><td>19.6</td></tr>
<tr><td>M16x1.5</td><td rowspan="2">15</td><td>9</td><td>28</td><td>30</td><td rowspan="2">22</td><td rowspan="2">24.4</td></tr>
<tr><td>M20x1.5</td><td>10</td><td>29</td><td>32</td></tr>
</table>

Table 12.19

Dip sticks, mm



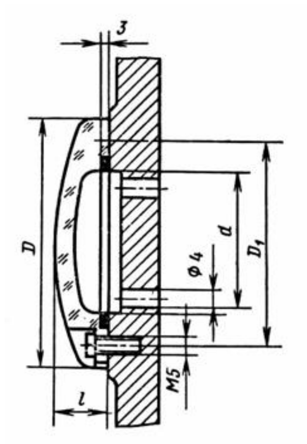
a) *b)*

a – with thread; *b* – without thread

d	d_1	Thread pitch	d_2	*D*	l_1	l_2	*L*
3	10	1.0	16	20	10	12	16
4	12	1.25	20	25	12	15	20
6	16	1.5	25	32	15	15	25

Table 12.20

Transparent tube gauge, mm



d	*D*	D_1	*L*
30	60	48	12
50	82	70	14.5

12.4. Designing lubrication system of the speed reducer.

Lubrication serves to decrease frictional loses, to offer protection against corrosion and to improve speed reducer operation. The usual lubricants for meshing elements, bearings of the speed reducer are mineral and synthetic oils and greases.

The basic parameter of any oil is its viscosity that characterizes the ability of fluid layers to resist flow. The oil viscosity is chosen depending upon the expected peripheral speed, load and tooth materials. It should be raised with increasing load and decreasing speed. The oil viscosity is determined according to tables 12.21and 12.22. The oil is chosen by table 12.23.

Table 12.21

Recommended viscosity of oils for lubricating gearing when t=50°C

Contact stresses , σ_H, MPa	Kinematic viscosity, 10^{-6} at peripheral speed V, m/sec		
	Up to 2	Over 2 to 5	Over 5
Up to 600	34	28	22
Over 600 to 1000	60	50	40
Over 1000 to 2000	70	60	50

Table 12.22

Recommended viscosity of oils for lubricating worm gears when t=100°C

Contact stresses , σ_H, MPa	Kinematic viscosity, 10^{-6} at peripheral speed V, m/sec		
	Up to 2	Over 2 to 5	Over 5
Up to 200	25	20	15
Over 200 to 250	32	25	18
Over 250 to 300	40	30	23

There are two methods of lubrication:

- immersion lubrication, when toothed wheels are immersed into the oil bath;
- stream lubrication, when oil feeds the contact area of toothed wheels by means of special nozzles.

Table 12.23

Recommended oil grades for general-purpose speed reducer

Oil	Oil grade	Kinematic viscosity, 10^{-6}м^2/с
Industrial at 50°C	И-12А	10-14
	И-20А	17-23
	И-25А	24-27
	И-30А	28-33
	И-40А	35-45
	И-50А	47-55
	И-70А	65-75
	И-100А	90-118
Aviation at 100°C	МС-14	14
	МК-22	22
	МС-20	20.5

Immersion lubrication is effective when peripheral speed is less than 10 m/sec.

The oil bath lubricates the larger wheel. The recommended depth of immersion of the spur gear ranges from m to $5 \cdot m$ but not less than 10 mm (m is the module of the gearing). Bevel gears are immersed along the entire length of a tooth.

In worm-down speed reducers the oil level should not exceed the thread height of the worm. But in this case the oil level should not rise above the centre of the lower rolling element of the worm shaft bearings. If the worm is not immersed in oil the additional rings with blades are used (Fig. 12.9). In worm-up arrangement the worm gear should be immersed not more than 1/3 of the worm gear radius.

Let us determine the volume of the oil bath.

Needed volume is chosen to ensure removing the heat generated in the engagement of a gearing to casing walls. Recommended volume of the oil bath is chosen as 0.35 to 0.7 liter of the oil per 1 kilowatt of transmitted power. Consequently, the needed volume $V = (0.35 \ldots 0.7) \cdot P_{motor}$.

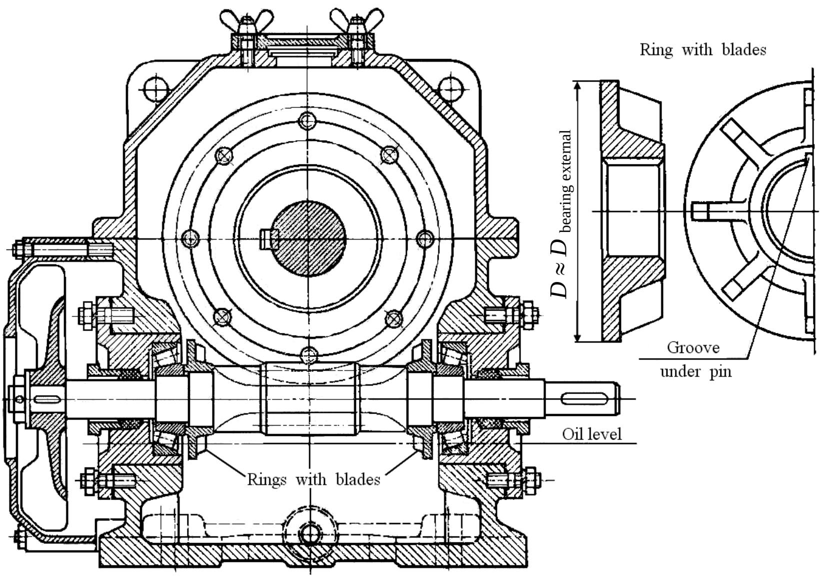


Fig. 12.9. Ring with blades

The larger volume corresponds to the longer oil life and better lubrication conditions. That is why the volume of the oil bath is only limited by the maximum permissible oil level in the casing.

The distance between the oil level and the speed reducer bottom is determined as $H = \frac{V}{S}$, where $S = L{\cdot}B$ is the area of the speed reducer inner space in dm^2; L and B are correspondingly the length and the width of the speed reducer inner space in dm. It is necessary to note that the minimum distance between tops of teeth of the larger gear and the speed reducer bottom is 20 mm.

Lubrication of bearings.

Bearings may be lubricated with the same oil as used for the mashing parts (when the peripheral speed is greater than 3 m/sec) or individually with greases.

Splash lubrication is used when the bearings are installed in cases which are not insulated from the general system of lubrication unit. Rotating parts (gears, wheels etc.) come into contact with oil which fills in into the housing then under rotation sprays oil, which falls on the rolling bodies and bearing tracks.

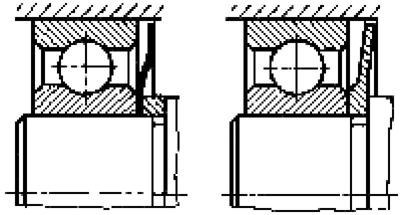


Fig. 12.10. Bearings with shields

To protect the bearings from the heavy jets of oil (which create high-speed helical pinions or worms) the shields (protective washers) are installed (Fig. 12.10).

Pressure lubrication through nozzles is used for reducers, working for a long time without interruption, as well as for the bearings of high-speed transmission, which is necessary to provide intensive heat removal.

Oil fog lubrication is used for high-speed understressed bearings. This method allows to penetrate the oil in the bearings, located in inaccessible places, creates a flow with minimal lubrication oil consumption provides a good cooling of bearings and the pressure protects the assembly from contamination.

Greases offer better protection against corrosion than oils and it's used when environment contains harmful impurities or the temperature sharply changes. In this case grease-retaining rings (Fig 12.11) are used to isolate the bearing cavity from the inner space of the casing. The ring

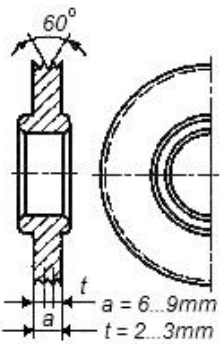


Fig. 12.11. Grease-retaining ring

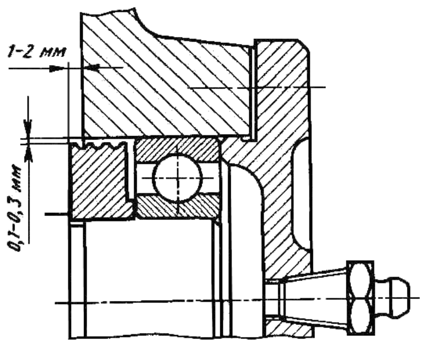


Fig. 12.12 Bearing assembly with grease cup

periphery should extend over the end face of the bearing housing for 1 or 2 mm (Fig. 12.12). The gap between the ring periphery and the housing should be about 0.2 mm. The ring rotates together with the shafts and it has from two to four grooves. In order to feed the grease inside the bearing without removing the cap grease cups are used (Fig.12.12). The lubricant is injected under pressure by means of a grease gun.

12.5. Analysis of keyed joints.

Dimensions of keys are chosen according to table 12.24 depending upon the shaft diameter. The length of the key should be less than the hub length by 5…10 mm and corresponds to the standard series.

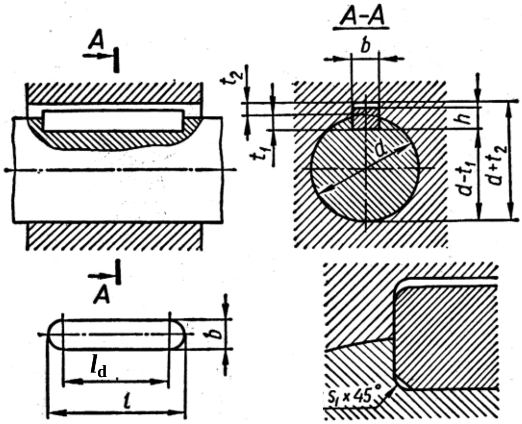
In general-purpose speed reducer, keyed joints are usually analyzed to prevent bearing stresses.

$$\sigma_{bear} = \frac{2 \cdot T}{d \cdot (h - t_1) \cdot l_d} \le [\sigma_{bear}],$$

where T is the torque in N·mm; d is the diameter of the shaft in mm; h is the height of the key in mm; t_1 is the depth of the slot in the shaft; l_d is the design length of the key in mm (for keys with round sides $l_d = l - b$; for keys with square sides $l_d = l$, where l is the length of the key; b is the width of the key); $[\sigma_{bear}]$ is the allowable bearing stress (for cast-iron hubs $[\sigma_{bear}]$=60…80 MPa; for steel hubs $[\sigma_{bear}]$=100…120 MPa).

Table 12.24

Standard Sunk Keys



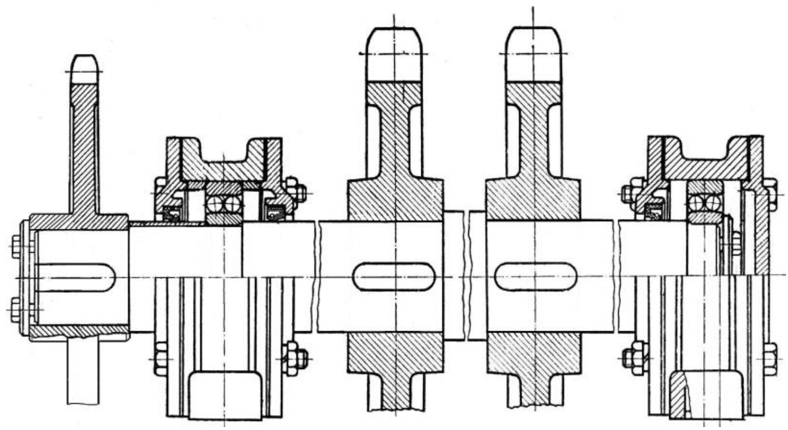
Shaft diameter *d*, mm	Key cross section, mm		Keyseat depth, mm		Length *l*
	b	*h*	shaft, t_1	hub, t_2	
Over 17 to 22	6	6	3.5	2.8	Over 14 to 70
Over 22 to 30	8	7	4	3.3	Over 18 to 90
Over 30 to 38	10	8	5	3.3	Over 22 to 110
Over 38 to 44	12	8	5	3.3	Over 28 to 140
Over 44 to 50	14	9	5.5	3.8	Over 36 to 160
Over 50 to 58	16	10	6	4.3	Over 45 to 180
Over 58 to 65	18	11	7	4.4	Over 50 to 200
Over 65 to 75	20	12	7.5	4.9	Over 56 to 220
Over 75 to 85	22	14	9	5.4	Over 63 to 250
Over 85 to 95	25	14	9	5.4	Over 70 to 280
Over 95 to 110	28	16	10	6.4	Over 80 to 320
Over 110 to 130	32	18	11	7.4	Over 90 to 360

Note: The length of the key is chosen according to the following series: 6; 8; 10; 12; 14; 16; 18; 20; 25; 28; 32; 35; 40; 45; 50; 56; 63; 70; 80; 90; 100; 110; 125; 140; 160; 180; 200.

13. DESIGNING THE MECHANICAL DRIVE

A mechanical drive is drawn in two projections (as a rule, front view and top view) to scale 1: 4 or 1:5.

13.1. Draw the main structural units of the mechanical drive. Among them there is electrical motor (table 9.1), coupling with rubber-bushed studs (tables 9.7), belt drive, speed reducer, open gearing, chain drive. Dimensions of all mentioned above elements and units have been found.



13.2. Design the output shaft of the mechanical drive (Fig.13.1).

Fig.13.1. Output shaft of the mechanical drive

Determine the minimum diameter of the output shaft. For this purpose we use the same formula as for the speed reducer shafts

$$d_{\min} = \sqrt[3]{\frac{T}{0.2 \cdot [\tau]}} .$$

If the output shaft of the mechanical drive is joined with the speed reducer shaft by the coupling, the minimum diameter of the mechanical drive output shaft is equal to the minimum diameter of the speed reducer output shaft.

On the cantilever portion of the output shaft half coupling, sprocket or gear may be mounted. They should be fixed in the axial direction. That is why it is necessary to provide the shoulder on the shaft. Then the diameter of the second portion of the shaft is determined as d_2=d_1 + 2·t_1 (t_1 is chosen from table 9.2).

The second portion of the output shaft is for mounting a bearing. That is why the diameter of this portion should be ended by 0 or 5.

The next portion of the output shaft is necessary for installation of the drum or conveyer sprockets. Diameter of this portion is $d_3 = d_2 + 2 \cdot t_1$.

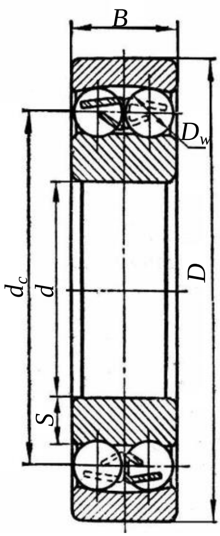
The last portion of the output shaft is for mounting the second bearing. The diameter of this portion is d_2.

13.3. Design supports of the output shaft.

As a rule, supports of the output shaft are mounted in different housings. In order to compensate inaccuracy and misalignment in assembly self-aligning double-row spherical radial ball bearings of the light–weight series are used (table 13.1). Owing to the race spherical surface of the outer ring, these bearings can handle the shaft misalignment of up to 2 or even 3.

Table 13.1

Double-row radial ball bearings (GOST 28428-90). Lightweight series, mm



$d_c = 0.5 \cdot (D+d)$
$D_w = 0.25 \cdot (D-d)$
$S = 0.17 \cdot (D-d)$

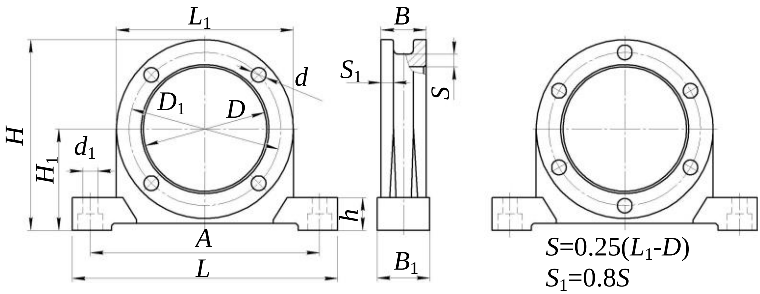
Type designation	d	D	B	r	C_r, kN	C_0, kN	Y for			
							e	$\frac{F_a}{F_r} < e$	$\frac{F_a}{F_r} > e$	Y_0
1204	20	47	14	1.5	9.95	3.18	0.27	2.31	3.57	2.42
1205	25	52	15	1.5	12.1	4.0	0.27	2.32	3.6	2.44
1206	30	62	16	1.5	15.6	5.8	0.24	2.58	3.99	2.7
1207	35	72	17	2	15.9	6.6	0.23	2.74	4.24	2.87
1208	40	80	18	2	19.0	8.55	0.22	2.87	4.44	3.01
1209	45	85	19	2	21.6	9.65	0.21	2.97	4.6	3.11
1210	50	90	20	2	22.9	10.8	0.21	3.13	4.85	3.28
1211	55	100	21	2.5	26.5	13.3	0.2	3.23	5.0	3.39
1212	60	110	22	2.5	30.2	15.5	0.19	3.41	5.27	3.57
1213	65	120	23	2.5	31.2	17.2	0.17	3.71	5.73	3.68
1214	70	125	24	2.5	34.5	18.7	0.18	3.51	5.43	3.88
1215	75	130	25	2.5	39.0	21.5	0.18	3.6	5.57	3.77
1216	80	140	26	3	39.7	23.5	0.16	3.94	6.11	4.13
1217	85	150	28	3	48.8	28.5	0.17	3.69	5.71	3.87
1218	90	160	30	3	57.2	32.0	0.17	3.76	5.82	3.94
1220	100	180	34	3.5	68.9	40.5	0.17	3.68	5.69	4.81
1221	105	190	36	3.5	74.1	44.0				
1222	110	200	38	3.5	88.4	52.0				
1224	120	215	42	3.5	119	70.0				

Bearings of the output shaft are arranged as the fixed and floating supports located in bearing housings (table 13.2). The fixed support can take up double-sided axial load. For that the inner and outer rings of the bearing are fixed in both axial directions. The floating support should compensate deformation of the shaft. In this case the inner ring of the bearing is fixed in both directions. For that we use boundary plates (tables 13.3 and 13.4) or spring rings (table 13.5). The outer ring is left free.

Table 13.2

Standard УМ series bearing housings (GOST 13218.3-80), mm

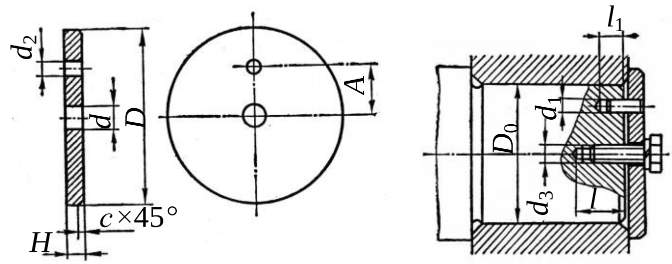
УМ 110-150 УМ 160-400



Bore diameter D, mm	D_1	d	d_1	A	B	B_1	L	L_1	H	H_1	h
80	100	M8	13	135	35	42	180	110	113	58	19
85	105	M8	13	140	35	42	185	115	120.5	63	19
90	110	M10	13	150	38	42	195	125	130.5	68	22
100	120	M10	17	165	40	48	215	135	139.5	72	24
110	130	M10	17	185	45	48	235	155	157.5	80	26
120	145	M12	17	210	48	48	260	175	179.5	92	32
125	150	M12	17	220	48	48	270	180	188	98	34
130	155	M12	17	225	50	54	280	185	190.5	98	34
140	165	M12	22	235	52	58	295	195	199.5	102	35
150	180	M12	22	255	55	64	315	210	215	110	40
160	190	M12	22	260	60	64	315	220	230	120	40
170	200	M12	22	280	63	66	335	230	240	125	40
180	210	M12	22	290	68	75	355	240	250	130	40
190	220	M16	22	295	70	82	360	250	260	135	40
200	230	M16	22	300	75	82	365	260	270	140	40
215	250	M16	22	325	85	90	385	285	292.5	150	45
225	260	M16	26	340	90	95	410	295	307.5	160	48

Table13.3

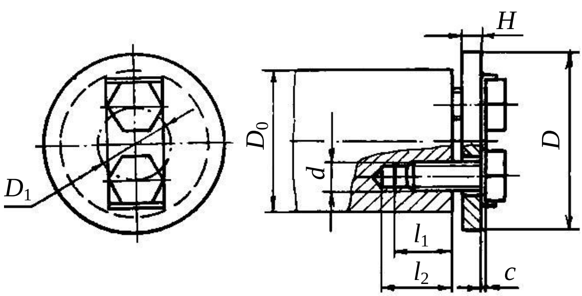
Boundary plate (GOST 14734–69), mm



Designation	D	H	A	d	d_2	c	D_0	d_3	d_1	l	l_1	Screw (ГОСТ 7798–70)	Pin (ГОСТ 3128–70)
7019–0623	32	5	9	6,6	4,5	1,0	24...28	M6	4	18	12	M6×16	4*m*8×12
7019–0625	36		10				28...32						
7019–0627	40		10				32...36						
7019–0629	45		12				36...40						
7019–0631	50		16				40...45						
7019–0633	56		16				45...50						
7019–0635	63	6	20	9,0	5,5	1,6	50...55	M8	5	22	16	M8×20	5*m*8×16
7019–0637	67		20				55...60						
7019–0639	71		25				60...65						
7019–0641	75		25				65...70						
7019–0643	85		28				70...75						

Table 13.4

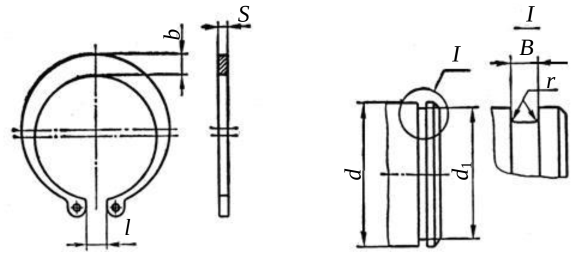
Boundary plate with two screws and retaining plate, mm



<table>
<tr><th>D_0</th><th>D</th><th>H</th><th>D_1</th><th>c</th><th>l_1</th><th>l_2</th><th>Screw $d{\times}l$</th></tr>
<tr><td>From 35 to 40</td><td>50</td><td rowspan="3">6</td><td>20</td><td rowspan="3">0,5</td><td rowspan="3">20</td><td rowspan="3">24</td><td rowspan="3">M8×20</td></tr>
<tr><td>above 40 to 45</td><td>55</td><td>20</td></tr>
<tr><td>from 45 to 50</td><td>60</td><td>25</td></tr>
<tr><td>from 50 to 60</td><td>70</td><td rowspan="2">8</td><td>30</td><td rowspan="8"></td><td rowspan="4">30</td><td rowspan="4">35</td><td rowspan="4">м12×30</td></tr>
<tr><td>from 60 to 70</td><td>80</td><td>35</td></tr>
<tr><td>from 70 to 80</td><td>90</td><td rowspan="2">10</td><td>40</td></tr>
<tr><td>from 80 to 90</td><td>110</td><td>45</td></tr>
<tr><td>from 90 to 100</td><td>120</td><td rowspan="4">12</td><td>50</td><td rowspan="4">36</td><td rowspan="4">42</td><td rowspan="4">м16×36</td></tr>
<tr><td>from 100 to 110</td><td>125</td><td>55</td></tr>
<tr><td>from 110 to 120</td><td>140</td><td>60</td></tr>
<tr><td>from 120 to 130</td><td>150</td><td>65</td></tr>
</table>

Table 13.5

Spring snap rings and grooves for them (ГОСТ 13942-86), mm



<table>
<tr><th rowspan="2">Shaft diameter d</th><th colspan="2">Grooves</th><th colspan="3">Rings</th></tr>
<tr><th>d_1</th><th>B</th><th>s</th><th>b</th><th>l</th></tr>
<tr><td>35</td><td>33.0</td><td rowspan="3">1.9</td><td rowspan="3">1.7</td><td>4.9</td><td rowspan="10">6.0</td></tr>
<tr><td>40</td><td>37.5</td><td rowspan="2">5.5</td></tr>
<tr><td>45</td><td>42.5</td></tr>
<tr><td>50</td><td>47.0</td><td rowspan="3">2.2</td><td rowspan="3">2.0</td><td rowspan="2">6.0</td></tr>
<tr><td>55</td><td>52.0</td></tr>
<tr><td>60</td><td>57.0</td><td>6.5</td></tr>
<tr><td>65</td><td>62.0</td><td rowspan="4">2.8</td><td rowspan="4">2.5</td><td rowspan="2">7.0</td></tr>
<tr><td>70</td><td>67.0</td></tr>
<tr><td>75</td><td>72.0</td><td rowspan="2">8.0</td></tr>
<tr><td>80</td><td>76.5</td></tr>
</table>

13.4. Design the drum or sprockets of the conveyer.

Diameter of the drum (sprocket) is given in the specification for the course project.

The drum (sprockets) should be mounted on the output shaft by distance 100 or 200 mm relative to supports.

There exist cast drums and welded drums. Welded drums are used more frequently.

For determination sizes of the conveyer sprocket it is necessary to choose a pull chain (table 13.6).

Dimensions of the pull chain sprocket are determined in the following way:

– addendum circle diameter $D_a = D + 0.25 \cdot D_1 + 6$ mm;
– dedendum circle diameter $D_f = D - D_1$;
– web thickness $b = 0.9 \cdot B_{\mathrm{bush}}$;

where D is the nominal pitch circle diameter of the sprocket (look through the specification for the course project)); D_1 is the diameter of the roller; B_{bush} is the bush width.

Possible constructions of welded drums are given in Fig.13.2. The rim and disks of the drum are made of steel sheet of thickness 8 mm. Ribs of the drum are produced from the strip of width 40 mm and thickness 6 mm.

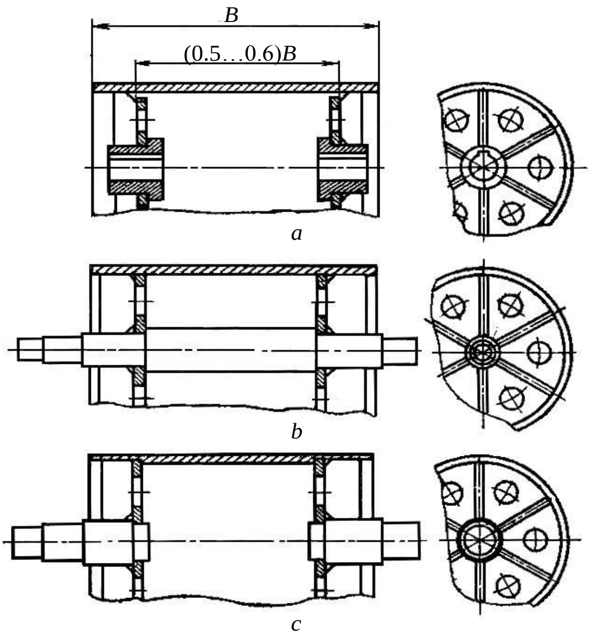


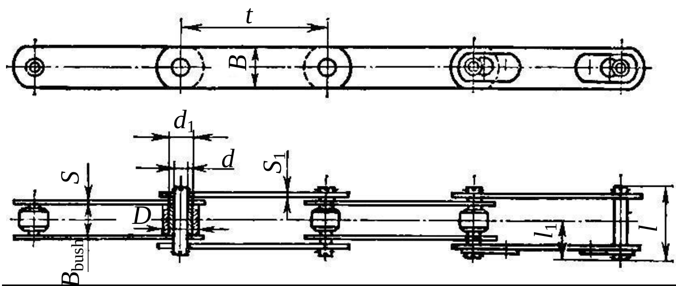
Fig. 13.2. Welded drums

13.5. Design the welded frame.

Welded frames are used for mounting assembly units. They should correspond to certain requirements of accuracy to provide needed relative disposition of assembly units. Besides, the welded frame should have high rigidity.

Table 13.6

Standard pull chains (GOST 588 – 81), mm



<table>
<tr><th>t</th><th>B_{bush}</th><th>B</th><th>S</th><th>S₁</th><th>d</th><th>d₁</th><th>D₁</th><th>l</th><th>l₁</th></tr>
<tr><td>100</td><td>32</td><td rowspan="2">36</td><td rowspan="2">5</td><td rowspan="2">4</td><td rowspan="2">14</td><td rowspan="2">21</td><td>30</td><td>64</td><td>35</td></tr>
<tr><td>100</td><td>38</td><td>36</td><td>70</td><td>38</td></tr>
<tr><td>125</td><td>44</td><td>50</td><td>7</td><td>7</td><td>20</td><td>30</td><td>44</td><td>100</td><td>54</td></tr>
</table>

Welded frames are obtained as a result of welding steel rolling elements such as channel bars, angle (*L*) bars, strips, sheets and others. Channel bars are used more frequently.

The height of the channel bar is determined as

$$H \approx 0.1 \cdot L_{max},$$

where L_{max} is the maximum length of the mechanical drive.

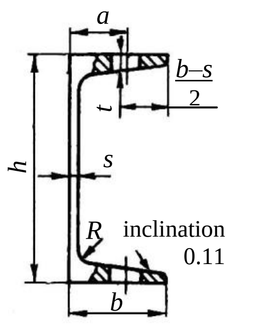
Obtained value of H should be rounded off to the greater side according to standard series given in table 13.7.

In order to simplify fixation of assembly units to the frame channel bars are mounted with outside flanges. For aligning the base surface for the bolt head we use skew plates (table13.8).

If assembly units of the mechanical drive are located at different levels we may use constructions of frames given in Fig.13.3, *a–e*.

Table 13.7

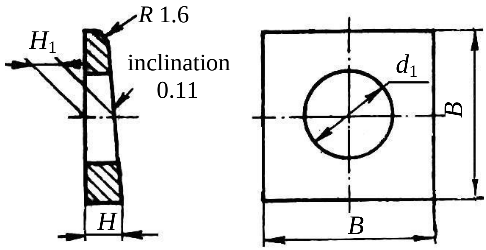
Channels (GOST 8240-97), mm



Number of channel	Dimensions, mm			
	h	*b*	*s*	*t*
14	140	58	4.9	8.0
16	160	64	5.0	8.4
18	180	70	5.1	8.7
20a	200	80	5.2	9.0
22a	220	87	5.4	9.5
24a	240	95	5.6	10.7
27	270	95	6	10.5
30	300	100	6.5	11
33	330	105	7	11.7

Table 13.8

Standard skew plates (GOST 10906 – 78)



Skew plates parameters, mm				
Bolt diameter	d_1	H_1	H	B
12	13	5.7	6	30
16	17	5.7	6	30
18	19	6.2	7	40
20	22	6.2	7	40
22	24	6.2	7	40
24	26	6.8	9	50

a
b
c
d
e

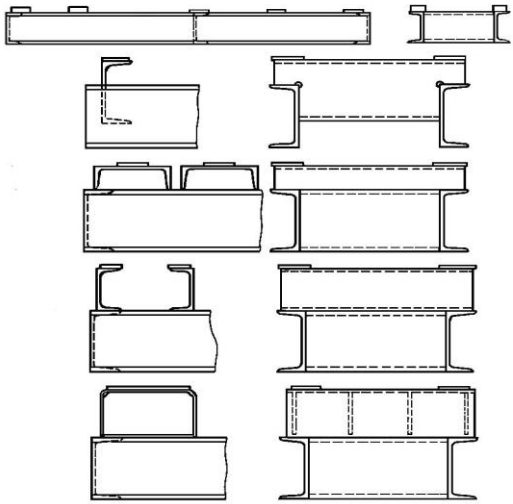
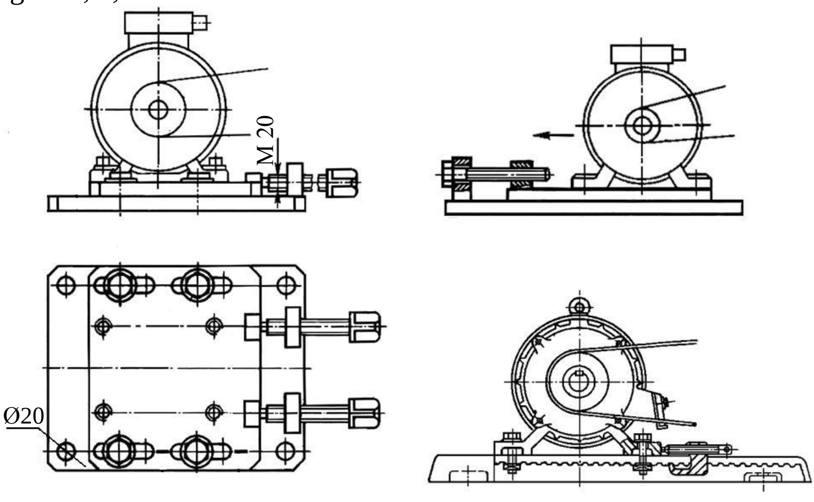


Fig.13.3. Alternatives of frames, when assembly units are located at different levels.

During operation of the belt drive the belt stretches. In order to provide tension of the belt at the required level belt tension adjusters are used. Possible constructions of belt tension adjusters are given in Fig 13.4, *a*, *b* and table 13.9.

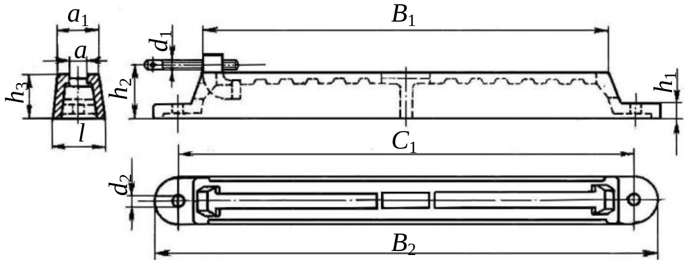


a *b*

Fig.13.4. Constructions of belt tension adjusters.

Table13.9

Sledges for electric motor



Type	Dimensions, mm											Mass of set, kg	Screws for engine mounting
	a	a_1	B_1	B_2	C_1	d_1	d_2	h_1	h_2	h_3	l		
C–3	16	38	370	440	410	M12	12	15	44	36	42	3,8	M10×35
C–4	18	45	430	540	470	M12	14	18	55	45	50	5,3	M12×40
C–5	25	65	570	670	620	M16	18	22	67	55	72	12,5	M16×55

14. SHOP DRAWINGS OF SPEED REDUCER ELEMENTS

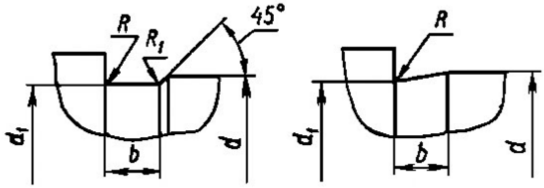
According to the specification for the course paper it is necessary to make two shop drawings such as the shop drawing of the speed reducer output shaft and the shop drawing of the toothed wheel.

Shop drawing of the output shaft

The shop drawing is carried out to scale 1:1 or 1:2. First of all, it is necessary to plot the output shaft according to the dimensions of assembly drawing. The shaft must be drawn in the position of installing on a machine, i.e. the axis of the shaft should be parallel to the main inscription. Transition from one installing diameter to the other is carried out by means of fillets or grooves. Fillets are used when the installing surface is not ground. Shaft portions where bearings are installed should be ground. As a space required for grinding wheel grooves are used. Possible alternatives of grooves are shown in table 14.1. Dimensions of grooves are given in table 14.1. In the shop drawing grooves should be represented to the increased scale separately.

Table 14.1

Grooves for a grinding wheel in shafts and their dimensions, mm



d	b	d_1	R	R_1
Over 10 to 50	3	d – 0.5	0.1	0.5
Over 50 to 100	5	d – 0.5	1.6	0.5
Over 100	8	d – 1.0	2.0	1.0

The next step is dimensioning the drawing. The number of dimensions should be minimal but enough to produce the shaft. Chamfers and grooves width cannot be included to the total dimensions chain.

There exist three methods of dimensioning drawings:

- chain method that provides the accuracy of disposition of every following element relative to the previous. In this case the accuracy relative to certain base is decreased;
- coordinate method according to which dimensioning of a drawing is carried out with respect to base *A*;
- combined method that consists of the chain and coordinate methods.

For the shop drawing the recommended method is combined method. Dimensioning in the axial direction is carried out under an element drawing.

As it is known dimension must be held between two limits. The difference of these limits is called tolerance. Tolerance limits of relatively low accuracy dimensions are not marked on a drawing. In this case it is necessary to make the following inscription:

"*Dimensional tolerances: holes H14, shafts h14, other elements* $\pm\frac{\mathrm{IT14}}{2}$ *(medium accuracy class)*".

The nature of elements connections is called a fit. Fits may provide clearance or interference. There exist also transition fits that may have either clearance or interference. Fits are marked by a letter of Roman alphabet. Letters *a*-*h* corresponds to clearances, *js*-*n* – transition fits, *p*-*z* - interference. A numeral near a letter shows the quality grade. There exist 19 quality grades. For mechanical engineering the most typical are quality grades 5 through 12. Quality grades 6 through 8 refer to critical parts and units.

Example of the shaft drawing – Fig. 14.1, example of the gears construction – Fig. 14.2-14.4.

Fits of main elements

1. Straight spur gear on the shaft - $\frac{H7}{p6}$;

2. Helical spur gear and worm gear on the shaft - $\frac{H7}{r6}$;

3. Bevel gear on the shaft - $\frac{H7}{s6}$;

4. Coupling and gear located on a cantilever portion of the shaft - $\frac{H7}{k6}$;

5. Pulleys or sprockets - $\frac{H7}{h6}$;
6. Commercial seals - $h11$;
7. Inner ring of a bearing - $k6$;
8. Outer ring of a bearing - $H7$;
9. The width of a keyseat in the shaft - $P9$;
10. The width of a keyseat in the hole of a hub - J_S9.

During treatment of the shaft besides errors of linear dimensions errors of geometrical shapes and errors of surfaces disposition arise.

Possible errors of geometrical shapes are non-cylindrical surfaces, non-rounding, non-flatting.

For shaft portions and gear holes tolerances of cylindrical surface should be taken into account. Sign /○/ marks tolerance of cylindrical surface. The magnitude of this tolerance is determined as $0.3 \cdot t \cdot 10^{-3}$, where t is diametrical tolerance range in micrometers (table 14.2). Obtained value of the tolerance should be rounded off according to the following standard series: 0.004, 0.005, 0.006, 0.008, 0.01, 0.012, 0.016, 0.02.

Table 14.2

Tolerance ranges in micrometers

Dimensions in mm	Quality grades											
	3	4	5	6	7	8	9	10	11	12	13	14
Over 3 to 5	2.5	4	5	8	12	18	30	48	75	120	180	300
Over 6 to 10	2.5	4	6	9	15	22	36	58	90	150	220	360
Over 10 to 18	3	5	8	11	18	27	43	70	110	180	270	430
Over 18 to 30	4	6	9	13	21	33	52	84	130	210	330	520
Over 30 to 50	4	7	11	16	25	39	62	100	160	250	390	620
Over 50 to 80	5	8	13	19	30	46	74	120	190	300	460	740
Over 80 to 120	6	10	15	22	35	54	87	140	220	350	540	870
Over 120 to 180	8	12	18	25	40	63	100	160	250	400	630	1000
Over 180 to 250	10	14	20	29	46	72	115	185	290	460	720	1150

Possible errors of surface dispositions are non-perpendicularity relative to a base, misalignment, non-symmetry, non-parallelism.

For shafts it is necessary to use total tolerances that take into account tolerance of shape and tolerance of surface disposition: radial run-out that allows for non-rounding and misalignment and end-play that takes into account non-flatting and non-perpendicularity.

The magnitude of radial run-out ↗ depends upon the peripheral speed and is determined according to table 14.3.

The magnitudes of end play ↗ may be found according to table 14.4.

Table 14.3

Tolerances of radial run out of shaft portions for fitting toothed wheels, pulleys, couplings

Peripheral speed of elements mounted on a shaft, m/sec	< 2	2…6	6…10	> 10
Tolerance of radial run out	$2.0 \cdot t \cdot 10^{-3}$	$1.4 \cdot t \cdot 10^{-3}$	$1.0 \cdot t \cdot 10^{-3}$	$0.7 \cdot t \cdot 10^{-3}$

Table 14.4

Tolerances of end play of gearings, hubs, of toothed wheels and shaft shoulders

Degree of accuracy	For gearing at *d*=100 mm, and at face width of		For toothed wheel hub and shaft shoulder at bore diameter (shaft diameter of)		
	< 55	55…110	< 55	55…80	> 80
6	0.017	0.009	0.02	0.03	0.04
7	0.021	0.011	0.02	0.03	0.04
8	0.026	0.014	0.03	0.04	0.05
9	0.034	0.018	0.03	0.04	0.05

As a base the shaft axis of rotation is used for surfaces where bearings are installed. In order to eliminate misalignments of elements that are installed on the shaft we will use as a base of all other shaft surfaces, the surfaces where bearings are located.

Possible errors of a keyseat are non-parallelism and non-symmetry. Parallelism tolerance is marked as // and is equal to $0.6 \cdot t_{ks} \cdot 10^{-3}$, where t_{ks} is keyseat width tolerance range in micromeres (table 14.2). Symmetry tolerance is marked as ÷ and is $4 \cdot t_{ks} \cdot 10^{-3}$.

The next step is marking surfaces roughness.

Surface roughness may be evaluated by average deviation of profile R_a or height of profile irregularities R_z by ten points. Marking surface roughness by R_a is more preferable. The magnitude of surface roughness depends upon the surface treatment and the quality grade.

Main surfaces roughness

- shaft portions for installing bearings – 0.8;
- shaft portions for installing gears, half-couplings, sprockets, pulleys:

if $d < 55$ mm – 0.8, if $55 < d < 120$ – 1.6;

- shoulder face end for bearings fixation – 1.6;
- shoulder face end for fixation of gears, sprockets, pulleys, half-couplings – 3.2;
- shaft potion for installing seals – 0.2;
- working surfaces of a keyseat made in the shaft – 1.6;
- holes of gears that are installed on the shaft
  if $d < 55$ mm – 0.8;
  if 55mm $< d <$ 120mm – 1.6;
- gear face end that is fixed by the shaft shoulder or the face end of other element – 3.2;
- free gear face end – 6.3;
- tooth profile

for 6th degree of accuracy – 0.4;
for 7th degree of accuracy – 0.8;
for 8th degree of accuracy – 1.6;
for 9th degree of accuracy – 3.2;

- working surfaces of a keyseat made in the hub– 3.2.

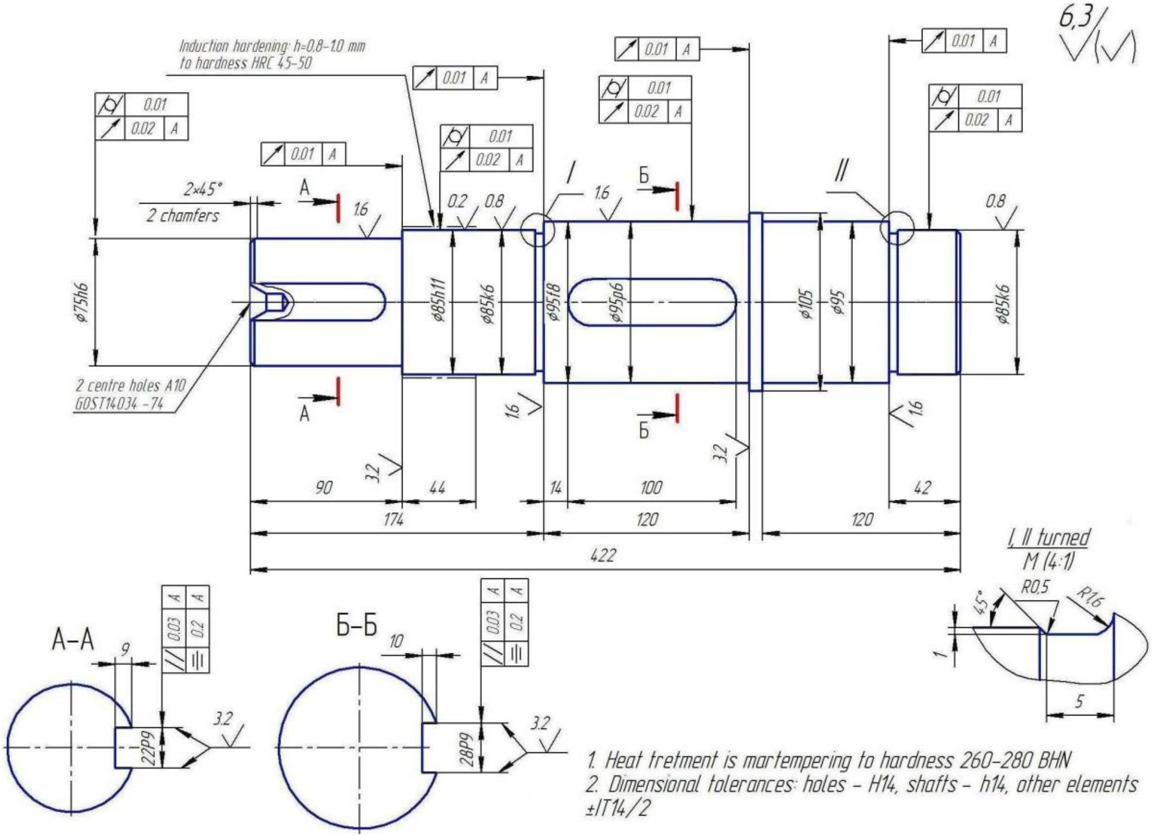
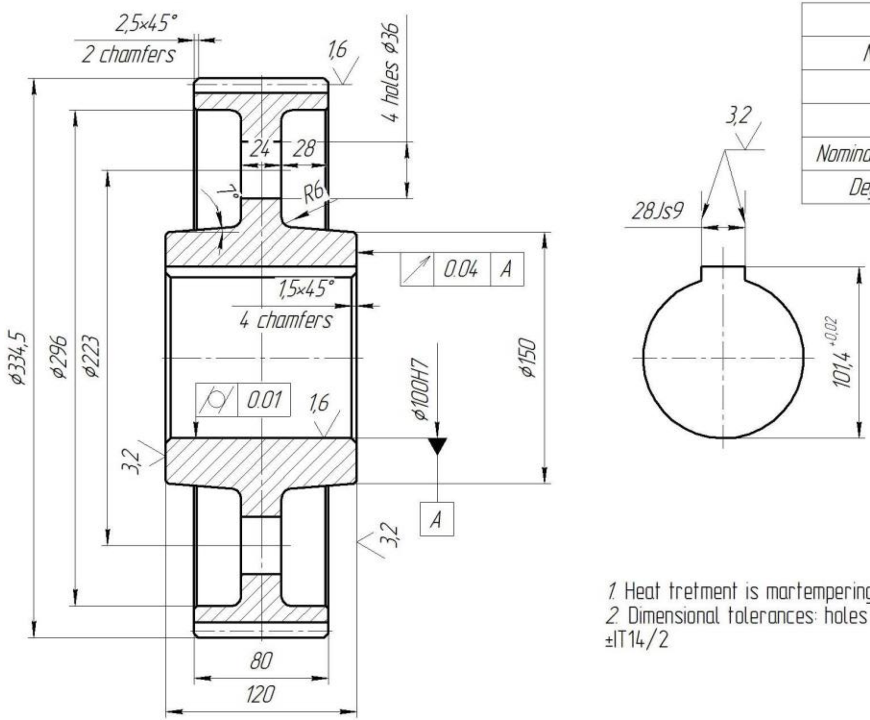


Fig. 14.1. Shop drawing of the output shaft

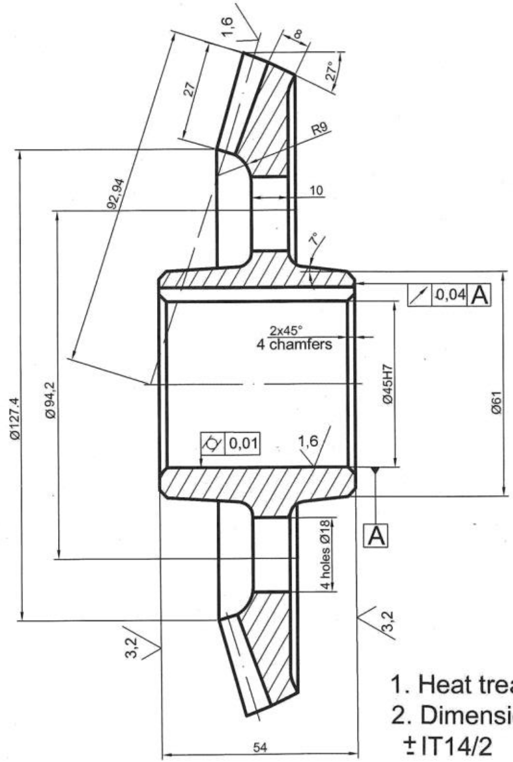


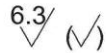
6,3

Module	m	4
Number of teeth	z	98
Helix angle	β	11.48°
Offset factor	x	0
Nominal pith circle diameter	d	326.5
Degree of accuracy		9

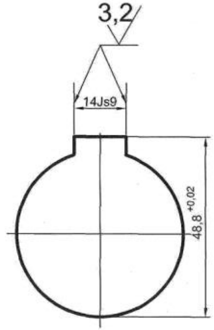
1. Heat tretment is martempering to hardness 269–302 BHN
2. Dimensional tolerances: holes – H14, shafts – h14, other elements ±IT14/2

Fig. 14.2. Spur gear construction





Module	m	1,48
Number of teeth	z	121
Offset factor	x	0
Nominal pitchcircle diameter	d	153,56
Degree of accuracy		8



1. Heat treatment is martempering to hardness 269...302 BHN
2. Dimensional tolerances: holes - H14, other elements ±IT14/2

Fig. 14.3. Bevel gear construction

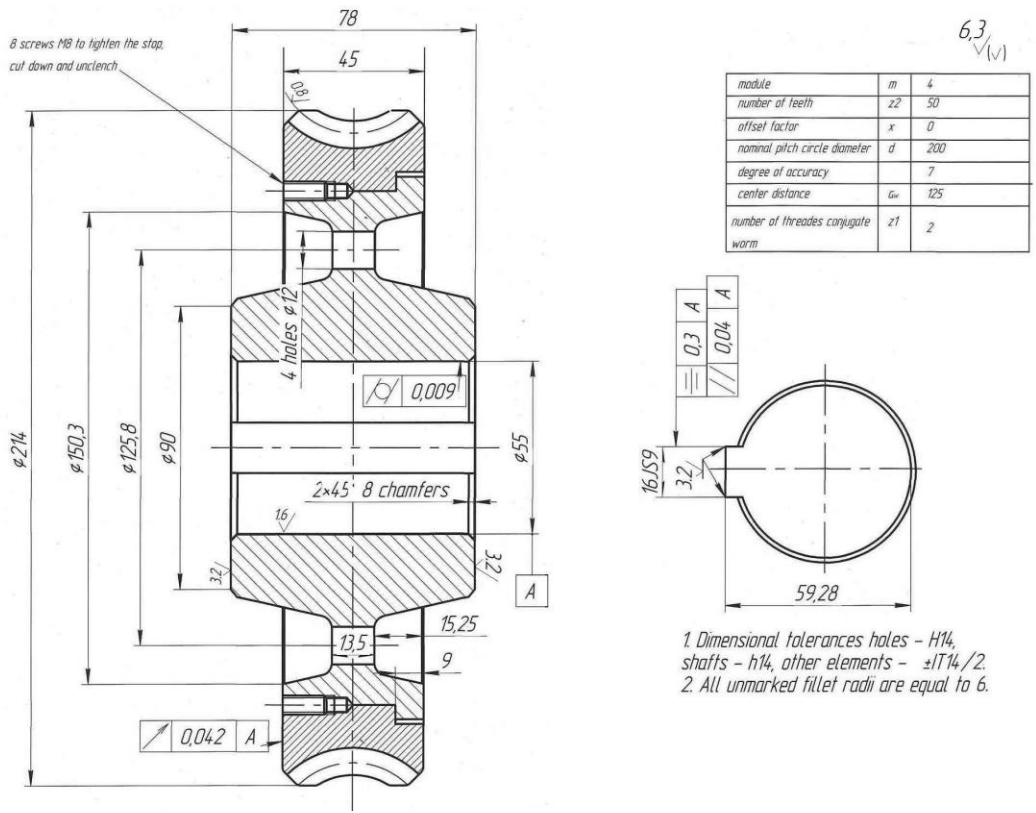


Fig. 14.4. Worm gear construction

15. DESIGN OF A PARTS LIST

According to GOST 2.108-96 a Parts List is made in the form of tables on separate A4 papers for every assembly unit.

The Parts List consists of the following subparts:

1. Documentation
2. Assembly Units
3. Elements
4. Standard Elements
5. Materials

The name of every subpart has to be written in the form of the underlined title in the box “Description”. It is recommended to remain 1-3 free lines for possible additional records.

The subpart “Documentation” includes the main set of design documentation, for example “Assembly Drawing”, “Explanatory Note”, etc.

The subpart “Assembly Units” includes assembly units, which are parts of the main item. For example, “Speed reducer”, “Welded Frame”, “Belt Tension Adjuster”, “Drum Shaft”, “Worm Gear”, “Deep Stick”, etc.

The subpart “Elements” includes nonstandard elements. For example, “ Gear”, “Input Shaft”, “Cap”, “Bearing Housing”, “Driven Pulley”, “Driving Sprocket”, etc. It is recommended to list them alphabetically.

The subpart “Standard Elements” includes state and industry standard items. Standard elements are divided into groups, e.g. fastening elements, bearings, etc. and are listed alphabetically.

The subpart “Materials” includes materials used in the item, for which the parts list is made. For example, “Industrial Oil”, “Wire”, etc.

Parts list boxes to be filled in as following:

1. The “Paper Size” box contains the paper size of the item drawing (A1, A2, A3, A4). If there is no drawing for an item this box is filled in by WD (Without Drawing). For subparts “Standard Elements” and “Materials” this box should not be filled in.
2. The “Area” box is not filled in for course projects.

3. The “Item No.” box contains consecutive number of the designed item component parts. For subpart “Documentation” this box should not be filled in.
4. The “Part Number” box contains designation of documents, assembly units and elements. For subparts “Standard Elements” and “Materials” this box should not be filled in.
5. The “Description” box contains
   a) The name of a document for subpart “Documentation” (for example, Assembly Drawing, Explanatory Note, etc.)
   b) The name of an item according to the main inscription on the drawing for subparts “Assembly Units” and “Elements” (for example Bevel Gear, Output Shaft, etc.)
   c) The name and designation of an item according to state or industrial standard for subparts “Standard Elements” and “Materials” (for example, Bolt M12x70.58 GOST 7798-70.)
6. The “Quantity” box contains the number of assembly units, elements and standard elements for one item
7. The “Notes” box contains additional information about elements, documents, materials.

At the bottom of the Parts List the main frame is made similar as for drawings.

Designation of design documentation

Designation of design documentation consists of the following parts:

NAU 12. 03.04.005 AA,

where

NAU is the institution code

1 is the number of task

2 is the number of variant

03 is the consecutive number of main assembly units which are a part of the designed item. For example, if the speed reducer (assembly unit of the mechanical drive) is marked by number 1 on the mechanical drive drawing the speed reducer should be designated as following

NAU 12.01.00.000 AD.

04 is the consecutive number of assembly units which are a part of the main assembly units. For example, if the worm gear (assembly unit of the speed reducer) is marked by number 4 on the speed reducer drawing the worm gear should be designated as following

NAU 12.01.04.000 AD.

005 is the consecutive number of elements which are a part of the item. For example, if the driven pulley (element of the mechanical drive) is marked by number 7 on the mechanical drive drawing, the driven pulley should be designated as following

NAU 12.00.00.007.

If the output shaft (element of speed reducer) is marked by number 9 on the speed reducer drawing, the output shaft should be designated as following

NAU 12.03.04.009.

AA is the code of a document. For example, assembly drawing is marked by AD, explanatory note – by EN, parts list – by PL. The mechanical drive assembly drawing and the explanatory note to this drawing are designated as following

NAU 12.00.00.000 AD

NAU 12.00.00.000 EN.

It is necessary to note that designation of the element drawing does not contain the document code.

The example of the Parts List for the mechanical drive is given in Fig.15.1.

Paper Size	Area	Item No.	Part Number	Description	Quantity	Notes
				Documentation		
			NAU 12.00.00.000 AD	Assembly Drawing		
			NAU 12.00.00.000 EN	Explanatory Note		
				Assembly Units		
A1		1	NAU 12.01.00.000 AD	Speed Reducer	1	
WD		2	NAU 12.02.00.000 AD	Drum Shaft	1	
WD		3	NAU 12.03.00.000 AD	Welded Frame	1	
WD		4	NAU 12.04.00.000 AD	Belt Tension Adjuster	1	
				Elements		
WD		5	NAU 12.00.00.005	Cap	1	
WD		6	NAU 12.00.00.006	Driven Pulley	1	
WD		7	NAU 12.00.00.007	Driving Pulley	1	
WD		8	NAU 12.00.00.008	Flanged Cap	3	
WD		9	NAU 12.00.00.009	Spacer Ring	1	
				Standard Elements		
		101		Bolt M 10x30.58 GOST 7798-70	24	
		102		Bolt M 12x30.58 GOST 7798-70	4	
		103		Bolt M 12x50.58 GOST 7798-70	4	
		104		Bolt M 16x40.58 GOST 7798-70	4	
		105		Bolt M 20x50.58 GOST 7798-70	4	
		106		Nut M10.6 GOST 5915-70	24	
		107		Nut M12.6 GOST 5915-70	4	
		108		Nut M16.6 GOST 5915-70	4	
		109		Nut M20.6 GOST 5915-70	4	
		110		Spring Washer 10 GOST 6402-70	24	
		111		Spring Washer 12 GOST 6402-70	8	
		112		Spring Washer 16 GOST 6402-70	4	
		113		Spring Washer 20 GOST 6402-70	4	
		114		Skew plate 12 GOST 10906-78	4	
		115		Skew plate 16 GOST 10906-78	4	
		116		Skew plate 20 GOST 10906-78	4	
		117		Boundary Plate 7019-0623	1	
				GOST 14734-69		
		118		Boundary Plate 7019-0629	1	
				GOST 14734-69		
		119		Boundary Plate 7019-0639	1	
				GOST 14734-69		

Change	Sheet	Document No.	Signature	Date	NAU 12.00.00.000 PL		
Developed		Dubinin A.			Mechanical Drive	Letter	Sheet 1	Sheets 2
Checked		Kryzhanovskyi				TO-305		
Approved								

Fig.15.1. Parts List for the mechanical drive

PaperSize	Area	Item No.	Part Number	Description	Quantity	Notes
		120		*Key 8x7x50 GOST 23360-78*	1	
		121		*Key 14x9x50 GOST 23360-78*	1	
		122		*Key 20x12x60 GOST 23360-78*	1	
		123		*Lip Seal 70x95 GOST 8752-79*	3	
		124		*Bearing 1214 GOST 28428-90*	2	
		125		*Bearing Housing УМ 130*	2	
				GOST 13218.3-80		
		126		*Belt 50-Б-800 GOST 23831-79*	1	
		127		*Coupling with Rubber Bushed Studs*		
				1000-60-2 GOST 21424-93		
		128		*Electrical Motor 4A132S6*	*1*	
				GOST 19523-81		

Change	Sheet	Document No.	Signature	Date	NAU 12.00.00.000 PL	Sheet 2

,

Fig.15.2. Parts List for the mechanical drive

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