

# The Elements of Mechanical Design

J.G. Skakoon, ASME Press, New York, 2008

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# Contents:

- ▶ Elementary rules of mechanical design
- ▶ Essentials of thought and procedure in mechanical design
- ▶ Practical advice

▶ References

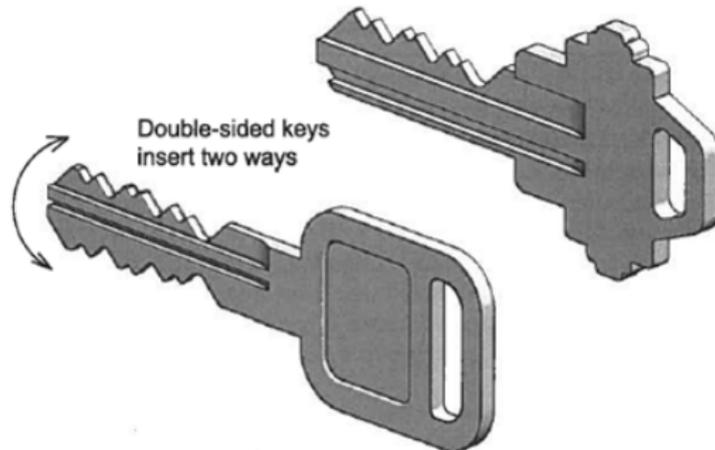
◀ Title

# Elementary rules of mechanical design

- 1 ▶ Create designs that are explicitly simple
- 2 ▶ Keep the functions of a design independent
- 3 ▶ Use exact kinematic constraint design
- 4 ▶ Plan the load paths
- 5 ▶ Triangulate parts and structures to make them stiffer
- 6 ▶ Avoid bending stress
- 7 ▶ Improve designs with self-help
- 8 ▶ Manage friction in mechanisms

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# Create designs that are explicitly simple, keep complexity intrinsic



**Figure 1-1** Symmetric items are simpler—to use or assemble, even if they are more complicated to produce.

# Keep the functions of a design independent from one another

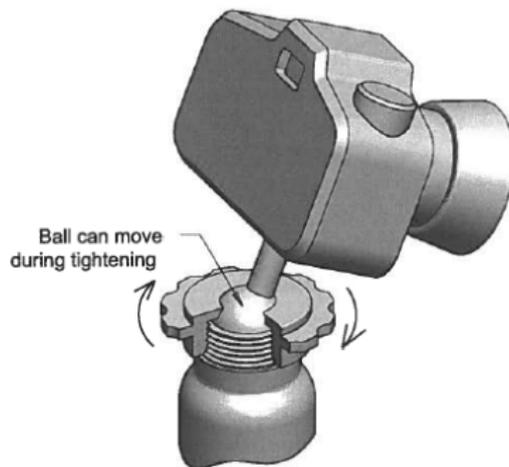
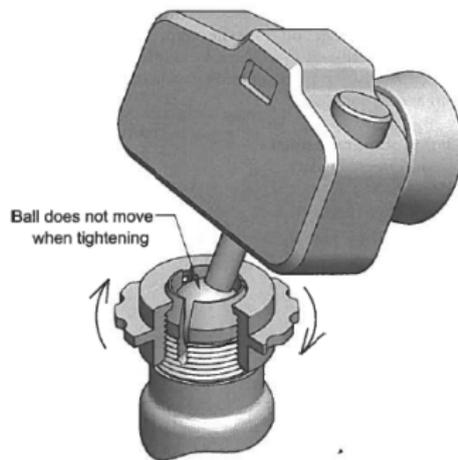


Figure 2-1 Ball-and-socket tripod head for camera. There is no functional independence of positioning and locking.

# Locking function independent from locating function



**Figure 2-2** Slotted collet for ball-and-socket tripod head.  
Locking function is independent of locating function.

# Independence of all functions

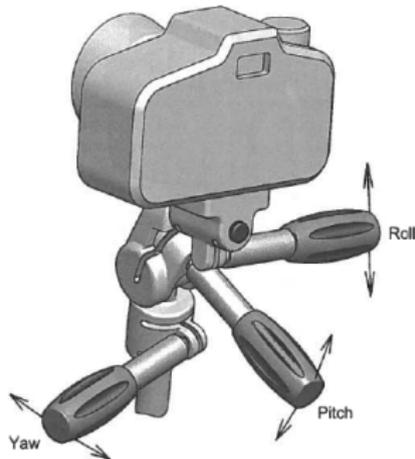


Figure 2-3 Multi-axis pan head camera mount has functional independence of all three rotational locking and positioning functions.

# Golden Sentence

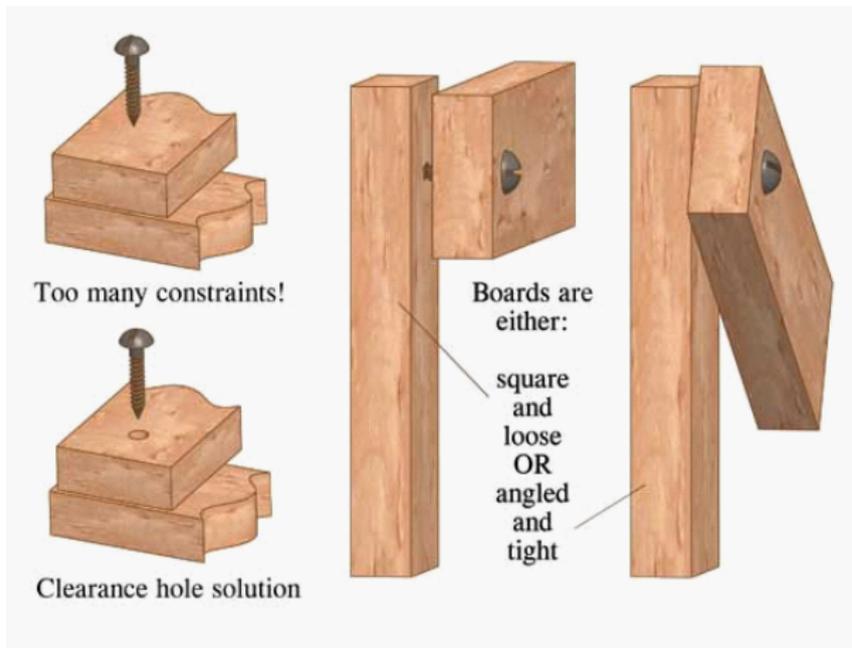
Use Exact Kinematic Constraint Design to generate Sound Mechanical Designs

# Use exact kinematic constraint when designing structures and mechanisms

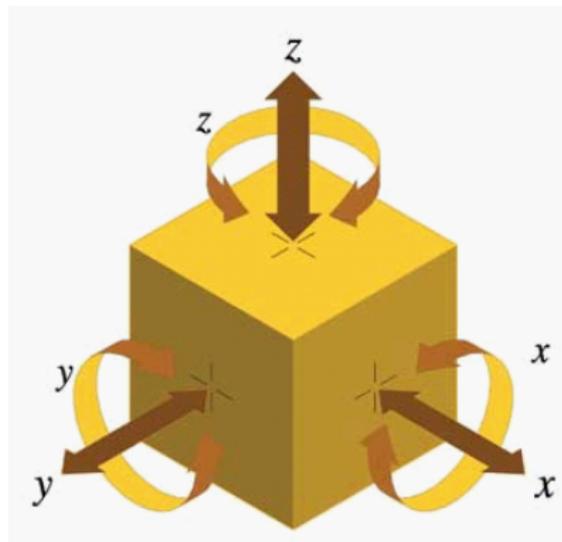
Advantages exactly constrained compared to over-constrained designs:

- 1 No binding
- 2 No play
- 3 Repeatable position
- 4 No internal stresses
- 5 Loose-tolerance parts
- 6 Easy assembly
- 7 Robustness to wear and environment

# Example: overconstrained design



# 6 degrees of freedom of a rigid body



# Exact kinematic constraint diagram (basic how to)

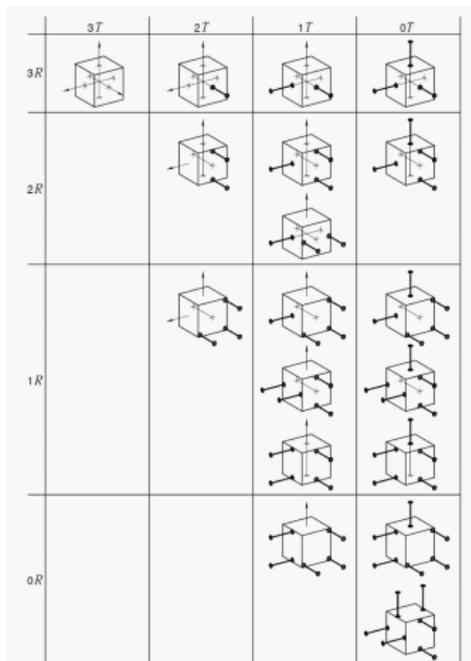
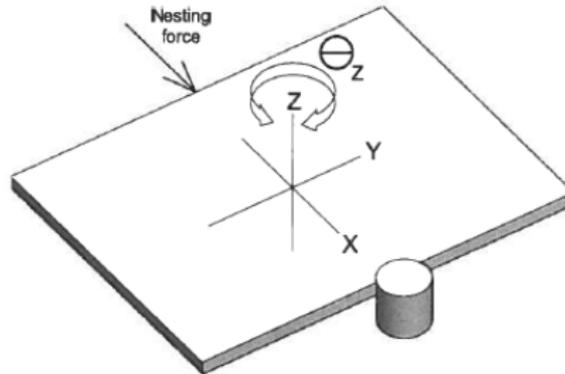


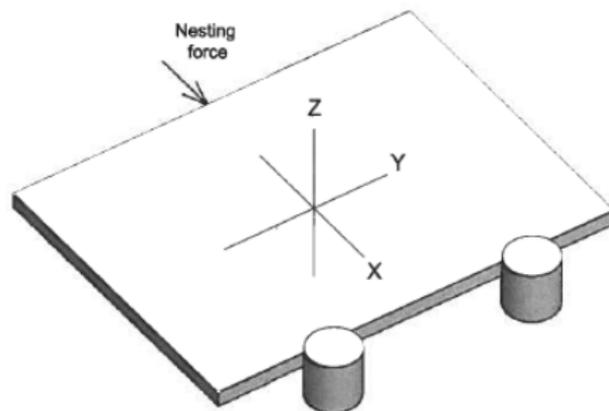
Figure 2-21 A matrix of desired rotational degrees of freedom (centerlines) and translational degrees of freedom (arrows) shows all possible orthogonal constraint arrangements, after [Bland, 1992]

## 2D Single constraint design example



**Figure 3-6** Two-dimensional example; a single constraint. A constraint is a point of contact together with a nesting force. The nesting force goes through the contact point in the tangent normal direction.

## 2D plate 2 constraint example



**Figure 3-7** Plate constrained against rotation in two dimensions.

## 2D plate fully constraint example

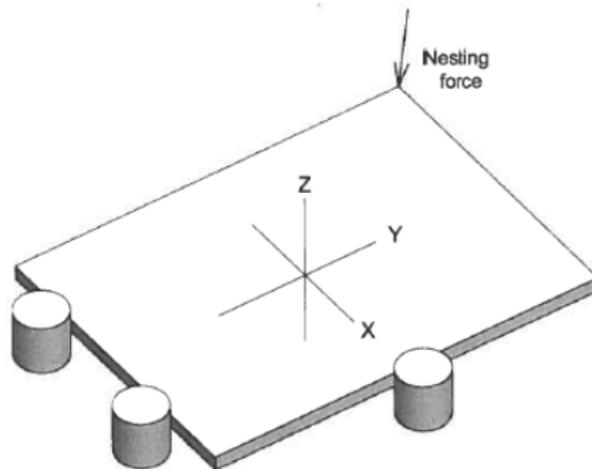
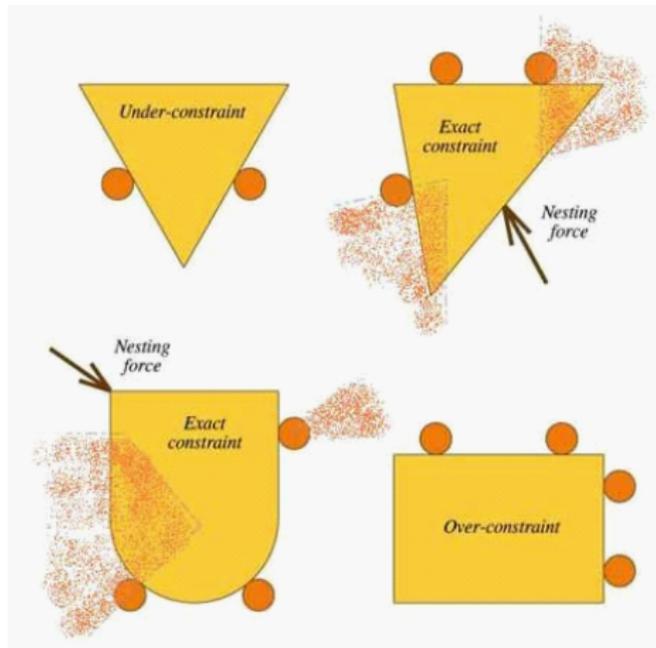
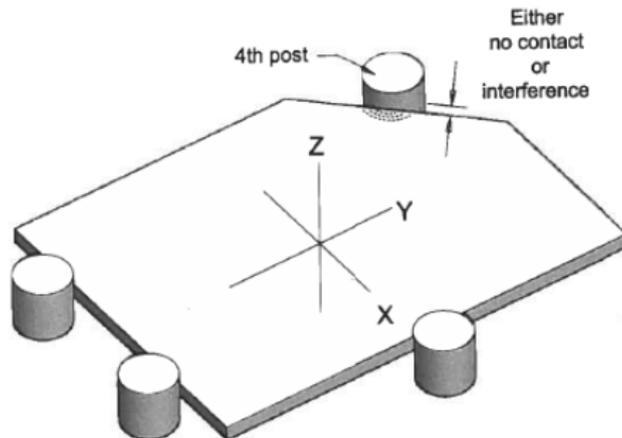


Figure 3-9 Plate fully constrained in two dimensions.

## 2D constraint examples

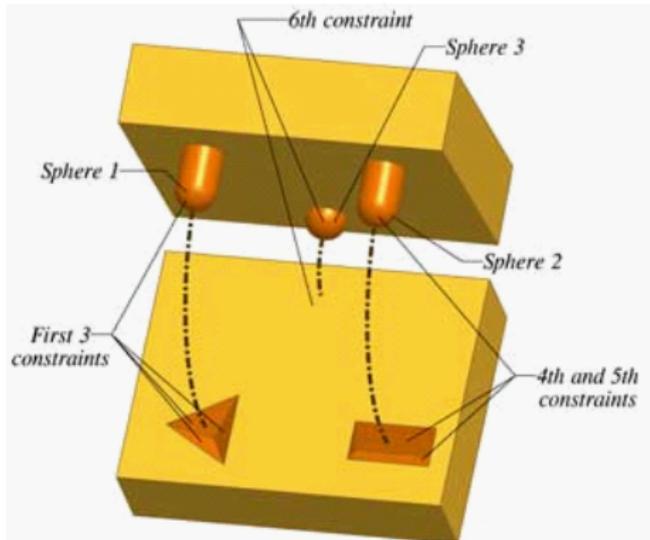


## 2D Overconstrained! (Form closed!)

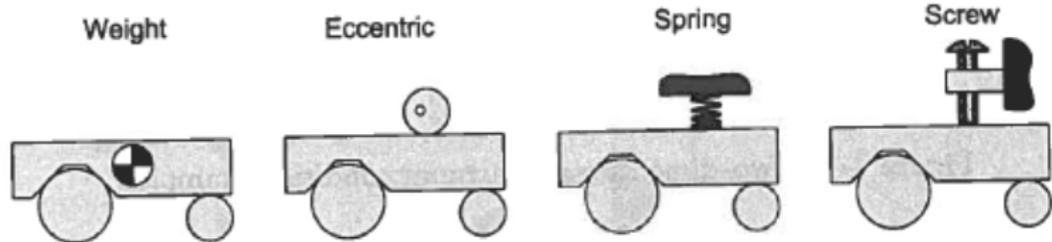


**Figure 3-11** A fourth post is overconstrained and does not replace the nesting force.

# Exact constraint design example

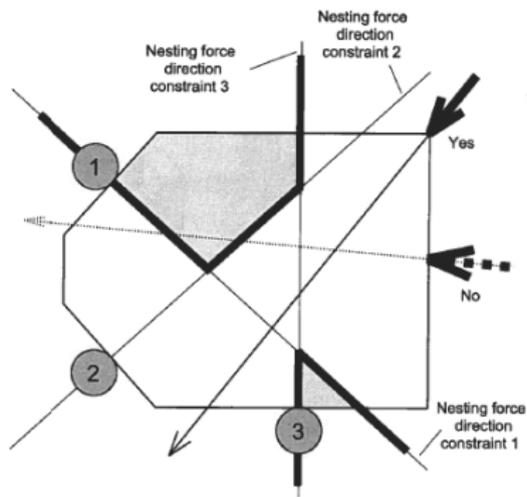


## Applying a nesting force



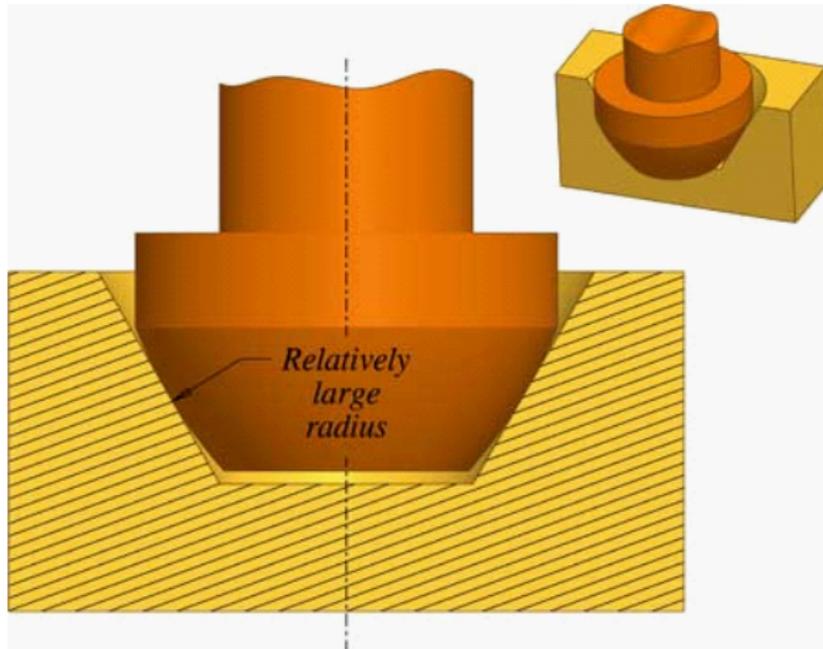
**Figure 3-12** Example means of applying a nesting force.  
(Adapted from Blanding [12].)

# The nesting force window



**Figure 3-13** The nesting force window (unshaded area) in an exactly constrained block showing suitable (Yes) and unsuitable (No) nesting forces. Any force directed outside this window will not maintain contact at all constraints.

# Curvature and surface matching



# Wobbling table



# Elastic constraint design



# Elastic constraint design



**Figure 3-17** Office chair with five legs shows elastic constraint design.

# Plan the load path in parts, structures and assemblies

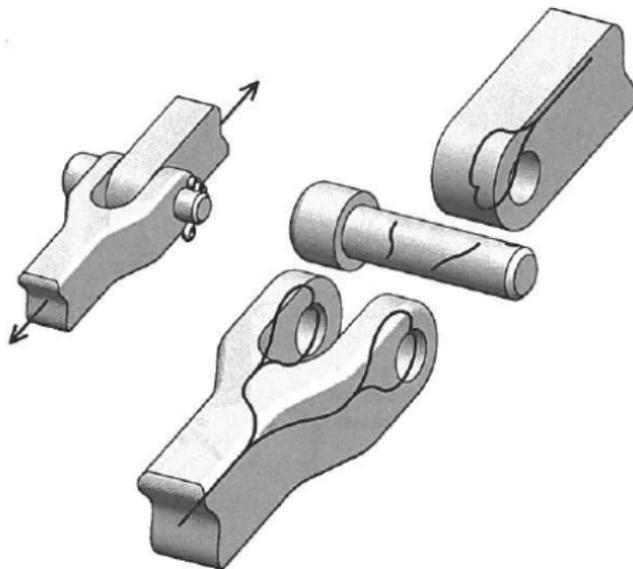


Figure 4-1 Load paths through a pinned clevis connection. The first step in planning the load path is visualizing it.

# You want the load path to be:

- 1 Short
- 2 Direct
- 3 In a line, or barring that, in a plane
- 4 Symmetric
- 5 Non-redundant, or barring that, elastic
- 6 Locally-closed
- 7 (Easily analyzed)

# Load path

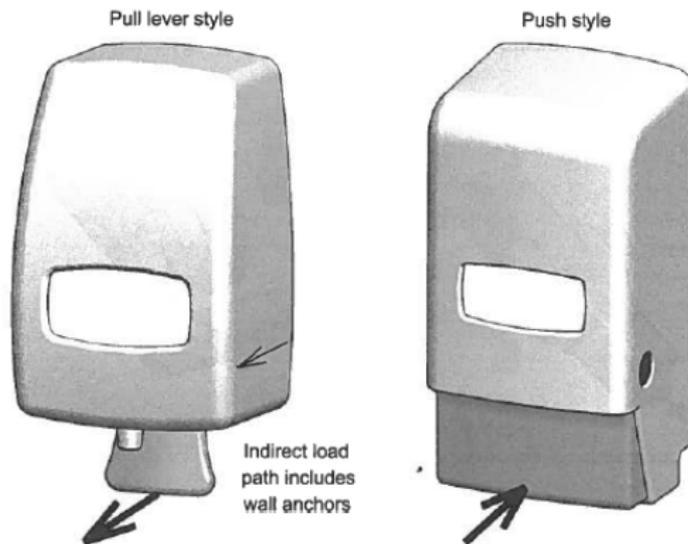
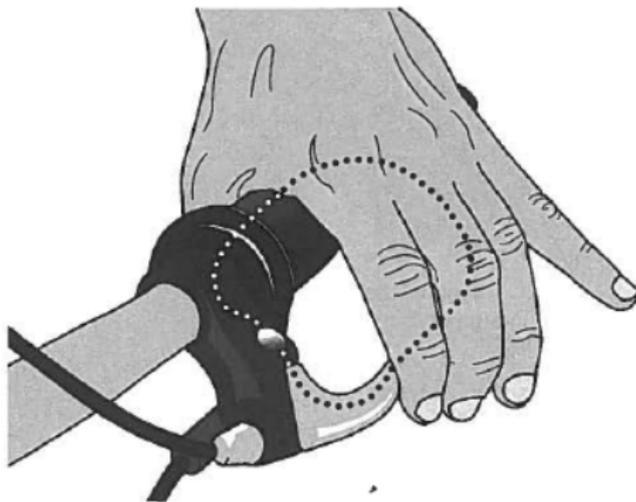


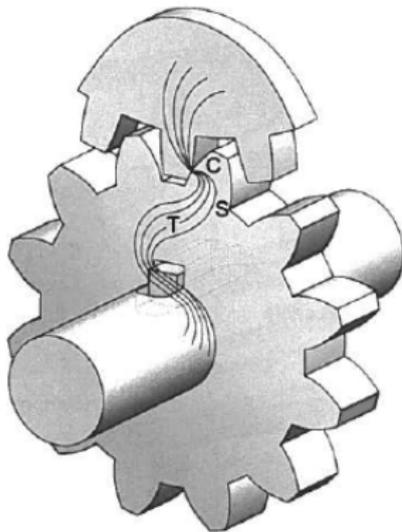
Figure 4-2 Wall-mounted soap dispensers. The load path in the push style travels more directly to the wall surface.

## Locally-closed load path



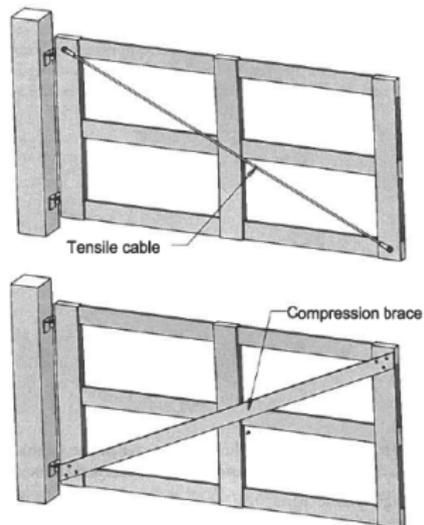
**Figure 4-5** A bicycle hand brake is squeezed rather than pulled or pushed. The load path is locally-closed. Pulling rather than squeezing a bicycle hand brake would be perilous.

# Force flow lines



**Figure 4-6** Detailed force flow lines in a gear set and keyed shaft. The lines can be labeled for tension, compression, and shear.

# Triangulate parts and structures to make them stiffer



**Figure 5-1** Swinging gates with triangulating tension and compression members. Structures without triangulating members rely on the rigidity of connecting joints between members for stiffness.

# Triangulate to obtain stiffness

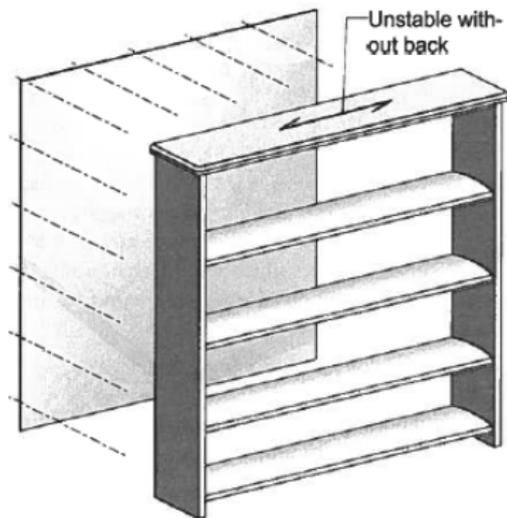
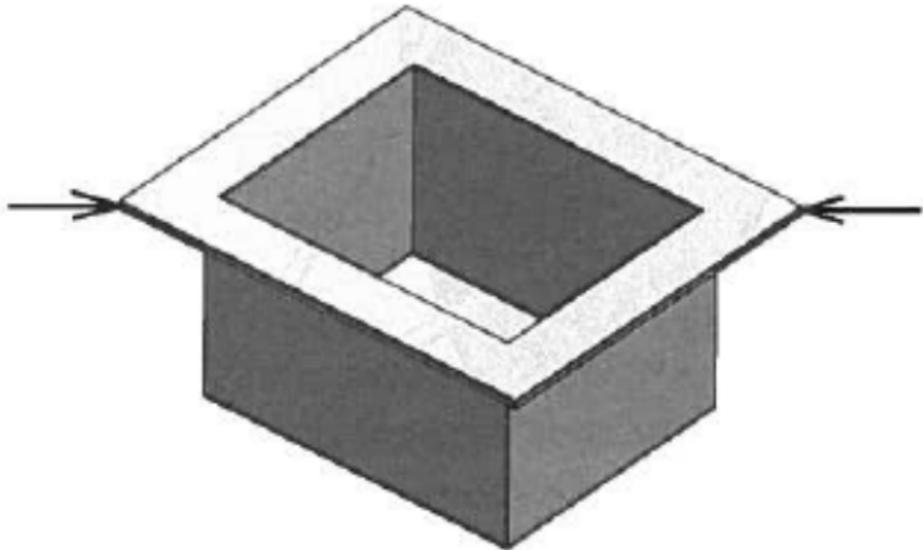


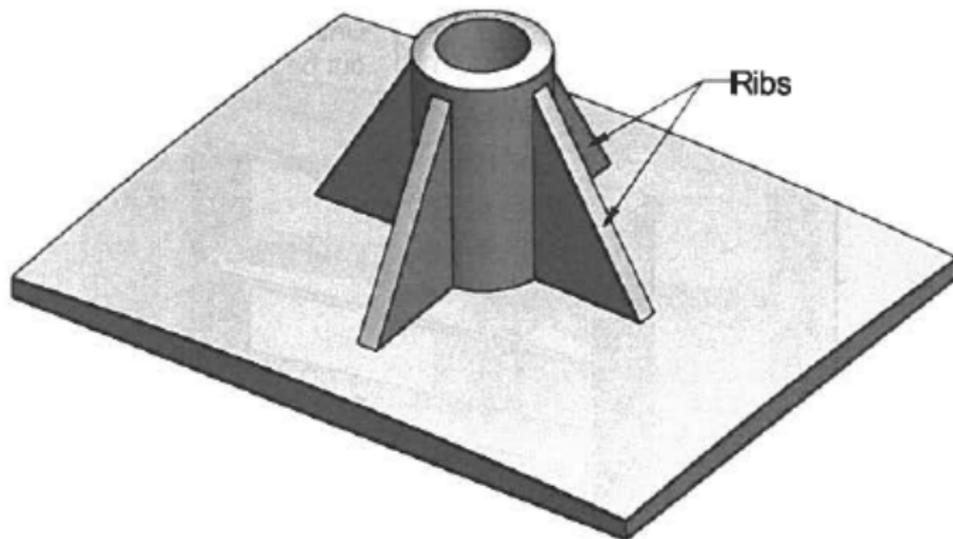
Figure 5-2 Bookcase with triangulating back. This bookcase will not collapse side-to-side, but still could twist corner-to-corner, an uncommon loading.

## Flange to obtain stiffness



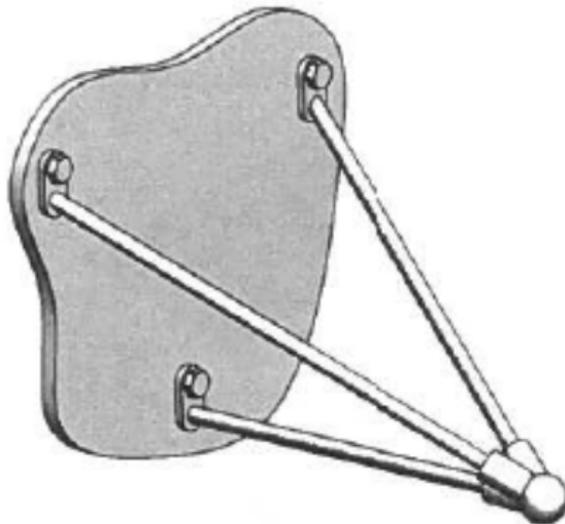
**Figure 5-3** Open box with stiffening flange.

## Ribs to obtain stiffness



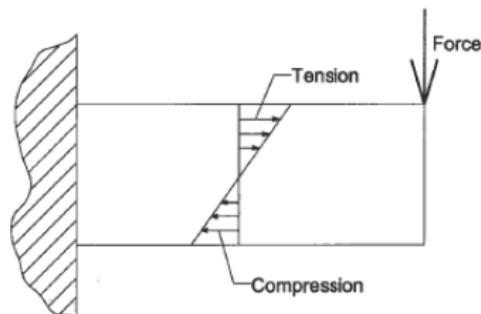
**Figure 5-4** Triangulating ribs in a molded part. Molding and casting often require thin ribs and webs for strength or rigidity.

# Tetrahedron: 3D triangulation



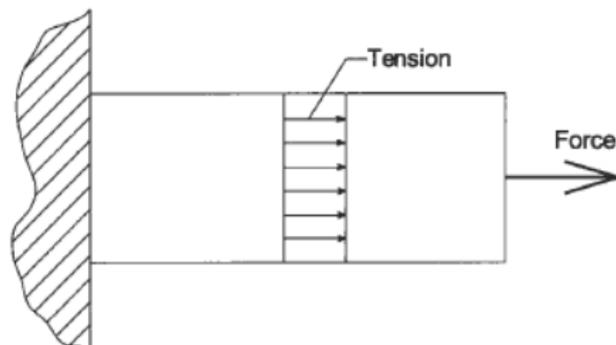
**Figure 5-5** A tetrahedron: three-dimensional triangulation. Four triangles give three-dimensional rigidity.

Avoid bending stresses. Prefer tension and compression.



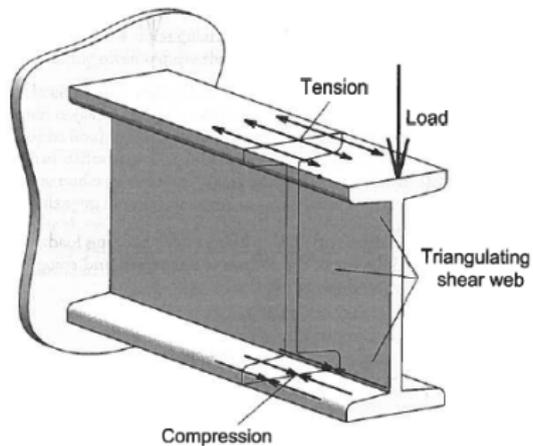
**Figure 6-1** Stress distribution in a beam under bending load. Material at the midpoint of the section is unstressed and contributes nothing to strength or rigidity.

# Optimal material use



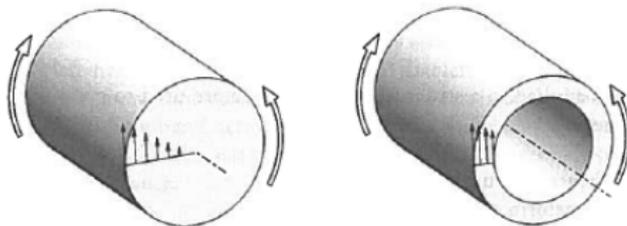
**Figure 6-2** Stress distribution in a beam under tension. All material contributes to carry load.

# Optimal material use



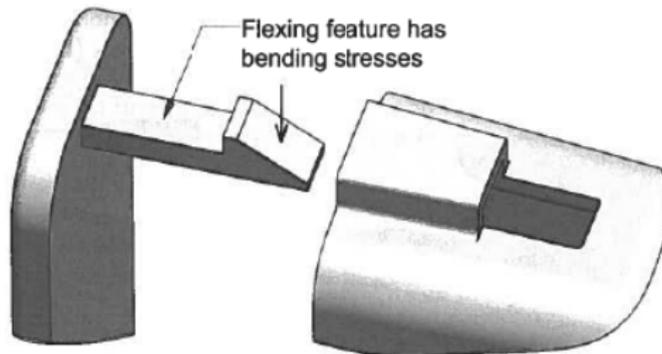
**Figure 6-3** I-beams use material efficiently. The horizontal portions resist tension and compression. The vertical portion is a triangulating shear web.

# Shear stress



**Figure 6-4** Shear stress distributions in solid and hollow torsion shafts. Material near the center of a solid shaft carries no load. Material in a thin, hollow shaft has nearly constant shear.

# Flexibility needed use: bending or non-uniform torsional loads



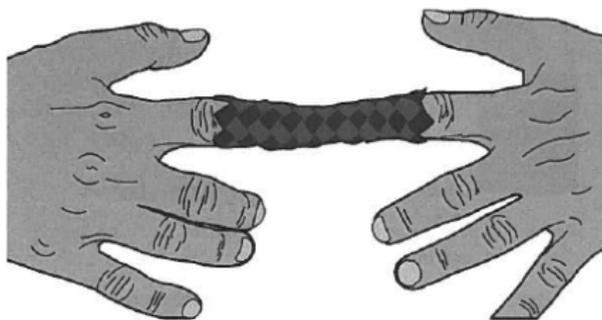
**Figure 6-5** Bending is an advantage for parts requiring flexing: a cantilever snap fit.

# Improve designs with self-help

Use applied loads to improve performance:

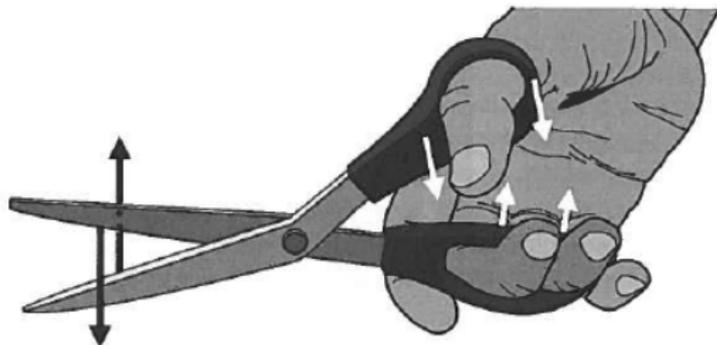
- ① Create new, useful forces
- ② Transform or redirect themselves
- ③ Balance either themselves or existing loads
- ④ Help to distribute loads

# Self-help that creates forces



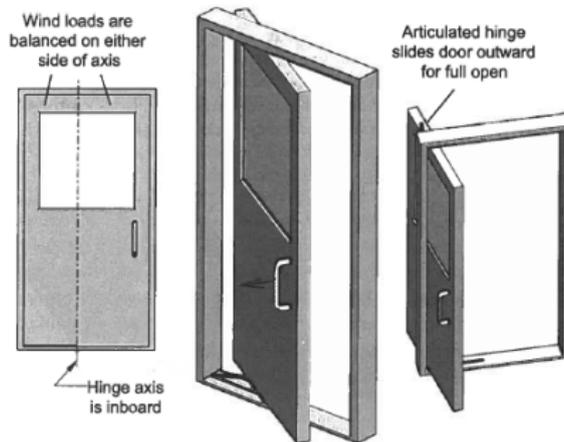
**Figure 7-1** Chinese finger trap—an example of self-help that creates forces. The harder you pull, the tighter it grips.

# Self-help that redirects forces



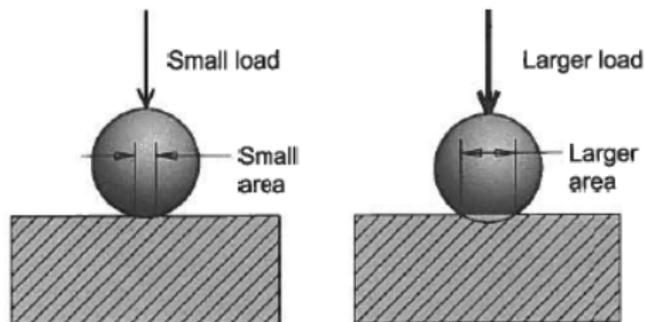
**Figure 7-2** Self-help in a scissors. Normal hand action forces the blades' cutting edges together. Left- and right-handed scissors are mirror images of each other, improving the scissors' shearing action for either user.

# Self-help that balances forces



**Figure 7-3** A balanced door with an articulated hinge exhibits self-help. Wind will not open this door, yet it opens easily in strong winds.

# Self-help that distributes loads

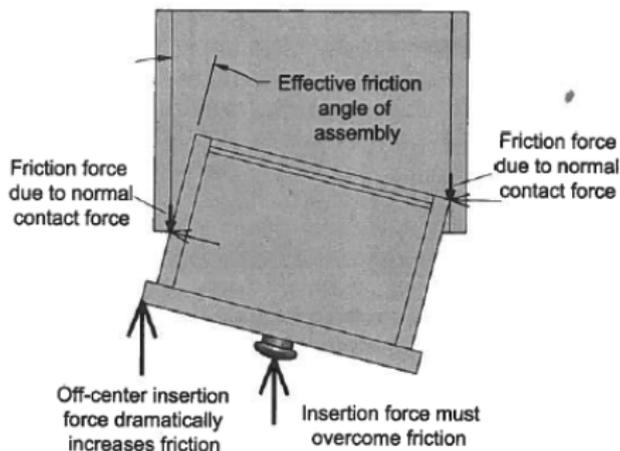


**Figure 7-4** Hertzian stress: simple load-distributing self-help.  
The larger the load, the larger the contact area.

# Manage friction in mechanisms

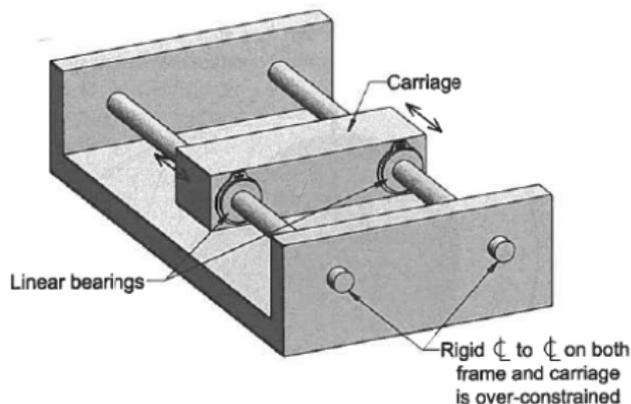
- 1 Avoid sliding friction
- 2 Maximize the length of linearly guided components
- 3 Select rotary motion over linear motion
- 4 Use rolling element bearings whenever possible
- 5 Use flexures to eliminate friction

# Avoid sliding friction



**Figure 8-1** Diagram of friction angle and forces in a short, wide "sticky drawer."

# Linear guided system (overconstraint design)



**Figure 8-2** A poor design for linearly-guided systems. The center-to-center distance is fully constrained two different ways, giving over-constraint.

# Use rolling elements bearing

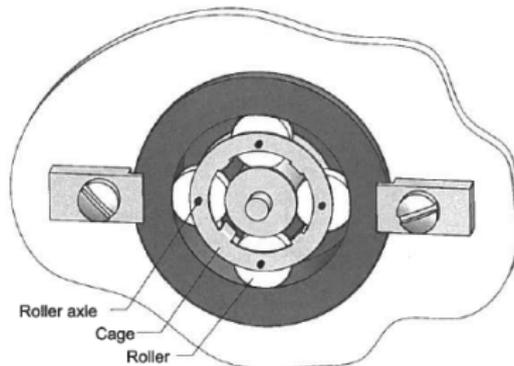


Figure 8-4 John Harrison's caged roller bearing. (Adapted from Andrewes [35].)

# Select rotary motion over linear motion

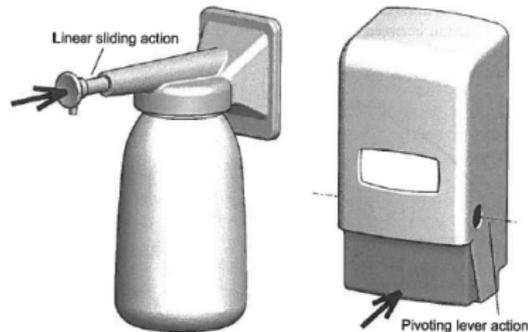


Figure 8-5 Plunger style versus lever-style soap dispenser. The lever-style has a natural advantage for managing friction.

# Use flexures to eliminate friction



**Figure 8-6** Triple spiral frictionless flexure for guiding axial displacement.

# Essentials of thought and procedure in mechanical design

- ▶ Use 3D solid models layouts
- ▶ Early ideation stage: use sketches
- ▶ Invert geometry to reveal new solutions
- ▶ Apply inversion
- ▶ Build prototypes of everything
- ▶ Separate strength from stiffness
- ▶ Never overlook buckling phenomena
- ▶ Analyze and test for trends and relationships
- ▶ Identify contingency plans

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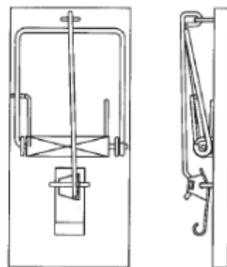
## Use 3D solid models layouts

- ① As an aid to thinking
- ② For communicating design ideas

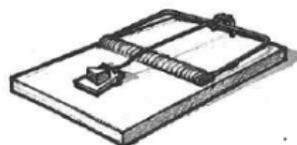
SOLID modelling why?

- Exceptional visualization
- Continuity of effort
- Unambiguous communication

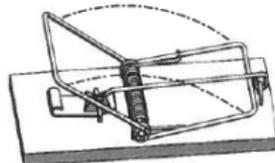
## 3D solid modelling



2D layout and  
orthogonal views



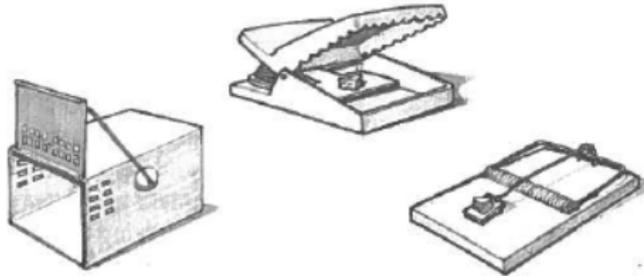
Hand sketch



3D fully-  
dimensioned model

**Figure 9-1** 2D layout, 3D sketch, and 3D model. A fully-dimensioned 3D model captures more information than the other two.

## Early ideation stage: use sketches



**Figure 9-2** Sketches are valuable when generating multiple concepts. 3D CAD models are often unnecessary at the early ideation stages of a project.

◀ Essential thoughts

# Invert geometry to reveal new solutions

Formal techniques to generate needs, requirements, and concepts

- Quality Function Deployment
- Brainstorming
- TRIZ
- Particularly useful thought process: Inversion What happens if I flip things around, or over, or inside-out?

◀ Essential thoughts

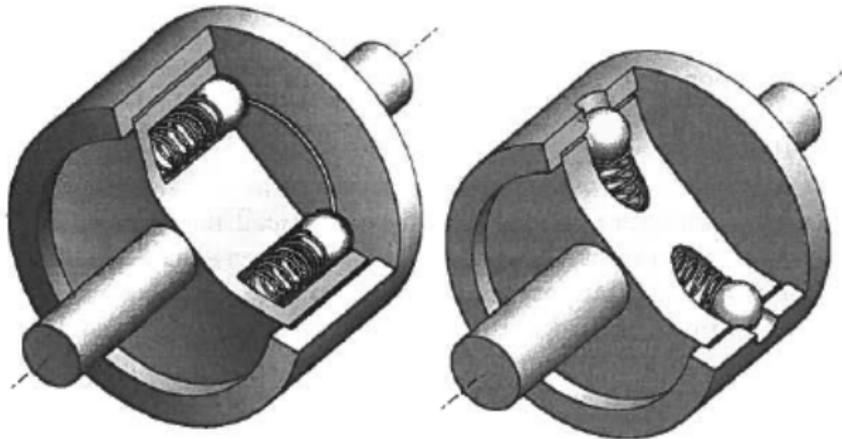
# Inversion

- Inside → outside
- Right → left
- Above → below
- Symmetric → asymmetric
- In-line → offset
- Smaller → larger
- Parallel → normal
- Oblique → normal or parallel
- Concentric → eccentric
- Moving → stationary

## Inversion cont.

- Pressure  $\rightarrow$  vacuum
- axial  $\rightarrow$  radial
- flat  $\rightarrow$  curved
- bolt  $\rightarrow$  nut
- peg  $\rightarrow$  hole
- stiff  $\rightarrow$  elastic
- translating  $\rightarrow$  rotating
- 2-dimensional  $\rightarrow$  3D
- Mirror about a plane

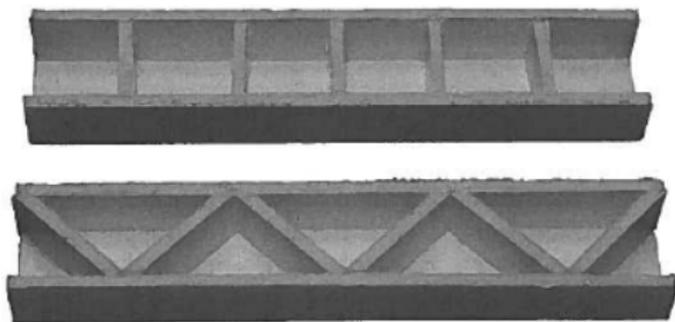
## Inversion example



**Figure 10-1** Spring clutch inverted from axial to radial orientation of springs and ball motion.

◀ Essential thoughts

# Build prototypes of everything but not all at once



**Figure 11-1** Structural prototypes from foam core board to compare 3D bracing of a torsion profile. These models can be tested for comparative performance.

## Separate strength from stiffness

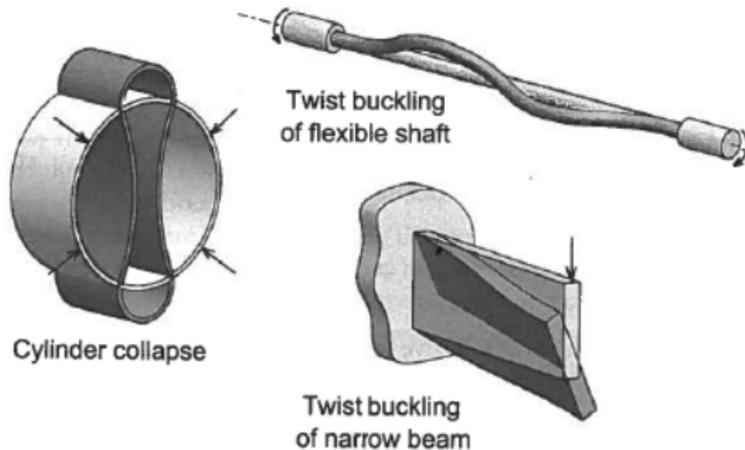
- Strength is how much load causes yielding or breaking. If something fails it is not strong enough! ( $\sigma_y$ )
- Stiffness, or rigidity, defines how much something deforms when load is applied. ( $E$ )

If something does not break, do not assume it is stiff enough for its purpose!

◀ Essential thoughts

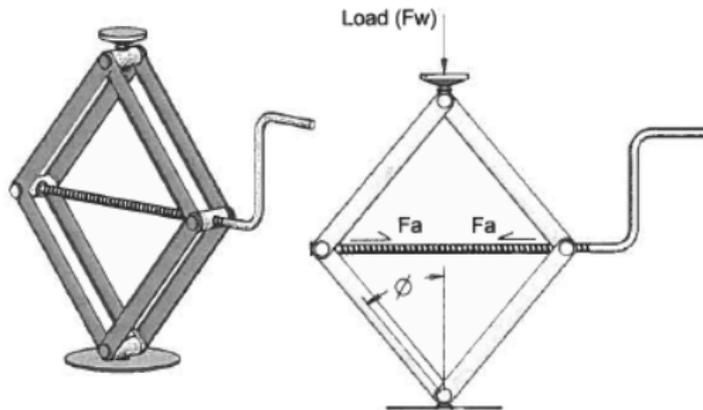
# Never overlook buckling phenomena

Catastrophic failures of man-made objects are often caused by buckling.



**Figure 13-1** Buckling occurs not only in columns, but also in many other slender structures.

# Analyze and test for trends and relationships



**Figure 14-1** Scissors jack. Knowing relationships between parameters is a useful guide for design.

# Identify contingency plans to minimize risks in design

Include as part of your design process :

- a review for anything that could go awry;
- anticipate possible failures and
- identify corrections
- Do not limit your definition of failure to hazards include:  
Function, robustness, production, service, and life

◀ Essential thoughts

## Some practical advice

- ▶ Avoid press fits
- ▶ Used closed sections or 3D bracing for torsional rigidity
- ▶ When designing springs use: ...
- ▶ Minimize and localize the tolerance path in parts and assemblies
- ▶ Include lead-ins in assembled designs
- ▶ Design assemblies to be ...

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## Avoid press fits

- Are overconstrained
- Require tight tolerances
- Generate uncontrolled friction
- Create assembly stress
- Are hard to assemble

# Alternatives for press fits

- Elastic fits
- Snap fits
- Tapered fits

## Elastic fits as alternatives

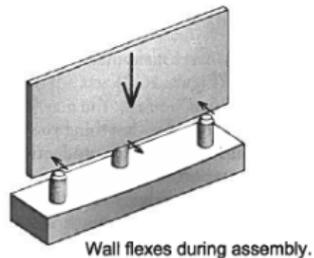
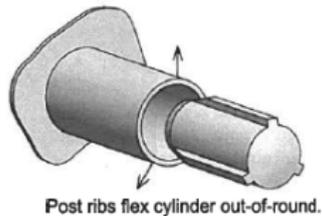


Figure 16-1 Elastic fits replace overconstrained press fits.

## Snap fit as alternative

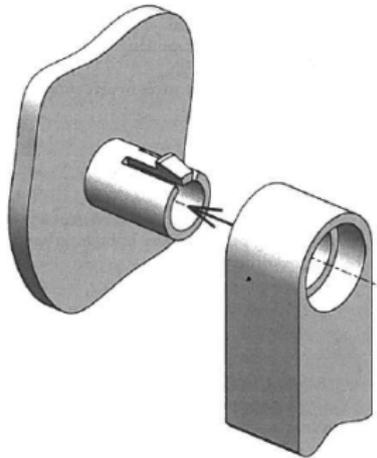
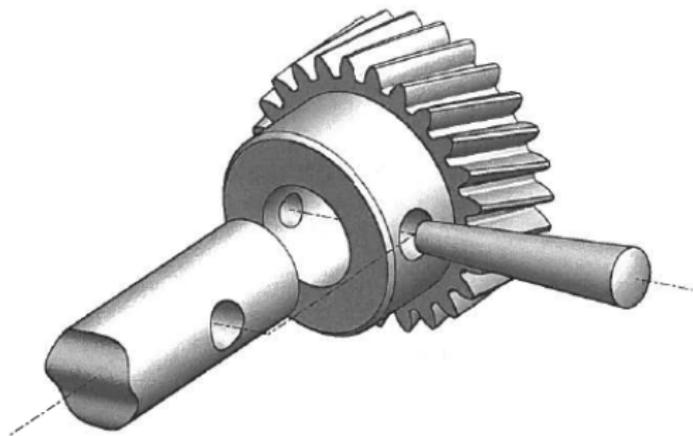


Figure 16-2 Snap fit post avoids the over-constraint of a press fit, and relaxes tight diameter tolerances.

## Tapered fits



**Figure 16-3** Tapered pin improves assembly, but does not eliminate over-constraint.

◀ Practical advice

# Used closed sections or 3D bracing for torsional rigidity

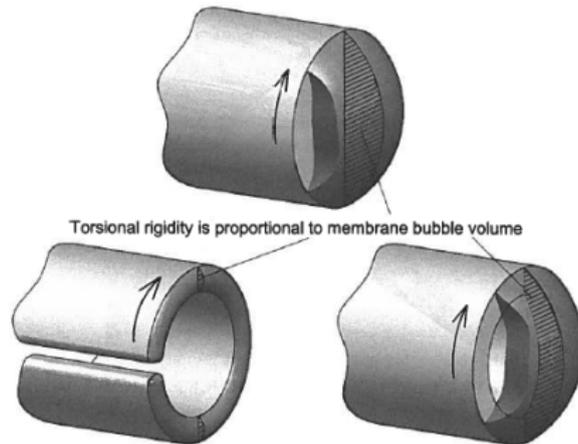
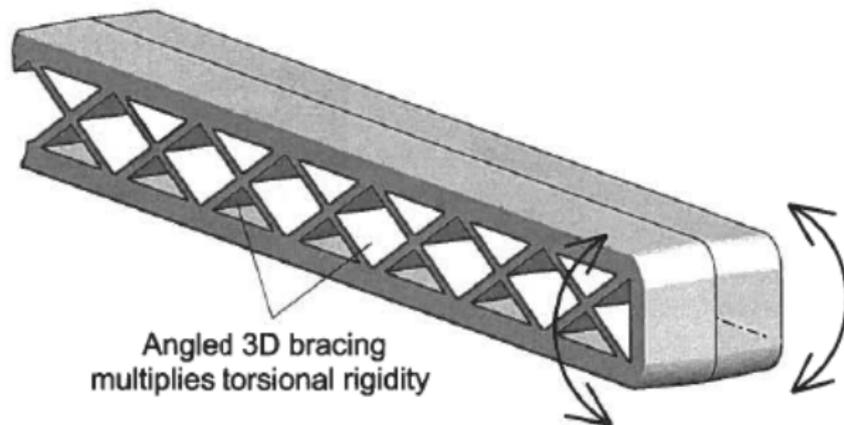


Figure 17-1 Membrane analogy for torsion of solid bar, thin-walled tube, and split tube. The relative torsional rigidity is proportional to the inflated membranes' volumes.

## 3D bracing for torsional rigidity



**Figure 17-2** Three-dimensional bracing of open section for torsional rigidity. This is especially useful in cast and molded parts.

## When designing springs use:

- A low spring rate and
- A high initial deflection
- Why: Springs exert force and store energy!

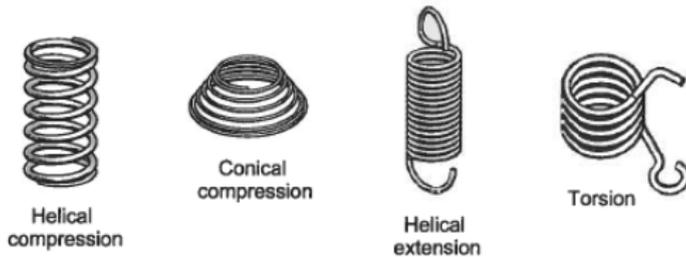
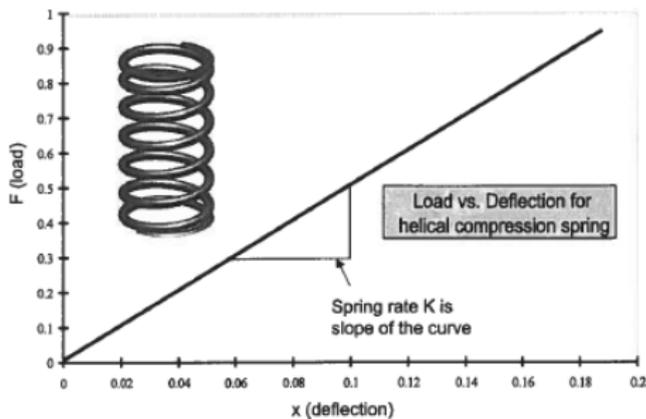


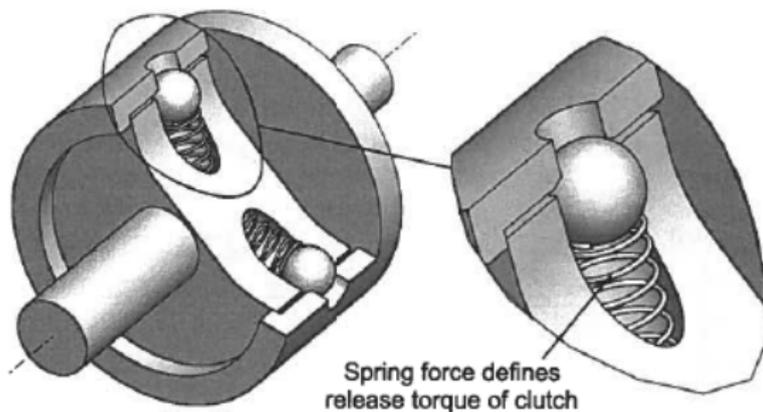
Figure 18-1 Common wound springs.

# Load-deflection diagram



**Figure 18-2** Load-deflection diagram for a helical compression spring.

## Example



**Figure 18-3** Torque-limiting spring clutch. The spring's rate, not just its force, is an important parameter in spring design. Lower spring rates are usually better.

## Why low spring rates?

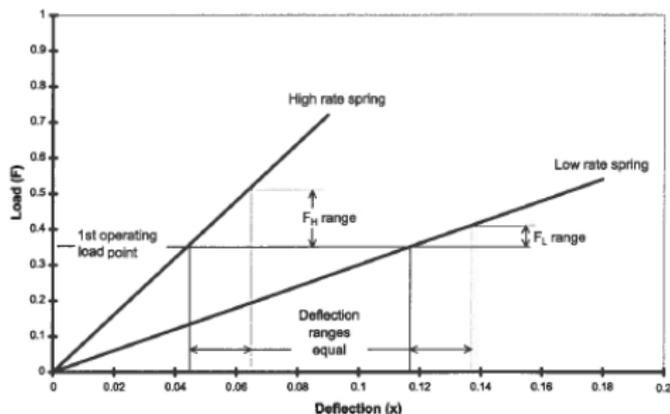
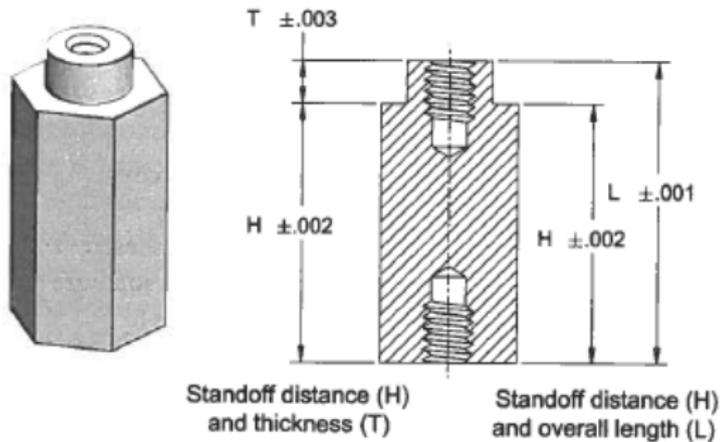


Figure 18-4 Force range vs. deflection range for different rate springs. Lower spring rates mean less force variation over the operating range.

# Minimize and localize the tolerance path in parts and assemblies



**Figure 19-1** Two dimensioning schemes for a standoff.

# Tolerancing

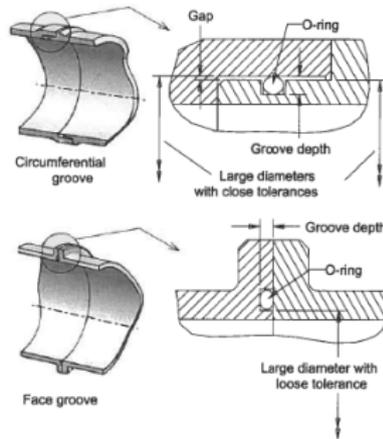
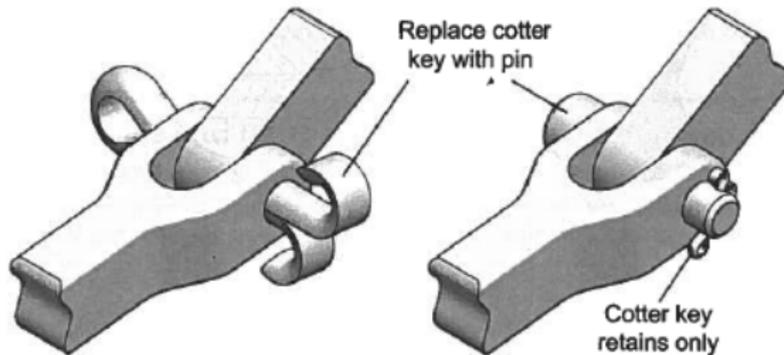


Figure 19-2 O-ring seal joint comparing circumferential with face seal dimensioning. The face seal's important dimensions are probably easier to manufacture.

## Use mechanical amplification to reduce failures

An amplifier is any device that uses a small amount of something to control a larger amount



**Figure 20-1** A simple example of mechanical amplification.

## Include lead-ins in assembled designs

The tapered end provides three functions:

- Starting, or spearing the parts together
- Aligning to the desired final position
- Directing the applied force

◀ Practical advice

## Design assemblies to be:

- Self-locating
- Self-fixturing
- Self-securing
- Self-aligning
- Self-adjusting
- Self-assembling

## Self locating & self-fixturing

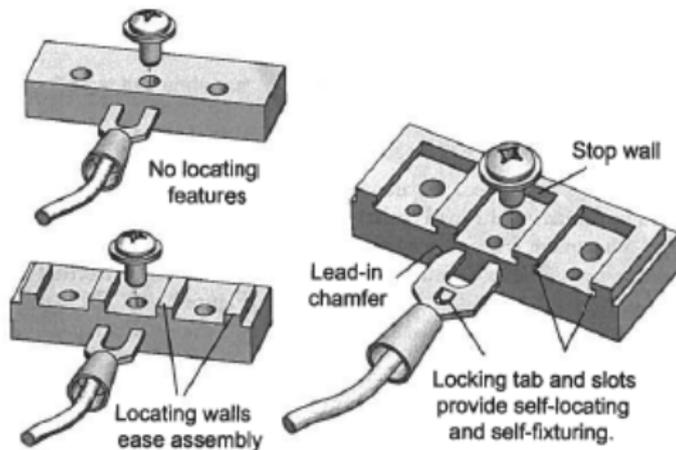


Figure 22-1 Self-locating and self-fixturing examples of a spade terminal.

## Self-aligning

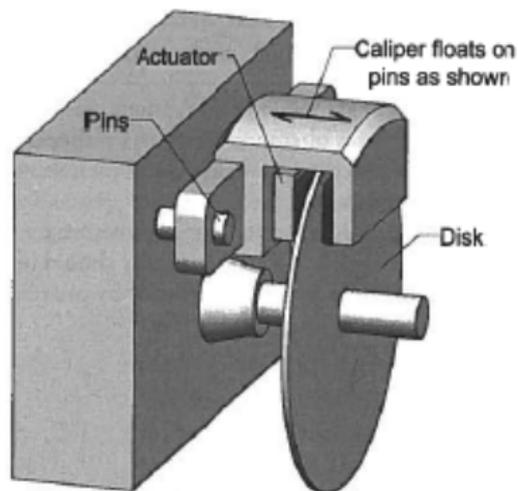


Figure 22-2 Self-aligning caliper of disk brake assembly.

# Self adjusting

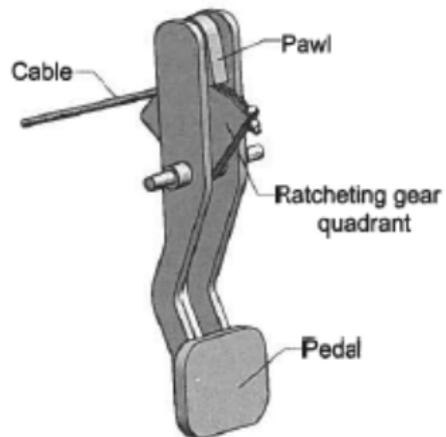
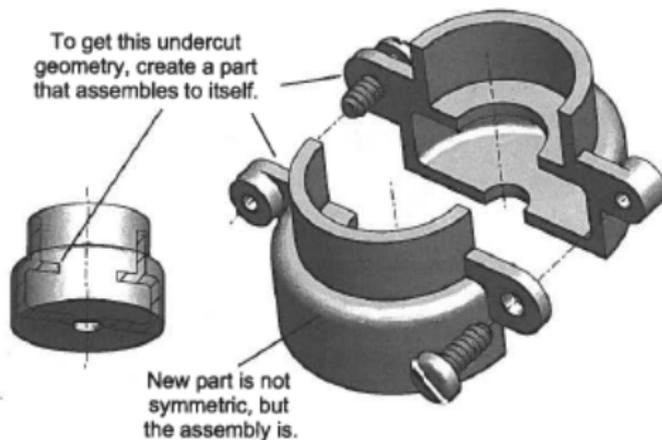


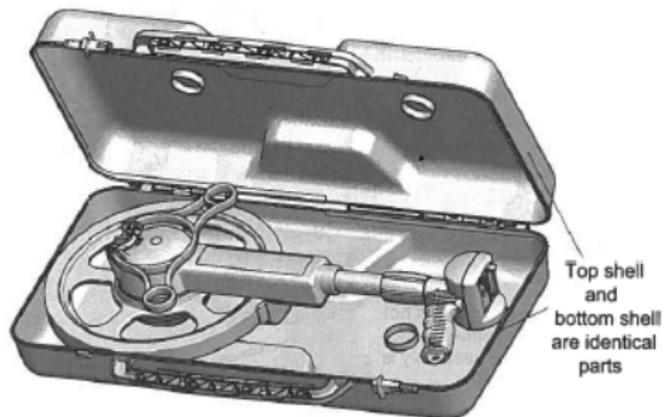
Figure 22-3 Self-adjusting clutch cable assembly.

## Use self assembling symmetry



**Figure 23-1** A cylindrical assembly with an undercut. Self-assembling symmetry allows the parts to be identical.

## Identical halves



**Figure 23-2** Identical large housing halves. Identical halves can reduce tooling costs and simplify assembly. (Used with permission of Meter-Man, Inc.)

## Feature detail

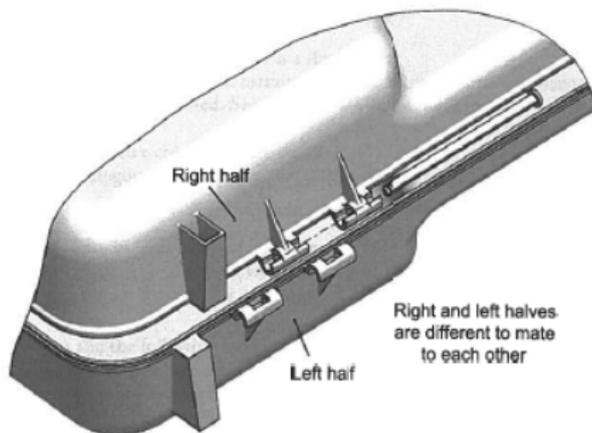


Figure 23-3 Feature detail of self-assembling symmetry. (Used with permission of Meter-Man, Inc.)

## References

- 1 J.G. Skakoon, The Elements of Mechanical Design, ASME Press, New York, 2008.