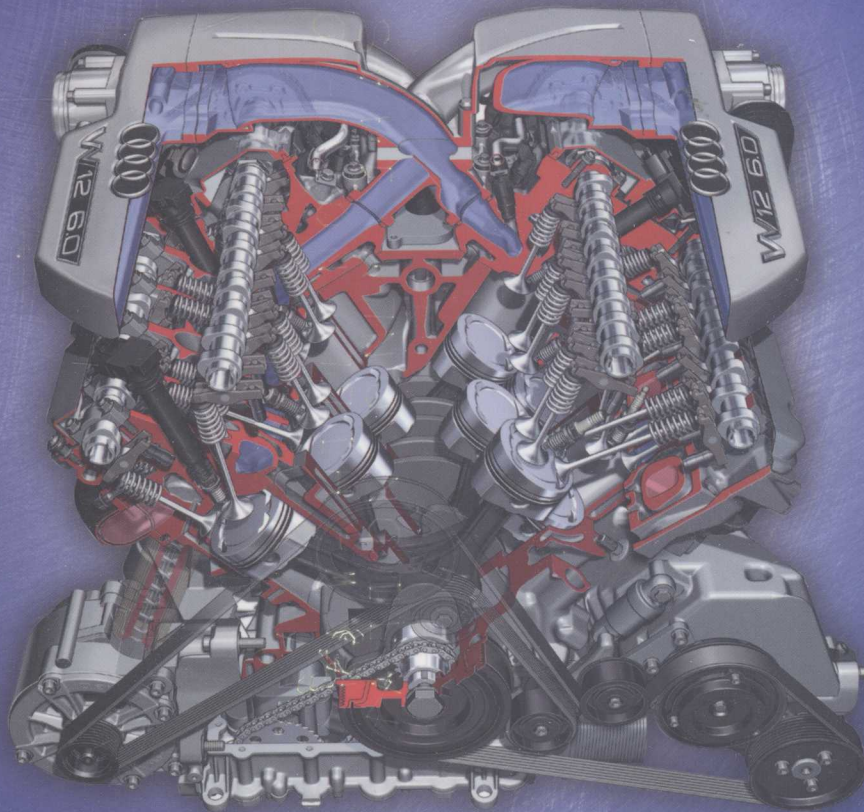


ROBERT L. NORTON

# DESIGN OF MACHINERY



third edition

An Introduction to  
the Synthesis and Analysis of  
Mechanisms and Machines

# DESIGN OF MACHINERY

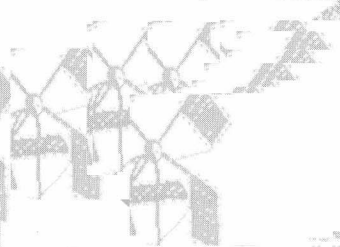
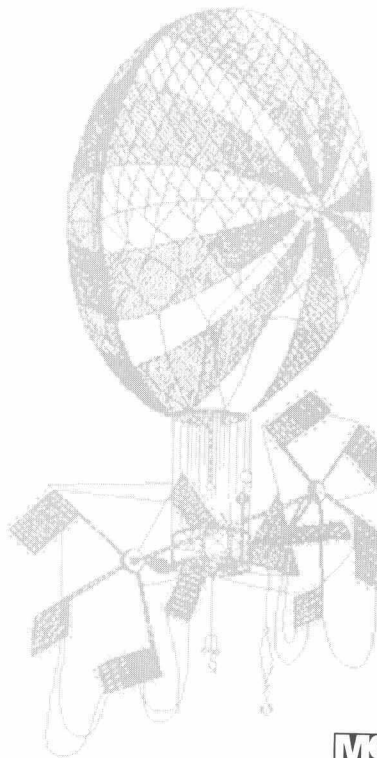
AN INTRODUCTION TO THE SYNTHESIS AND  
ANALYSIS OF MECHANISMS  
AND MACHINES

Third Edition

*Robert L. Norton*

Worcester Polytechnic Institute

Worcester, Massachusetts



Higher Education

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## ABOUT THE AUTHOR

Robert L. Norton earned undergraduate degrees in both mechanical engineering and industrial technology at Northeastern University and an MS in engineering design at Tufts University. He is a registered professional engineer in Massachusetts. He has extensive industrial experience in engineering design and manufacturing and many years experience teaching mechanical engineering, engineering design, computer science, and related subjects at Northeastern University, Tufts University, and Worcester Polytechnic Institute.

At Polaroid Corporation for 10 years, he designed cameras, related mechanisms, and high-speed automated machinery. He spent three years at Jet Spray Cooler Inc., designing food-handling machinery and products. For five years he helped develop artificial-heart and noninvasive assisted-circulation (counterpulsation) devices at the Tufts New England Medical Center and Boston City Hospital. Since leaving industry to join academia, he has continued as an independent consultant on engineering projects ranging from disposable medical products to high-speed production machinery. He holds 13 U.S. patents.

Norton has been on the faculty of Worcester Polytechnic Institute since 1981 and is currently professor of mechanical engineering, head of the design group in that department, and the director of the Gillette Project Center at WPI. He teaches undergraduate and graduate courses in mechanical engineering with emphasis on design, kinematics, vibrations, and dynamics of machinery.

He is the author of numerous technical papers and journal articles covering kinematics, dynamics of machinery, cam design and manufacturing, computers in education, and engineering education and of the texts *Machine Design: An Integrated Approach* and the *Cam Design and Manufacturing Handbook*. He is a Fellow of the American Society of Mechanical Engineers and a member of the Society of Automotive Engineers. Rumors about the transplantation of a Pentium microprocessor into his brain are decidedly untrue (though he could use some additional RAM). As for the unobtainium\* ring, well, that's another story.

\* See Index.

This book is dedicated to the memory of my father,

*Harry J. Norton, Sr.*

who sparked a young boy's interest in engineering;

to the memory of my mother,

*Kathryn W. Norton*

who made it all possible;

to my wife,

*Nancy Norton*

who provides unflagging patience and support;

and to my children,

*Robert, Mary, and Thomas,*

who make it all worthwhile.

# PREFACE

## to the Third Edition

*The third time is the charm.*

ANONYMOUS

The third edition is an evolutionary improvement over the second edition, which was an extensive revision of the first edition. See the updated *Preface to the First Edition* (overleaf) for more detailed information on the book's purpose and organization. Throughout this third edition many small improvements have been made to the discussion of a variety of topics in every chapter, based largely on user feedback, and all known errors have been corrected. The major change is the addition of 231 new problem sets, a 46% increase over the second edition, bringing the total to 731 problems, plus 88 larger scale project assignments. Many problem figures have been redrawn and enhanced as have some in the text body. All of the problem figures are now included as PDF files on the CD-ROM so that students can easily obtain hard copies to work the solutions on.

Some new material also has been added. An introduction to compliant mechanisms and MEMS is provided in Chapter 2. Chapter 3 adds a section on "Other Useful Linkages" that solve common problems in industry. The treatment of cams in Chapter 8 has been both condensed and enhanced with new material. Chapter 9's discussion of transmissions is enhanced and expanded. The treatment of engine dynamics in Chapters 13 and 14 has been improved.

The third edition is also enhanced by the addition of much new software on the attached CD-ROM. New student versions of the author-written programs, FOURBAR, FIVEBAR, SIXBAR, SLIDER, DYNACAM, ENGINE, and MATRIX have been revised, enhanced, and improved. All now provide larger screens and many new features. These programs undergo frequent revision with added features and enhancements. Instructors who adopt the book for a course may download the latest student versions of the programs from <http://www.designofmachinery.com>.

Professor Shih-Liang (Sid) Wang of North Carolina A&T has added many models to his included package, *Mechanism Simulation in a Multimedia Environment*. It now contains over 100 *Working Model* (WM) files based on the book's figures and 19 *Matlab*® models for kinematic analysis and animation. These WM models bring the text's figures to life with animation, graphs, and numerical output. For each of Professor Wang's simulations, a video file of the mechanism can be played independently of the *Working Model* program. Microsoft Internet Explorer is used to navigate among hyperlinked HTML files that contain text, picture, video, *Matlab*, and *Working Model* files.

The *Working Model* 2D Version 5.2 Textbook Edition (WM) program is included on the CD-ROM and is a newer version than in the second edition. The student can open, run, modify, and interact with the many WM simulation files provided on the CD-

ROM. Students also may build and test new mechanisms in the *WM* Textbook Edition provided on the CD-ROM, but the Textbook Edition as supplied does not allow the user to save or print the model. However, instructors who adopt the text for a class and require its purchase by their students may call 800-766-6615 or 650-381-3395 to obtain information on how to expand the capabilities of the *WM* Textbook Edition for their student's class assignments. For separate information on printing high-quality graphics from either edition of *WM*, follow the instructions at <http://www.workingmodel.com/faqlist.html#print>.

Some of the *Matlab* files supplied will analyze fourbar, slider crank, and inverted slider crank linkages and animate their motion. Other *Matlab* files calculate the tooth profile of an involute spur gear, show the geometric generation of an involute and the motion of an elliptic trammel. *Matlab* source code is provided. The *Matlab* program is not. Extensive comments are provided within each *Matlab* file identifying the equations used from the text by number. The student can modify these models for other applications.

**ACKNOWLEDGMENTS** The sources of photographs and other nonoriginal art used in the text are acknowledged in the captions and opposite the title page, but the author would also like to express his thanks for the cooperation of all those individuals and companies who generously made these items available. The author is indebted to, and would like to thank, a number of users who kindly notified him of errors or suggested improvements. These include: Professors *Eben Cobb* of WPI, *Diego Galuzzi* of University of Buenos Aires, *John R. Hall* of WPI, *Shafik Iskander* of U. Tennessee, *Richard Jakubek* of RPI, *Cheong Gill-Jeong* of Wonkwang Univ., Korea, *Swami Karunamoorthy* of St. Louis University, *Pierre Larochelle* of Florida Tech, *Scott Openshaw* of Iowa State, *Francis H. Raven* of Notre Dame, *Arnold E. Sikkema* of Dordt College, and *Donald A. Smith* of U. Wyoming.

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Professors *Larry L. Howell* of BYU, *G. K. Ananthasuresh* of U. Penn, and *Yong-Mo Moon* of WPI kindly supplied photographs of compliant mechanisms. Professor *Cosme Furlong* of WPI generously supplied MEMS photos and information.

The author would like to express his special appreciation to Professor *Sid Wang* of NCAT for his efforts in creating the *Working Model* and *Matlab* files on the CD-ROM. Professor *Thomas A. Cook*, Mercer University (Emeritus) provided most of the new problem sets as well as their solutions in his impressive and voluminous solutions manual and its accompanying *Mathcad*® solution files. The author is most grateful for Dr. Cook's valuable contributions.

If you find any errors or have comments or suggestions for improvement, please email the author at [norton@wpi.edu](mailto:norton@wpi.edu). Errata as discovered, and other book information, will be posted on the author's web site at <http://www.designofmachinery.com>.

*Robert L. Norton*  
*Mattapoisett, Mass.*  
*May, 2004*

# PREFACE

to the First Edition

*When I hear, I forget*

*When I see, I remember*

*When I do, I understand*

ANCIENT CHINESE PROVERB

This text is intended for the kinematics and dynamics of machinery topics which are often given as a single course, or two-course sequence, in the junior year of most mechanical engineering programs. The usual prerequisites are first courses in statics, dynamics, and calculus. Usually, the first semester, or portion, is devoted to kinematics, and the second to dynamics of machinery. These courses are ideal vehicles for introducing the mechanical engineering student to the process of design, since mechanisms tend to be intuitive for the typical mechanical engineering student to visualize and create.

While this text attempts to be thorough and complete on the topics of analysis, it also emphasizes the synthesis and design aspects of the subject to a greater degree than most texts in print on these subjects. Also, it emphasizes the use of computer-aided engineering as an approach to the design and analysis of this class of problems by providing software that can enhance student understanding. While the mathematical level of this text is aimed at second- or third-year university students, it is presented *de novo* and should be understandable to the technical school student as well.

Part I of this text is suitable for a one-semester or one-term course in kinematics. Part II is suitable for a one-semester or one-term course in dynamics of machinery. Alternatively, both topic areas can be covered in one semester with less emphasis on some of the topics covered in the text.

The writing and style of presentation in the text is designed to be clear, informal, and easy to read. Many example problems and solution techniques are presented and spelled out in detail, both verbally and graphically. All the illustrations are done with computer-drawing or drafting programs. Some scanned photographic images are also included. The entire text, including equations and artwork, is printed directly from the author's computer disk by laser typesetting for maximum clarity and quality. Many suggested readings are provided in the bibliography. Short problems, and where appropriate, many longer, unstructured design project assignments are provided at the ends of chapters. These projects provide an opportunity for the students *to do and understand*.



The author's approach to these courses and this text is based on over 40 years' experience in mechanical engineering design, both in industry and as a consultant. He has taught these subjects since 1967, both in evening school to practicing engineers and in day school to younger students. His approach to the course has evolved a great deal in that time, from a traditional approach, emphasizing graphical analysis of many structured problems, through emphasis on algebraic methods as computers became available, through requiring students to write their own computer programs, to the current state described above.

The one constant throughout has been the attempt to convey the art of the design process to the students in order to prepare them to cope with *real* engineering problems in practice. Thus, the author has always promoted design within these courses. Only recently, however, has technology provided a means to more effectively accomplish this goal, in the form of the graphics microcomputer. This text attempts to be an improvement over those currently available by providing up-to-date methods and techniques for analysis and synthesis that take full advantage of the graphics microcomputer, and by emphasizing design as well as analysis. The text also provides a more complete, modern, and thorough treatment of cam design than existing texts in print on the subject.

The author has written seven interactive, student-friendly computer programs for the design and analysis of mechanisms and machines. These programs are designed to enhance the student's understanding of the basic concepts in these courses while simultaneously allowing more comprehensive and realistic problem and project assignments to be done in the limited time available than could ever be done with manual solution techniques, whether graphical or algebraic. Unstructured, realistic design problems which have many valid solutions are assigned. Synthesis and analysis are equally emphasized. The analysis methods presented are up to date, using vector equations and matrix techniques wherever applicable. Manual graphical analysis methods are de-emphasized. The graphics output from the computer programs allows the student to see the results of variation of parameters rapidly and accurately and reinforces learning.

These computer programs are distributed on CD-ROM with this book, which also contains instructions for their use on any IBM compatible, Windows 98/2000/NT capable computer. Programs SLIDER, FOURBAR, FIVEBAR and SIXBAR analyze the kinematics and dynamics of those types of linkages. Program DYNACAM allows the design and dynamic analysis of cam-follower systems. Program ENGINE analyzes the slider-crank linkage as used in the internal combustion engine and provides a complete dynamic analysis of single and multicylinder engine inline, V, and W configurations, allowing the mechanical dynamic design of engines to be done. Program MATRIX is a general purpose linear equation system solver.

All these programs, except MATRIX, provide dynamic, graphical animation of the designed devices. The reader is strongly urged to make use of these programs in order to investigate the results of variation of parameters in these kinematic devices. The programs are designed to enhance and augment the text rather than be a substitute for it. The converse is also true. Many solutions to the book's examples and to the problem sets are provided on the CD-ROM as files to be opened in these programs. Most of these solutions can be animated on the computer screen for a better demonstration of the concept than is possible on the printed page. The instructor and students are both encouraged to take advantage of the computer programs provided. Instructions for their use are in Appendix A.

The author's intention is that synthesis topics be introduced first to allow the students to work on some simple design tasks early in the term while still mastering the analysis topics. Though this is not the "traditional" approach to the teaching of this material, the author believes that it is a superior method to that of initial concentration on detailed analysis of mechanisms for which the student has no concept of origin or purpose.

Chapters 1 and 2 are introductory. Those instructors wishing to teach analysis before synthesis can leave Chapters 3 and 5 on linkage synthesis for later consumption. Chapters 4, 6, and 7 on position, velocity, and acceleration analysis are sequential and build upon each other. In fact, some of the problem sets are common among these three chapters so that students can use their position solutions to find velocities and then later use both to find the accelerations in the same linkages. Chapter 8 on cams is more extensive and complete than that of other kinematics texts and takes a design approach. Chapter 9 on gear trains is introductory. The dynamic force treatment in Part II uses matrix methods for the solution of the system simultaneous equations. Graphical force analysis is not emphasized. Chapter 10 presents an introduction to dynamic systems modeling. Chapter 11 deals with force analysis of linkages. Balancing of rotating machinery and linkages is covered in Chapter 12. Chapters 13 and 14 use the internal combustion engine as an example to pull together many dynamic concepts in a design context. Chapter 15 presents an introduction to dynamic systems modeling and uses the cam-follower system as the example. Chapters 3, 8, 11, 13, and 14 provide open ended project problems as well as structured problem sets. The assignment and execution of unstructured project problems can greatly enhance the student's understanding of the concepts as described by the proverb in the epigraph to this preface.

**ACKNOWLEDGMENTS** The sources of photographs and other nonoriginal art used in the text are acknowledged in the captions and opposite the title page, but the author would also like to express his thanks for the cooperation of all those individuals and companies who generously made these items available. The author would also like to thank those who reviewed various sections of the first edition of the text and who made many useful suggestions for improvement. Mr. John Titus of the University of Minnesota reviewed Chapter 5 on analytical synthesis and Mr. Dennis Klipp of Klipp Engineering, Waterville, Maine, reviewed Chapter 8 on cam design. Professor William J. Crochetiere and Mr. Homer Eckhardt of Tufts University, Medford, Mass., reviewed Chapter 15. Mr. Eckhardt and Professor Crochetiere of Tufts, and Professor Charles Warren of the University of Alabama taught from and reviewed Part I. Professor Holly K. Ault of Worcester Polytechnic Institute thoroughly reviewed the entire text while teaching from the pre-publication, class-test versions of the complete book. Professor Michael Keefe of the University of Delaware provided many helpful comments. Sincere thanks also go to the large number of undergraduate students and graduate teaching assistants who caught many typos and errors in the text and in the programs while using the pre-publication versions. Since the book's first printing, Profs. D. Cronin, K. Gupta, P. Jensen, and Mr. R. Jantz have written to point out errors or make suggestions that I have incorporated and for which I thank them. The author takes full responsibility for any errors that may remain and invites from all readers their criticisms, suggestions for improvement, and identification of errors in the text or programs, so that both can be improved in future versions. Contact [norton@wpi.edu](mailto:norton@wpi.edu).

*Robert L. Norton  
Mattapoisett, Mass.  
August, 1991*

# CONTENTS

Preface to the Third Edition .....	xvii
Preface to the First Edition .....	xix

## PART I KINEMATICS OF MECHANISMS ..... 1

### Chapter 1 Introduction ..... 3

1.0 Purpose .....	3
1.1 Kinematics and Kinetics .....	3
1.2 Mechanisms and Machines .....	4
1.3 A Brief History of Kinematics .....	5
1.4 Applications of Kinematics .....	6
1.5 The Design Process .....	7
<i>Design, Invention, Creativity</i> .....	7
<i>Identification of Need</i> .....	8
<i>Background Research</i> .....	9
<i>Goal Statement</i> .....	10
<i>Performance Specifications</i> .....	10
<i>Ideation and Invention</i> .....	10
<i>Analysis</i> .....	12
<i>Selection</i> .....	13
<i>Detailed Design</i> .....	13
<i>Prototyping and Testing</i> .....	13
<i>Production</i> .....	14
1.6 Other Approaches to Design .....	15
<i>Axiomatic Design</i> .....	15
1.7 Multiple Solutions .....	16
1.8 Human Factors Engineering .....	16
1.9 The Engineering Report .....	17
1.10 Units .....	17
1.11 What's to Come .....	20
1.12 References .....	20
1.13 Bibliography .....	20

### Chapter 2 Kinematics Fundamentals ..... 24

2.0 Introduction .....	24
2.1 Degrees of Freedom (DOF) or Mobility .....	24
2.2 Types of Motion .....	25
2.3 Links, Joints, and Kinematic Chains .....	26
2.4 Determining Degree of Freedom or Mobility .....	30
<i>Degree of Freedom (Mobility) in Planar Mechanisms</i> .....	31
<i>Degree of Freedom (Mobility) in Spatial Mechanisms</i> .....	34
2.5 Mechanisms and Structures .....	34
2.6 Number Synthesis .....	35
2.7 Paradoxes .....	39
2.8 Isomers .....	40
2.9 Linkage Transformation .....	42
2.10 Intermittent Motion .....	44
2.11 Inversion .....	45

2.12	The Grashof Condition .....	47
	<i>Classification of the Fourbar Linkage</i> .....	52
2.13	Linkages of More Than Four Bars .....	54
	<i>Geared Fivebar Linkages</i> .....	54
	<i>Sixbar Linkages</i> .....	54
	<i>Grashof-Type Rotatability Criteria for Higher-Order Linkages</i> .....	55
2.14	Springs as Links .....	57
2.15	Compliant Mechanisms .....	57
2.16	Micro Electro-Mechanical Systems (MEMS) .....	59
2.17	Practical Considerations .....	61
	<i>Pin Joints versus Sliders and Half Joints</i> .....	61
	<i>Cantilever or Straddle Mount?</i> .....	63
	<i>Short Links</i> .....	64
	<i>Bearing Ratio</i> .....	64
	<i>Commercial Slides</i> .....	65
	<i>Linkages versus Cams</i> .....	65
2.18	Motors and Drivers .....	66
	<i>Electric Motors</i> .....	66
	<i>Air and Hydraulic Motors</i> .....	71
	<i>Air and Hydraulic Cylinders</i> .....	71
	<i>Solenoids</i> .....	72
2.19	References .....	72
2.20	Problems .....	73
<b>Chapter 3 Graphical Linkage Synthesis .....</b>		<b>86</b>
3.0	Introduction .....	86
3.1	Synthesis .....	86
3.2	Function, Path, and Motion Generation .....	88
3.3	Limiting Conditions .....	90
3.4	Dimensional Synthesis .....	92
	<i>Two-Position Synthesis</i> .....	93
	<i>Three-Position Synthesis with Specified Moving Pivots</i> .....	99
	<i>Three-Position Synthesis with Alternate Moving Pivots</i> .....	100
	<i>Three-Position Synthesis with Specified Fixed Pivots</i> .....	103
	<i>Position Synthesis for More Than Three Positions</i> .....	107
3.5	Quick-Return Mechanisms .....	107
	<i>Fourbar Quick-Return</i> .....	108
	<i>Sixbar Quick-Return</i> .....	110
3.6	Coupler Curves .....	113
3.7	Cognates .....	122
	<i>Parallel Motion</i> .....	127
	<i>Geared Fivebar Cognates of the Fourbar</i> .....	129
3.8	Straight-Line Mechanisms .....	130
	<i>Designing Optimum Straight-Line Fourbar Linkages</i> .....	132
3.9	Dwell Mechanisms .....	136
	<i>Single-Dwell Linkages</i> .....	136
	<i>Double-Dwell Linkages</i> .....	139
3.10	Other Useful Linkages .....	141
	<i>Constant Velocity Piston Motion</i> .....	141
	<i>Large Angular Excursion Rocker Motion</i> .....	142
	<i>Remote Center Circular Motion</i> .....	143
3.11	References .....	145
3.12	Bibliography .....	146
3.13	Problems .....	146
3.14	Projects .....	158

<b>Chapter 4</b>	<b>Position Analysis</b>	<b>162</b>
4.0	Introduction	162
4.1	Coordinate systems	164
4.2	Position and Displacement	164
	<i>Position</i>	164
	<i>Coordinate Transformation</i>	165
	<i>Displacement</i>	165
4.3	Translation, Rotation, and Complex Motion	167
	<i>Translation</i>	167
	<i>Rotation</i>	167
	<i>Complex Motion</i>	168
	<i>Theorems</i>	169
4.4	Graphical Position Analysis of Linkages	169
4.5	Algebraic Position Analysis of Linkages	171
	<i>Vector Loop Representation of Linkages</i>	172
	<i>Complex Numbers as Vectors</i>	172
	<i>The Vector Loop Equation for a Fourbar Linkage</i>	174
4.6	The Fourbar Slider-Crank Position Solution	178
4.7	An Inverted Slider-Crank Position Solution	180
4.8	Linkages of More Than Four Bars	182
	<i>The Geared Fivebar Linkage</i>	182
	<i>Sixbar Linkages</i>	185
4.9	Position of any Point on a Linkage	186
4.10	Transmission Angles	187
	<i>Extreme Values of the Transmission Angle</i>	188
4.11	Toggle Positions	190
4.12	Circuits and Branches in Linkages	191
4.13	Newton-Raphson Solution Method	192
	<i>One-Dimensional Root-Finding (Newton's Method)</i>	193
	<i>Multidimensional Root-Finding (Newton-Raphson Method)</i>	194
	<i>Newton-Raphson Solution for the Fourbar Linkage</i>	195
	<i>Equation Solvers</i>	196
4.14	References	197
4.15	Problems	197
<b>Chapter 5</b>	<b>Analytical Linkage Synthesis</b>	<b>210</b>
5.0	Introduction	210
5.1	Types of Kinematic Synthesis	210
5.2	Precision Points	211
5.3	Two-Position Motion Generation by Analytical Synthesis	211
5.4	Comparison of Analytical and Graphical Two-Position Synthesis	218
5.5	Simultaneous Equation Solution	221
5.6	Three-Position Motion Generation by Analytical Synthesis	223
5.7	Comparison of Analytical and Graphical Three-Position Synthesis	228
5.8	Synthesis for a Specified Fixed Pivot Location*	233
5.9	Center-Point and Circle-Point Circles	239
5.10	Four- and Five-Position Analytical Synthesis	241
5.11	Analytical Synthesis of a Path Generator with Prescribed Timing	242
5.12	Analytical Synthesis of a Fourbar Function Generator	242
5.13	Other Linkage Synthesis Methods	246
	<i>Precision Point Methods</i>	248
	<i>Coupler Curve Equation Methods</i>	249
	<i>Optimization Methods</i>	249
5.14	References	253
5.15	Problems	255



<b>Chapter 6 Velocity Analysis .....</b>	<b>265</b>
6.0 Introduction .....	265
6.1 Definition of Velocity .....	265
6.2 Graphical Velocity Analysis .....	268
6.3 Instant Centers of Velocity .....	273
6.4 Velocity Analysis with Instant Centers .....	280
<i>Angular Velocity Ratio</i> .....	281
<i>Mechanical Advantage</i> .....	283
<i>Using Instant Centers in Linkage Design</i> .....	285
6.5 Centroids .....	287
<i>A "Linkless" Linkage</i> .....	290
<i>Cusps</i> .....	291
6.6 Velocity of Slip .....	291
6.7 Analytical Solutions for Velocity Analysis .....	295
<i>The Fourbar Pin-Jointed Linkage</i> .....	295
<i>The Fourbar Slider-Crank</i> .....	298
<i>The Fourbar Inverted Slider-Crank</i> .....	300
6.8 Velocity Analysis of the Geared Fivebar Linkage .....	302
6.9 Velocity of any Point on a Linkage .....	303
6.10 References .....	304
6.11 Problems .....	305
<b>Chapter 7 Acceleration Analysis .....</b>	<b>328</b>
7.0 Introduction .....	328
7.1 Definition of Acceleration .....	328
7.2 Graphical Acceleration Analysis .....	331
7.3 Analytical Solutions for Acceleration Analysis .....	336
<i>The Fourbar Pin-Jointed Linkage</i> .....	336
<i>The Fourbar Slider-Crank</i> .....	339
<i>Coriolis Acceleration</i> .....	341
<i>The Fourbar Inverted Slider-Crank</i> .....	343
7.4 Acceleration Analysis of the Geared Fivebar Linkage .....	347
7.5 Acceleration of any Point on a Linkage .....	348
7.6 Human Tolerance of Acceleration .....	350
7.7 Jerk .....	352
7.8 Linkages of n Bars .....	355
7.9 References .....	355
7.10 Problems .....	355
<b>Chapter 8 Cam Design .....</b>	<b>377</b>
8.0 Introduction .....	377
8.1 Cam Terminology .....	378
<i>Type of Follower Motion</i> .....	379
<i>Type of Joint Closure</i> .....	380
<i>Type of Follower</i> .....	380
<i>Type of Cam</i> .....	380
<i>Type of Motion Constraints</i> .....	383
<i>Type of Motion Program</i> .....	383
8.2 S V A J Diagrams .....	384
8.3 Double-Dwell Cam Design—Choosing S V A J Functions .....	385
<i>The Fundamental Law of Cam Design</i> .....	388
<i>Simple Harmonic Motion (SHM)</i> .....	389
<i>Cycloidal Displacement</i> .....	391
<i>Combined Functions</i> .....	394

	<i>The SCCA Family of Double-Dwell Functions</i> .....	397
	<i>Polynomial Functions</i> .....	407
	<i>Double-Dwell Applications of Polynomials</i> .....	408
8.4	Single-Dwell Cam Design—Choosing S V A J Functions .....	411
	<i>Single-Dwell Applications of Polynomials</i> .....	415
	<i>Effect of Asymmetry on the Rise-Fall Polynomial Solution</i> .....	417
8.5	Critical Path Motion (CPM) .....	421
	<i>Polynomials Used for Critical Path Motion</i> .....	422
8.6	Sizing the Cam—Pressure Angle and Radius of Curvature .....	429
	<i>Pressure Angle—Translating Roller Followers</i> .....	430
	<i>Choosing a Prime Circle Radius</i> .....	433
	<i>Overturning Moment—Translating Flat-Faced Follower</i> .....	434
	<i>Radius of Curvature—Translating Roller Follower</i> .....	435
	<i>Radius of Curvature—Translating Flat-Faced Follower</i> .....	440
8.7	Cam Manufacturing Considerations .....	444
	<i>Machining a Cam</i> .....	445
	<i>Actual Cam Performance Compared to Theoretical Performance</i> ..	446
8.8	Practical Design Considerations .....	449
	<i>Translating or Oscillating Follower?</i> .....	450
	<i>Force or Form-Closed?</i> .....	450
	<i>Radial or Axial Cam?</i> .....	451
	<i>Roller or Flat-Faced Follower?</i> .....	451
	<i>To Dwell or Not to Dwell?</i> .....	452
	<i>To Grind or Not to Grind?</i> .....	452
	<i>To Lubricate or Not to Lubricate?</i> .....	452
8.9	References .....	453
8.10	Problems .....	453
8.11	Projects .....	459

## Chapter 9 Gear Trains ..... 462

9.0	Introduction .....	462
9.1	Rolling Cylinders .....	463
9.2	The Fundamental Law of Gearing .....	464
	<i>The Involute Tooth Form</i> .....	465
	<i>Pressure Angle</i> .....	467
	<i>Changing Center Distance</i> .....	468
	<i>Backlash</i> .....	468
9.3	Gear Tooth Nomenclature .....	470
9.4	Interference and Undercutting .....	472
	<i>Unequal-Addendum Tooth Forms</i> .....	474
9.5	Contact Ratio .....	474
9.6	Gear Types .....	477
	<i>Spur, Helical, and Herringbone Gears</i> .....	477
	<i>Worms and Worm Gears</i> .....	478
	<i>Rack and Pinion</i> .....	479
	<i>Bevel and Hypoid Gears</i> .....	479
	<i>Noncircular Gears</i> .....	480
	<i>Belt and Chain Drives</i> .....	481
9.7	Simple Gear Trains .....	483
9.8	Compound Gear Trains .....	484
	<i>Design of Compound Trains</i> .....	485
	<i>Design of Reverted Compound Trains</i> .....	486
	<i>An Algorithm for the Design of Compound Gear Trains</i> .....	489
9.9	Epicyclic or Planetary Gear Trains .....	493
	<i>The Tabular Method</i> .....	495
	<i>The Formula Method</i> .....	499

9.10	Efficiency of Gear Trains .....	501
9.11	Transmissions .....	504
9.12	Differentials .....	509
9.13	References .....	512
9.14	Bibliography .....	512
9.15	Problems .....	512
<b>PART II DYNAMICS OF MACHINERY .....</b>		<b>523</b>
<b>Chapter 10 Dynamics Fundamentals .....</b>		<b>525</b>
10.0	Introduction .....	525
10.1	Newton's Laws of Motion .....	525
10.2	Dynamic Models .....	526
10.3	Mass .....	526
10.4	Mass Moment and Center of Gravity .....	527
10.5	Mass Moment of Inertia (Second Moment of Mass) .....	529
10.6	Parallel Axis Theorem (Transfer Theorem) .....	531
10.7	Determining Mass Moment of Inertia .....	532
	<i>Analytical Methods</i> .....	532
	<i>Experimental Methods</i> .....	532
10.8	Radius of Gyration .....	533
10.9	Modeling Rotating Links .....	534
10.10	Center of Percussion .....	535
10.11	Lumped Parameter Dynamic Models .....	537
	<i>Spring Constant</i> .....	538
	<i>Damping</i> .....	538
10.12	Equivalent Systems .....	540
	<i>Combining Dampers</i> .....	541
	<i>Combining Springs</i> .....	542
	<i>Combining Masses</i> .....	543
	<i>Lever and Gear Ratios</i> .....	543
10.13	Solution Methods .....	549
10.14	The Principle of d'Alembert .....	550
10.15	Energy Methods—Virtual Work .....	552
10.16	References .....	554
10.17	Problems .....	554
<b>Chapter 11 Dynamic Force Analysis .....</b>		<b>559</b>
11.0	Introduction .....	559
11.1	Newtonian Solution Method .....	559
11.2	Single Link in Pure Rotation .....	560
11.3	Force Analysis of A Threebar Crank-Slide Linkage .....	563
11.4	Force Analysis of a Fourbar Linkage .....	569
11.5	Force Analysis of a Fourbar Slider-Crank Linkage .....	576
11.6	Force Analysis of the Inverted Slider-Crank .....	579
11.7	Force Analysis—Linkages with More Than Four Bars .....	581
11.8	Shaking Forces and Shaking Torque .....	582
11.9	Program Fourbar .....	583
11.10	Linkage Force Analysis by Energy Methods .....	583
11.11	Controlling Input Torque—Flywheels .....	586
11.12	A Linkage Force Transmission Index .....	592
11.13	Practical Considerations .....	594
11.14	References .....	595

11.15	Problems .....	595
11.16	Projects .....	606
<b>Chapter 12 Balancing .....</b>		<b>608</b>
12.0	Introduction .....	608
12.1	Static Balance .....	609
12.2	Dynamic Balance .....	612
12.3	Balancing Linkages .....	617
	<i>Complete Force Balance of Linkages</i> .....	618
12.4	Effect of Balancing on Shaking and Pin Forces .....	621
12.5	Effect of Balancing on Input Torque .....	623
12.6	Balancing the Shaking Moment in Linkages .....	624
12.7	Measuring and Correcting Imbalance .....	628
12.8	References .....	630
12.9	Problems .....	630
<b>Chapter 13 Engine Dynamics .....</b>		<b>638</b>
13.0	Introduction .....	638
13.1	Engine Design .....	640
13.2	Slider-Crank Kinematics .....	645
13.3	Gas Force and Gas Torque .....	651
13.4	Equivalent Masses .....	653
13.5	Inertia and Shaking Forces .....	657
13.6	Inertia and Shaking Torques .....	660
13.7	Total Engine Torque .....	661
13.8	Flywheels .....	662
13.9	Pin Forces in the Single-Cylinder Engine .....	663
13.10	Balancing the Single-Cylinder Engine .....	671
	<i>Effect of Crankshaft Balancing on Pin Forces</i> .....	675
13.11	Design Trade-offs and Ratios .....	676
	<i>Conrod/Crank Ratio</i> .....	676
	<i>Bore/Stroke Ratio</i> .....	676
	<i>Materials</i> .....	677
13.12	Bibliography .....	677
13.13	Problems .....	677
13.14	Projects .....	682
<b>Chapter 14 Multicylinder Engines .....</b>		<b>683</b>
14.0	Introduction .....	683
14.1	Multicylinder Engine Designs .....	685
14.2	The Crank Phase Diagram .....	688
14.3	Shaking Forces in Inline Engines .....	689
14.4	Inertia Torque in Inline Engines .....	693
14.5	Shaking Moment in Inline Engines .....	694
14.6	Even Firing .....	696
	<i>Two-Stroke Cycle Engine</i> .....	697
	<i>Four-Stroke Cycle Engine</i> .....	699
14.7	Vee Engine Configurations .....	705
14.8	Opposed Engine Configurations .....	717
14.9	Balancing Multicylinder Engines .....	718
	<i>Secondary Balance in the Four-Cylinder Inline Engine</i> .....	722
	<i>A Perfectly Balanced Two-Cylinder Engine</i> .....	725