Installation

This section is organized so that the installer can follow step by step instructions to prepare and install a new ball screw assembly. Ball screw assemblies are offered in several variations, so all of the installation steps may not be followed for a specific type. The Glossary of Terms will define any terms with which the user may not be familiar. All product specifications and dimensions are found in this catalog.

Installation Can Be Completed in Six Easy Steps

STEP ONE: Mounting the Flange to the Ball Nut
STEP TWO: Mount Front End of Wiper to the Screw (brush type wipers only)
STEP THREE: Install Ball Nut onto the Ball Screw
STEP FOUR: Complete Installation of the Wiper Kit
STEP FIVE: Lubricate the Ball Nut and Screw
STEP SIX: Install Ball Screw Assembly into Your Machine

Ball screws are delivered to the user in one of four ways:

1. Finished ends with assembled ball nut, ready to mount in a machine. No further preparation is required.
2. Screw ends machined and ball nut supplied on an arbor ready for transfer.
3. Screw cut and annealed ready for machining and ball nut supplied on an arbor ready for transfer.
4. Hardened screw in bulk length with ball nut supplied on an arbor ready for transfer.

Ball nuts are delivered without flanges attached and without lubrication. **Ball screw assemblies must not be run without proper lubrication.**

STEP ONE: Mounting the Flange to the Ball Nut

If flange is not used, proceed to STEP TWO.

Preparation of Ball Nut

A ball nut flange is the recommended means of attaching a ball nut to a load. A flange should be tightened firmly against the ball nut on its threads and secured by one of the methods described below. Take care not to grasp and damage the return tubes when tightening the flange. Ball circulation will be impaired if the return tubes are damaged.

Flanges are provided loose from the factory unless otherwise specified. The standard method to secure the flange to the ball nut is shown in Method "A" (retain with pins). Smaller ball screw assemblies may be assembled using Method "B" (retain with set screws). Flanges can be pinned at the factory upon request.

Flange Installation Method A

Retain with pins (recommended)

1. Remove the ball nut from the transfer arbor. Catch and save the balls for reassembly.
2. Apply Loctite grade 271 (red in color) to the ball nut V-threads.
3. Thread the flange onto the ball nut until it contacts the ball nut shoulder.
4. Loosen the flange until the required machine bolts can be inserted into the flange mounting holes without interfering with the ball return guides (see Figure 1).
5. Drill two holes approximately 90° apart, as shown in Figure 1. Note: the pin circle diameter is also the V-thread pitch diameter.
6. Press two groove type pins to the bottom of the drilled holes.
7. Stake the pin holes to prevent the pins from disengaging.
8. Remove all chips from the ball nut, and clean it thoroughly to remove potential contaminants.
9. Reassemble the flanged ball nut and components on the transfer arbor or ball screw.

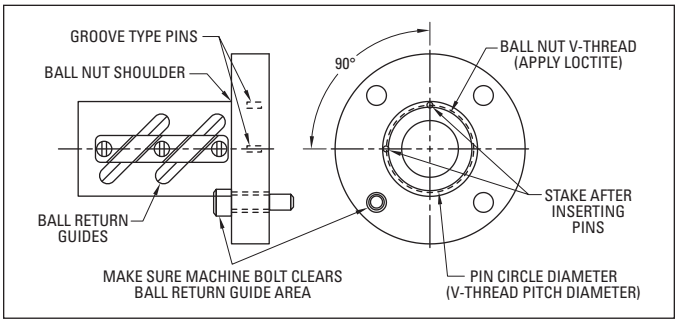


Figure 1

Installation

Flange Installation Method B

Retain with set screws (optional for flanges with set screws)

1. Apply Loctite grade 271 (red in color) to the ball nut V-threads.
2. Thread the flange onto the ball nut until it contacts the ball nut shoulder.
3. Loosen the flange until the required machine bolts can be inserted into the flange mounting holes without interfering with the ball return guides (see Figure 2).
4. Apply Loctite grade 271 (red in color) to the radial threaded hole in the flange.
5. Select a cup point set screw with a length of one half the threaded hole depth. Install two set screws, tightening to the manufacturer's recommended torque (see Figure 2).

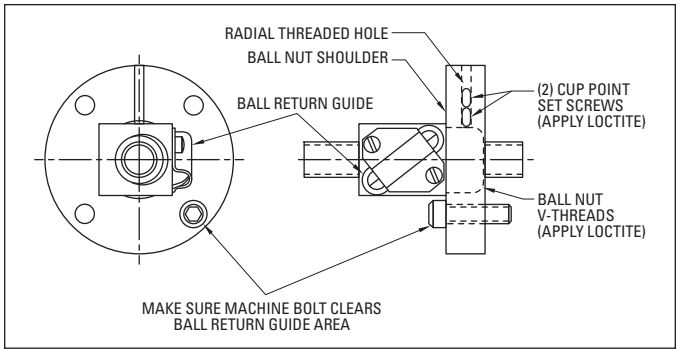


Figure 2

Method B Dimensions

V-Thread	Reference			Pin Circle Diameter	Drill		Pin	
	BCD	Lead	Ball Diameter		Diameter	Depth	Diameter	Length
.664-32 UNS	0.375	0.125	0.063	Use Method A — Retain with set screws				
0.6875-24 UNEF	0.375	0.125	0.063					
0.9375-16 UN	0.500	0.200	0.125					
0.9375-16 UN	0.500	0.500	0.125					
0.9375-16 UN	0.631	0.200	0.125					
0.9375-16 UN	0.631	1.000	0.125					
1.173-18 UNS	0.750	0.200	0.125					
1.125-18 UNEF	0.750	0.200	0.125					
1.250-18 UNEF	0.750	0.200	0.125					
1.173-18 UNS	0.750	0.500	0.156					
1.250-16 UN	0.750	0.500	0.156					
1.375-16 UN	0.875	0.200	0.125	1.332	0.094	0.312	0.094	0.250
1.563-18 UNEF	1.000	0.250	0.156	1.527	0.125	0.438	0.125	0.375
1.563-18 UNEF	1.000	0.500	0.156	1.527	0.125	0.438	0.125	0.375
1.563-18 UNEF	1.000	1.000	0.156	1.527	0.125	0.438	0.125	0.375
1.625-20 UN	1.150	0.200	0.125	1.591	0.094	0.312	0.094	0.250
1.967-18 UNS	1.171	0.413	0.281	1.929	0.188	0.438	0.188	0.375
1.967-18 UNS	1.500	0.250	0.156	1.929	0.125	0.312	0.125	0.250
2.548-18 UNS	1.500	0.473	0.344	2.509	0.250	0.438	0.250	0.375
2.360-18 UNS	1.500	0.500	0.312	2.337	0.250	0.438	0.250	0.375
2.250-20 UN	1.500	1.000	0.344	2.215	0.250	0.562	0.250	0.500
2.250-20 UN	1.500	1.875	0.281	2.215	0.188	0.562	0.188	0.500
2.250-20 UN	1.500	2.000	0.281	2.215	0.188	0.562	0.188	0.500
3.000-12 UN	2.000	0.500	0.375	2.944	0.250	1.000	0.250	0.625
3.000-12 UN	2.000	1.000	0.375	2.944	0.250	1.000	0.250	0.625
3.137-12 UNS	2.250	0.500	0.375	3.080	0.250	1.000	0.250	0.625
3.137-12 UNS	2.250	1.000	0.375	3.080	0.250	1.000	0.250	0.625
3.340-12 UNS	2.500	0.250	0.156	3.283	0.125	0.750	0.125	0.500
3.625-12 UN	2.500	0.500	0.375	3.443	0.250	1.000	0.250	0.625
3.625-12 UN	2.500	1.000	0.375	3.443	0.250	1.000	0.250	0.625
4.325-12 UNS	3.000	0.660	0.500	4.267	0.250	1.188	0.250	0.750
4.325-12 UNS	3.000	1.500	0.500	4.267	0.250	1.188	0.250	0.750
5.497-12 UNS	4.000	1.000	0.625	5.439	0.375	1.250	0.375	0.750

Installation

STEP TWO: Mount Front End of Wiper to the Screw

If wiper is not included or integral to ball nut, then proceed to STEP THREE.

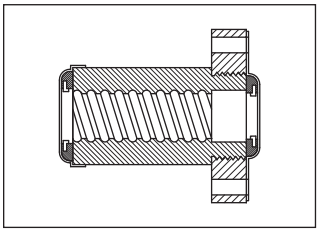
Wipers

Wipers are available for most units as optional items. Precision inch ball nuts typically do not include wipers but they may be added as an option. Precision Plus inch ball nuts and all metric ball nuts include wipers as standard. Wipers generally fall into two categories: one style is internally mounted inside the extreme ends of the ball nut; the other is a wiper and retainer kit combination mounted on the exterior end of the ball nut. In some applications, one or the other may be used or a combination of both. Visual inspection will reveal the style used.

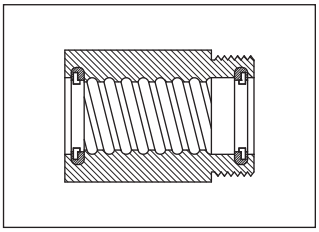
To obtain maximum service from a ball screw assembly, the ball nut should be protected from metal chips and dirt. Foreign material entering the ball nut may be rolled into the ball race, causing high localized loading, abrasion and spalling of the balls, resulting in premature failure. The wiper helps prohibit contaminants from entering the nut as it translates along the screw. These wipers are effective in most industrial applications.

For wipers with flange retainer: 1) Select end of screw to install ball nut (typically end with shortest journal length). 2) Orient ball nut with flange facing desired direction. 3) Install wiper holder and wiper for leading end of ball nut to ball screw. Then follow the ball nut installation procedure, STEP THREE, page 230 4) Install wiper holder onto trailing end of ball nut once the ball nut is installed on the ball screw.

Brush Wiper

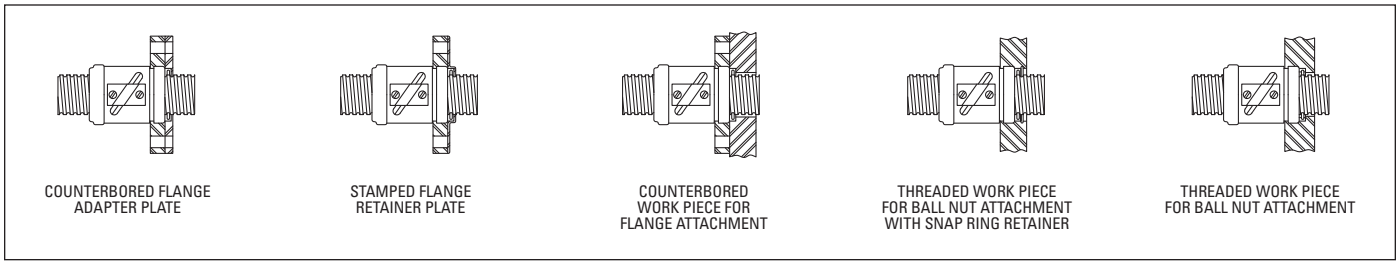


Wiper with Flange Retainer



Internal Snap Ring

Typical Methods of Attaching Wipers to V-Thread End



Wiper without Flange Retainer

Installation

STEP THREE: Install Ball Nut onto the Ball Screw

Installing Ball Nut onto Ball Screw

Each ball nut is completely assembled and loaded with bearing balls before it leaves the factory. The balls are held in place by a shipping arbor/mandrel.

CAUTION: If the arbor is removed without turning the nut onto the screw, the bearing balls will fall out of the nut and will require reloading.

Method A: Install Ball Nut without Preload onto Ball Screw

Method B: Install Ball Nut with Preload onto Ball Screw Using Gap Technique (required on part numbers listed in Table B)

Method C: Install Ball Nut with Preload onto Ball Screw Using Turn Technique (required on part numbers listed in Table C)

Method A: Install Ball Nut without Preload onto Ball Screw

To transfer the ball nut to the screw, proceed as follows:

1. Remove any ball nut retainer from the arbor. Hold the arbor firmly end to end with the screw. Make certain the arbor end is centered on the screw shaft end. (See Figure 3.)

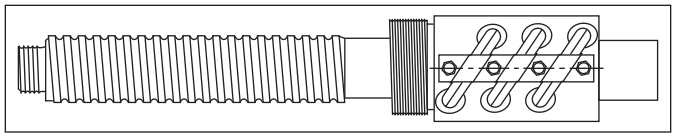


Figure 3

2. Slide the ball nut down to the screw shaft and rotate to the thread until you feel the balls drop into the screw thread. Then rotate with the screw thread until the ball nut completely clears the end of the screw shaft adjacent to the arbor. (See Figure 4.)

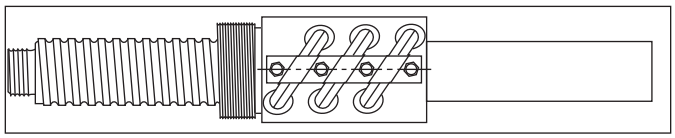


Figure 4

3. Remove the arbor. (See Figure 5.)

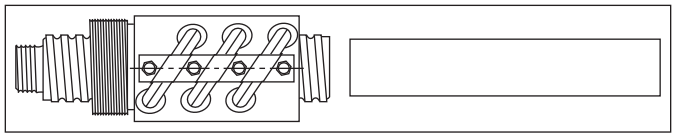


Figure 5

To transfer the ball nut to the arbor, reverse these steps.

CAUTION: When end machining makes it impossible to bring the arbor adjacent to the shaft ball grooves, wrap the machined portion with tape to the nominal O.D. of the arbor. The tape will permit the ball nut to slide over the machined area without the balls dropping into machined irregularities in the shaft.

CAUTION: Extreme care must be taken to prevent the ball nut from sliding off the end of the screw shaft during installation and handling. Temporary stops can be made by wrapping tape around the shaft ball grooves at each end. Be sure to remove the tape and any residual adhesive after the ball screw assembly is properly installed.

Notes regarding installation of Preloaded Ball Nuts (Applicable to Methods B and C):

Installing Preloaded Double Nut
Preloaded Ball Screws (Double Nut Design)

General Description: The two primary reasons for preloading ball screws are to: eliminate backlash and obtain maximum system stiffness.

Preload for units having a compensating spring feature should be established in excess of the normal operating load whenever possible. Further adjustment is not normally required during the life expectancy. Units of this type are used in many specific applications requiring special considerations.

Transferring Ball Nuts from Arbor

Double nut design ball nuts are supplied on arbors. Care must be used not to lose any of the bearing balls, or trap balls between circuits when rotating the ball nut onto the screw.

Method B: Install Ball Nut with Preload onto Ball Screw Using Gap Technique (required on part numbers listed in Table B)

Use this procedure for assemblies having part numbers indicated in Table B.

Preloading Double Nuts Using Gap Technique

Ball nuts are transferred from arbor without a preload. Before preloading these ball nuts, oil the coupling threads, spring washers, ball nut bearing surfaces and the ball grooves of the screw shaft.

Be sure to keep the ball return tubes of the two ball nuts aligned (see Figure 6). Also, make sure the coupling tangs line up with the slots in the ball nut if they have become disengaged.

Position the ball nut midway on the screw shaft. Place retainers on screw to prevent the ball nut from accidentally running off the screw shaft. With the ball return tubes facing upwards, tighten the spanner nut against the spring washer "finger tight", plus 1/4 turn. Rotate the screw shaft through several turns in both directions while holding the ball nut with the ball return tubes on top. Continue to tighten the spanner nut with spanner or channel locks until the .003" (075mm) average gap is obtained resulting in the preload as indicated by the chart. Rotate the screw in both directions several times and check for smoothness. Be sure the spring washer of the coupling is centralized (not protruding in any direction). Use a plastic or brass mallet, if necessary, to help seat the coupling system. Tap lightly. Recheck torque and re-average gap as necessary.

Check the torque by rotating screw shaft with a torque wrench. Secure the spanner nut with the set screw(s) provided.

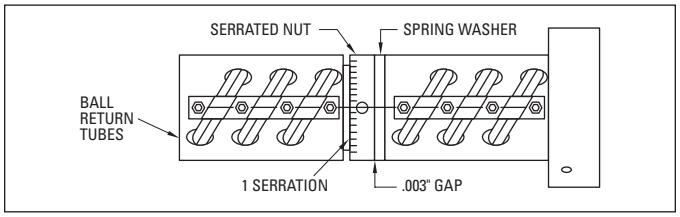


Figure 6

Installation

Table B. Preload Using Gap Technique

Ball Nut Nominal Size & Lead	Ball Nut P/N	Preload Lbs (Newtons) at .003" Gap	Torque In-Lbs (N-mm) at .003" Gap
.500 x .500	7826767	150 (667)	1.0 (113)
.631 x .200	7820955 / 7820956 7823584	150 (667)	1.0 (113)
.631 x 1.000	7827531	50 (222)	50 (222)
.750 x .500	7826991	220 (979)	1.5 (170)
.875 x .200	7823585	220 (979)	1.5 (170)
1.000 x .250	5704167 / 5704168	330 (1468)	2.0 (226)
1.000 x .250	8110-448-089	330 (1468)	2.0 (226)
1.000 x .250	8110-448-092	330 (1468)	2.0 (226)
1.000 x .250	8110-448-097	330 (1468)	2.0 (226)
1.000 x 1.000	7829720	330 (1468)	2.0 (226)
1.150 x .200	5704270 / 7820206 7823587	240 (1068)	1.5 (170)
1.150 x .200	8111-448-014	242 (1078)	1.5 (170)
1.500 x .250	5704271 / 7823588 7833234 / 5704573	920 (4092)	5.5 (622)
1.500 x 1.000	5700698	1550 (6894)	10.0 (1130)
1.500 x 1.875	5704272	1550 (6894)	10.0 (1130)
2.250 x .500	7823589	5000 (22240)	30.0 (3390)
2.500 x .250	7823590	1300 (5782)	10.0 (1130)
3.000 x .660	5703045	12400 (55155)	75.0 (8475)

Method C: Install Ball Nut with Preload onto Ball Screw Using Turn Technique (required on part numbers listed in Table C)

Use this procedure for assemblies having part numbers indicated in Table C.

Preloading Double Nuts Using Turn Technique

Turn the locknut onto the V-threads of the rear nut until it shoulders against the nut (Figure 7). Do not tighten the set screws yet.

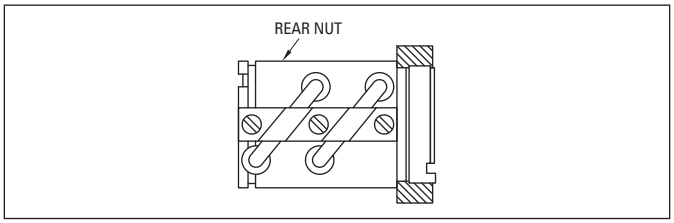


Figure 7. Assembly of locknut to rear nut.

Turn the front nut onto the screw as shown in Figure 10 Insert the tanged sleeve into position against the front nut with preload springs oriented as shown in Figure 8.

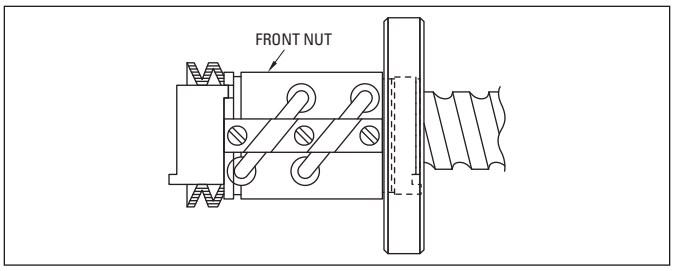


Figure 8. Preload spring orientation.

Insert the slots of the rear nut (lock nut end) into the tangs of the preload sleeve and turn the rear nut onto the screw. Both nuts now turn as an assembly with the tangs in full engagement to prevent the two nuts from rotating separately. The return tubes of the two nuts should be in line with one another. The adjuster nut must be loose at this point, not compressing the belleville springs. (See Figure 9.)

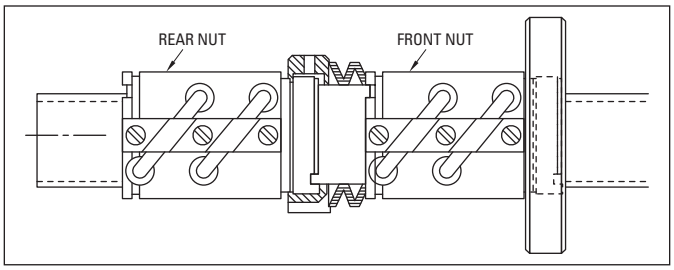


Figure 9. Assembly of rear nut to preload spring.

Hand turn the locknut until all freeplay is just removed. At this point, further turning will begin compressing the preload springs and begin to set the preload force.

Assembly

Transfer the front nut, with flange attached, onto the ball screw as shown in Figure 10. The nut should be turned onto the screw only far enough to avoid loss of bearing balls upon removing the mandrel.

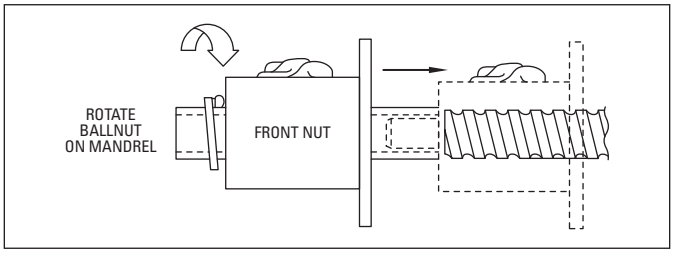


Figure 10. Transfer of front nut to screw.

Installation

Method C (Continued)

Bring the rear nut on its mandrel to position for turning onto the screw. (See Figure 11.)

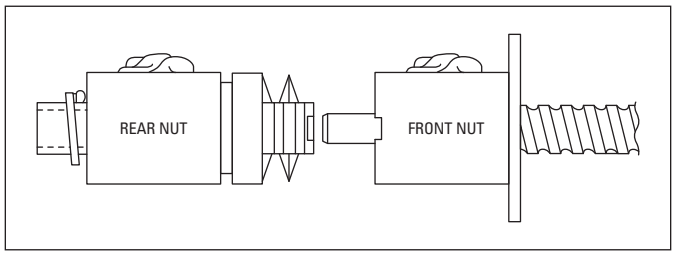


Figure 11. Positioning rear nut for mounting.

NOTE: Normally the rear nut for preloading is shipped fully assembled from the factory. If the spring package is not assembled to the rear nut as shown in Figure 12, review Preload Components Assembly for assembly instructions.

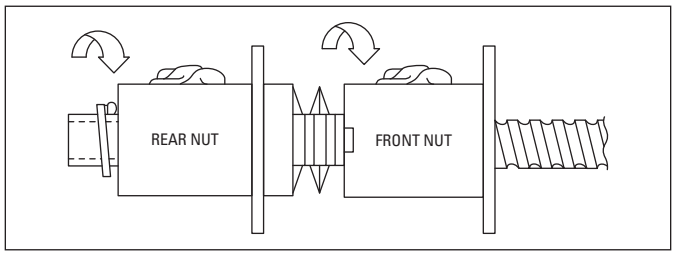


Figure 12. Mounting rear nut.

Insert the tabs of the preload sleeve into the slots of the front nut and then turn the rear nut onto the screw. Both nuts now turn as an assembly with the tangs in full engagement to prevent the two nuts from rotating separately. The return tubes of the two nuts should be in line with one another. The adjuster nut must be loose at this point, not compressing the belleville springs. (See Figure 13.)

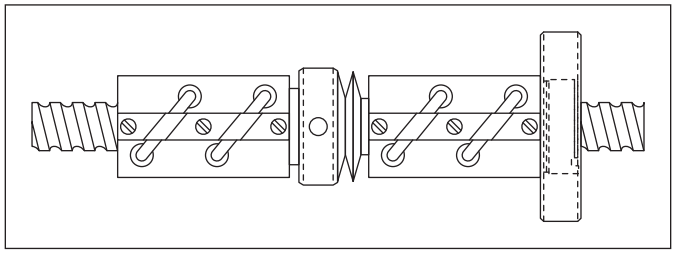


Figure 13. Assembled preload ready for setting.

Turn the locknut until all freeplay is just removed. At this point further turning will begin compressing the preload springs and set the preload force.

Setting the Preload

Amount of Preload

Refer to Table C on page 233 for the number of turns, after freeplay is removed, required for the desired preload. The approximate preload per rotation is also given for preloads between recommended and maximum.

Methods of Setting the Preload

1. Small ball screws with light loads may often be set by hand-turning the adjuster nut to position while preventing rotation of the ball nuts.
2. Ball screws of medium size often require a spanner wrench to turn the adjuster nut to position.
3. Large size units sometimes require a spanner wrench with a pipe extension.

Rotation of the ball nuts during preload setting can be prevented by securing the flange in a fixture or installing the ball screw in its end use application.

CAUTION: Clamping the O.D. of the ball nuts in a vise or similar gripping system to prevent rotation during preload setting is unacceptable due to damage that may be caused to the balls or return tubes of the ball nut.

After setting the preload to the desired preload force, tighten the set screws into the adjuster nut to secure the preload setting.

Preload Components Assembly

Use in conjunction with Assembly instructions on page 231 if assembly of resilient preload components to rear nut is necessary.

Turn the locknut onto the V-threads of the rear nut until the spanner wrench holes line up with the pin holes on the nut. (See Figure 14.)

Do not tighten the set screws at this point.

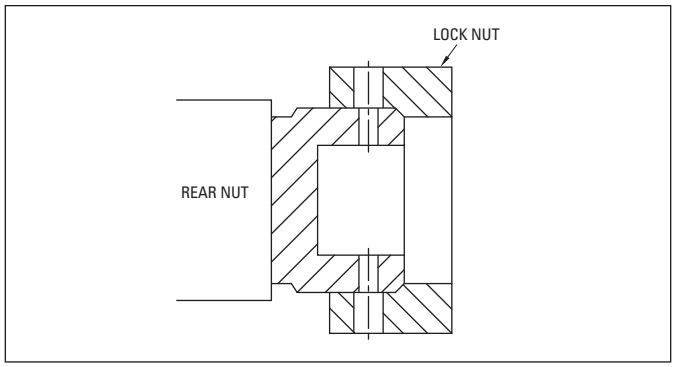


Figure 14. Assembly of locknut to rear nut.

Installation

Method C (Continued)

Insert the sleeve into position with preload springs oriented as shown in Figure 15. Align the sleeve holes for insertion of the spring pins.

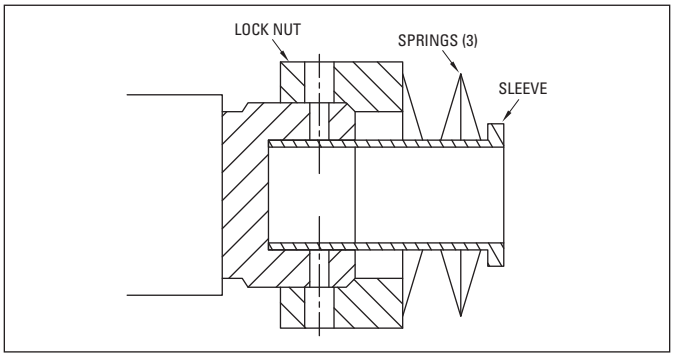


Figure 15. Assembly of sleeve and preload springs.

Press the pins to a depth just below the root of the V-threads in the locknut to allow the locknut to turn freely (see Figure 16). The pins must not be inserted deeper, as they may interfere with the ball screw grooves.

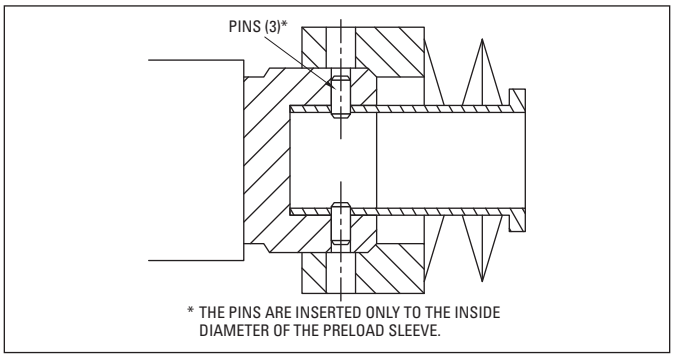


Figure 16. Inserting retainer pin.

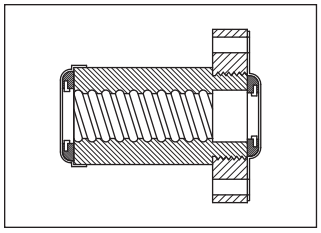
Table C. Preload Using Turn Technique

Ball Nut Nominal Size & Lead	Ball Nut P/N	Preload Lbs (Newtons)	Turns
.375 x .125	8103-448-004	50	0.29
.375 x .125	8103-448-005	50	0.29
.500 x .200	8105-448-008	120	0.24
.500 x .500	8105-448-009	220	0.46
.500 x .500	8105-448-012	190	0.33
.631 x .200	8106-448-015	80	0.25
.631 x .200	8106-448-019	80	0.25
.750 x .500	8107-448-011	345	0.58
.750 x .200	8107-448-012	190	0.33
.750 x .200	8107-448-025	190	0.33
1.000 x 1.000	8110-448-015	225	0.43
1.000 x .500	8110-448-016	395	0.77
1.000 x .250	8110-448-017	335	0.64
1.000 x .250	8110-448-018	335	0.64
1.150 x .200	8111-448-004	240	0.59
1.500 x .500	8115-448-006	1290	0.65
1.500 x .500	8115-448-007	1290	0.65
1.500 x 1.000	8115-448-011	825	0.49
1.500 x .250	8115-448-012	405	0.62
1.500 x .500	8115-448-029	1290	0.65
1.500 x 1.000	8115-448-032	825	0.49
1.500 X 2.000	8115-448-059	760	0.40
1.500 x 1.000	8115-448-075	825	0.49
2.000 x .500	8120-448-006	1915	0.26
2.000 x .500	8120-448-007	1915	0.26
2.000 x 1.000	8120-448-019	2195	0.30
2.250 x .500	8122-448-003	1930	0.51
2.250 x .500	8122-448-008	1930	0.51
2.500 x 1.000	8125-448-004	2690	0.51
2.500 x .500	8125-448-006	2120	0.40
2.500 x .500	8125-448-015	2120	0.40
3.000 x .660	8130-448-004	3800	0.34
3.000 x .660	8130-448-010	3800	0.34

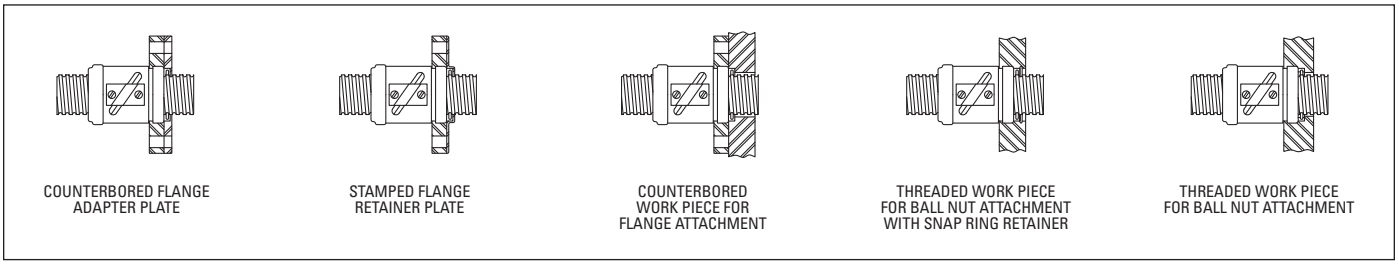
Installation

STEP FOUR: Complete Installation of the Wiper Kit

If applicable, complete wiper kit installation.



Wiper with Flange Retainer



Wiper without Flange Retainer

Installation

STEP FIVE: Lubricate the Ball Nut and Screw

Lubrication

Ball screw components are coated with a light oil for shipping and storage and must be properly lubricated upon assembly.

We recommend using TriGEL-450R or TriGEL-1800RC for lubricating ball screws every 500,000 to 1 million inches of travel or every six months. Other lubricants may be applicable but have not been evaluated.

The TriGEL grease can be applied directly to the screw threads near the root of the ball track. Some ball nut sizes are available with threaded lube holes for mounting lubrication fittings. For these ball nuts, the TriGEL grease can be pumped directly into the nut. Please refer to the catalog to verify which ball nuts have the threaded lube holes. It is recommended to use these nuts in conjunction with a wiper kit to contain the lubricant within the body of the nut.

Ball screws may require lubrication more frequently than 500,000 inches depending on both environmental and operating conditions. If the lubricant appears to be dispersed before this point or has become dry or crusted, the maintenance interval should be reduced. Before adding additional lubrication, wipe the screw clean, removing the old grease and any particular contamination seen on the screw.

Initial Lubrication

As with ball bearings, ball screws can be lubricated using either oils, greases or solid lubricants. Oils are recommended for systems which operate at high speeds, in aggressive environments, or in high ambient temperatures. Greases are recommended for ball screws where an oil circulation lubrication system cannot be applied, or areas where a lubricated-for-life situation is possible. Solid lubricants are typically applied to adverse operating conditions where oils and greases are not suitable.

Grease Lubrication Quantity

The nut can be filled to as much as 70% but no lower than 30% of its free space, depending upon operating speed and nDm. Nuts which are not fitted with wipers can be filled completely.

Grease Relubrication

In general, ball screws should be relubricated every 500,000 revolutions or every six months. Ball screws which operate above 70°C should be relubricated more often (1/2 the relubrication period for every 15°C increment above 70°C). Use of synthetic lubricants can increase the relubrication interval up to four times, depending on formulation and operating conditions.

Relubrication quantities should equal 30% of the nut free space. When possible, relubrication should be performed while the screw is operating.

Run-In

In order to distribute the grease throughout the ball screw elements, it is recommended that the screw be run two to ten times over its complete operating stroke. Run-in should be performed at initial start-up and after every subsequent relubrication.

Grease Operating Life

When relubricated with the proper frequency, ball screws should achieve their rated fatigue life. When no relubrication is possible, actual grease operating life will be affected by operating speed, running temperature, and the extent of environmental contamination.

Relubrication intervals can best be determined by experience. Changes in grease consistency, grease color, operating torque and operating temperature can indicate the need for lubrication replenishment.

Installation

STEP SIX: Install Ball Screw Assembly into Your Machine

Installation of Ball Screw Assembly

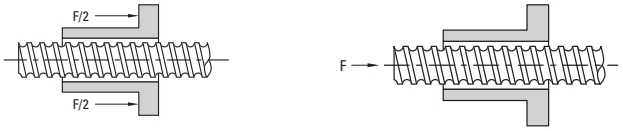
A ball nut flange is the recommended means of attaching a ball nut to a load. The ball screw assembly should be mounted into a system or machine as shown in the figures below. Axial loading of the nut is optimal for performance and life and side loading installations or applications should be avoided.

Typical ball screw installations are combined with linear slides to provide support and guidance. Linear rails and ball screws must then be aligned parallel to prevent binding, increased system torque and a decrease in life. Typical installation practice consists of "floating" the ball screw or the linear rail into alignment. To "float" a screw into alignment, secure the linear rail into position and adjust the mounting blocks or nut to minimize the error from parallel.

Nut Loading

Axial loading (on nut or screw) is optimal for performance and life. For applications requiring radial loads, please contact us.

Axial Loading: optimal

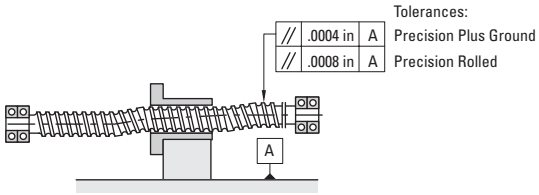


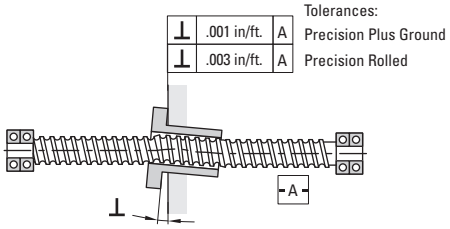
Radial Loading: detrimental*

* Minimize radial loading to less than 5% of the axial load.

Nut Mounting (Inch)

Use the following guidelines to achieve optimal performance.





Nut Mounting (Metric)

Use the following guidelines to achieve optimal performance.
(All units are mm)