TIGHTENING TORQUES AND THE TORQUE-TENSION RELATIONSHIP

All of the analysis and design work done in advance will have little meaning if the proper preload is not achieved. Several discussions in this technical section stress the importance of preload to maintaining joint integrity. There are many methods for measuring preload (see Table 12). However, one of the least expensive techniques that provides a reasonable level of accuracy versus cost is by measuring torque. The fundamental characteristic required is to know the relationship between torque and tension for any particular bolted joint. Once the desired design preload must be identified and specified first, *then* the torque required to induce that preload is determined.

Within the elastic range, before permanent stretch is induced, the relationship between torque and tension is essentially linear (see figure 13). Some studies have found up to 75 variables have an effect on this relationship: materials, temperature, rate of installation, thread helix angle, coefficients of friction, etc. One way that has been developed to reduce the complexity is to depend on empirical test results. That is, to perform experiments under the application conditions by measuring the induced torque and recording the resulting tension. This can be done with relatively simple, calibrated hydraulic pressure sensors, electric strain gages, or piezoelectric load cells. Once the data is gathered and plotted on a chart, the slope of the curve can be used to calculate a correlation factor. This technique has created an accepted formula for relating torque to tension.

$T = K \times D \times P$

T = torque, lbf.-in.
D = fastener nominal diameter, inches
P = preload, lbf.
K = “nut factor,” “tightening factor,” or “k-value”

If the preload and fastener diameter are selected in the design process, and the K-value for the application conditions is known, then the necessary torque can be calculated. It is noted that even with a specified torque, actual conditions at the time of installation can result in variations in the actual preload achieved (see Table 12).

One of the most critical criteria is the selection of the K-value. Accepted nominal values for many industrial applications are:

K = 0.20 for as-received steel bolts into steel holes

K = 0.15 steel bolts with cadmium plating, which acts like a lubricant,

K = 0.28 steel bolts with zinc plating.

The K-value is not the coefficient of the friction (μ); it is an empirically derived correlation factor.

It is readily apparent that if the torque intended for a zinc plated fastener is used for cadmium plated fastener, the preload will be almost two times that intended; it may actually cause the bolt to break.

Another influence is where friction occurs. For steel bolts holes, approximately 50% of the installation torque is consumed by friction under the head, 35% by thread friction, and only the remaining 15% inducing preload tension. Therefore, if lubricant is applied just on the fastener underhead, full friction reduction will not be achieved. Similarly, if the material against which the fastener is bearing, e.g. aluminum, is different than the internal thread material, e.g. cast iron, the effective friction may be difficult to predict, These examples illustrate the importance and the value of identifying the torque-tension relationship. It is a recommend practice too contact the lubricant manufacturer for K-value information if a lubricant will be used.

The recommended seating torques for Unbrako headed socket screws are based on inducing preloads reasonably expected in practice for each type. The values for Unbrako metric fasteners are calculated using VDI2230, a complex method utilized extensively in Europe. All values assume use in the received condition in steel holes. It is understandable the designer may need preloads higher than those listed. The following discussion is presented for those cases.

TORSION-TENSION YIELD AND TENSION CAPABILITY AFTER TORQUING

Once a headed fastener has been seated against a bearing surface, the inducement of torque will be translated into both torsion and tension stresses. These stresses combine to induce twist. If torque continues to be induced, the stress along the angle of twist will be the largest stress *while the bolt is being torqued.* Consequently, the stress along the bolt axis (axial tension) will be something less. This is why a bolt can fail at a lower tensile stress *during installation* than when it is pulled in straight tension alone, eg . a tensile test. Research has indicated the axial tension can range from 135,000 to 145,000 PSI for industry socket head cap screws at torsion-tension yield, depending on diameter. Including the preload variation that can occur with various installation techniques, eg. up to 25%, it can be understood why some recommended torques induce preload reasonably lower than the yield point.

Figure 13 also illustrates the effect of straight tension applied after installation has stopped. Immediately after stopping the installation procedure there will be some relaxation, and the torsion component will drop toward zero. This leaves only the axial tension, which keeps the joint clamped together. Once the torsion is relieved, the axial tension yield value and ultimate value for the fastener will be appropriate.

Table 12
Industrial Fasteners Institute’s Torque-Measuring Method

Preload Measuring Method	Accuracy Percent	Relative Cost
Feel (operator’s judgement)	±35	1
Torque wrench	±25	1.5
Turn of the nut	±15	3
Load-indicating washers	±10	7
Fastener elongation	±3 to 5	15
Strain gages	±1	20

THE TORQUE-TENSION RELATIONSHIP

Fig. 14

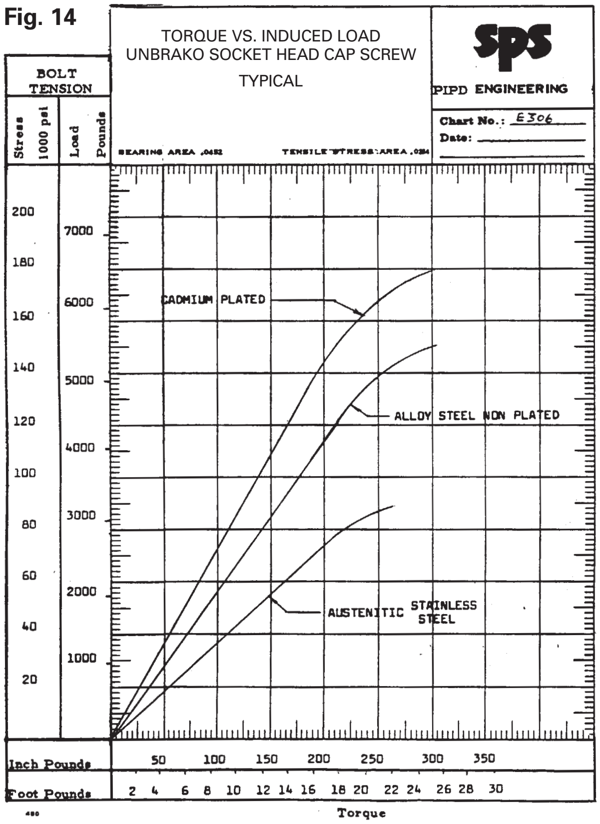

Fig. 13 Torque/Tension Relationship

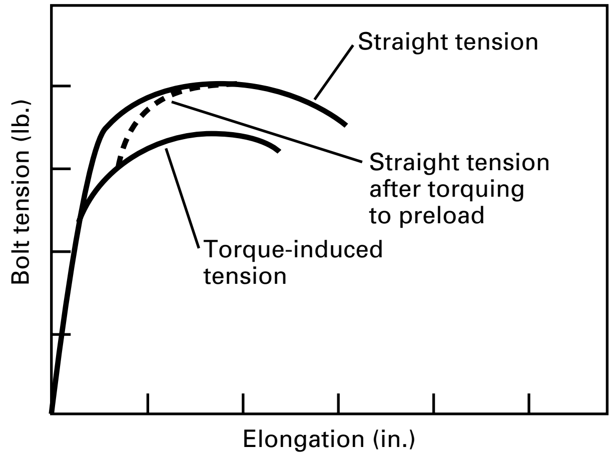

Fig. 15 Recommended Seating Torques (Inch-Lb.) for Application in Various Materials
UNBRAKO pHd (1960 Series) Socket Head Cap Screws

	mild steel Rb 87 cast iron Rb 83 note 1		brass Rb 72 note 2		aluminum Rb 72 (2024-T4) note 3	
	UNC	UNF	UNC	UNF	UNC	UNF
screw size	plain	plain	plain	plain	plain	plain
#0	–	*2.1	–	*2.1	–	*2.1
#1	*3.8	*4.1	*3.8	*4.1	*3.8	*4.1
#2	*6.3	*6.8	*6.3	*6.8	*6.3	*6.8
#3	*9.6	*10.3	*9.6	*10.3	*9.6	*10.3
#4	*13.5	*14.8	*13.5	*14.8	*13.5	*14.8
#5	*20	*21	*20	*21	*20	*21
#6	*25	*28	*25	*28	*25	*28
#8	*46	*48	*46	*48	*46	*48
#10	*67	*76	*67	*76	*67	*76
1/4	*158	*180	136	136	113	113
5/16	*326	*360	228	228	190	190
3/8	*580	635	476	476	397	397
7/16	*930	*1,040	680	680	570	570
1/2	*1,420	*1,590	1,230	1,230	1,030	1,030
9/16	*2,040	2,250	1,690	1,690	1,410	1,410
5/8	*2,820	3,120	2,340	2,340	1,950	1,950
3/4	*5,000	5,340	4,000	4,000	3,340	3,340
7/8	*8,060	8,370	6,280	6,280	5,230	5,230
1	*12,100	12,800	9,600	9,600	8,000	8,000
1 1/8	*13,800	*15,400	13,700	13,700	11,400	11,400
1 1/4	*19,200	*21,600	18,900	18,900	15,800	15,800
1 3/8	*25,200	*28,800	24,200	24,200	20,100	20,100
1 1/2	*33,600	*36,100	32,900	32,900	27,400	27,400

NOTES:
1. Torques based on 80,000 psi bearing stress under head of screw.
2. Torques based on 60,000 psi bearing stress under head of screw.
3. Torques based on 50,000 psi bearing stress under head of screw.

*Denotes torques based on 100,000 psi tensile stress in screw threads up to 1" dia., and 80,000 psi for sizes 1 1/8" dia. and larger.

To convert inch-pounds to inch-ounces – multiply by 16.

To convert inch-pounds to foot-pounds – divide by 12.