

# BEARING HANDLING

## *Precautions for Proper Handling of Bearings*

Since rolling bearings are high precision machine parts, they must be handled accordingly. Even if high quality bearings are used, their expected performance cannot be achieved if they are not handled properly.

The main precautions to be observed areas follows:

### (1) Keep Bearings and Surrounding Area Clean

Dust and dirt, even if invisible to the naked eye, have harmful effects on bearings. It is necessary to prevent the entry of dust and dirt by keeping the bearings and their environment as clean as possible.

### (2) Careful Handling

Heavy shocks during handling may cause bearings to be scratched or otherwise damaged possibly resulting in their failure. Excessively strong impacts may cause brinelling, breaking, or cracking.

### (3) Use Proper Tools

Always use the proper equipment when handling bearings and avoid general purpose tools.

### (4) Prevent Corrosion

Since perspiration on the hands and various other contaminants may cause corrosion, keep the hands clean when handling bearings. Wear gloves if possible. Pay attention to rust of bearing caused by corrosive gasses.

## **2 Mounting**

The method of mounting rolling bearings strongly affects their accuracy, life, and performance, so their mounting deserves careful attention. Their characteristics should first be thoroughly studied, and then they should be mounted in the proper manner. It is recommended that the handling procedures for bearings be fully investigated by the design engineers and that standards be established with respect to the following items:

### (1) Cleaning the bearings and related parts.

(2) Checking the dimensions and finish of related parts.

(3) Mounting

(4) Inspection after mounting.

(5) Supply of lubricants.

Bearings should not be unpacked until immediately before mounting. When using ordinary grease lubrication, the grease should be packed in the bearings without first cleaning them. Even in the case of ordinary oil lubrication, cleaning the bearings is not required. However, bearings for instruments or for high speed operation must first be cleaned with clean filtered oil in order to remove the anti-corrosion agent..

After the bearings are cleaned with filtered oil, they should be protected to prevent corrosion.

Prelubricated bearings must be used without cleaning. Bearing mounting methods depend on the bearing type and type of fit. As bearings are usually used on rotating shafts, the inner rings require a tight fit.

Bearings with cylindrical bores are usually mounted by pressing them on the shafts (press fit) or heating them to expand their diameter (shrink fit). Bearings with tapered bores can be mounted directly on tapered shafts or cylindrical shafts using tapered sleeves.

Bearings are usually mounted in housings with a loose fit. However, in cases where the outer ring has an interference fit, a press may be used. Bearings can be interference-fitted by cooling them before mounting using dry ice. In this case, a rust preventive treatment must be applied to the bearing because moisture in the air condenses on its surface.

### **Mounting of Bearings with Cylindrical Bores**

(1) Press Fits



Fitting with a press is widely used for small bearings. A mounting tool is placed on the inner ring and the bearing is slowly pressed on the shaft with a press until the side of the inner ring rests against the shoulder of the shaft. The mounting tool must not be placed on the outer ring for press mounting, since the bearing may be damaged. Before mounting, applying oil to the fitted shaft surface is recommended for smooth insertion. The mounting method using a hammer should only be used for small ball bearings with minimally tight fits and when a press is not available. In the case of tight interference fits or for medium and large bearings, this method should not be used. Any time a hammer is used, a mounting tool must be placed on the inner ring.

When both the inner and outer rings of non-separable bearings, such as deep groove ball

bearings, require tight-fit, a mounting tool is placed on both rings , and both rings are fitted at the same time using a screw or hydraulic press. Since the outer ring of self-aligning ball bearings may deflect a mounting tool . should always be used for mounting them.

In the case of separable bearings, such as cylindrical roller bearings and tapered roller bearings, the inner and outer rings may be mounted separately. Assembly of the inner and outer rings, which were previously mounted separately, should be done carefully to align the inner and outer rings correctly. Careless or forced assembly may cause scratches on the rolling contact surfaces.

## (2) Shrink Fits

Since press fitting large bearings requires a large force, a shrink fit is widely used. The bearings are first heated in oil to expand them before mounting.