



Recent techniques in static and dynamic torque measurements

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Abstract

The review article presents a historical scientific spot of light on the progress of torque measurements with focus on the traceability as a corner stone of NMIs daily work. An introduction to torque measurements including the background and the basic concepts of conventional static torque measurements with its traceability, as a derived mass unit, to force unit in Newton and the length unit in meter. Different methods of reaction torque measurements and its industrial applications are discussed. The advantages of the most common sensing part, the strain gauges, are deeply discussed. The construction of torque measuring body and how to transmit the signals in both static and rotary applications are viewed. The conceptual design of the primary and secondary torque standard machines and how their achieve traceability are briefly discussed. The static torque calibration machines from different leading NMIs are discussed to differentiate between the accuracy related designs; selection of bearing, selection of the measuring axis, design of the lever arm ends, and influences of connections and adapters. The NIS static torque standard machines are briefly discussed here. The dynamic torque measurements with its applications and impact to increasing industrial demand outside the research laboratories are discussed. The governor equations, assumptions, physical parameters and Modelling of the system are discussed as well. Pioneer European project with its results are presented. The NIS running research work in dynamic torque is presented. The most recent trend in torque and force measurements, the electromagnetic force/torque machines, is briefly discussed with focus on the pioneer researches and its outputs with future expectations.

Keywords: Torque, static, dynamic, electrostatic, traceability.

1 Introduction

Torque is defined as the applied force to a lever arm with known length therefore its simplest form is force multiply length. The realization of torque quantity and establishing the

traceability through design of torque calibration machines with different accuracy levels is a fresh metrology field started in 1990^s [1]. Consequently, very few torque calibration machines at National Metrology Institutes (NMI) are frequently found. Such problems and associate uncertainties in both force and length measurements as they are two fields of metrology. And when they combine together to realize torque, new challenges will come in front.

In run-through, there are two main forms of applying torque; torque tools (wrenches commonly) or torque transducers. Torque tools are the daily use tools used to fasten screws and nuts such as wrenches, screwdrivers, multipliers, hydraulic, and pneumatic tools which are used in plants and workshops. They are mainly used to assemble different parts by generating appropriate amount of torque which produces internal tension between fastening bolts and nuts. Contrary, torque transducers are sensing and control element broadly used in various applications to measure, control, and adjusts the generated torque. Torque measuring devices mainly used in process quality control to check the performance and acceptance limits and calibration and tightening tools such as powered torque runners and drivers. In automotive industry the torque transducers are permanently fitted to monitor the fuel efficiency consumption, as well as for power assistance steering [2-13].

Particular applications of torque devices are studying the behavior of motors steering wheels. The alternating torque is generating as residual torque to the torque transducer such as curvilinear and straight linear travel. The torque application loading profile can't be predicted, and excessive torque changes which generated by curvilinear and straight linear travel or parking-in are superposed by small torque changes the road profile and obstacles. The alternating torque applications calibration procedure is user to calibrate the torque transducers used in such applications to simulate the practice application. Polynomial equations are generated to fit the calibration measurements to cover the transducer's full range [3].

2 Static torque standards machines

The accuracy level should depend on each country needs and situations. Such case studies are presented here for different design concepts from different countries; Germany, Finland, Italy, and Egypt to build their torque calibration machines. The principle of the component system presented by D. Peschel [1] and applied in the PTBs' machines is also applied in many other NMIs such as KRISS, NMIJ, UME, CENAM. Therefore, this article presents particular designs where concepts are different.

2.1 Primary standard torque calibration machines

Starting from the metrological traceability in field of force measurements, similar standard machines were developed for realization of torque quantity at the PTB. It has four primary standard torque calibration machines established to realize torque unit are tabulated in Table (1) [14]. The design principle for their design is a force application to the end of a lever system buoyed on a low friction aerostatic bearing [13]. The radial bearing offers the ability of rotation of its axis, the crosswise forces substitute on the lever arm produces tilting moments then this tilting moment converted to a torque vector. Therefore, pure torque can be

used to calibrate torque measuring devices. The lever –mass system is supported in an aerostatic bearing. The torque is generated by the motor driver system and measured by the supporting force on a pay compensation weighing device. A freely suspension of mass piece, possible oscillations in the weighing device is damped to reach system stabilization. A data acquisition system for both the signal of the calibrated torque transducer and of the mass stack device permits martial drift to minimize the error of mass handling repetitions and consequence calibration and measurement uncertainty (CMC).

The 1 kN·m torque calibration machine set up is showed in Figure (2). A detailed explanation is given in [15-23]. The machine has unique mass selection mechanism ranges, torque steps of 2 N·m are used in the range from 2 N·m to 1 kN·m. This is because of selecting different masses for right-hand side torques and left hand side torques in a combination to increase the ability of choosing small torque steps of 2 N·m.

Table 1: Primary torque calibration machines (PTB) [15]

Description	Measurement range 1	Measurement range 2	Expanded Uncertainty	Expanded Uncertainty
	Min max	Min max	range 1 (k = 2)	range 2 (k = 2)
20 kN·m	100 N·m to 20 kN·m	10 N·m to 1000 N·m	2×10^{-5}	1×10^{-4}
1 kN·m	2 N·m to 1000 N·m	0.2 N·m to 5 N·m	2×10^{-5}	1×10^{-4}
20 N·m	0.1N·m to 20 N·m	-	2×10^{-5}	-
1 N·m	0.05 N·m to 1N·m	0.0005 N·m to 0.1 N·m	1×10^{-4}	1×10^{-3}

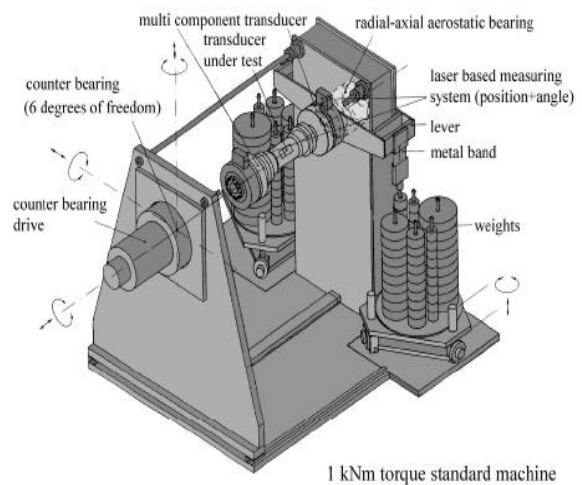


Figure 2: Photograph of 1 kN·m torque calibration machine on the left (PTB) and its main components on the right.

The 20 N·m torque calibration machine has a very similar design and concept of operation, it has 3 stacks to cover the range from 100 mN·m up to 20 N·m in both clockwise and anticlockwise directions with relative expanded uncertainty of 5×10^{-5} [15].

At the NMI of Finland (MIKES), they have two primary torque standard machines. A lever-weight system is developed for calibrating torque transducers, where the weights are loaded manually. Figure 3a and 3b shows the 20 N·m and 2 kN·m MIKES torque standard machine.

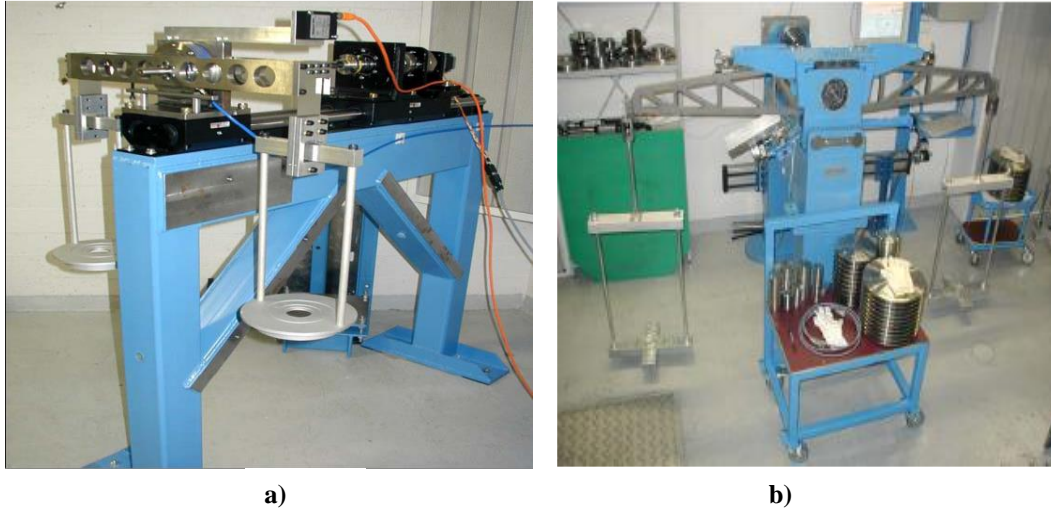


Figure 3: a) 20 N·m and b) 2 kN·m, primary torque calibration machines (MIKES)

As shown in Figure 3, the machines are using aerostatic bearings to reduce the friction to the minimum to be able of achieving relative expanded measurement uncertainty of 2×10^{-4} .

The ball bearings are used to establish the mechanism called counter rotating bearings. This mechanism is consisting of two ball bearing rows in series radially. The inner ring of the smaller bearing row is assembled to the machine shaft while its outer ring is the inner ring of the bigger one. This mechanism could be used in secondary standard torque calibrations or the primary torque calibrations. The bigger outer bearings are fixed to the machine. Standard ball bearing is used in this counter rotating mechanism. A rotation drive system is used to rotate these bushes [24-26]. MIKES uses a toothed belt derived by a motor drive with reduction gear train to rotate these bushes. Figure 4 shows a schematic view of the 2 kN·m dead weight machine counter rotating bearings.

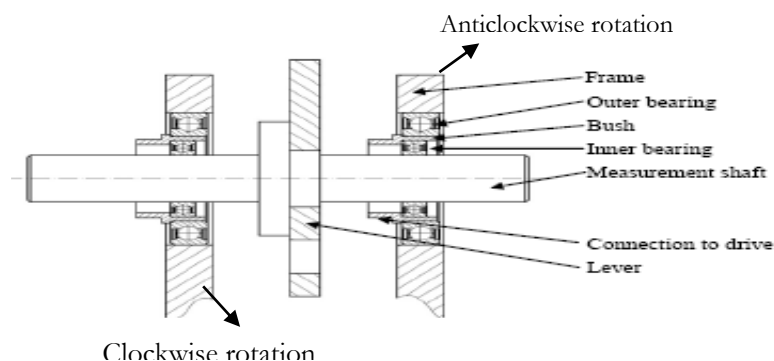


Figure 4: Counter rotating bearings in 2 kN·m torque calibration machine (MIKES)

The NMI of Italy (IMGC) 2 kN·m torque calibration machine [27] and NIS 1 kN·m machines [28-38] introduced a modified shape of the lever arm end to be able to have the same lever arm length even if the lever arm is rotated within limits. This idea was established by interrupting a sphere shape between the lever arm end and the machine loading frame. This principle has a disadvantage which is determining the accurate length of the lever arm, primarily because of dependency between the position of the force acting line and the local tension along the contact lines between the sphere connected to the lever arm and the machine loading frame. A schematic front view of the lever arm with the spherical ends is shown in Figure 5. Both lever arm ends are coaxial cylindrically with the machine axis.

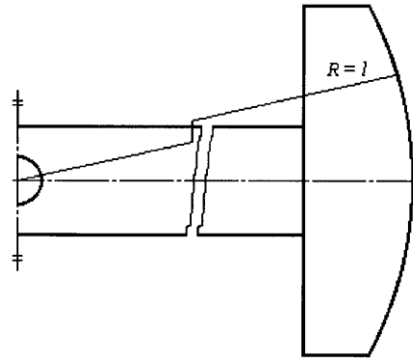


Figure 5: Front view of the 2 kN·m torque standard machine (IMGC)

This design principle offers possibility to evade controlling the lever arm horizontal position accurately. The machine uses counter rotating bearings as fulcrum as shown in Figure 6 [24]. The measuring range of this machine is from (0.005- 2) kN·m with expanded uncertainty of 5×10^{-4} . Figure (6a) and (6b) shows a photograph of the IMGC and NIS machines, respectively.



(a)



(b)

Figure 6: (a) 2 kN·m torque standard machine at IMGC, (b) 1 kN·m primary torque standard machine at NIS.

2.2 Secondary Standard Torque Calibration Machines

The torque calibration machines with their lever-mass systems offers accurate measurements but considered a time-consuming measurements. Nevertheless, various torque measuring devices are used for continuous or quasi-static torque measurements in the field. The principle of the secondary machines is to use a high accuracy torque transducer as reference value connects the torque transducer under calibration in series, then use a torque generation drive to apply the required torque values. There are four secondary torque machines at PTB for automated continued measurements. Figure (7) shows the 20 N·m machine. Interchangeable reference torque transducers are mounted to the motor/gear driving unit through a flexible coupling and hydraulic clamps.

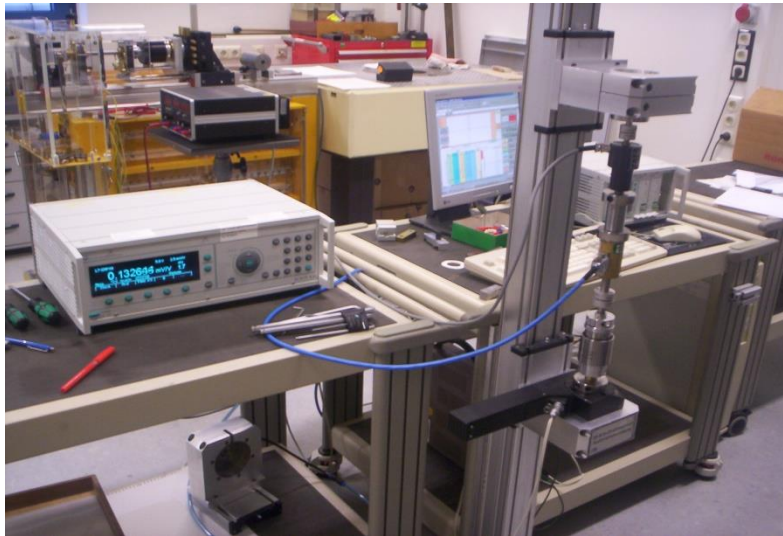


Figure 7: 20 N·m torque standard machine at (PTB)

Another technique used to realize the torque quantity through the measuring double-side lever arm is located at the opposite end of the machine frame. Two multi-components strain control hinges are used to convert the generated torque steps to coupled forces, there force are measured by reference force transducers traceable to force unit. The double-side lever arm is supported by a movable crosshead can be move vertically to adjust the height of measuring space up to 4 m length.

3 Dynamic torque measurements

The reason for research on the traceability of dynamic torque transducer calibration comes mainly from two applications with dynamic torque signals [39-43].

3.1 Principle of Dynamic Torque Calibration

Authors At the moment, commonly accepted calibration machines as well as calibration procedures for a dynamic torque transducers calibration, do not exist. Entirely torque transducers which used in the dynamic applications or even rotary applications are calibrated statically only.

The Newton's second law is the governance law in the primary dynamic. The applied dynamic torque $T(t)$ equivalent to the mass moment of inertia J multiplied by the rotational acceleration $\ddot{\varphi}(t)$.

$$T(t) = J \cdot \ddot{\varphi}(t). \quad (1)$$

The first dynamic torque machine applying this principle was established and performance evaluated at PTB [42, 44, 47-49]. PTB was leading the European Metrology Research Programme Joint Research Project IND09 to realize dynamic traceability for mechanical quantities; pressure, force, and torque. PTB through the project improved their dynamic torque machine by replacement of the exciter and the larger aerostatic bearing.

Figure (8) shows the principle in design and the main parts of the dynamic torque device at PTB. The device is oriented vertically while all machine parts are assembled in series to rotate freely. The torque is generated by a rotational exciter located at the bottom. The exciter is able to move vertically by three guided vertical screws to be adjustable to meet the length and assembly requirements. The calibrated torque transducer is assembled to machine above the rotational exciter.

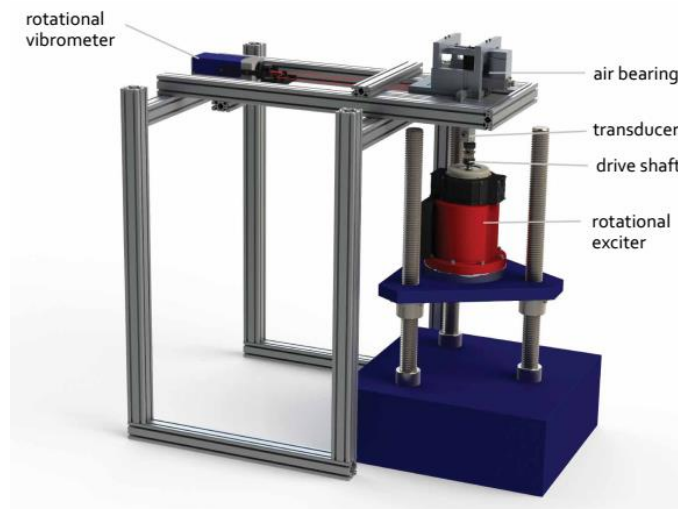


Figure 8: Schematic drawing of the PTB's dynamic torque machine

3.2 Physical Model

Torque transducers are commonly coupled from both sides to different types of connections to measure the applied torque. The mechanical connections with its mass moment of inertia have effect to the transducer's dynamic behavior. In order to realize these influences, the model calculations are used to represent the whole mechanical system of both torque transducer under test and measuring device. The proposed model uses a system be made up of two main mass moment of inertia elements J_H , J_B joined by a torsion spring c_T and in parallel with damper d_T , that describe the device under test (DUT), and at the top of the model, an extra mass moment of inertia J_0 . The dynamic behavior is represented by the amplitude response which represents the ratio of the angular accelerations' amplitudes φ_0 and φ_B at both the top and the bottom of the dynamic torque machine, respectively. Figure (9) shows the proposed model and the amplitude response.

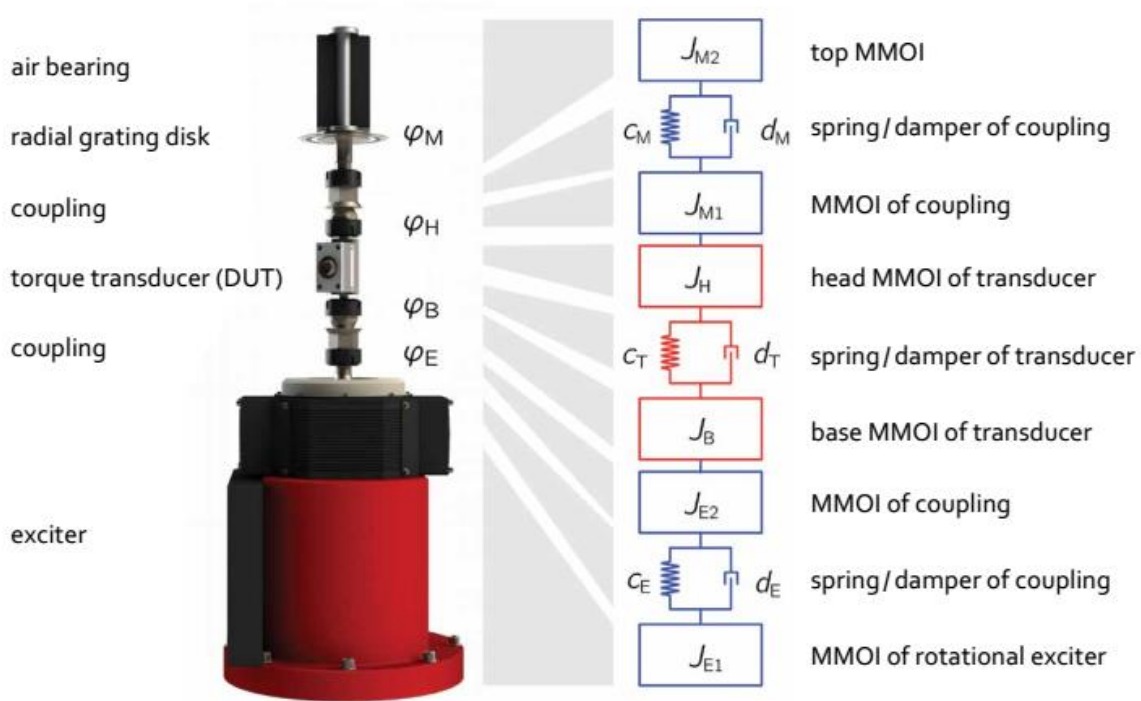


Figure 9: Modelling of the dynamic torque calibration machine

The identification of the torque measurement instrument's model parameters is required. Therefore, three devoted supplementary measurement set-ups were established to define system mass moment of inertia, stiffness coefficient [43], and damping coefficient [44]. Since the three coefficients are now known by three auxiliary measurements, the model parameters can be specified [44-48].

Two years ago, the NMI of Egypt (NIS) started to work in realization of dynamic torque. The proposed design is a horizontal axis, which consists of a motor drive connected to a dynamic torque transducer mounted between two flexible couplings. The free side of the dynamic torque transducer is coupled to a shaft passes through an air bearing and the other side of this shaft is connected to a disc with a changeable mass coupled to its outer distance. The rotation of the motor drive cause sinusoidal torque application. The torque amplitude is controlled by the changeable masses coupled to the rotary disc and the frequency could be controlled by the drive motor rotational speed [50].

4 Electromagnetic torque machines

As mentioned in the introduction part the dead weight torque standard machines produces torque by means of distance from traceable mass to the international prototype kilogram (IPK) and gravitational acceleration. This generated standard torque, on the other hand can calibrate only the static torque value. Dynamic torque applications have recently been

increasing. So far, there is no traceability to the dynamic torque measurements. Research on the traceability of dynamic torque has been initiated within the European Research Project IND09, and some outputs have already been presented [51–56]. Recently, the field of mass standard has been studying the Kibble balance to overcome the limits to the IPK artifact [57–62]. As a result of these researches, the mass definition has been redefined as Planck's constant beginning in 2019. This opens the door to the derived units, force and torque, to be changed as well to be defined using the Kibble balance principle [63], [64].

In the beginning of 2021, Myeong Hyeon Kim from KRISS introduced his pioneer research showing the design principle of generating standard torque using the principle and basics of the Kibble balance. Furthermore, as this machine uses the electromagnetic force in consistence with the Kibble balance idea, it has the advantage of being able to realize both static and dynamic torque in the same machine [63].

The weighing mode and the moving mode are two modes applied for redefining the kilogram on the basis of Planck's constant. The weighing mode is an experiment that maintains gravity-electromagnetic force equilibrium. The moving mode is a test to measure induced voltage and coil velocity.

Figure 10 shows the shape of the coil of the proposed new dead weight torque standard machine (DMTSM). Magnetic fields are distributed in opposite directions on both sides of the coil as shown in the figure. Therefore, a coupled force is generated in a direction perpendicular to the linear coil when a current is applied to this coil. This generated force produces torque based on the entire center; the coupled force and produced torque are formulated as:

$$F = B I l \quad (2)$$

$$T = r \times F = r \times B I l \quad (3)$$

$$T = U I / \omega \quad (4)$$

where F is the Lorentz force, B is the magnetic field, I is the current, l is the effective length of the coil, T is the produced torque, and r is the radius from the entire center, U is the induced voltage, and ω is the angular velocity of the coil. Meanwhile, using the second mode, such as the principle of the Kibble balance, the magnetic field and the radius can be omitted. The second mode in principle, in which the coil rotates under the magnetic field, is the rotating mode. When the coil moves under a uniform magnetic field an induced voltage is produced.

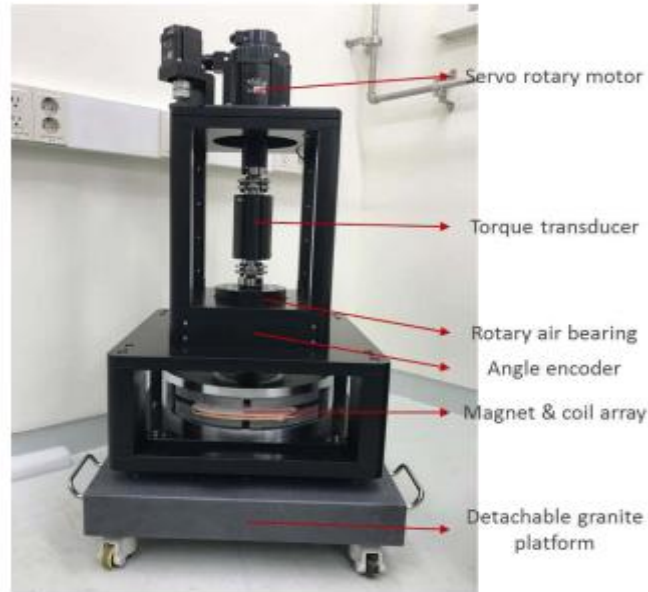


Figure 10: Dual-Mode torque standard machine (KRISS) [65].

The manufacturing process of the proposed machine and experiments were conducted. The machine capacity is 10 N·m in static torque mode with relative expanded uncertainty less than 10^{-4} . The target dynamic torque frequency range is up to 100 Hz. The results of the performance evaluation for the static or the dynamic measurements as torque standard machine are not published yet.

The other trial was at NMIJ Japan by applying the Equation (4) [66-67] to cover the range from $0.27 \mu\text{N}\cdot\text{m}$ to $100 \text{ mN}\cdot\text{m}$. The measurements relative expanded uncertainty is 0.17 %. The performance evaluation of this machine was done by comparing its results with the 10 N·m primary static torque calibration machine. The comparison points were from $0.01 \text{ N}\cdot\text{m}$ to $0.1 \text{ N}\cdot\text{m}$ with 10 increments in both clockwise and anticlockwise directions. This Machine has an angular measurement system to calibrate the rotational speed. Figure (11) shows the NMIJ machine.

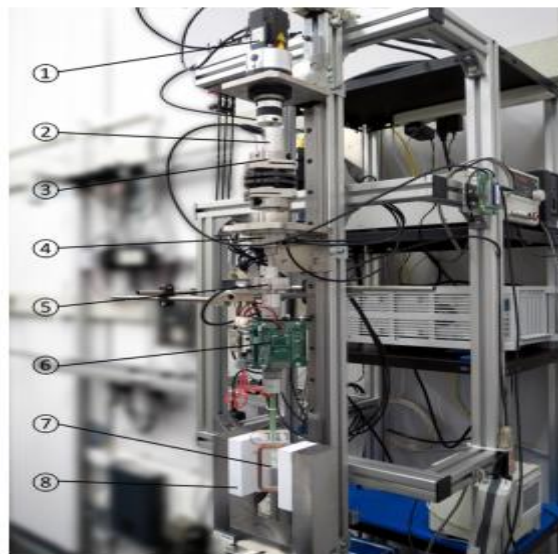


Figure 11. Electromagnetic force torque standard machine (NMIJ). Key: (1) motor driver with gear box, (2)

torque transducer, (3) adapters, (4) air bearing, (5) photosensitive encoder, (6) electrical volt and current millimeter, (7) rectangle-cross section coil, and (8) two neodymium magnets [67]

Overall, using the features of the watt balance in the force and torque measurements and the fact that I is not affected by gravity, allow installing the machine itself in arbitrary locations to calibrate measuring devices.

5 Conclusions

A historical review starting from the concepts and basics to the recent techniques of static and dynamic torque measurements is presented. The conceptual design of static torque standard machines and the requirements to have a standard machine with a certain level of uncertainty are discussed with focus on the influencing components. The dynamic torque measurements with its applications and impact to increasing industrial demand outside the research laboratories; such as impulse wrenched and calibration of rotary test rigs are discussed. The governor equations, assumptions, physical parameters and Modelling of the system are discussed as well. Pioneer European project with its results are presented. The NIS calibration machines which cover the range up to 100 kN·m for static measurements and the running research work in dynamic torque are presented. The dramatic impact of the redefinition of the kilogram on the future of torque measurements is discussed. The principle of the Kibble balance and its governor formulas are now used to re-shape the SI traceability of torque measurements in both static and dynamic applications. Author expect in the few upcoming years to see the principle of electrostatic force torque machines will grow rapidly to cover the small and intermediate torque range because it is a quite easy for both static and dynamic. More improvements and more simple designs may be introduced to widen the application scope

6 Declarations

6.1 Study Limitations

None.

6.2 Acknowledgements

None.

6.3 Funding source

None.

6.4 Competing Interests

None.

7 Human and Animal Related Study

None.

7.1 Ethical Approval

None.

7.2 Informed Consent

None.

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