

# INSTRUCTION MANUAL FOR DODGE® SETSCREW, ECCENTRIC COLLAR, D-LOK, H, H-E SERIES & EZ-KLEEN MOUNTED BALL BEARINGS

## INSTALLATION

### WARNING

To ensure that drive is not unexpectedly started, turn off and lock out or tag power source before proceeding. Failure to observe these precautions could result in bodily injury.

**Under certain operating conditions it is possible for a static electric charge to build-up on E-Z KLEEN® Polymer Housings. Do not operate these bearings in any environment where a sudden static discharge may cause either an operating hazard or personnel discomfort.**

1. Clean shaft and bearing bore thoroughly. Measure and confirm shaft size and tolerance. File flats on shaft at setscrew locations to permit easy removal of bearing.
2. Slip bearing into position. Be sure that bearing is not on a worn section of the shaft. For tighter fits, tap inner ring face only with soft driver. **DO NOT HAMMER ON HOUSING.**
3. The bearing outer ring OD is spherical and swivels in the housing to accommodate misalignment. Snug hold-down bolts and use shaft to swivel each bearing until its final position is in the center of free movement top to bottom as well as side to side. Pass shaft through both bearings without forcing. This will prevent preloading of the bearings. Housing slippage depends on the mounting hold-down bolt tightening torque, number of bolts and friction characteristics between mounting surfaces. Auxiliary load carrying devices such as shear bars are advisable for side or end loading of pillow blocks and radial loads for flange units where normal to heavy loading or shock loading is encountered.

**NOTE:** On coated and non-metallic housings, hold-down bolts should be tightened carefully with flat washers to prevent damage to the coating. Coated housings have reduced friction characteristics, so auxiliary load carrying devices are even more important in those applications.

4. Tighten hold-down bolts to proper torque (Table 1). Turn shaft by hand. Resistance to turning should be the same as before full tightening of hold-down bolts.
5. For setscrew mounted bearings: **After final alignment of the shaft, tighten both setscrews hand tight**, then the setscrews should be tightened alternately and in small increments to the torque specified in Table 1. After 24 hours operation, the setscrews should be retightened to the torque in Table 1 to assure full locking of the inner race to the shaft. Care should be taken that the socket key or driver is in good condition with no rounded corners and the key is fully engaged in the setscrew and held square with the setscrew to prevent rounding out of the setscrew socket when applying maximum torque. Do not drill through the setscrew holes for spot drilling of the shaft. (Some inner rings have tempered setscrew threads and can be damaged by a drill.) If spot drilling is required, locate bearings on the shaft and center punch through the setscrew hole. Remove bearing and spot drill the shaft, then reassemble over the spot drilled position and assemble as above. Milled or filed flats are preferable to spot drilling.

**NOTE: On all SC Product the setscrews can be re-torqued many times without damage to the bearing system. To achieve maximum shaft holding power it is highly recommended that setscrews be replaced with new hardware after any disassembly operation.**

6. For eccentric collar mounted bearings, slide collar against cam end of inner race. Use a punch in the hole provided in the collar, tap collar smartly in the direction of shaft rotation. Tighten setscrews to proper torque (Table 1). To remove bearings, loosen setscrew and tap collar in the direction opposite of shaft rotation.
7. For D-LOK mounted bearings, be sure collar is square and tight against shoulder on inner ring. Tighten cap screw to recommended torque shown in Table 1.
8. For expansion bearings (H-E Series), locate inner unit in housing to allow expansion in the desired direction before locking to the shaft.

**WARNING:** Because of the possible danger to persons(s) or property from accidents which may result from the improper use of products, it is important that correct procedures be followed: Products must be used in accordance with the engineering information specified in the catalog. Proper installation, maintenance and operation procedures must be observed. The instructions in the instruction manuals must be followed. Inspections should be made as necessary to assure safe operation under prevailing conditions. Proper guards and other suitable safety devices or procedures as may be desirable or as may be specified in safety codes should be provided, and are neither provided by Baldor Electric Company nor are the responsibility of Baldor Electric Company. This unit and its associated equipment must be installed, adjusted and maintained by qualified personnel who are familiar with the construction and operation of all equipment in the system and the potential hazards involved. When risk to persons or property may be involved, a holding device or shear bars must be an integral part of the driven equipment.

SETSCREWS					D-LOK			MOUNTING BOLTS						
Setscrew Size	Key Hex Across Flats	Recommended Torque			Cap Screw Size	Recommended Torque	E-Z Kleen Recommended Torque	Metal Housings		EZ-KLEEN Housed Bearings				
		Standard Ball Bearing Insert		Corrosion Resistant-Stainless Steel				Bolt Size	Recommended Dry Torque (Grade 2)	2-Bolt PB, 2 & 4-Bolt Fig. And Fig. Brackets		Tapped-Base PB		
		Min	Max							Bolt Size	Torque*	Bolt Size	Torque**	
(in.)	(in.)	(in.-lbs.)	(in.-lbs.)	(in.-lbs.)	(in.)	(in.-lbs.)	(in.)	(in.-lbs.)	(in.)	(in.-lbs.)	(in.)	(in.-lbs.)	(in.)	(in.-lbs.)
#10	3/32	28	33	25	#8-32	58	46	3/8-16	240	3/8-16	225	3/8-16	175	
1/4	1/8	66	80	60	#10-32	90	72	7/16-14	384	7/16-14	350	7/16-14	350	
5/16	5/32	126	156	117	1/4-28	180	144	1/2-13	600	1/2-13	500	1/2-13	400	
3/8	3/16	228	275	206	5/16-24	400	320	5/8-11	1200	9/16-12	650	5/8-11		
7/16	7/32	342	428	321	3/8-24	750	600	3/4-10	1950	5/8-11	1000			
								7/8-9	2890					
(mm)	(mm)	(N-m)	(N-m)	(N-m)	(mm)	(N-m)	(N-m)	(mm)	(N-m)	(mm)	(N-m)	* Torque for Austenitic (18-8) Stainless		
M5	2.5	3.2	3.7	2.8	M4	5.85	4.68	M10	29	M8	15			
M6	3	6.2	7.7	5.8	M5	10.75	8.6	M12	50	M10	25			
M8	4	14.2	17.8	13.4	M6	20.5	16.4	M16	124	M12	50	**Max. torque values published. Do not exceed.		
M10	5	26	31	23	M8	45	36	M20	238	M14	75			
M12	6	46	57	43				M22	322	M16	125			

## LUBRICATION

High Speed Operation – In the higher speed ranges, too much grease will cause over-heating. The amount of grease that the bearing will take for a particular high speed application can only be determined by experience. If excess grease in the bearing causes overheating, it will be necessary to remove grease fitting to permit excess grease to escape. The bearing has been greased at the factory and is ready to run. When establishing a relubrication schedule, note that a small amount of grease at frequent intervals is preferable to a large amount at infrequent intervals.

### Lubrication Guide

**Use a No. 2 Lithium complex base grease or equivalent.\***

Hours Run per Day	Suggested Lubrication Period in Weeks								
	1 to 250 RPM	251 to 500 RPM	501 to 750 RPM	751 to 1000 RPM	1001 to 1500 RPM	1501 to 2000 RPM	2001 to 2500 RPM	2501 to 3000 RPM	
8	12	12	10	7	5	4	3	2	
16	12	7	5	4	2	2	1	1	
24	10	5	3	2	1	1	1	1	

\* For H and H-E series bearings, use Exxon Unirex N3 or equivalent suitable to 300° F.

Lubrication recommendations are intended for standard products applied in general operating conditions. For modified products, high temperature applications, and other anomalous applications contact product engineering at 864-284-5700

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This material is not intended to provide operational instructions. Appropriate instruction manuals and precautions should be studied prior to installation, operation or maintenance of equipment.