INTERNATIONAL STANDARD

ISO 3040

Fourth edition 2016-05-01

Geometrical product specifications (GPS) — Dimensioning and tolerancing — Cones

Spécification géométrique des produits (GPS) — Cotation et tolérancement — Cônes





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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see the following URL: www.iso.org/iso/foreword.html.

The committee responsible for this document is ISO/TC 213, *Dimensional and geometrical product specifications and verification*.

This fourth edition cancels and replaces the third edition (ISO 3040:2009), which has been technically revised:

- Clause 6 on the tolerancing of cones has been revised;
- Annex A on former practice from ISO 3040:1990 has been deleted;
- a new informative Annex A with examples has been added.

Introduction

This International Standard is a geometrical product specification (GPS) standard and is to be regarded as a general GPS standard (see ISO 14638), applicable to a conical feature. It influences chain links A and B of the chain of standards on size, form, orientation, location and run-out.

For more detailed information about the relationship of ISO 3040 to other standards and to the GPS matrix model, see Annex B.

The ISO/GPS matrix model given in ISO 14638 gives an overview of the ISO/GPS system of which this international standard is a part. The fundamental rules of ISO/GPS given in ISO 8015 apply to this international standard and the default decision rules given in ISO 14253-1 apply to specifications made in accordance with this international standard, unless otherwise indicated.

In this International Standard, the figures illustrate the text only and should not be considered as design examples. For this reason, the figures are simplified and are not to scale.

No indications from the previous edition (ISO 3040:2009) have been made obsolete by this edition. Therefore, there is no 'former practice'.

Geometrical product specifications (GPS) — Dimensioning and tolerancing — Cones

1 Scope

This International Standard specifies graphical indication applicable to a cone (right-angle circular cones) to define its dimensioning or to specify its tolerancing.

For the purposes of this International Standard, the term "cone" relates to right-angle circular cones only (any intersection by a plane perpendicular to the axis of the nominal cone is a circle).

NOTE 1 For simplicity, only truncated cones have been represented in this International Standard. However, this International Standard can be applied to any type of cone within its scope.

NOTE 2 This International Standard is not intended to prevent the use of other methods of dimensioning and tolerancing.

2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 1119:2011, Geometrical product specifications (GPS) — Series of conical tapers and taper angles

ISO 81714-1, Design of graphical symbols for use in the technical documentation of products — Part 1: Basic rules

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

3.1

rate of taper

 \mathcal{C}

ratio of the difference in the diameters of two sections of a cone to the distance between them

Note 1 to entry: It is expressed by the following formula (see also Figure 1).

$$C = \frac{D - d}{L} = 2 \tan\left(\frac{\alpha}{2}\right) \tag{1}$$

Figure 1

4 Graphical symbol for a rate of taper for a cone

A rate of taper for a cone shall be indicated using the graphical symbol illustrated in <u>Figure 2</u> centred on a reference line (see <u>Figure 7</u>). The orientation of the graphical symbol shall coincide with that of the cone (see <u>Figure 7</u> and <u>Figure 8</u>).

Size and line thickness of the graphical symbol are according to ISO 81714-1.

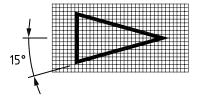


Figure 2

5 Dimensions and indication on a cone

5.1 Dimensions on a cone

Several kinds of dimensions as shown in <u>Table 1</u> may be used in order to define a cone.

Type of dimensions Letter symbol **Examples of indication** Preferred method **Optional** method Rate of taper value 1:5 0,2:1 C1/5 20 % 35° Cone angle value 0.6 rad α Cone diameter value — at the larger end D at the smaller end d – at the specified cross-section D_X Length value Distance between two planes limiting La cone Distance between two planes limiting a L'set of a cone and a cylinder Distance locating the cross-section L_{x} where D_X is defined

Table 1 — Dimensions on a cone

No more dimensions than necessary shall be indicated. However, additional dimensions may be given for information as auxiliary dimensions.

Some dimensions may be used to establish a tolerancing by dimensional or geometrical specification (see <u>Clause 6</u>). For this reason these dimensions may be defined as TEDs.

Some typical combinations of cone dimensions are shown in Figure 3, Figure 4, Figure 5 and Figure 6.

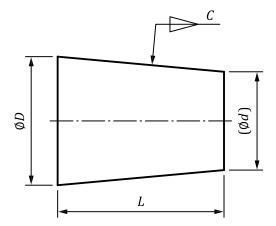


Figure 3

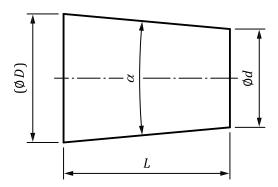


Figure 4

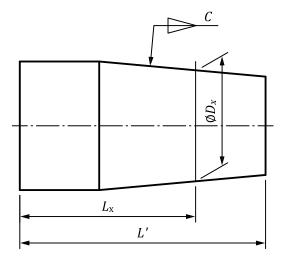


Figure 5

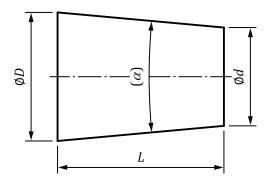


Figure 6

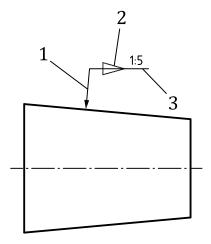
5.2 Indication of rate of taper value on drawings

The graphical symbol with the rate of taper value of a cone shall be indicated near the feature according to the rules presented in <u>Clause 4</u>.

As shown in Figure 7, the reference line attached to the graphical symbol shall be:

- drawn parallel to the cone axis, and
- connected by a leader line to the outline of the cone.

When the taper belongs to a standardized series of conical taper (in particular Morse or metric taper), the rate of taper value of the cone may be replaced by the codification given by standard series according to ISO 1119 and appropriate number (see Figure 8). For example, the rate of taper value "1:20,047" may be replaced by the codification "Morse No. 1".

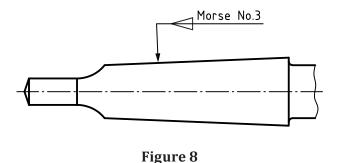


Key

- 1 leader line
- 2 rate of taper graphical symbol
- 3 reference line

NOTE 1:5 is the rate of taper value.

Figure 7



6 Tolerancing of a cone

A cone is intrinsically defined by its angle (see Figure 9).

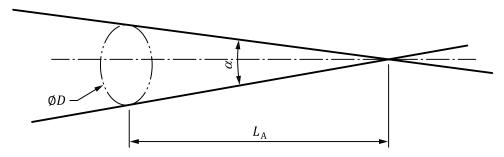
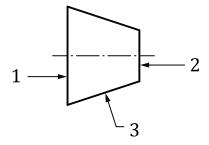


Figure 9 — Intrinsic representation of a cone

NOTE A cone is different from a frustum which is defined by three geometrical entities (one of them is a cone).

EXAMPLE A frustum defined by a cone and two end planes (not necessarily perpendicular to the axis of this cone). See Figure 10.



Key

- 1 Plane 1
- 2 Plane 2
- 3 cone

Figure 10 — Example

The objective of tolerancing is to define a set of one or more GPS specifications. Each GPS specification defines a particular characteristic and its permissible extent by the mean of one or two tolerances limits (see example in Figure 11).

When a gauge plane is used in a specification, the gauge plane location shall be defined by TEDs (explicit or implicit: 0 mm).

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When a datum or datum system is used to locate or orientate the tolerance zone, the angular or linear dimensions constraining the tolerance zone shall be defined by TEDs (explicit or implicit:0 mm, 0° , 90° , 180° , 270°).

When a geometrical specification is applied to a cone with the surface profile characteristic symbol without datum or datum system and the intrinsic characteristic of the cone shall be taken into account as fixed, then:

- the symbol VA shall not be indicated in the second compartment of the tolerance frame; and
- the angle of the cone shall be indicated:
 - directly with the cone angle as a TED, or
 - indirectly with the rate of taper value or by a combination of several dimensions on a cone (e.g. see <u>Figure 6</u>).

Each characteristic controls a set of degrees of freedom on the real workpiece.

The set of degrees of freedom, which are possible to consider individually or collectively, is:

- the angle deviation;
- the form deviation on a section line or the surface;
- the location deviation (X, Y, Z: in Cartesian system);
- the orientation deviation (β , γ : in Cartesian system).

The table in Figure 11 presents, for a specification, the type of deviations which are controlled. The indication of the specification is presented and its meaning is illustrated and explained. This presentation is used in Annex A.

Figure 11 and Annex A present various individual (independent) examples of possible dimensional or geometrical specifications in relation with a cone, in accordance with ISO 1101, ISO 14405-1 and ISO 14405-3. Each of these examples shall be considered independently from each other, but could be used in the same drawing on the same feature.

Indication of a form specification of the cone surface with its size considered as fixed	Meaning
0,3	The extracted surface of the cone is required to be inside of the tolerance zone without orientation or location constraint. The tolerance zone consists of the space included between two coaxial conical surfaces with a specified theoretical angle and 0,3 mm apart.

	Controlled deviations														
Angle deviation	Form de- viation	_	cati viati	_	Orier devi	itatio		Illustration of degrees of freedom							
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y							
Yes	Yes	No	No	No	Never	No	No	R_y R_x X Z							
WARNING	The c	rient	tation	n and	location	of th	ie coi	ne are not locked.							

Figure~11-Example~of~tolerancing~of~a~cone:~specification~of~the~surface~form~considering~its~theoretical~exact~angle

Annex A

(informative)

Tolerancing of a cone: Examples

A.1 General

Cones belong to the invariance class of revolute surface. Therefore, the rotation about the cone axis cannot be locked. The six degrees of freedom of a cone can be represented in a Cartesian or cylindrical coordinate system aligned with the cone axis, with its origin located at the apex of the cone.

Alternatively, the origin can be located elsewhere along the cone axis, at a nominal distance, L_A , from the apex of the cone [see Formula (A.1) and Figure 9].

$$L_{\rm A} = \frac{D}{2} \left(\tan \frac{\alpha}{2} \right) \tag{A.1}$$

where

- α is the cone angle;
- *D* is the nominal cross section diameter;
- L_A is the distance between the apex of the cone and the cross section where D is defined.

A.2 Examples

Thirteen cone tolerancing examples are provided.

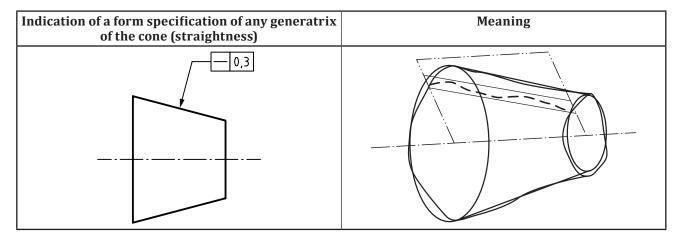
EXAMPLE 1 Cone tolerancing - surface form without considering the cone angle (illustration of the closeness to a perfect conical shape, without taking into account a predefined cone angle)

Indication of a form specification of the cone surface with its size considered as variable	Meaning				
0,3 VA	The extracted surface of the cone is required to be inside of the tolerance zone without orientation or location constraint. The tolerance zone consists of the space included between two coaxial conical surfaces with the same unspecified angle and 0,3 mm apart.				
	Key				
	heta non predefined angle				

		(Cont	roll	ed devi	atio	ns by	the specification
Angle deviation	Form de- viation		cati viati		Orier devi	itatio		Illustration of degrees of freedom
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y
No	Yes (conical surface)	No	No	No	Never	No	No	R_y R_x X Z
WARNING	The orient	ation	and	locat	ion of th	e con	e and	l its size are not locked.

This kind of specification combines two requirements (straightness of any generatrix line or all generatrix lines and roundness of any directrix line or all directrix lines).

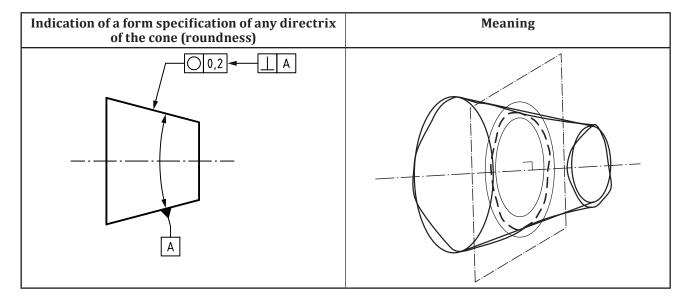
EXAMPLE 2 Cone tolerancing - form of any generatrix lines



		(Cont	roll	ed devi	y the specification		
Angle deviation	Form de- viation		cati viati		Orientation deviation			Illustration of degrees of freedom
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y
No	Yes (genera- trix lines)	No	No	No	Never	No	No	R_y R_x X Z

WARNING The orientation and location of the cone and its size are not locked. The form of the cone is partially locked.

EXAMPLE 3 Cone tolerancing - form of any directrix line or all directrix lines at any cross section perpendicular to the axis of the associated feature with the real surface of the cone, using the least squares criteria.



		С	ontr	olle	the specification					
Angle deviation	Form deviation	_	cati viati	-	Orientation deviation				-	Illustration of degrees of freedom
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y		
No	Yes (directrix lines at any cross-sec- tion)	No	No	No	Never	No	No	R_{y} R_{x} X		

WARNING The orientation and location of the cone and its size are not locked. The form of the cone is partially locked.

EXAMPLE 4 Cone tolerancing - surface located from an end datum. The controlled degrees of freedom (Tx, Rz, Ry) are dependent on the datum. Datum A locks the location and orientation. In this case, the orientation constraint and the location constraint are applied to lock the tolerance zone from datum A (no other restriction is required).

Indication of a location specification of a cone (with its size considered as fixed) from the datum A	Meaning
0,3 A A 5	The extracted surface of the cone is required to be inside of the tolerance zone with orientation and location constraint from the datum A: the axis of the tolerance zone is constrained perpendicular to the datum A, and the gauge plane is located at 5 mm from the datum A. The tolerance zone consists of the space included between two coaxial conical surfaces with specified theoretical angle and 0,3 mm apart.

			Cont	roll	ed devi	the specification		
Angle deviation	Form de- viation	1	catio viati		Orientation deviation			Illustration of degrees of freedom
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y
Yes	Yes	Yes	No	No	Never	Yes	Yes	R_y R_x X Z

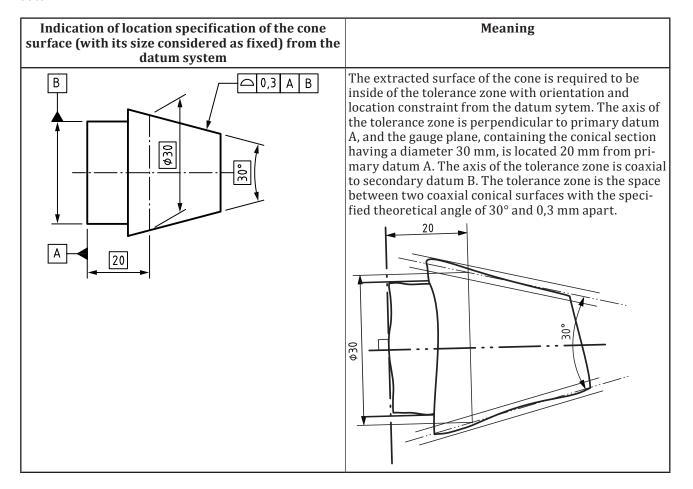
WARNING The size, the form and the orientation of the cone are locked and the location of the cone is partially locked.

 $\begin{tabular}{ll} EXAMPLE 5 & Cone tolerancing - surface orientated from an end datum. Datum A can lock the location and orientation, the modifier >< retains only the orientation constraint of the tolerance zone from datum A. \\ \end{tabular}$

Indication of orientation specification of the cone surface (with its size considered as fixed) from the datum A	Meaning
0,3 A ><	The extracted surface of the cone is required to be inside of the tolerance zone with orientation constraint only from the datum A: the axis of the tolerance zone is constrained perpendicular to the datum A. The tolerance zone consists of the space included between two coaxial conical surfaces with specified theoretical angle and 0,3 mm apart.

			Con	troll	ed devi	iatio	ns by	the specification
Angle deviation	Form de- viation		cati viati			ntatio		Illustration of degrees of freedom
		Tx	Ту	Tz	Rx	Ry	Rz	Y
Yes	Yes	No	No	No	Never	Yes	Yes	R_{y} R_{x} X Z
WARNING	The locati	on of	the c	one i	is not loc	ked.		

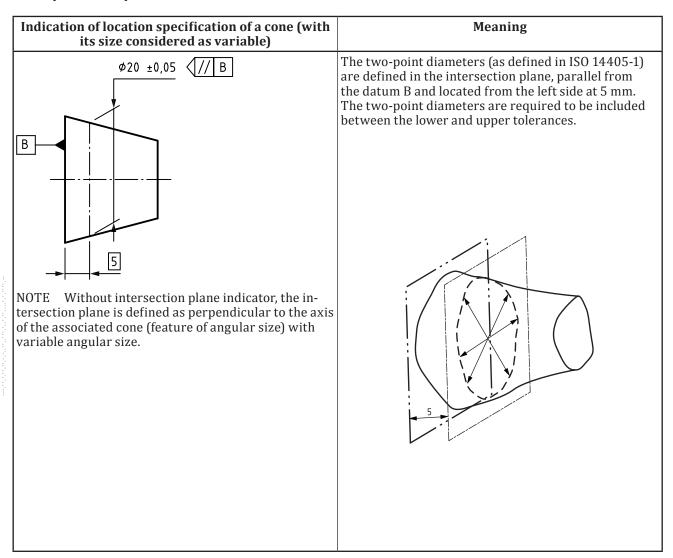
EXAMPLE 6 Cone tolerancing - surface located from a datum system. Secondary datum B is defined perpendicular to primary datum A. The tolerance zone is constrained to be coaxial with datum B (Y = Z = 0) and located so that the section plane, where the diameter of the circular cross section is 30 mm, is placed 20 mm from datum A.



	Controlled deviations by the specification														
Angle deviation	Form de- viation		ocatio eviati		Orientation deviation			Illustration of degrees of freedom							
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y							
Yes	Yes	Yes	Yes	Yes	Never	Yes	Yes	R_y R_x X Z							
WARNING	The form,	orien	tation	and l	ocation	of the	cone a	and its size are locked.							

EXAMPLE 7 Cone tolerancing - circle diameter located on a cross section a fixed distance from one end plane. By default, the GPS characteristic is the local diameter (two point size). Other type of size characteristic can be defined (see ISO 14405-1, e.g. \emptyset 20 ± 0,08 \bigcirc 0.

Locating the section plane a distance of 0 mm from the end plane is ambiguous on a real workpiece, due to the possible imperfections of the corner and should be avoided.



		(Cont	rolle	ed devi	ation	ıs by	the specification
Angle deviation	Form de- viation	_	catio viati		Orientation deviation			Illustration of degrees of freedom
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y
No	No	Yes	No	No	Never	No	No	R_y R_x X R_z

WARNING The size, the form and the orientation of the cone are not locked. The location of the cone is partially locked in X direction depending of the actual size of the cone.

EXAMPLE 8 Cone tolerancing - angle between two opposite generatrices. Any local angle, located in any longitudinal section, defined between two contacting straight lines, is required to be within tolerance. A longitudinal section is obtained by a plane that contains the axis of the associated cone (with variable angle) associated with fit to the real cone surface.

Indication of dimensional angular specification of Meaning a cone (with its size considered as variable) 30° ±0,5° Any local angle is defined as the angle between two associated coplanar straight lines. These straight lines are established with minimax association criteria constrained outside of material from an extracted pair line resulting of the intersection between the extracted integral surface and any longitudinal plane (that includes the axis of the least-square associated cone with variable size). The local angles are required to be included between the lower and upper tolerances. 1 5 6 Key Extracted integral surface 1 2 Associated cone 3 Cone axis 4 (Example of an) intersection plane 5 (Example of) two extracted lines 6 (Example of) two associated straight lines (Example of a) local angle

		(Cont	roll	ed devi	atio	ns by	the specification
Angle deviation	Form de- viation	l	cati viati		Orientation deviation			Illustration of degrees of freedom
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y
Yes a	No	No	No	No	Never	No	No	R_{y} R_{x} X Z

The angle is controlled between two opposite generatrices, and not the angle of the best fit cone.

WARNING The form, orientation and location of the cone are not locked. Only the local size of the cone is locked, since there is no global size modifier indicated (see ISO 14405-3).

Indication of a set of two dimensional specifi- cations on a cone defined in two specific cross sections	Meaning
Ø20 ±0,10 Ø16 ±0,05	Two dimensional specifications defined in two different specific cross sections from the same conical surface and located from the left side which is by default constrained to be perpendicular to the axis of the associated cone.

		(Cont	rolle	ed devi	atior	ıs by	the specification
Angle deviation	Form de- viation		catio viati			Orientation deviation		Illustration of degrees of freedom
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y
Yes ^a	No	Yes	No	No	Never	No	No	R_y R_x X Z
a The an	gle control i	s indi	rect a	and is	effected	d by t	he fo	rm.

NOTE Specific cross section (SCS) is implicit.

 $\label{eq:example 10} \textbf{EXAMPLE 10} \quad \textbf{Cone tolerancing-perpendicularity of the axis of the cone. The tolerance zone which is a cylinder is constrained perpendicular in orientation from the datum A.}$

Indication of orientation specification of a cone from the datum A without considering its form	Meaning
→ ↓ Ø0,1 A	The extracted median line of the cone is required to be inside of the tolerance zone with orientation constraint from the datum A: the axis of the tolerance zone is constrained perpendicular to the datum A. The tolerance zone consists of the space included into a cylinder of 0,1 mm diameter.

			Con	troll	ed dev	iatio	ns by	the specification			
Angle deviation	Form de- viation		cati viati		Orientation deviation			Illustration of degrees of freedom			
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y			
No	No	No	No	No	Never	Yes	Yes	R_y R_x X Z			
WARNING	WARNING The size, the form and the location of the cone are not locked.										

EXAMPLE 11 Cone tolerancing – coaxiality of the extracted median line of a cone from a datum system. The tolerance zone which is a cylinder is constrained to be perpendicular to the datum A and coaxial to datum B.

Indication of location specification of a cone from the datum system	Meaning
B Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø Ø	The extracted median line of the cone is required to be inside of the tolerance zone with orientation and location constraint from the datum system: the axis of the tolerance zone is constrained perpendicular to the primary datum A and coaxial to the secondary datum B. The tolerance zone consists of the space included into a cylinder of 0,3 mm diameter.

			Con	troll	ed devi	ation	s by	the specification			
Angle deviation	Form de- viation	_	ocati eviati			Orientation deviation		Illustration of degrees of freedom			
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y			
No	No	No	Yes	Yes	Never	Yes	Yes	R_y R_x R_z X			
WARNING	VARNING The size and the form of the cone are not locked.										

EXAMPLE 12 Cone tolerancing – circular runout of the cone from the datum system. The area between two circles, 0,2 mm apart on a cone, the axis of which is constrained perpendicular to datum A in orientation and coaxial to datum B in location.

Indication of a circular runout specification of a cone surface with considering as its angle as variable	Meaning
B	Any extracted integral line of the cone is defined as the intersection between the extracted conical surface and an intersecting cone, the axis of which is perpendicular to datum A and coaxial to datum B, and which has an angle of 60°.
	The tolerance zone consists of the portion area of an intersecting cone limited by two circles, 0,2 mm apart, which are centred on the cone axis. This axis is constrained perpendicular to the datum A and coaxial to the datum B.
A 7 0,2 A B	Any extracted line is required to be inside the tolerance zone.

			Con	troll	ed devi	ation	s by	the specification
Angle deviation	Form de- viation	Location deviation			ntatio	-	Illustration of degrees of freedom	
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y
No	Yes	No	Yes	Yes	Never	Yes	Yes	R_y R_x X Z
WARNING	The size o	fthe	cone i	s not	locked a	nd th	e locat	ion of the cone is partially locked.

 $\begin{tabular}{ll} EXAMPLE~13 & Cone~tolerancing~-~calculated~angle~from~two~diameters~of~two~circles~located~in~two~cross-sections~(see~ISO~14405-1). \end{tabular}$

Indication of a calculated angle defined from two dimensional characteristics evaluated in two specific cross sections	Meaning
Calculated characteristic from the d_1 and d_2 characteristics Intermediate characteristic evaluated with G for calculated characteristic C	Two linear dimensional characteristics are defined in two different specific cross-sections from the same conical surface and located from the left side. Each linear dimensional characteristic corresponds to the evaluated size of the maximum inscribed circle associated to the extracted line obtained by the intersection of the extracted integral surface of the cone and a specific cross-section. The calculated characteristic α is the angle derived from these two linear dimensional characteristics d_1 and d_2 and the distances a and b , such as $2\tan\left(\frac{\alpha}{2}\right) = \frac{d_2 - d_1}{b-a}$

		(Cont	rolle	ed devia	ation	s by th	e specification
Angle deviation	Form de- viation	Location deviation			Orientation deviation		Illustration of degrees of freedom	
		Tx	Ту	Tz	Rx	Ry	Rz	_ Y
Yes ^a	No	Yes	No	No	Never	No	No	R_y R_x X Z

Annex B

(informative)

Relation to the GPS matrix model

B.1 General

For full details about the GPS matrix model, see ISO 14638.

B.2 Information about the standard and its use

This International Standard specifies graphical indication applicable to a cone to define its dimensioning or to specify its tolerancing.

B.3 Position in the GPS matrix model

This International Standard is a general GPS standard, which influences chain links A and B of the chain of standards on size, form, orientation, location and run-out, as illustrated in Table B.1

Table B.1 — ISO GPS Standards matrix model

Chain links

	Chain links						
	A	В	С	D	E	F	G
	Symbols and indications	Feature requirements	Feature prop- erties	Conformance and non-con- formance	Measurement	Measurement equipment	Calibrations
Size	•	•					
Distance							
Form	•	•					
Orientation	•	•					
Location	•	•					
Run-out	•	•					
Profile sur- face texture							
Areal surface texture							
Surface imperfections							

B.4 Related standards

The related standards are those of the chains of standards indicated in Table B.1.

Bibliography

- [1] ISO 8015, Geometrical product specifications (GPS) Fundamentals Concepts, principles and rules
- [2] ISO 14253-1, Geometrical product specifications (GPS) Inspection by measurement of workpieces and measuring equipment Part 1: Decision rules for proving conformity or nonconformity with specifications
- [3] ISO 14405-1: —¹⁾, Geometrical product specifications (GPS) Dimensional tolerancing Part 1: Linear sizes
- [4] ISO 14405-3: —²⁾, Geometrical product specifications (GPS) Dimensional tolerancing Part 3: Angular sizes
- [5] ISO 14638:2015, Geometrical product specifications (GPS) Matrix model

¹⁾ To be published.

²⁾ To be published.

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