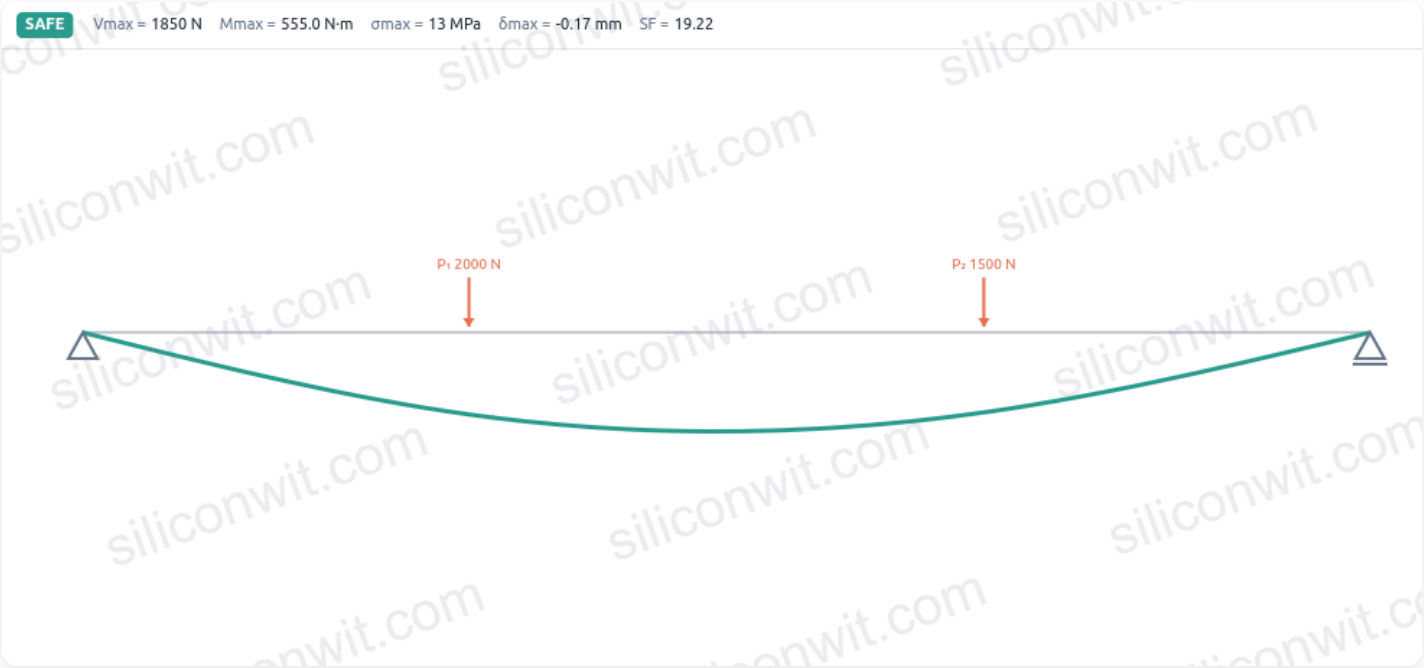
# Lesson 2.1: Shear Force and Bending Moment in Beams




Modified: Aug. 2, 2026

Published: Sep. 21, 2025



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Master shear force and bending moment analysis through real-world industrial beam structures: robotic arm cantilevers, conveyor support systems, and solar tracker mechanisms. Learn load distribution analysis, diagram construction techniques, and critical section identification essential for safe structural design across mechatronics and automation systems.

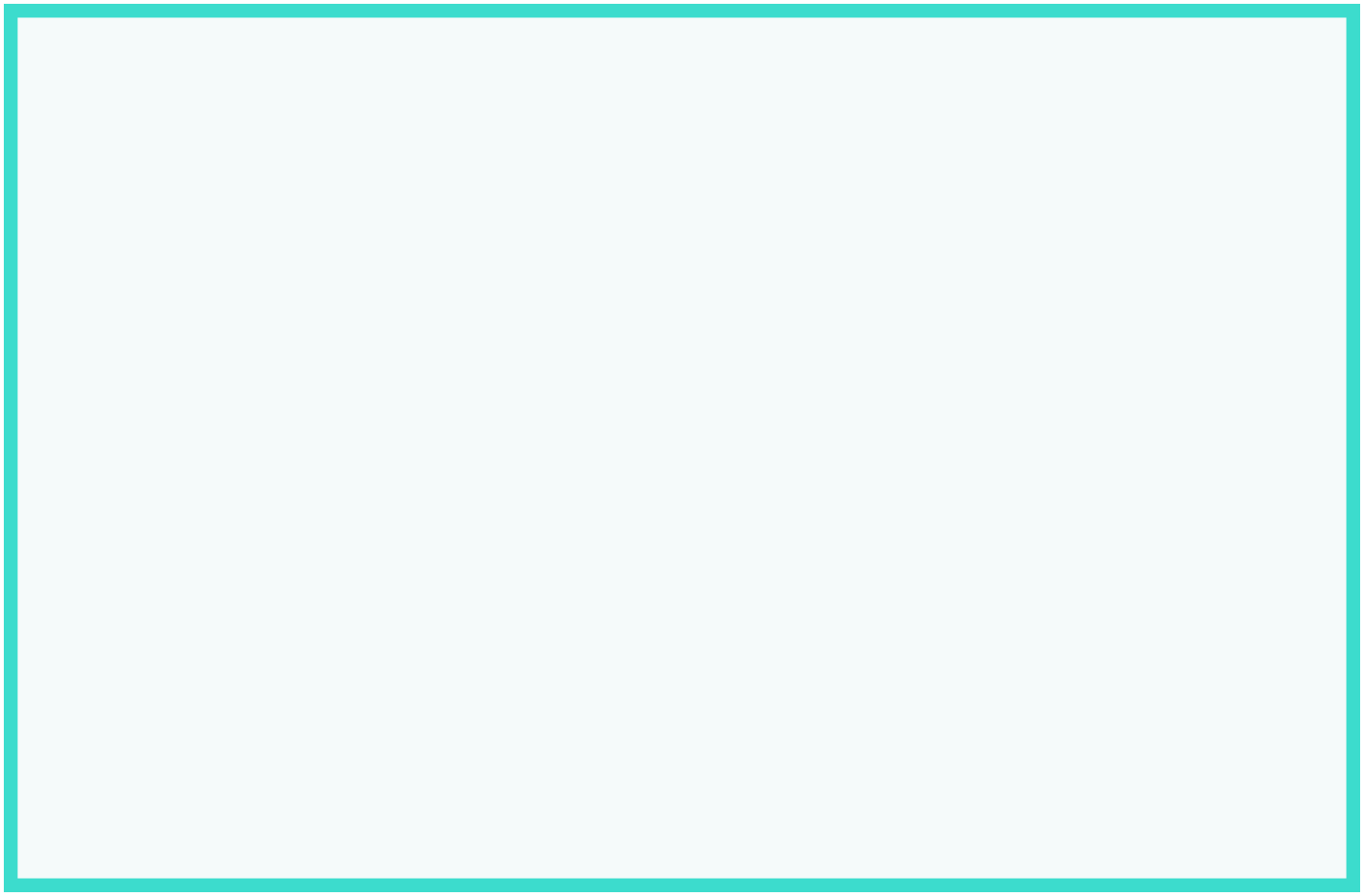
# Learning Objectives

By the end of this lesson, you will be able to:

1. **Construct** shear force and bending moment diagrams for cantilever, simply supported, and overhanging beam configurations
2. **Identify** critical sections with maximum shear and moment values across diverse loading conditions
3. **Apply** equilibrium principles to analyze beams under point loads, distributed loads, and combined loading scenarios
4. **Determine** reaction forces for different support types including fixed, pinned, and roller supports

> **Try it as you read**
>
> This lesson pairs with the Beam Analysis Simulator: place point loads and distributed loads on a beam and watch the shear-force and bending-moment diagrams build as you drag the loads. The Beam Analysis Experiments reproduce the worked examples step by step with Python.

# Real-World Engineering Challenge: Beam Analysis in Industrial Automation Systems



**Indus**trial **autom**ation **syst**ems **re**ly on **struc**tural **be**am **elem**ents **th**at must **saf**ely **supp**ort **comp**lex **load**ing **condi**tions. **Unders**tanding **ho**w **inte**rnal **for**ces and **mome**nts **distr**ibute **alo**ng **be**am **struc**tures is **fundam**ental to **preve**nting **fail**ure, **optim**izing **mate**rial **usa**ge, and **ensu**ring **reli**able **perfor**mance **acr**oss **mechat**ronics, **mate**rial **hand**ling, and **renew**able **ene**rgy **applic**ations.

## Industrial Beam Applications

**Common Beam Structures in Automation:**

- **Robotic Arms** (cantilever beams supporting payloads and end-effectors)
- **Conveyor Support Beams** (simply supported beams carrying multiple concentrated loads)
- **Solar Tracker Arms** (overhanging beams managing distributed loads plus equipment forces)

## The Structural Challenge

All industrial beam structures experience **internal shear forces and bending moments** that determine structural adequacy. Different support types (fixed, pinned, roller) and loading patterns (point loads, distributed loads, combined) create varying internal force distributions requiring careful analysis for safe design.

> **Engineering Question 1:** How do we determine where maximum bending stresses occur in different beam configurations and what governs the critical design section? **Engineering Question 2:** How do support types and loading patterns affect internal force distributions and structural requirements? **Engineering Question 3:** What analytical tools enable optimized designs that balance safety, cost, and performance?

### Why Beam Analysis Matters

**Consequences of Inadequate Analysis:**

- **Structural failure** causing downtime, equipment damage, and safety hazards
- **Excessive deflection** compromising positioning accuracy
- **Over-designed structures** wasting material and increasing costs

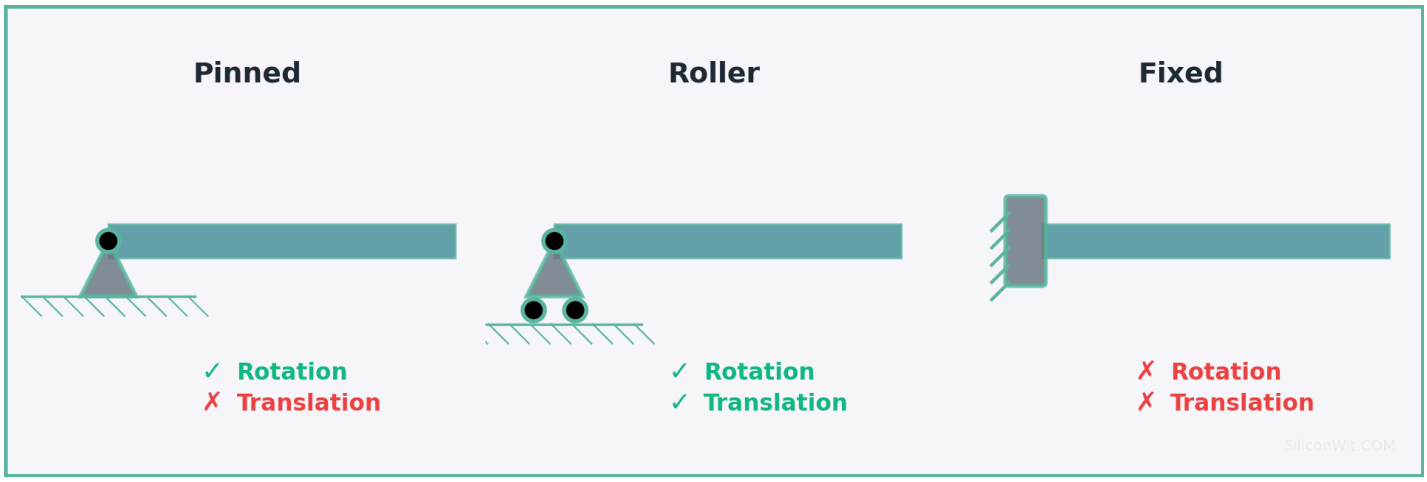
**Benefits of Proper Analysis:**

- **Safe, reliable structures** with appropriate safety factors
- **Material optimization** through accurate critical section identification
- **Foundation for advanced analysis** including stress and deflection prediction

# Fundamental Theory: Shear Force and Bending Moment

## Basic Beam Concepts

Before analyzing shear forces and bending moments, it's essential to understand how beams are supported. The type of support determines which movements and rotations are allowed or prevented, directly affecting the reaction forces and internal stresses.




**Common Support Types:**

1. **Pinned Support (Hinge)**
    - ✅ Allows rotation at the connection
    - ✕ Prevents translation (both horizontal and vertical movement)
    - **Reactions:** Provides both vertical and horizontal reaction forces (2 unknowns: $R_x$, $R_y$)
    - **Common applications:** Used in joints of robotic arms, mechanical linkages, and hinged enclosures where controlled rotation is needed
2. **Roller Support**

- ✅ Allows rotation at the connection
- ✅ Allows translation in one direction (typically horizontal)
- **Reactions:** Provides only vertical reaction force (1 unknown: $R_y$)
- **Common applications:** Found in systems like conveyor supports, linear guides, and structures accommodating thermal or mechanical expansion

3. **Fixed Support (Built-in/Clamped)**
   - ✕ Prevents rotation at the connection
   - ✕ Prevents translation (both horizontal and vertical movement)
   - **Reactions:** Provides vertical force, horizontal force, and moment (3 unknowns: $R_x$, $R_y$, M)
   - **Common applications:** Used in cantilevered robotic arms, rigidly mounted machine bases, and firmly fixed electronic equipment supports

> 🚀 **Support Selection Guidelines**
>
> - Use **fixed supports** when you need maximum rigidity (e.g., cantilever robotic arms)
> - Use **pinned + roller** combination for simply supported beams to allow thermal expansion
> - The choice of support affects the internal force distribution and maximum bending moments
> - Fixed supports create the most statically indeterminate systems but provide the strongest connection

When a beam is loaded transversely, internal forces develop to maintain equilibrium:

**Shear Force (V):** Internal force that resists sliding
**Bending Moment (M):** Internal moment that resists rotation
**Normal Force (N):** Internal axial force (usually zero in pure bending)

## Sign Conventions

Shear Force Convention | Bending Moment Convention | Load Directions

**Positive Shear Force (+V):**

- Left side of cut pushed **up** ⬆️
- Right side of cut pushed **down** ⬇️
- Creates clockwise rotation tendency ↻

**Negative Shear Force (-V):**

- Left side of cut pushed **down** ⬇️
- Right side of cut pushed **up** ⬆️
- Creates counterclockwise rotation tendency ↺

## Common Beam Equations

The fundamental relationship between load, shear, and moment:

### 📏 Beam Differential Equations

$$\frac{dV}{dx} = -w(x)$$

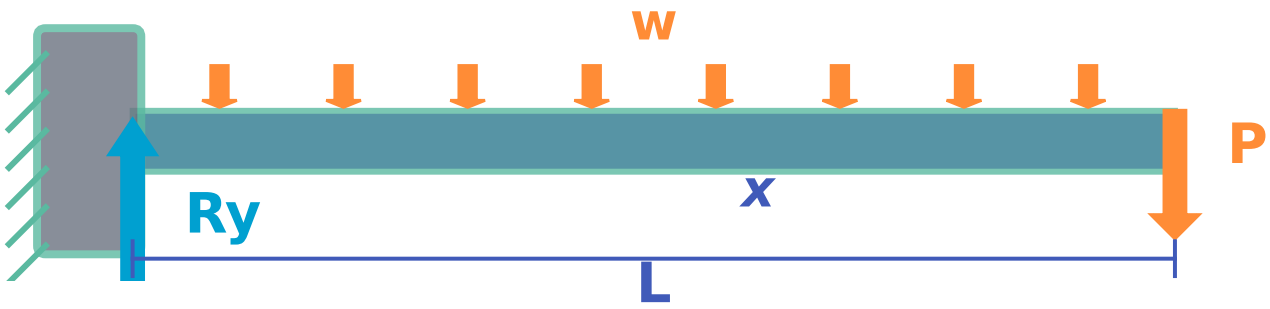
$$\frac{dM}{dx} = V(x)$$

**Where:**

- $w(x)$ = distributed load intensity (N/m)
- $V(x)$ = shear force at position x (N)
- $M(x)$ = bending moment at position x (N·m)

**Physical Meaning:** These equations show how load affects shear force rate of change, and how shear force affects bending moment rate of change.

## Cantilever Beam (Fixed-Free)




**For cantilever with distributed load w and point load P at tip:**

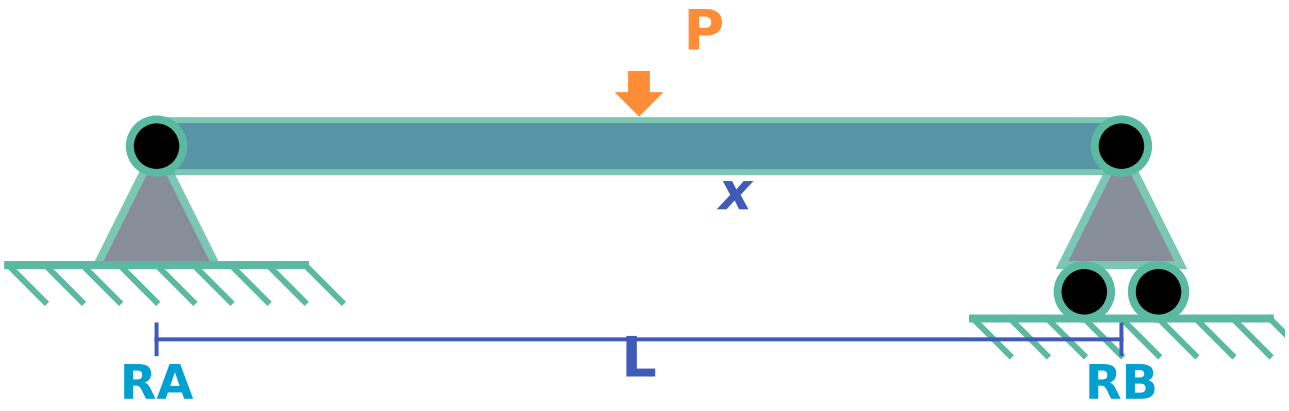
**Shear Force:** $V(x) = -(wL + P) + w \cdot x$

**Bending Moment:** $M(x) = -M_{base} + R_y \cdot x - w \cdot \frac{x^2}{2}$

**Key Characteristics:**

- Maximum shear and moment at **fixed support**
- Zero shear and moment at **free end**
- Linear shear variation, parabolic moment variation

## Simply Supported Beam (Pin-Roller)




**For simply supported beam with central point load P:**

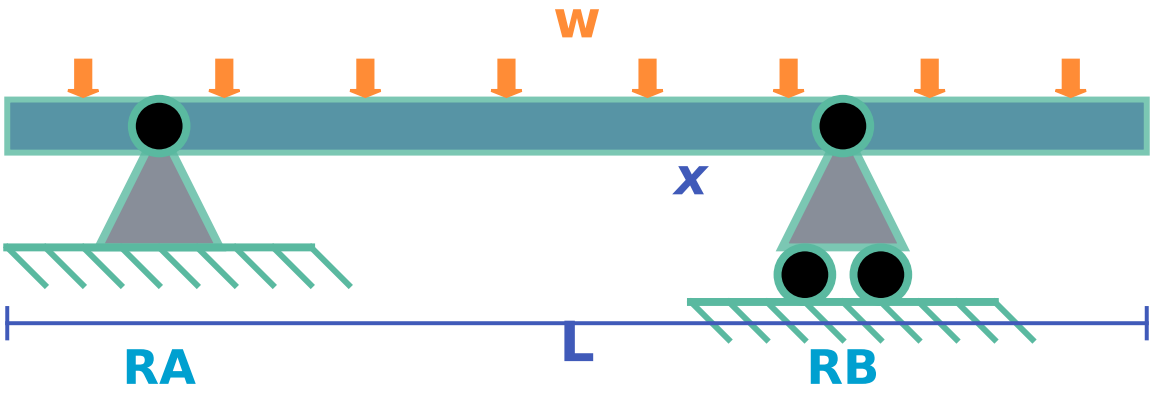
**Shear Force:** $V(x) = \frac{P}{2}$ (constant from 0 to L/2)

**Bending Moment:** $M(x) = \frac{P}{2} \cdot x$ (for $0 \leq x \leq L/2$)

**Key Characteristics:**

- Zero moment at **both supports** (pins/rollers cannot resist rotation)
- Maximum moment at **center** (where shear = 0)
- Symmetric shear and moment for symmetric loading

## 🔗 Overhanging Beam




**For overhanging beam with UDL across entire length:**

**Shear Force:**

- Between supports: $V(x) = R_A - w \cdot x$
- Overhang region: $V(x) = R_A - w \cdot x + R_B$

**Bending Moment:**

- Between supports: $M(x) = R_A \cdot x - w \cdot \frac{x^2}{2}$
- Overhang region: $M(x) = R_A \cdot x - w \cdot \frac{x^2}{2} + R_B(x - L_{span})$

**Key Characteristics:**

- **Both positive and negative moments** occur
- Maximum negative moment typically at **intermediate support**

- Zero moment at pin/roller supports

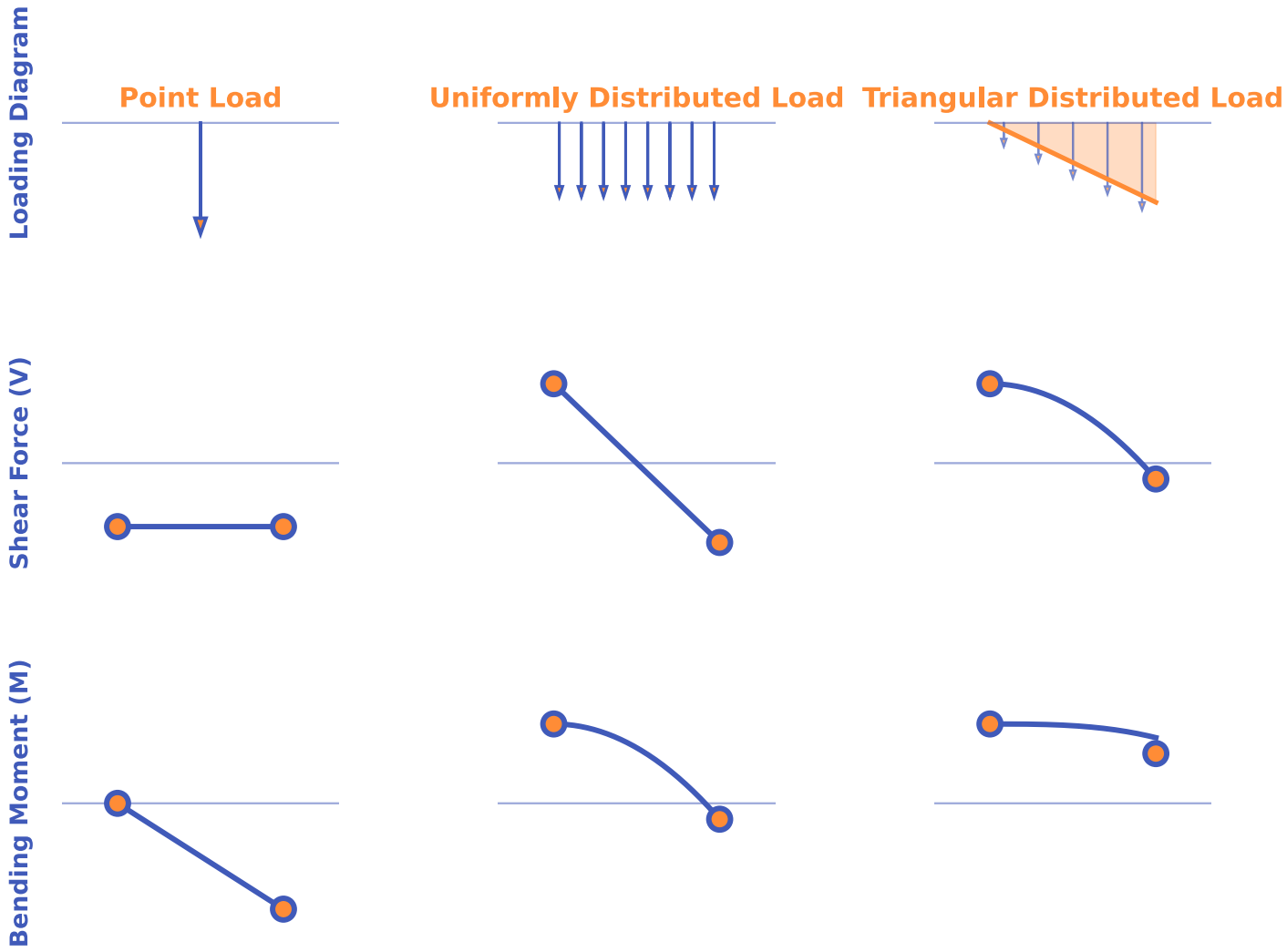
> **Key Insights**
>
> 1. **Slope of shear diagram = negative of applied load**
> 2. **Slope of moment diagram = shear force value**
> 3. **Maximum moment occurs where shear = 0**
> 4. **Point loads cause jumps in shear diagrams**
> 5. **Applied moments cause jumps in moment diagrams**

## Quick Sketching Techniques

The differential equations $\frac{dV}{dx} = -w(x)$ and $\frac{dM}{dx} = V(x)$ provide exact mathematical relationships for **all beam types**. While the equations above show specific formulas for cantilever, simply supported, and overhanging beams, engineers can use these fundamental differential relationships to **quickly sketch** approximate shear force and bending moment diagrams for any beam configuration before performing detailed calculations.

### Rule 1: Integration Pattern (from dV/dx = -w and dM/dx = V)

Since shear "integrates" from loading ($\frac{dV}{dx} = -w$) and moment "integrates" from shear ($\frac{dM}{dx} = V$), the diagram shapes follow an **integration-like pattern** for **any beam type**:



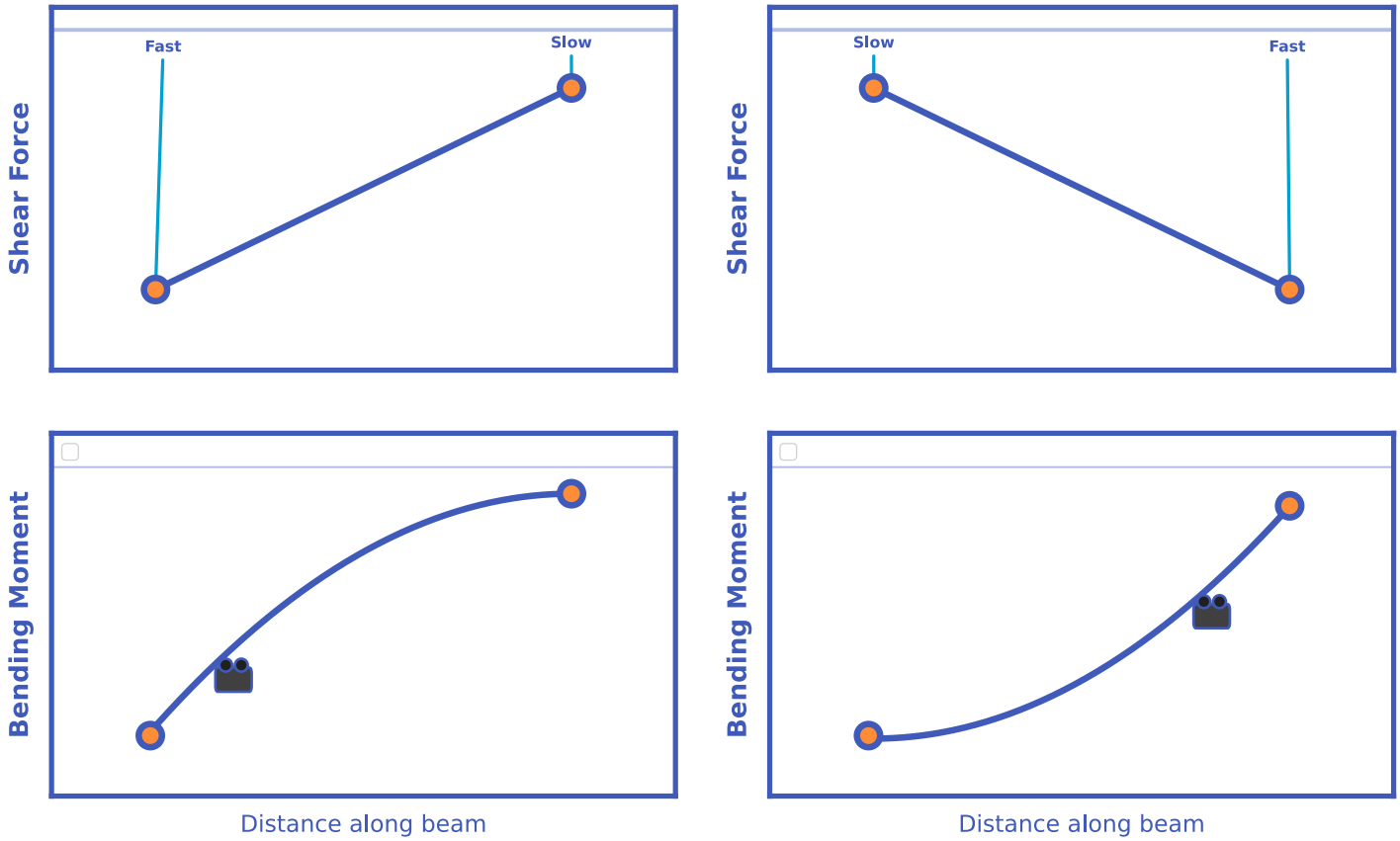

**Pattern Recognition:**

- **Point load** (vertical line) → **Constant shear** (horizontal) → **Linear moment** (slope)
- **UDL** (uniform arrows) → **Linear shear** (slope) → **Parabolic moment** (curve)
- **Triangular load** (varying) → **Parabolic shear** (curve) → **Cubic moment** (S-curve)

**Why this works:** Just like integrating $y = 5$ gives $5x$, then $\frac{5x^2}{2}$, each integration "steps up" curve complexity by one order. This directly follows from $\frac{dV}{dx} = -w(x)$ and $\frac{dM}{dx} = V(x)$.

### Rule 2: Slope Direction → Curve Shape (from dM/dx = V)

When sketching moment diagrams from shear diagrams, the **slope direction** in the shear plot tells you the **curvature** in the moment plot:




**The “Inverted Road” Analogy:**

Imagine an **inverted car** (shown in diagrams) rolling on an **inverted road** representing the moment curve. The shear slope tells you how the “car” accelerates:

- **Right slope “/” (positive shear slope):** Moment change starts **slow**, ends **fast**
  - Moment curve must be **flat on left, steep on right** → **Concave up** parabola
  - Think: car needs gentle start, steep finish
- **Left slope “\” (negative shear slope):** Moment change starts **fast**, ends **slow**
  - Moment curve must be **steep on left, flat on right** → **Concave down** parabola
  - Think: car needs steep start, gentle finish

**Practical Application:** Mark calculated moment values at critical points, then connect them with curves matching the shear slope direction.

### Rule 3: Essential Boundary Conditions

Use these instant checks derived from support types and equilibrium:

**Support Behavior:**

1. **Cantilever Free End:** $V = 0$ **and** $M = 0$ (no loads or constraints at tip)
2. **Simple Supports (Pin/Roller):** $M = 0$ (cannot resist rotation, only vertical force)
3. **Fixed Support:** Both $V \neq 0$ **and** $M \neq 0$ (resists shear force and rotation)

**Loading Effects:**

1. **Point Load:** Shear **jumps** by magnitude P; moment remains **continuous** (no slope discontinuity)
2. **Applied Moment:** Moment **jumps** by $M_0$; shear remains **continuous**
3. **Zero Shear Point:** Indicates **local maximum or minimum** in moment diagram (since $dM/dx = V = 0$)

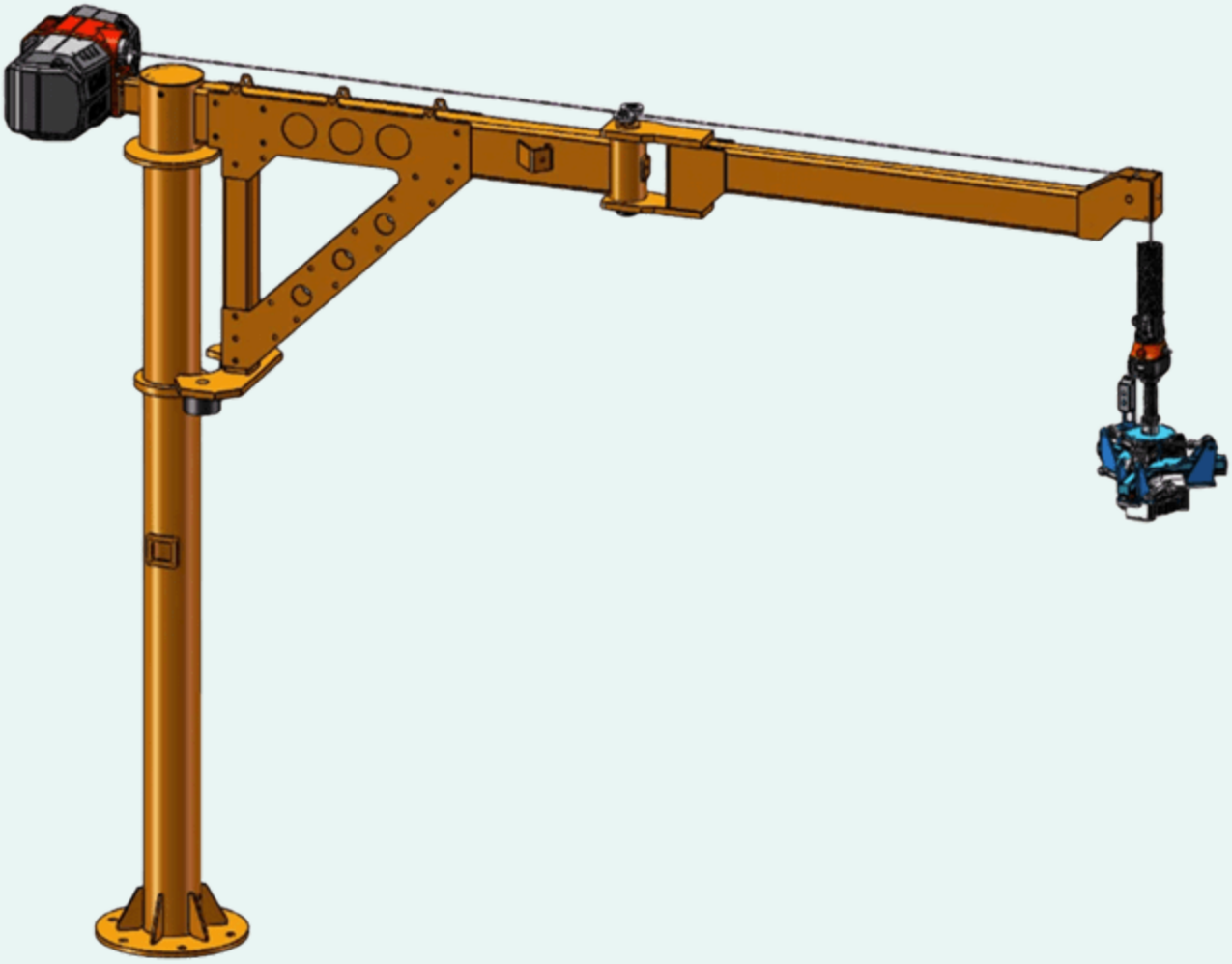
> **Rapid Sketching Workflow**
>
> 1. **Sketch supports** and identify boundary conditions ($M = 0$ at pins/rollers, both V and M at fixed)
> 2. **Calculate** critical reaction forces and at least one key shear/moment value
> 3. **Apply integration pattern** to determine curve type (point load → horizontal → slope; UDL → slope → parabola)
> 4. **Use slope direction rule** for moment curve shape (right slope → concave up; left slope → concave down)
> 5. **Verify** boundary conditions are satisfied and shear jumps occur at point loads

# Application 1: Semi-Automatic Robotic Arm Cantilever Analysis (Mechatronics)

A material handling robotic arm is modeled as a cantilever beam carrying both its own weight and a payload at the tip.

### System Problem Statement

- **Loading condition:** Uniformly distributed load (UDL) + one point load (actuator force)
- **Support configuration:** Cantilever beam (fixed at base)



**What we need to analyze:**

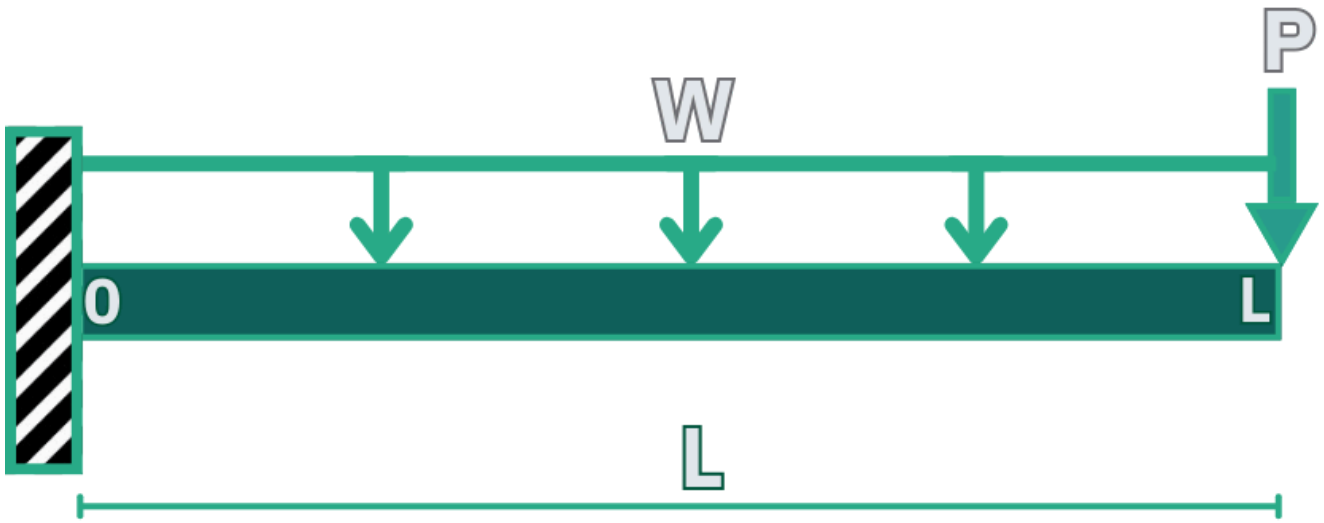
1. **Support reaction forces** under combined loading
2. **Shear force and bending moment diagrams** across the entire beam
3. Locate **maximum bending moment** locations

**Key Question:** What are the maximum shear force and bending moment for this robotic arm?

Build this beam in the simulator and watch its shear-force and bending-moment diagrams form:

**Open the Beam Analysis Simulator**

### Equivalent System Model




**Given:**

- Cantilever arm length: L = 2.5 m
- Distributed load: w = 75 N/m (arm self-weight)
- Point load at tip: P = 1200 N (payload)
- Cross-section: 80 mm × 10 mm (rectangular aluminum bar, $I = 5.33 \times 10^6$ $mm^4$, c = 40 mm)
- Material: Aluminum alloy ($\sigma_{yield}$ = 275 MPa)

## Step 1: Calculate Reaction Forces

> **Click to reveal reaction force calculations**

## Step 2: Construct Shear Force Diagram

> **Click to reveal shear force analysis**

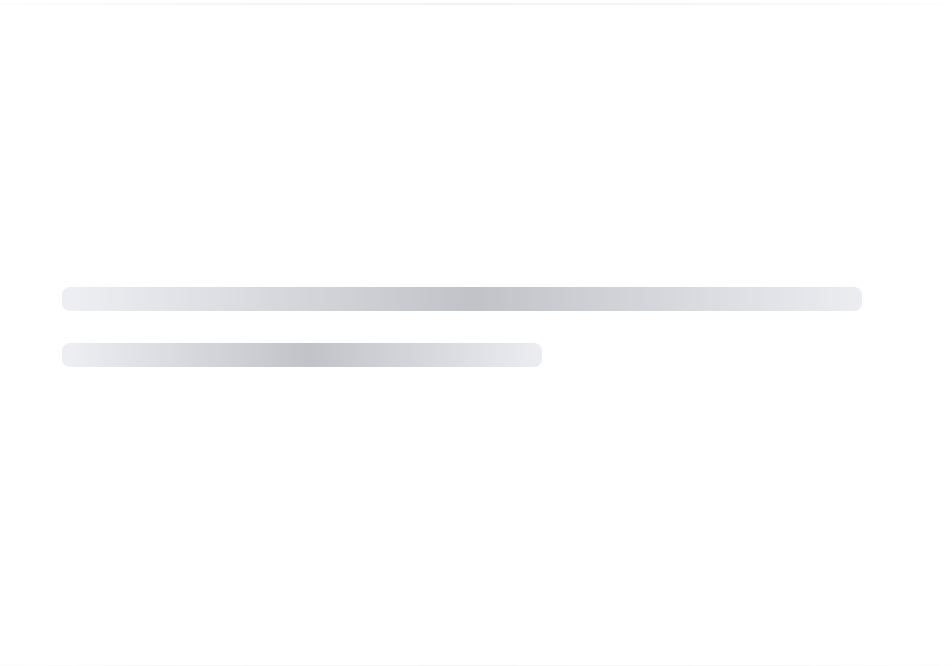
## Step 3: Construct Bending Moment Diagram

> **Click to reveal bending moment analysis**

## Step 4: Summary of Critical Values

> **Click to reveal summary of maximum shear and moment**

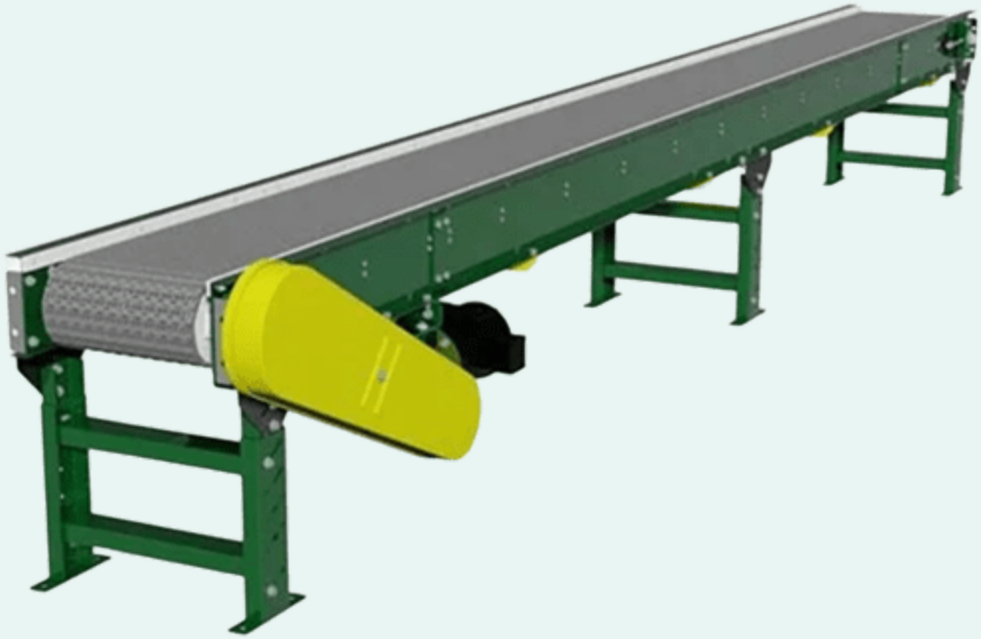
# Application 2: Conveyor Roller Support Beam (Electromechanical)



A conveyor beam supports five equally spaced boxes during material handling operations.

### System Problem Statement

- **Loading condition:** Multiple point loads (boxes on conveyor)
- **Support configuration:** Simply supported (pinned + roller)

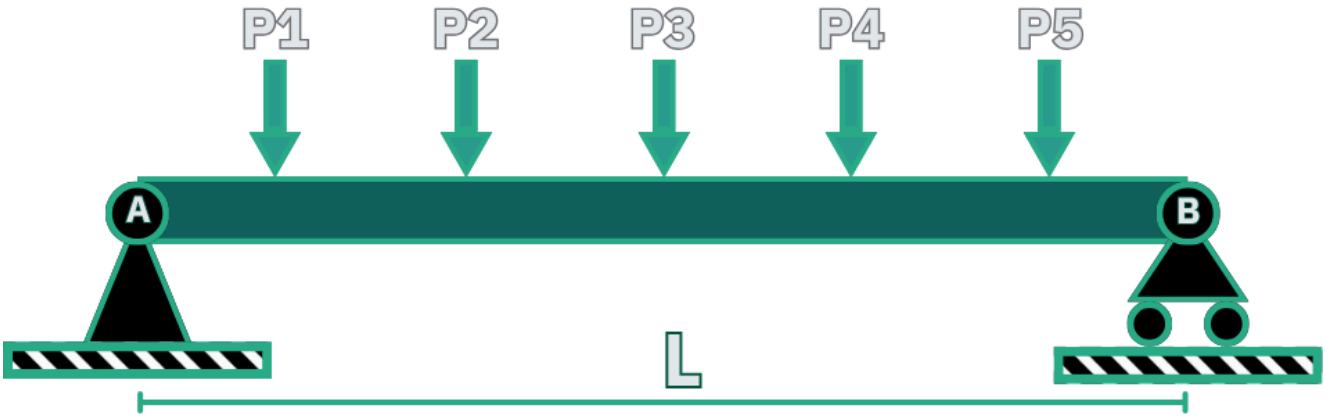


**What we need to analyze:**

1. **Support reaction forces** under multiple concentrated loads
2. **Shear force and bending moment diagrams** with multiple discontinuities
3. Compare **maximum moments** at load points vs. midspan locations
4. Determine **critical design section** for beam sizing

**Key Question:** What are the maximum shear force, bending moment, and critical design location?

## Equivalent System Model




**Given:**

- Beam length: L = 2000 mm
- Support conditions: Simply supported at both ends
- Load configuration: 5 boxes, each P = 400 N
- Load spacing: 400 mm intervals (at x = 200, 600, 1000, 1400, 1800 mm)
- Cross-section: Hollow rectangular steel 60×40×4 mm ($I = 3.1\times10^6$ mm⁴, c = 30 mm)
- Material: Steel ($\sigma_{yield}$ = 250 MPa)

## Step 1: Calculate Reaction Forces

> **Click to reveal reaction force calculations**

## Step 2: Construct Shear Force Diagram

> **Click to reveal shear force analysis**

## Step 3: Construct Bending Moment Diagram

> **Click to reveal bending moment analysis**

## Step 4: Critical Section Analysis

> **Click to reveal critical analysis and design recommendations**

# Application 3: Solar Tracker Arm (Electronics/Mechatronics)



A solar tracker support beam adjusts panel orientation to track the sun, experiencing combined self-weight, wind loading, and equipment forces.

### System Problem Statement

- **Loading condition:** UDL (self-weight + wind) + concentrated clamp force
- **Support configuration:** Overhanging simply supported beam

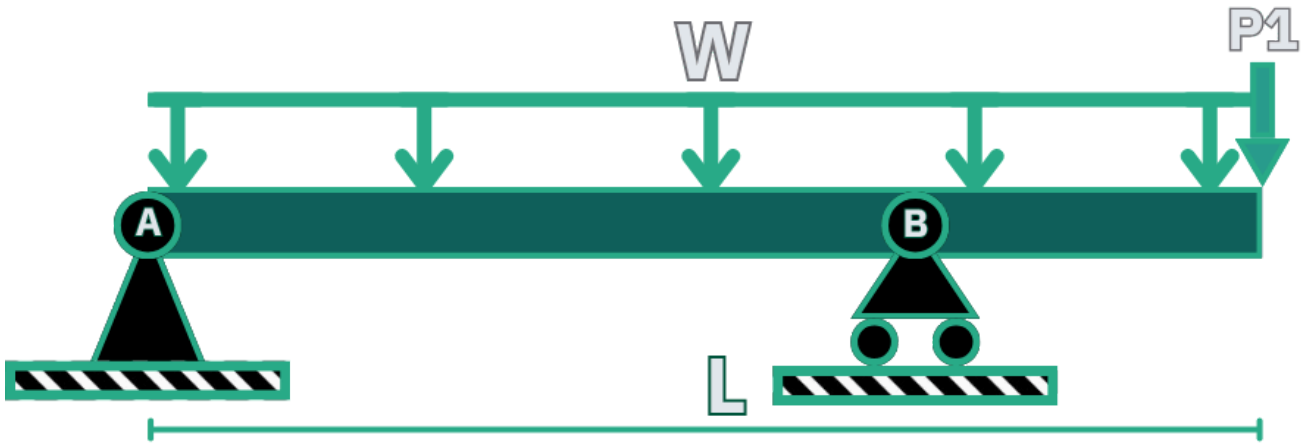


**What we need to analyze:**

1. **Support reaction forces** for overhanging beam configuration
2. **Shear force and bending moment diagrams** across entire beam length
3. **Maximum positive and negative bending moments** and their locations
4. **Critical section assessment** for bending stress design

**Key Question:** What are the maximum positive and negative bending moments, and which section is most critical?

## Equivalent System Model




**Given:**

- Total beam length: 3.0 m (2.5 m span + 0.5 m overhang)
- Support A (pinned): at x = 0
- Support B (roller): at x = 2.5 m
- Uniformly distributed load: W = 300 N/m across entire length (panel weight + wind)
- Point load at tip: P1 = 600 N at x = 3.0 m (clamp mechanism)
- Cross-section: Structural steel I-beam ($I = 6.8 \times 10^6$ mm⁴, c = 40 mm)
- Material: Structural steel ($\sigma_{yield}$ = 250 MPa)

## Step 1: Calculate Reaction Forces

> **Click to reveal reaction force calculations**

## Step 2: Construct Shear Force Diagram

> **Click to reveal shear force analysis**

## Step 3: Construct Bending Moment Diagram

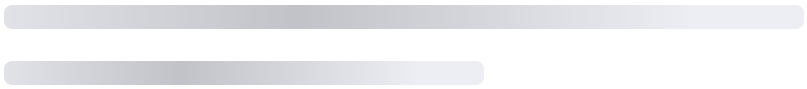
> **Click to reveal bending moment analysis**

## Step 4: Critical Section Analysis

> **Click to reveal critical bending stress assessment**

> **Instrument it**
>
> The bending moment at any section is something you can read off a beam in service. Bond a strain gauge to the top or bottom fibre where the moment is largest; the surface strain times Young’s modulus times the section modulus gives the bending moment there, and a few gauges spaced along the span reconstruct the whole moment diagram. Read them with a quarter-bridge into an HX711 or an instrumentation amplifier and an ESP32 or STM32, and you can watch the live moment on siliconwit.io and catch an overload before the beam yields.

# Summary and Next Steps



In this lesson, you learned to:

1. **Construct** shear force diagrams using equilibrium ($V = \Sigma F_y$) and differential relationships ($dV/dx = -w$)

2. **Build** bending moment diagrams using integration (dM/dx = V) and moment equilibrium principles
3. **Identify** critical sections with maximum shear and moment values
4. **Analyze** cantilever, simply supported, and overhanging beam configurations
5. **Determine** reaction forces for fixed, pinned, and roller supports

**Key Design Insights:**

- Cantilever beams: Maximum moment at fixed support
- Simply supported beams: Maximum moment often at midspan
- Overhanging beams: Critical section at intermediate support
- Shear jumps at point loads, moment jumps at applied moments
- Distributed loads create linear shear and parabolic moment curves

**Critical Relationships:**

- **Load-Shear:** dV/dx = -w(x)
- **Shear-Moment:** dM/dx = V(x)
- **Maximum moment:** Occurs where V(x) = 0

**Coming Next**: In Lesson 2.2, we'll calculate bending stresses using the flexure formula σ = My/I to determine if beam designs can safely support operational loads.

# Comments

*Loading comments...*

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