CRITICAL COMBINATIONS OF SHEAR AND TRANSVERSE DIRECT STRESS FOR AN INFINITELY LONG FLAT PLATE WITH EDGES ELASTICALLY RESTRAINED AGAINST ROTATION

By S. B. Batdorf and John C. Houbolt

SUMMARY

An exact solution and a closely concurring approximate energy solution are given for the buckling of an infinitely long flat plate under combined shear and transverse direct stress with edges elastically restrained against rotation. It was found that an appreciable fraction of the critical stress in pure shear may be applied to the plate without any reduction in the transverse compressive stress necessary to produce buckling. An interaction formula in general use was shown to be decidedly conservative for the range in which it is supposed to apply.

INTRODUCTION

In the design of stressed-skin structures, consideration must sometimes be given to the critical stresses for a sheet under a combination of shear and direct stress. The upper surface of a wing in normal flight, for example, is subjected to combined shear and compressive stress, and the lower surface is subjected to combined shear and tensile stress. The upper surface may then buckle at a lower compressive or shear stress than if either stress were acting alone. The critical shear stress for the lower surface may be increased by the presence of the tensile stress.

If the wing has closely spaced chordwise stiffeners, the skin between two adjacent stiffeners may be regarded as a long sheet slightly curved in the longitudinal or chordwise direction, straight in the transverse or spanwise direction, and loaded in shear and transverse direct stress. A conservative preliminary estimate of the critical stresses may be obtained if the sheet is considered to be flat and infinitely long. In the present paper, the critical stresses are computed for an infinitely long flat plate loaded as indicated in figure 1 (a). The corresponding idealization of the case of a wing with spanwise stiffeners, shown in figure 1 (b), was treated in reference 1.

CONVENTIONAL INTERACTION FORMULAS

For buckling of structures under combined loading conditions, no general theory has been developed that is applicable to all cases. Stress ratios (reference 2), however, provide a convenient method of representing such conditions. For example, the ratio of the shear stress actually present in a structure to the critical shear stress of the structure when no other stresses are present may be called the shear-stress ratio. Stress ratios may similarly be defined for each type of stress occurring in the structure.
The same formula was found in reference 5 to be applicable to simply supported rectangular plates of aspect ratios 0.5, 1, and 2; the conclusion was drawn that interaction curves in stress-ratio form are practically independent of the dimensions of the plate.

The present analysis, however, indicates that the buckling of an infinitely long plate loaded in shear and transverse compression (fig. 1 (a)) is not adequately represented either by equation (2) or (3) or by any formula of the type of equation (1). Two independent theoretical solutions to this buckling problem are given in appendixes B and C. Appendix B contains the exact solution of the differential equation of equilibrium, and appendix C contains an energy solution leading directly to an interaction formula. This energy solution, which gives approximate values only, was made to obtain an initial quick survey of the problem and to provide a check on the results of the exact solution. Approximate interaction formulas in substantial agreement with these results were given for the cases of simply supported and clamped edges in reference 6.

RESULTS AND DISCUSSION

In figure 2, curves are given that indicate the critical combinations of shear and transverse direct stress for an infinitely long plate with edges elastically restrained against rotation. These curves are computed from the exact solution presented in appendix B. The degree of edge restraint is denoted by ε, which is defined in appendix B in such a way that zero edge restraint corresponds to simply supported edges and infinite edge restraint indicates clamped edges. A similar set of curves is given in terms of stress ratios in figure 3. The numerical values used to plot figures 2 and 3, together with the values found by the energy solution, are given in table I.

The most striking feature of these results is that an appreciable fraction of the critical stress in pure shear can evidently be applied to the plate without any reduction in the compressive stress necessary to produce buckling. (See fig. 3.) This fraction varies from about one-third to more than one-half, depending on the degree of restraint. At shear stresses higher than those corresponding to this fraction, the compressive stress required to produce buckling is reduced by the presence of shear. The result that the compressive buckling stress is entirely unaffected by the presence of a considerable amount of shear is probably peculiar to infinitely long plates. It is to be expected, however, that this result will be closely approached in the case of long finite plates.

In figure 4 a comparison is made between the exact solutions and the interaction formulas of equations (2) and (3). Equation (2), which is the interaction formula in general use, is seen to be decidedly conservative.

CONCLUSIONS

The exact solution of the differential equation for the buckling of an infinitely long flat plate under combined shear and transverse direct stress with edges elastically restrained against rotation indicates the following:

1. An infinitely long flat plate may be loaded with an appreciable fraction of its critical stress in pure shear without causing any reduction in the transverse compressive stress necessary to produce buckling.

2. An interaction formula in general use for rectangular plates in combined shear and compression is decidedly conservative when applied to an infinitely long plate in shear and transverse compression.

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SHEAR AND TRANSVERSE DIRECT STRESS FOR AN INFINITELY LONG FLAT PLATE

(a) Shear with tension or compression.

FIGURE 3.—Critical combinations of shear-stress ratio $R_s$ and transverse direct-stress ratio $R_c$ for an infinitely long plate with edges elastically restrained against rotation.

(b) Shear with compression.

FIGURE 3.—Concluded.

FIGURE 4.—Comparison of correct interaction curves with a curve formerly proposed for infinitely long plates under combined shear and compression.
APPENDIX A
SYMBOLS

$C_1, C_3$ functions of edge restraint coefficient $\epsilon$ given in appendix C

$D$ flexural stiffness of plate per unit length, in-lb

$E$ elastic modulus of material, psi

$N_s$ compressive force per unit length, lb/in.

$N_{ss}$ shearing force per unit length of plate, lb/in.

$S$ rotational stiffness per inch of restraining member at edge of plate, lb/radian

$T_s$ work done by compressive force per half wave length, in-lb

$T_s$ work done by shear force per half wave length, in-lb

$V_1$ strain energy in plate per half wave length, in-lb

$V_s$ strain energy in edge restraint per half wave length, in-lb

$Y$ function of $y$ associated with deflection of plate during buckling

$b$ width of plate, in.

$b_1$ width of plate in oblique coordinate system of reference 1, in.

$c$ function of $\alpha$, $\beta$, and $\lambda$

$k_a, k_s$ critical compressive and shear-stress coefficients, respectively

$m$ root of a characteristic equation of appendix B

$f_1, f_2, f_3$ functions of restraint coefficient $\epsilon$ given in appendix C

$t$ thickness of plate, in.

$w = \frac{\pi b}{2\lambda}$ displacement of buckled plate from original position

$w_0$ amplitude of assumed wave form of buckle

$x$ longitudinal coordinate of plate

$y$ transverse coordinate of plate

$\alpha, \beta$ functions of $\lambda$, $\gamma$, and $k_s$

$\epsilon$ nondimensional coefficient of edge restraint

$\gamma$ one of two parameters determining buckle form

$\lambda$ one of two parameters determining buckle form (half wave length of buckle, in.)

$\mu$ Poisson's ratio

$\sigma$ direct stress

$\sigma_\tau$ transverse direct stress, psi

$\tau$ shear stress, psi

$\phi$ angle between buckle node and $y$-axis

$\theta = \tan \phi$

$R_1, R_2, R_3$ stress ratios

$R_s$ shear-stress ratio

$R_c$ longitudinal direct-stress ratio

$cr$ critical (used as subscript)
APPENDIX B

SOLUTION BY DIFFERENTIAL EQUATION

Statement of problem.—The exact solution for the critical stress at which buckling occurs in a flat rectangular plate subjected to combined shear and compression in its own plane may be obtained by solving the differential equation that expresses the equilibrium of the buckled plate. The plate is assumed to be infinitely long, and equal elastic restraints against rotation are assumed to be present along the two edges of the plate.

Differential equation.—Figure 5 shows the coordinate system used. The differential equation for equilibrium of a flat plate under shear and transverse direct stress is (from reference 7)

\[ D \left( \frac{\partial^4 w}{\partial z^4} + 2 \frac{\partial^4 w}{\partial z^2 \partial y^2} + \frac{\partial^4 w}{\partial y^4} \right) + 2 \tau \frac{\partial^2 w}{\partial z \partial y} + \sigma_y \frac{\partial^2 w}{\partial y^2} = 0 \]  

(B1)

It is convenient to write \( \sigma_y \) and \( \tau \) in terms of the dimensionless buckling coefficients \( k_s \) and \( k_c \) by means of the relations

\[ \sigma_y = \frac{k_s \pi^2 D}{b^4} \]

\[ \tau = \frac{k_c \pi^2 D}{b^4} \]  

(B2)

Substitution of the expressions for \( \sigma_y \) and \( \tau \) from equations (B2) in equation (B1) gives

\[ \frac{\partial^4 w}{\partial x^4} + 2 \frac{\partial^4 w}{\partial x^2 \partial y^2} + \frac{\partial^4 w}{\partial y^4} + 2 \pi k_s \frac{\partial^2 w}{\partial x \partial y} + \pi^2 k_c \frac{\partial^2 w}{\partial y^2} = 0 \]  

(B3)

Solution of differential equation.—If the plate is infinitely long in the \( z \)-direction, all displacements must be periodic in \( z \) and the deflection surface may be taken in the form

\[ w = Y e^{i \frac{2 \pi r}{L}} \]  

(B4)

where \( Y \) is a function of \( y \) only and \( \lambda \) is the half wave length of the buckles in the \( x \)-direction.

Substitution of the expression for \( w \) from equation (B4) in the differential equation (B3) gives the following as the equation that determines \( Y \):

\[ \frac{d^4 Y}{d y^4} + \frac{2 \pi^2 k_s}{L} \left( \frac{\pi^2 y^2}{\lambda^2} \right)^2 \frac{d^2 Y}{d y^2} + 2 \pi^2 k_c \frac{d^4 Y}{d y^4} + \frac{\pi^4 k_c}{L^3} = 0 \]  

(B5)

A solution of equation (B5) is

\[ Y = e^{i \frac{m y}{L}} \]

where \( m \) is a root of the characteristic equation

\[ m^4 + \left[ 2 \left( \frac{\pi^2 b}{L} \right)^2 - \pi^2 k_s \right] m^2 - 2 \pi^4 \left( \frac{b^2}{L} \right)^4 k_c = 0 \]  

(B6)

Except for the substitution of \( 2 \left( \frac{\pi^2 b}{L} \right)^2 - \pi^2 k_s \) for \( 2 \left( \frac{\pi^2 b}{L} \right)^2 \), equation (B6) is identical with equation (A-6) of appendix A of reference 8, in which equation (B3) of this appendix was solved with \( k_c = 0 \). With this change, all the results obtained in appendix A of reference 8 are applicable here. The stability criterion for combined compression and shear is therefore the same in form as that for shear alone, given by equation (A-16) of reference 8, which is

\[ 2 \alpha \beta \left( 4 \gamma^2 - \frac{\pi^2 b}{L} \right) (cosh 2 \alpha \cos 2 \beta - cos 4 \gamma) - \left[ 4 \gamma^2 (\beta^2 - \alpha^2) \right. \]

\[ - (\beta^2 + \alpha^2)^2 - (4 \gamma^2 - \beta^2 + \alpha^2) \left( \frac{\pi^2 b}{L} \right)^2 \sinh 2 \alpha \sin 2 \beta \]

\[ + \varepsilon \left[ \alpha (4 \gamma^2 + \alpha^2 + \beta^2) \right. \cosh 2 \alpha \sin 2 \beta \]

\[ + \beta (4 \gamma^2 - \alpha^2 - \beta^2) \sinh 2 \alpha \cos 2 \beta - 4 \alpha \beta \gamma \sin 4 \gamma] = 0 \]  

(B7)

The relation between \( k_s \), \( \alpha \), \( \beta \), and \( \gamma \) is also the same in form as that in equation (A-23) of reference 8, namely,

\[ k_s = \frac{8 \gamma (\alpha^2 + \beta^2)}{\pi^2 \left( \frac{\pi^2 b}{L} \right)^2} \]  

(B8)

In the present report, however, \( \alpha \) and \( \beta \) have the following values:

\[ \alpha = \sqrt{c + \sqrt{(c + \alpha)^2 - \left( \frac{1}{16} \left( \frac{\pi^2 b}{L} \right)^4 \right)}} \]

\[ \beta = \sqrt{-c + \sqrt{(c + \alpha)^2 - \left( \frac{1}{16} \left( \frac{\pi^2 b}{L} \right)^4 \right)}} \]  

(B9)

where

\[ c = \gamma^2 + \frac{1}{4} \left( \frac{\pi^2 b}{L} \right)^2 - \frac{9}{8} k_s \]
As in reference 8, the restraint coefficient $\varepsilon$ is defined herein by the relation

$$\varepsilon = \frac{Sb}{D}$$

where $S$ is the ratio of a sinusoidally applied moment to the resulting sinusoidally distributed rotation of the restraining element measured in radians.

Evaluation of $k_*$ corresponding to a selected value of $k_c$—The procedure for evaluating $k_*$, after values of $k_c$ and $\varepsilon$ have been chosen, is as follows: A value of $b/\lambda$ is selected; a series of values of $\gamma$ are assumed until one is found that, together with the corresponding values of $\alpha$ and $\beta$ computed from equation (B9), satisfies equation (B7); $k_*$ is then computed from equation (B8). Another value of $b/\lambda$ is selected; a new set of values of $\gamma$, $\alpha$, and $\beta$ is found that satisfies the stability criterion; and a new value of $k_*$ is computed. The entire process is repeated until the minimum value of $k_*$ can be found from a plot of $k_*$ against $L/A$, When $\varepsilon$ is a function of $b/h$, $\varepsilon$ must be reevaluated each time a different value of $b/h$ is selected. The minimum value of $k_*$ and the chosen value of $k_c$, when inserted in equations (B2), give a critical combination of shear and direct stress.

Evaluation of $k_*$ when $k_c$ has value corresponding to buckling as Euler strip.—One critical combination of shear and compression is simply $k_c=0$ and $k_*$ equals the value corresponding to buckling as an Euler strip. The curves giving critical stress combinations, however, did not appear to be approaching this point as their construction progressed. It was therefore necessary to determine whether values of $k_*$ other than zero are critical when the Euler compressive stress is reached. The determination of $k_*$ when $k_c$ reaches the value at which the plate buckles as an Euler strip requires special treatment, because $k_*$, given by equation (B8), becomes indeterminate when the wave length becomes infinite as suggested by the energy solution. The result that $\lambda$ becomes infinite when $k_c$ takes its Euler value is readily checked from equation (Cl1) for the special case of $\varepsilon=0$; for this case $p=q=r=\frac{1}{2}$ and $(k_*)o=1$. From equation (B8) it is clear that, if $k_*$ is to remain finite when the wave length approaches infinity, either $\gamma\to0$, case (a), or $\alpha^2+\beta^2\to0$, case (b).

For case (a), when $\varepsilon=0$, it follows from equations (B9) that, to small quantities of the second order,

$$\alpha=\tan^{-1}\left(\frac{\pi}{2}\frac{\pi}{3}\frac{\pi}{2}\frac{\pi}{3}\right)$$

$$\beta=\gamma$$

where

$$u=\frac{\pi b}{2\lambda}$$

If the values of $\alpha$ and $\beta$ from equations (B10) are substituted in equation (B7) and the resulting equation is expanded, with only the lowest powers of $u$ and $\gamma$ retained,

$$\gamma^2=\frac{4\pi^2u^2}{24-6\pi^2}$$

(B11)

Substitution of the values of $\alpha$ and $\beta$ from equations (B10) and (B11) in equation (B8) gives as the final result for $\varepsilon=0$

$$k_*=-\frac{2\pi}{6\sqrt{4-6\pi^2}}$$

(B12)

Case (b) can be analyzed by a similar method, but the analysis is quite complicated because terms of third order must be retained. For $\varepsilon=0$ and $\varepsilon=\infty$, case (a) and case (b) were found to lead to exactly the same result for $k_*$. A value of $k_*$ other than zero when $k_c$ takes its Euler value may be found in the same manner for other values of edge restraint. For any value of the restraint coefficient $\varepsilon$,

$$k_*=-\frac{2\pi}{6\sqrt{4-6\pi^2}}$$

(B12)

where $k_c$ has the value corresponding to Euler strip buckling, at this value of $\varepsilon$. The relationship between this Euler value of $k_c$ and the corresponding $\varepsilon$ is given by the equation (from reference 9)

$$\varepsilon=-\frac{\pi k_c}{2\tan\frac{\pi k_c}{2}}$$

When $k_c$ reaches the Euler value, the critical shear-stress coefficient $k_*$ can therefore be either 0 or the value given by equation (B12). The conclusion that $k_*$ can also have any value between these limits is plausible on the basis of the following physical considerations. The shear stress does no work during buckling when the stress condition is such that the plate buckles with an infinite wave length. The effect of shear, furthermore, is to reduce the wave length to a value of the order of the width of the plate. The wave length at the time buckling occurs is infinite, however, when the plate is either in pure compression or at the value of $k_c$ satisfying equation (B12). This fact means that, for values of $k_*$ between 0 and that given by equation (B12), the shear stress is not great enough to force buckling in short waves and therefore does not assist in producing buckles. In this range of shear stress the compressive stress necessary to produce buckling is, consequently, the Euler stress.
APPENDIX C

SOLUTION BY ENERGY METHOD FOR EDGE RESTRAINT INDEPENDENT OF WAVE LENGTH

The critical stress is determined on the basis of the principle that the elastic-strain energy stored in a structure during buckling is equal to the work done by the applied loads during buckling. If the structure under consideration is an infinitely long plate under combined shear and edge compression with edges elastically restrained against rotation, this equality may be written

\[ T_e + T_s = V_1 + V_2 \]  
(C1)

In reference 1 an energy solution was given for the type of loading shown in figure 1 (b). The deflection function used in reference 1 is also suitable for application to the solution of the type of loading shown in figure 1 (a), which is the loading considered in the present paper. The values for \( T_e, V_1, \) and \( V_2 \) may accordingly be taken directly from reference 1, but \( T_s \) must be recomputed to apply to the case of transverse compressive stress.

The following substitutions are used to transform the energy expressions from the oblique coordinates of reference 1, the left-hand terms of the equations, to the rectangular coordinates (fig. 6) used in the present paper, the right-hand terms of the equations:

\[ \frac{y}{b_1} = \frac{y}{b}, \quad b_1 \cos \phi = b \]  
(C2)

For brevity the following notation is also adopted

\[ \tan \phi = \theta \]

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By use of equations (C2), the expressions from reference 1 that are used in the present paper may be rewritten as follows:

\[ T_e = w_o \frac{N_x \pi^2 b^2 \theta}{2 \lambda} f_1 \]  
(C3)

\[ V_1 = \frac{w_o^2 \pi^4 D}{4 \lambda \beta} \frac{\left( \beta \lambda \right)^3}{\left( \beta \lambda \right)^3 + \left( 1 + \beta \lambda \right)^2 f_1 + 2 \left( 1 + 3 \beta \lambda \right) f_2 + \left( \frac{\lambda}{b} \right)^3 f_3} \]  
(C4)

\[ V_2 = \frac{w_o^2 \pi^2 D \lambda^4}{2 b^2} \]  
(C5)

where

\[ f_1 = \left( \frac{\pi^2}{120} + \frac{1}{8} \frac{1}{\pi^2} \right) \epsilon^2 + \left( \frac{1}{2} - \frac{4}{\pi^2} \right) \epsilon + \frac{1}{2} \]

\[ f_2 = \left( \frac{5}{24} - \frac{2}{\pi^2} \right) \epsilon^2 + \left( \frac{1}{2} - \frac{4}{\pi^2} \right) \epsilon + \frac{1}{2} \]

\[ f_3 = \left( \frac{1}{8} - \frac{1}{\pi^2} \right) \epsilon^2 + \left( \frac{1}{2} - \frac{4}{\pi^2} \right) \epsilon + \frac{1}{2} \]

and \( \epsilon \) is the restraint coefficient defined in appendix B.

The work done by the compressive force per half wave length may be written

\[ T_s = \frac{1}{2} N_s \int \frac{b^2}{\beta} \left( \frac{\partial w}{\partial y} \right)^2 \, dx \, dy \]  
(C6)

As in reference 1, the assumed deflection function is

\[ w = w_o \left[ \frac{\cos \theta}{2} \left( \frac{1}{4} \frac{\epsilon}{\lambda} - \frac{1}{4} \frac{\epsilon}{\lambda} \right) + \left( 1 + \frac{\epsilon}{\lambda} \right) \cos \frac{\pi y}{\lambda} (x + \theta y) \right] \]  
(C7)

When the expression for \( w \) from equation (C7) is substituted in equation (C6) and the indicated operations are performed,

\[ T_s = w_o^2 \frac{N_x \pi^2 b}{4 \lambda} \left( \frac{\lambda^2}{b^2} f_1 + \theta^2 f_1 \right) \]  
(C8)

Values from equations (C3), (C4), (C5), and (C8) are now substituted in the buckling equation (C1). The use of the equations

\[ N_x = k_* \frac{\pi^2 D}{\beta^3} \]

\[ N_y = k_* \frac{\pi^2 D}{\beta^3} \]

eliminates \( N_x \) and \( N_y \). The resulting equation gives the critical combination of stresses and may be written as

\[ k_* = \frac{1}{2 f_1 \theta} \left[ \frac{\beta \lambda}{\lambda} \left( 1 + \theta \right)^2 f_1 + \frac{\lambda^2}{b^2} f_2 + 2 \left( 1 + 3 \theta \right) f_3 \right. \]

\[ + \left. 2 \epsilon \lambda^2 \right] - k_* \left[ \frac{\lambda^2}{b^2} f_1 + \theta f_1 \right] \]  
(C9)

This equation shows that, for a selected value of \( k_* \), the critical shear stress depends upon the wave length and the angle of the buckle. Since a structure buckles at the lowest stress at which instability can occur, \( k_* \) is minimized with respect to wave length and angle of buckle. The minimum value of \( k_* \) with respect to value of wave length is determined from the condition

\[ \frac{\partial k_*}{\partial \lambda} = 0 \]  
(C10)
which gives (when \( e \) does not depend on wave length)

\[
\left(\frac{\lambda}{b}\right)^2 = \frac{(1+e^2)\sqrt{f_1}}{f_1 + \frac{2e}{\pi^2} - k_f j_f}
\]  
(C11)

Substitution of this value of wave length in equation (C9) gives

\[
k = \frac{1+e^2}{f_1 \theta} \left( j_f \left( \frac{2e}{\pi^2} + f_1 \right) - k_f j_f \right)^{1/2} + \frac{1}{2f_1 \theta} \left[ 2(1+e^2) \right] f_2 - k^2 \theta f_1 \]  
(C12)

The minimum value of \( k \) with respect to angle of buckle is found from the condition

\[
\frac{dk}{d\theta} = 0
\]  
(C13)

which gives

\[
\theta^2 = \sqrt{\left[ f_1 \left( \frac{2e}{\pi^2} + f_1 \right) - k_f j_f \right]^2 + f_2} \quad \frac{2f_1}{f_1 + \frac{2e}{\pi^2} - k_f j_f}
\]  
(C14)

If this value of \( \theta \) is substituted in equation (C12), the final result is the following interaction formula, in which \( k_c \) is given in terms of \( k \) and the edge restraint \( e \):

\[
k^2 = 4C_1 + 3C_2 (C_3 - k_c) + (4C_3 - k_c) \sqrt{2(2C_1 - C_2 k_c)}
\]  
(C15)

where

\[
f_1 = \frac{f_1 + 2e}{\pi^2}
\]

and

\[
f_2 = \frac{2f_1}{\pi^2}
\]

TABLE I.—VALUES OF \( k_1 \) AND \( R_1 \) WITH CORRESPONDING COMPUTED VALUES OF \( k_1 \) AND \( R_1 \)

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8. Stowell, Elbridge Z.: Critical Shear Stress of an Infinitely Long Flat Plate with Equal Elastic Restraints against Rotation along the Parallel Edges. NACA ARR No. 3K12, 1943.

Critical combinations of shear and transverse direct stress for an infinitely long flat plate with edges elastically restrained against rotation.

Curves are derived indicating the critical combinations of shear and transverse direct stress for an infinitely long plate with edges elastically restrained against rotation. As a result, it was found that an appreciable fraction of critical stress can be applied to plate without reduction in transverse compressive stress necessary to produce buckling. Curves are computed for exact solution and a closely concurring approximate energy solution. The interaction formula currently in use is much too conservative when applied to this problem.

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ABSTRACT:
An exact solution and a closely concurring approximate energy solution are given for the buckling of an infinitely long flat plate under combined shear and transverse direct stress with edges elastically restrained against rotation. It was found that an appreciable fraction of the critical stress in pure shear may be applied to the plate without any reduction in the transverse compressive stress necessary to produce buckling. An interaction formula in general use was shown to be decidedly conservative for the range in which it is supposed to apply.