How to Use IMDS Advanced Editing

Version: IMDS Release 10.0
When copying a Released MDS, you may not get a 100% copy because of the following:

- There may be confidential substances that cannot be copied and are removed.
- Deactivated basic substances are removed.
- Deactivated modules/MDSs are removed.
- MDSs that are forwarded are removed.

Additionally, if there was a 100% copy, you will have to leave the copy MDS to go and release the Material MDSs one by one.
Enhanced Editing > Copying a Released MDS II

Right-click to get the copy options e.g. in any of the Search screens. Choose either Copy > Copy (real copy, the new MDS belongs to a different part number) or Copy > new Version (minor changes to the part, no new part number).

When you make a copy/copy, you get a notification that there are placeholders created.
Enhanced Editing > Copying a Released MDS > Releasing Materials 1

IMDS will make a copy of the top node and the complete tree structure. Although components and semi-components can exist only in the tree, materials must exist on their own and the copy created Modules not MDSs. All material nodes to be replaced are shown as “material name (Placeholder)”. If you run a check at this point, you will have an error that “the referenced module is not internally released”.

If you highlight the error and double-click, the system will take you to the problem. Internally Release.
Enhanced Editing > Copying a Released MDS > Releasing Materials 2

At this point, the system will take you to the material module (copying creates modules of material sub nodes).

Clicking on the Pencil icon will put the material module into Edit mode so you can make any corrections to the tree.

Note: The Modify will appear on any non-released material, not just on copies. Thus releasing sub-nodes that you’ve forgotten to release is made much easier.
Enhanced Editing > Copying a Released MDS > Releasing Materials 3

You may have to update the substances (e.g. if there is a confidential or removed substance you will have to add a correct substance). When the tree is correct, all you have to do is to go to the Recipient tab and click on Release Internal to release the material.

The system will run it’s check and you can click on Release Internal in the following screen after the check to release the module.
Enhanced Editing > Copying a Released MDS > Releasing Materials 4

After making changes and releasing, you can return to the previous MDS/Module by clicking on the respective button.

Return to Top Node that references this material
You now can make the changes and release the top node.
Enhanced Editing > Copying a Released MDS > Other Warnings

Like shown in this example, you may get warning messages about deleted referenced MDSs, modules, or substances. You should make note of these because you will have to replace them to complete the tree structure.
Deleted/Hidden Substance Substitution Suggestion

In some cases, IMDS can suggest replacements for a deleted/hidden substance. In this example, we need to replace **Basalt, fibre**.

When the Replace button is activated, a list of possible replacements appears. It is up to the user to determine which replacement best fits their product. After making the selection, click on Apply.

It is not always possible to suggest a replacement (example: ions).
Enhanced Editing > Copying a Released MDS with Deleted Node

In this particular example, I am making a copy of an MDS with a deleted MDS – and I am warned when the copy/new version is made.

When I go to the Placeholder, the existing information is presented, but I will not be able to release with the placeholder in the tree structure.
Enhanced Editing > Replacing the Deleted Node

When I go to the Placeholder, IMDS tells me that I can use the Replace function (discussed later).

Another option would be to create a replacement in the tree by clicking on and filling in the appropriate information then deleting this node.
Enhanced Editing > Replace

Bulk replacements such as “replace all occurrences of arsenic in all own MDS by copper” will not be available - the user must perform one-to-one replacements. However, the advanced editing functions do make it somewhat easier.

The following is a list of requirements to be able to use the replace function:

Replace function can only be used in a tree structure of an MDS/module that can be edited or modified – version number is NOT a whole number and it is not in “handshake” mode.

The node to be replaced must have no other level of referenced nodes between it and the top of the tree.

The replaced and the replacing node do not have to be released. Released nodes can be replaced by a non-released node and vice versa.

Replacements must be of same node type - component by component, semi-component by semi-component, material by material, substance by substance)
Enhanced Editing > Replace Function > What Can be Replaced

We can use the Replace Function

Version not released

Have to go to Recipient data to check if in “handshake” but in this case, not

Can use Replace on 3 nodes:

- Example component
- Component with deleted material
- component created in the tree

The materials below Example component and Component with deleted material are children of a referenced node and the component created in the tree is not a referenced node.

Now, let’s replace the Component with deleted material.
Enhanced Editing > Replace Function > Replace

Clicking Replace brings up the search window where you can search out what to replace it with.
Enhanced Editing > Replace Function > Replace With

In this case, I am searching on Accepted MDSs, I am going to use test component

Select and click Apply

and the Component with deleted material is no longer in the tree but test component is.

Next you need to Save the changes.
Copy and Paste - Clipboard

The Copy/Paste function can be found in the menu under “Clipboard”, where the ID and name of a node can be stored for later use in the application. For this purpose a new area will open up on the right side of the screen.

You can only copy nodes/tree structures that you can find in a search (not created in the tree directly). You cannot partially copy a tree.

You can only paste nodes/tree structures into datasheets that can be edited (version number is not a whole number and not in “handshake” mode).
Enhanced Editing > Clipboard > Add Tree Node

Should you want to use the same MDS/MDS Request or substance in more than one datasheet, you can use the Clipboard function.

In this case, we’re going to use test component again – to add it to the Clipboard, drag it from the Search and drop it in the Clipboard area.
Enhanced Editing > Clipboard > Use

I’m going to Drag & Drop this onto the Assembly testing replace - and it can only be a child because the other components are referenced.

It is automatically added to the tree.
Places Where Clipboard can be Used

There are several places where the Clipboard function may be useful to “store” MDSs, MDS Requests or Substances:

Ingredients tree
Search results
Inbox > search results
Outbox > search results
Follow-up
Analysis > Certificate of Expenditure > results

In the following cases, the “stored” MDSs/MDS Requests/Substances can be inserted:

Add to the structure tree (a specific datasheet)
Request function – responding to a request
Analysis > Detailed Analysis of a specific MDS
Analysis > Certificate of Expenditure > analyzing for a module of basic substance
Analysis > Certificate of Expenditure > Non-standard selection – adding to the list
Drag & Drop Rules

For inserting a Module/MDS into a Module/MDS tree the same rules apply as for referencing a Module/MDS:

Module/MDS to be pasted may be own, published or accepted.

Forwarded MDSs (copy/forwarded of an accepted MDS) may not be used.

Under components components, semi-components and materials may be pasted.

Under semi-components only semi-components and materials may be pasted.

Under materials only materials and basic substances may be pasted.
Multiple Replace with Clipboard – Step 1

Bulk replacements are not available, but with the Clipboard function it is made easier. For example, we’re going to have to replace that Example component; first you’re going to need all the places you’ve used Example component.

Use Analysis > Where-used > MDS and find Example component (or your MDS of interest).

Use Rule based selection and click Analyze.

You get a result list of MDSs in which Example component is used.
Multiple Replace with Clipboard – Step 2

At this point, I would Export the results so I can keep track of what I’ve done. The file is exported to a .csv file – suitable for viewing in MS Excel.

Note that for those items that have a whole number version, you will have to copy/new version. For those in edit mode, you may be able to make the change here. “May” because this is a list where the MDS/Module appears and may not be directly attached to the top node.

Export the results.
Multiple Edit Replace vs. Single Replace

In the first MDS below you will have to do a 2 step replace because the Example component is a child of a referenced MDS. You will first have to make the change in the test assembly and then replace the test assembly node in the Top Component.

In the 2nd view, the Example component is attached directly to the top node so there will be only one replacement require. For the sake of brevity, we’re going to work with the 2nd MDS.
Multiple Replace with Clipboard – Step 3

Since this was a Released MDS (whole number version) the first thing you have to do is copy/new version of the top node MDS.

Next use the Replace button (as discussed earlier) and find the MDS you want to replace it with (in this case test component)
Multiple Replace with Clipboard – Step 4

Now that test component is in the tree structure, you can drag & drop it to the Clipboard. Then save your MDS/Module and finish whatever you need to do (internally release, send/propose to customer, publish).

Then use Search/Result to go back to your list and select another MDS/Module.

If you need to, copy/new version of the next MDS/Module.

Reminder: if the MDS is in “handshake” (meaning the version number is not a whole number and you have sent to a customer and they haven’t accepted yet) you will either have to copy/copy or delete the recipient from the existing one and copy/new version.
Multiple Replace with Clipboard – Step 5

In the Ingredients screen of the next MDS, drag & drop the test component to the tree structure. After test component is shown in the tree structure, you can delete Example component.

Once the replacement is made, complete the MDS.

Do so for all MDSs from the Analysis result.

For a nested replacement, you will need to repeat the process multiple times.

You cannot make changes in a MDS/Module that your company did not create.