



# P4 Panel Auto-Migration Tool COMPAS

January 2022

- Starting 1/28/2022, P4 Powerpanels will no longer be supported in COMPAS
- Quotes with Existing P4 lines will go “red” or into conflict.
- Additionally, quotes with P4’s can no longer be converted to Order.
- Users will be required to change their P4 to either a P3 or P5 panel type
- To aid in this change, an auto-migration tool has been developed. Steps are outlined in the following slides.


1

When you first open a quotation containing a P4, a message will display at the top indicating line(s) require migration

2

To start the auto-migration tool, click on "Select product(s) to Migrate"

3

Additionally, hovering over the status icon  will display a message indicating "P4 Panel type is no longer supported"

Quote Pricing Shipping Review & Submit											
<div> <div> <div>One</div> <div>13 products</div> </div> <div> <div>One or more product(s) require price revalidation - <a href="#">click here to revalidate</a></div> <div>13 product(s) need to be migrated - <a href="#">Select product(s) to Migrate</a></div> </div> </div>											
<div> <div>Check Availability</div> <div>Move Line Items</div> <div>Speed</div> <div>Assign Report Group</div> <div>Favorites</div> <div>Quick Add</div> <div>Slscan</div> </div> <div>Show Child Lines (72)</div>											
Line#	Product ID	Description	Designation	Qty	Unit Price	Total Price	Status	Report Group	Tech Review	Type	Review Status
65000	TYZ:PANELBOARD	PANELBOARD P3	P3A0028	1	\$28,760.00	\$28,760.00					
66000	TYZ:PANELBOARD	PANELBOARD P3	P3A0030	1	\$29,895.00	\$29,895.00					
67000	TYZ:PANELBOARD	PANELBOARD P4	P4A0001A	1	\$22,120.00	\$22,120.00					
68000	TYZ:PANELBOARD	PANELBOARD P4	P4A0002B	1	\$27,650.00	\$27,650.00					
69000	TYZ:PANELBOARD	PANELBOARD P4	P4A0012A	1	\$45,825.00	\$45,825.00					Not Required
70000	TYZ:PANELBOARD	PANELBOARD P4	P4A0018A	1	\$30,895.00	\$30,895.00					Not Required
71000	TYZ:PANELBOARD	PANELBOARD P4	P4A00027B	1	\$36,365.00	\$36,365.00					Not Required
72000	TYZ:PANELBOARD	PANELBOARD P4	P4A0070	1	\$86,528.00	\$86,528.00					Required
73000	TYZ:PANELBOARD	PANELBOARD P4	P4A0072	1	\$22,661.00	\$22,661.00					Not Required
74000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB001	1	\$20,635.00	\$20,635.00					Not Required
75000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB002	1	\$88,942.00	\$88,942.00					Required
76000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB007	1	\$155,210.00	\$155,210.00					Required

4

After clicking on "Select product(s) to Migrate" the following screen will open and to the tool will run.

5

When the tool is finished running, the status column will populate reflecting whether a P4 line is eligible for auto-migration or will require manual intervention.

**Product Migration**  
Select products you would like to migrate

<input type="checkbox"/>	#Line	Product ID	Description	Designation	Qty	Reason	Status
<input type="checkbox"/>	67000	TYZ:PANELBOARD	PANELBOARD P4	P4A0001A	1	<a href="#">P4 Panel type is no longer supported</a>	✓ Eligible For Migration
<input type="checkbox"/>	68000	TYZ:PANELBOARD	PANELBOARD P4	P4A0002B	1	<a href="#">P4 Panel type is no longer supported</a>	✓ Eligible For Migration
<input type="checkbox"/>	69000	TYZ:PANELBOARD	PANELBOARD P4	P4A0012A	1	<a href="#">P4 Panel type is no longer supported</a>	✓ Eligible For Migration
	70000	TYZ:PANELBOARD	PANELBOARD P4	P4A0018A	1	<a href="#">P4 Panel type is no longer supported</a>	✗ Require Manual Update
	71000	TYZ:PANELBOARD	PANELBOARD P4	P4A00027B	1	<a href="#">P4 Panel type is no longer supported</a>	✗ Require Manual Update
	72000	TYZ:PANELBOARD	PANELBOARD P4	P4A0070	1	<a href="#">P4 Panel type is no longer supported</a>	✗ Require Manual Update
<input type="checkbox"/>	73000	TYZ:PANELBOARD	PANELBOARD P4	P4A0072	1	<a href="#">P4 Panel type is no longer supported</a>	✓ Eligible For Migration
<input type="checkbox"/>	74000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB001	1	<a href="#">P4 Panel type is no longer supported</a>	✓ Eligible For Migration
	75000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB002	1	<a href="#">P4 Panel type is no longer supported</a>	✗ Require Manual Update
	76000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB007	1	<a href="#">P4 Panel type is no longer supported</a>	✗ Require Manual Update
	77000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB012	1	<a href="#">P4 Panel type is no longer supported</a>	✗ Require Manual Update
	78000	TYZ:PANELBOARD	PANELBOARD P4	P4BMB013	1	<a href="#">P4 Panel type is no longer supported</a>	✗ Require Manual Update
	79000	TYZ:PANELBOARD	PANELBOARD P4	P4A0018A	1	<a href="#">P4 Panel type is no longer supported</a>	✗ Require Manual Update

Cancel Migrate

PANELBOARD P4 P4A0018A Not Required SIEMENS View Status

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Auto-migration instructions will be available in Sandy FAQ; however, direct access is available by clicking on "P4 Panel type is no longer supported" link under the "Reason" field



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Once eligible line(s) have been identified for auto-migration, select the line(s)

**Product Migration**

Select products you would like to migrate

<input checked="" type="checkbox"/>	Line	Product ID	Description	Designation	Qty	Reason	Status
<input checked="" type="checkbox"/>	67000	TYZ:PANELBOARD	PANELBOARD P4	P4A0001A	1	P4 Panel type is no longer supported	✓ Eligible For Migration
<input checked="" type="checkbox"/>	68000	TYZ:PANELBOARD	PANELBOARD P4	P4A0002B	1	P4 Panel type is no longer supported	✓ Eligible For Migration
<input checked="" type="checkbox"/>	69000	TYZ:PANELBOARD	PANELBOARD P4	P4A0012A	1	P4 Panel type is no longer supported	✓ Eligible For Migration
<input type="checkbox"/>	70000	TYZ:PANELBOARD	PANELBOARD P4	P4A0018A	1	P4 Panel type is no longer supported	✗ Require Manual Update
<input type="checkbox"/>	71000	TYZ:PANELBOARD	PANELBOARD P4	P4A00027B	1	P4 Panel type is no longer supported	✗ Require Manual Update
<input type="checkbox"/>	72000	TYZ:PANELBOARD	PANELBOARD P4	P4A0070	1	P4 Panel type is no longer supported	✗ Require Manual Update
<input checked="" type="checkbox"/>	73000	TYZ:PANELBOARD	PANELBOARD P4	P4A0072	1	P4 Panel type is no longer supported	✓ Eligible For Migration
<input checked="" type="checkbox"/>	74000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB001	1	P4 Panel type is no longer supported	✓ Eligible For Migration
<input type="checkbox"/>	75000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB002	1	P4 Panel type is no longer supported	✗ Require Manual Update
<input type="checkbox"/>	76000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB007	1	P4 Panel type is no longer supported	✗ Require Manual Update
<input type="checkbox"/>	77000	TYZ:PANELBOARD	PANELBOARD P4	P4AMB012	1	P4 Panel type is no longer supported	✗ Require Manual Update
<input type="checkbox"/>	78000	TYZ:PANELBOARD	PANELBOARD P4	P4BMB013	1	P4 Panel type is no longer supported	✗ Require Manual Update
<input type="checkbox"/>	79000	TYZ:PANELBOARD	PANELBOARD P4	P4BMB013	1	P4 Panel type is no longer supported	✗ Require Manual Update

8

After line(s) have been selected for auto-migration, click on the "Migrate" button in the bottom right to submit.

Cancel Migrate

PANELBOARD P4 P4A0018A 1 \$30,895.00 \$30,895.00 SIEMENS View Status Subm

9

After P4 Lines have been successfully migrated, COMPAS will return to the main Quote Screen. Migrated lines will reflect the new panel type and price, in this case P5 as shown below.

<input type="checkbox"/>	↳ 67000	TYZ:PANELBOARD	PANELBOARD P5	P4A0001A	1	\$27,681.00	\$27,681.00		Not Required
<input type="checkbox"/>	↳ 68000	TYZ:PANELBOARD	PANELBOARD P5	P4A0002B	1	\$34,088.00	\$34,088.00		Not Required
<input type="checkbox"/>	↳ 69000	TYZ:PANELBOARD	PANELBOARD P5	P4A0012A	1	\$64,191.00	\$64,191.00		Not Required

10

The remaining P4 lines that were ineligible for auto-migration, will require manual intervention.

Steps for manual update are outlined in the next slides.

<input type="checkbox"/>	↳ 71000	TYZ:PANELBOARD	PANELBOARD P4	P4A00027B	1	\$36,365.00	\$36,365.00	⚠️	Not Required
<input type="checkbox"/>	↳ 72000	TYZ:PANELBOARD	PANELBOARD P4	P4A0070	1	\$86,528.00	\$86,528.00	⚠️	Required
<input type="checkbox"/>	↳ 73000	TYZ:PANELBOARD	PANELBOARD P5	P4A0072	1	\$28,514.00	\$28,514.00		Not Required

## COMPAS Auto-Migration Tool

- Auto-migration will follow least panel type rules. Meaning if the Panel is eligible to move down to a P3 panel type, the tool will automatically convert it.
- If there were any manual changes made to the P4 line, the line will not be eligible for auto-migration and the user will be required to manually update the configuration.
- Additionally, a P4 line may not be eligible for auto-migration if a feature is unavailable in the other panel types (e.g., unvented enclosure in 32"W P5, Legacy breaker no longer offered, etc.)

One or more product(s) require price revalidation - [click here to revalidate](#)

8 product(s) need to be migrated - [Select product\(s\) to Migrate](#)

Check Availability	Move Line Items	Speed	Assign Report Group	Favorites	Quick Add	Siscan				
<input type="checkbox"/>	Line#	Product ID	Description					Total Price	Status	Report Group
<input type="checkbox"/>	65000	TYZ:PANELBOARD	PANELBOARD P3					\$28,760.00		
<input type="checkbox"/>	66000	TYZ:PANELBOARD	PANELBOARD P3					\$29,895.00		
<input type="checkbox"/>	67000	TYZ:PANELBOARD	PANELBOARD P5		P4A0001A	1	\$27,681.00	\$27,681.00		
<input type="checkbox"/>	68000	TYZ:PANELBOARD	PANELBOARD P5		P4A0002B	1	\$34,088.00	\$34,088.00		
<input type="checkbox"/>	69000	TYZ:PANELBOARD	PANELBOARD P5		P4A0012A	1	\$64,191.00	\$64,191.00		
<input type="checkbox"/>	70000	TYZ:PANELBOARD	PANELBOARD P4		P4A0018A	1	\$30,895.00	\$30,895.00		
<input type="checkbox"/>	71000	TYZ:PANELBOARD	PANELBOARD P4		P4A00027B	1	\$36,365.00	\$36,365.00		

1

To manually update the configuration, the quote must be checked out. Start by clicking on the wrench icon

## Actions

Unassembled

New

Save

Save As

Save & New

Delete Layout

Save & Next

Save & Close

Close

2

Within the configuration, click on "Delete Layout" in the Actions toolbar on the right. Warning message will display. Go ahead and select "I Accept" to complete the action

## Delete Layout



If you Accept, all manual layout changes will be replaced with the default layout

I understand the impact of these changes. As a Sales Engineer, Channel Partner or Application Engineer I approve the removal of the custom layout changes.

Signed: na/mfx2 on 01/21/2022 10:47 AM

Cancel

I Accept



3

Click on the Panel Type tab which will take you directly to the "Panel Type" Field

General (Shift+A) Interior (Shift+B) Front And Enclosure (Shift+C) Nameplates (Shift+D) **Panel Type (Shift+E)**

Panel Type \*

P4

Dist Panel \*

90 inches

4

In the "Panel Type" field dropdown, select "Reset"

Panel Type \*

P4

--Reset--

--Clear value--

P4

Dist Panel \*

90 inches

5

Select the new panel type as desired (P3 or P5 depending on features)

P4 Panel Type will no longer be visible.

Panel Type \*

P4

--Reset--

--Clear value--

P3

P5

P1

P2

Dist Panel \*

90 inches

PANEL (CTRL+1)

SECTION/MAINS (CTRL+2)

LAYOUT / DESIGN (CTRL+3)

6

Proceed to "LAYOUT/DESIGN"

7

To Save changes, select "Save & Close"  
Configuration is now updated.

#### Actions

×

Unassembled

New

Save

Save As

Save & New

Delete Layout

Save & Next

Save & Close

Close