Prextra documentation

Prextra

ERP Solution Adapted to your Operations
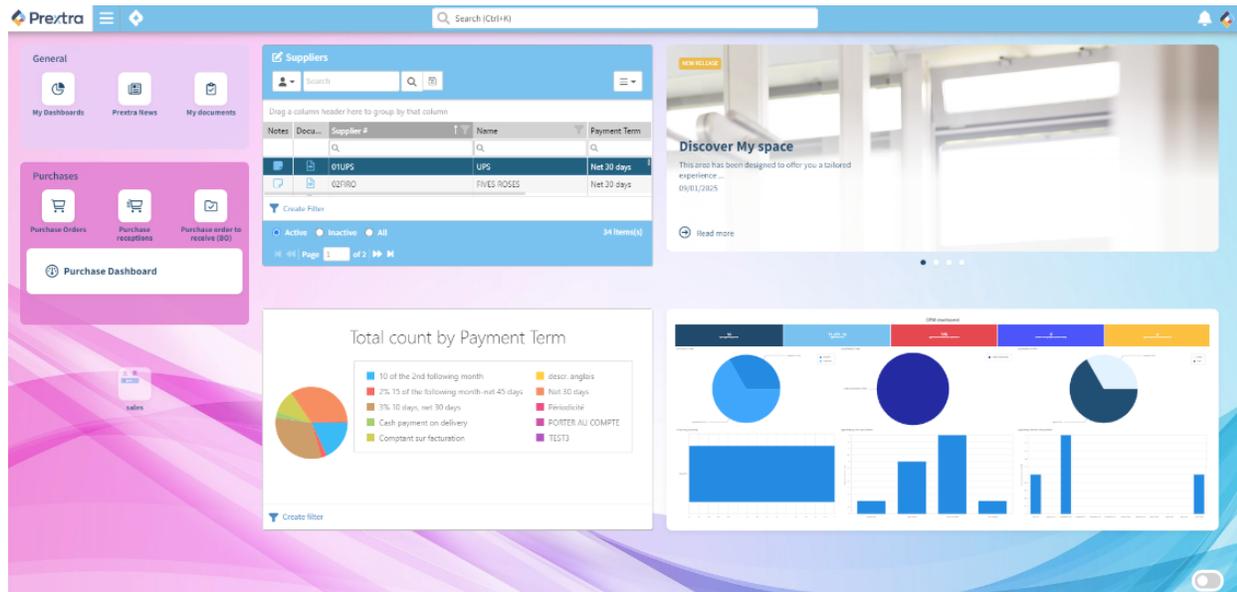
My Space

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My Space

This Space has been designed to provide you with a personalized experience by customizing the display to your preferences and offering features tailored to your needs.

When you open your session, the "My Space" section will be created with default settings.

The default settings of My Space create a group for each module that your user has access to for the default. Each group will contain a maximum of 8 shortcuts. You will then be able to add, remove, or modify shortcuts. Additionally, a "General" group will be created, containing the following shortcuts: Prextra News, My Documents, and My Dashboards.

Field :	Description :
	Click on this icon to return to the Prextra home screen at any time.
☰	Click this icon to display the "Prextra" menu in a reduced format. **NOTE:** Refer to the "General Help" documentation for more information.
	Displays the logo of the current company.

Field :	Description :
Search (Ctrl+K)	Click in this field to perform a global search in Prextra. **NOTE:** Refer to the "Search Bar" section to the documentation "General Help".
(notifications icon)	Click this icon to display notifications. **NOTE:** Refer to the "Notifications Icon" section to the documentation "General Help".
(avatar icon)	Display the image linked to your avatar. Click on your avatar to access your user menu. **NOTE:** Refer to the "User Menu" section to the documentation "General Help".
Documentation Prextra Projet	Displays the company name. You can also switch company here. **NOTE:** This field can also be displayed in the "User Menu". Refer to the "User Menu" section to the documentation "General Help".
(toggle button)	Click this button to switch from "Use" mode to "Editing" mode and customize the layout of your Space. **NOTE:** Refer to the "Configuration of "My Space" " section to the documentation "General Help".
(envelope icon)	This icon allows you to send and receive messages between users. A non-white envelope indicates that messages have been sent. Only users with access to the "Access to the "Notes" system between users" of the category "System Management Tab" will have access to this icon.

NOTE: If your user has created favorites in Prextra, the system will generate one group per module included in your favorites during the creation of My Space, provided there are at least 5 favorites. If there are fewer than 5 favorites, My Space will be created with the default settings.

Additionally, a guided tour of the main features will be displayed.

Configuration of "My Space"

To configure "My Space", click on the icon in the lower right corner.

This icon lets you switch between "Use" mode and "Edit" mode easily.

In "Use" mode, the button will be grayed out, allowing you to view information and use functionalities without making any changes.

In "Edit" mode, the button will turn blue, enabling you to modify, adjust, and customize elements as needed.
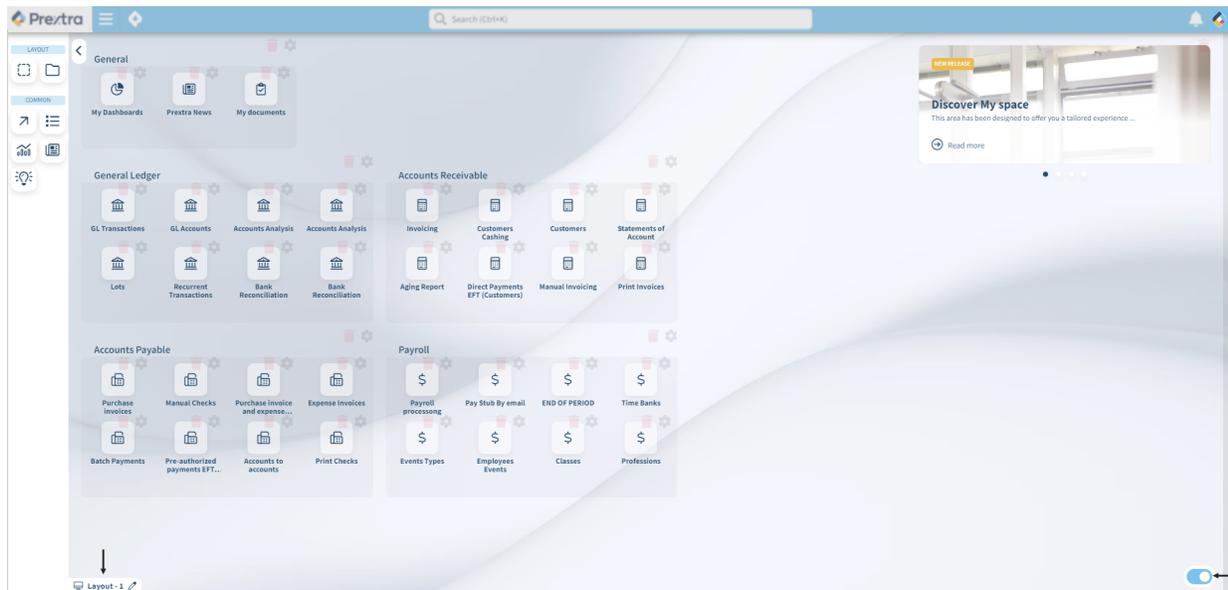
In the "Edit" mode, the left section contains all the widget buttons that allow you to build and customize your Space.

The central "My Space" sections where you can add the desired widgets and shortcuts to organize your workspace according to your needs.

Widgets:	Description:
🖥 Layout - 1 ✏	Click this button to name your layout. **NOTE:** For more information, refer to the "Layout - 1" section in this document.
Group: ⬚	Click and drag this widget into "My Space" to create a group of shortcuts and/or widgets. **NOTE:** For more details, refer to the "Group" section of this document.
Folder: 📁	Click and drag this widget into "My Space" to create a folder that groups several shortcuts in a compact display. **NOTE:** For more details, refer to the "Folder" section of this document.
Shortcut: ↗	Click and drag this widget into "My Space" to add a shortcut. **NOTE:** For more information, refer to the "Shortcuts" section of this document.

Widgets:	Description:
Navigation list: ☰	Click and drag this widget into "My Space" to add a navigation list. **NOTE:** You can display a maximum of 5 navigation lists in "My Space". For more details, refer to the "Navigation lists" section of this document.
Dashboard: 📊	Click and drag this widget into "My Space" to add a dashboard. **NOTE:** You can display a maximum of 5 dashboards in my Space. For more information, refer to the "Dashboards" section in this document.
News: 📰	Click and drag this widget into "My Space" to add a communication shortcut. **NOTE:** For more information, refer to the "Communication" section in this document

To add a widget or shortcut in "Edit" mode, select it and drag it to the desired location in the "My Space" section.

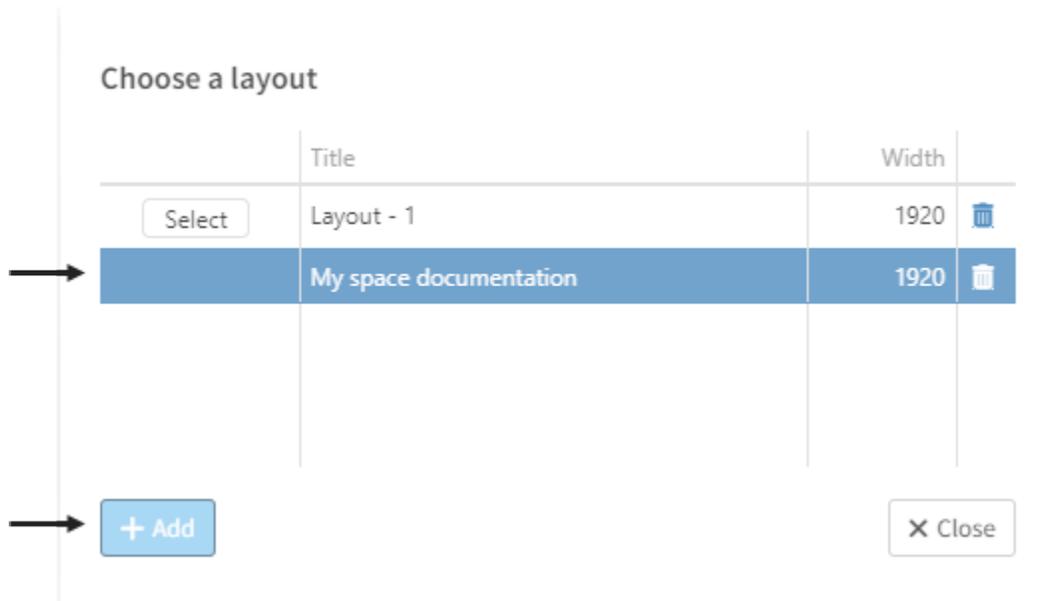You can configure each widget by clicking the gear icon.

No shortcut set
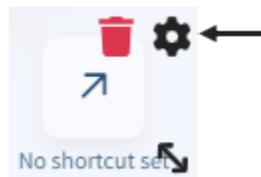
| Field:	Description:
🗑️	Click this button to remove the shortcut or widget from "My Space". **NOTE:** Deleting a "Group" or "Folder" widget that contains other widget and/or shortcut will delete all the items inside it.
⚙️	Click this button to adjust the settings for the widget or shortcut. **NOTE:** For more information on specific widgets and shortcuts, refer to the relevant sections in this document.
↘	Click this button and drag the widget or shortcut to resize it. **NOTE:** The "Folder" widget cannot be resized.

NOTE: It is possible to block certain users from adding, modifying, or deleting widgets in "My Space," allowing them only to modify the layout of "My Space" via the "Allow adding, modifying, and deleting widgets in My Space" access in the "System Management Tab" category of the user access.

1. Button "Layout"

Click the button « 🖥 **Layout - 1** 🖉 » at the bottom left of the screen to rename your layout.

Choose a layout

	Title	Width	
Select	Layout - 1	1920	🗑
	My space documentation	1920	🗑

+ Add   ✕ Close

Click on an existing layout to edit its title or click the "Add" button to create a new one. Enter a name for your layout, then click "Update" to rename it.

Modify layout's title

My space documentation

Update   ✕ Cancel
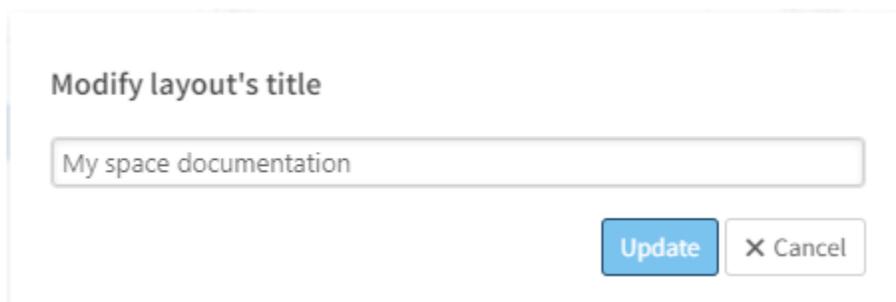
The title "Layout – 1" will be renamed to your layout's name at the bottom of the screen.

NOTE: You can save multiple layouts and select the desired one by clicking the "Select" button. The selected layout will be highlighted. While the widget will remain the same across all layouts, their locations may differ.

2. Widget "Group"

Click this button and drag it into "My Space" to create a group of shortcuts and/or widgets.

NOTE: A group widget cannot contain another group widget.

Once the group is added, click the gear icon to edit its settings.

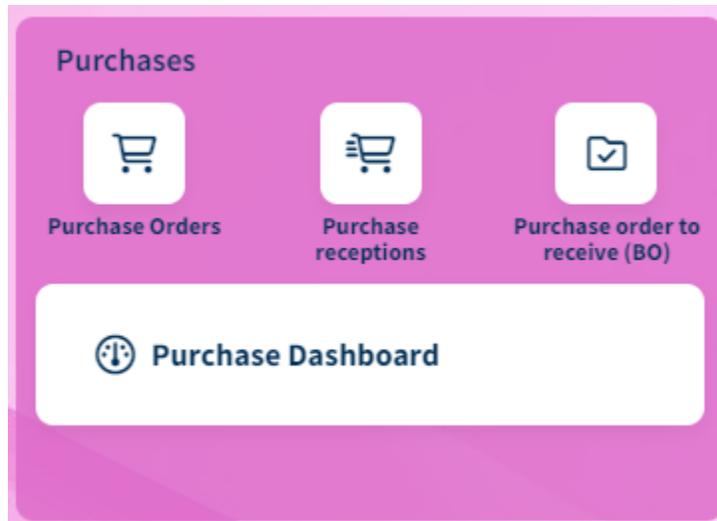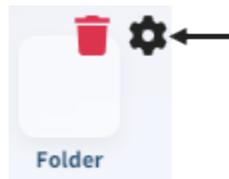| Field:	Description:
Title:	Enter a title for your folder.
Text color:	Select the title color for your folder.
Background color:	Select a background color for your folder.

When your group is created, you can drag shortcuts and/or widgets into it.

3. Widget "Folder"

Click on the "Folder" widget and drag it into "My Space" to create a folder that groups several shortcuts in a compact display.

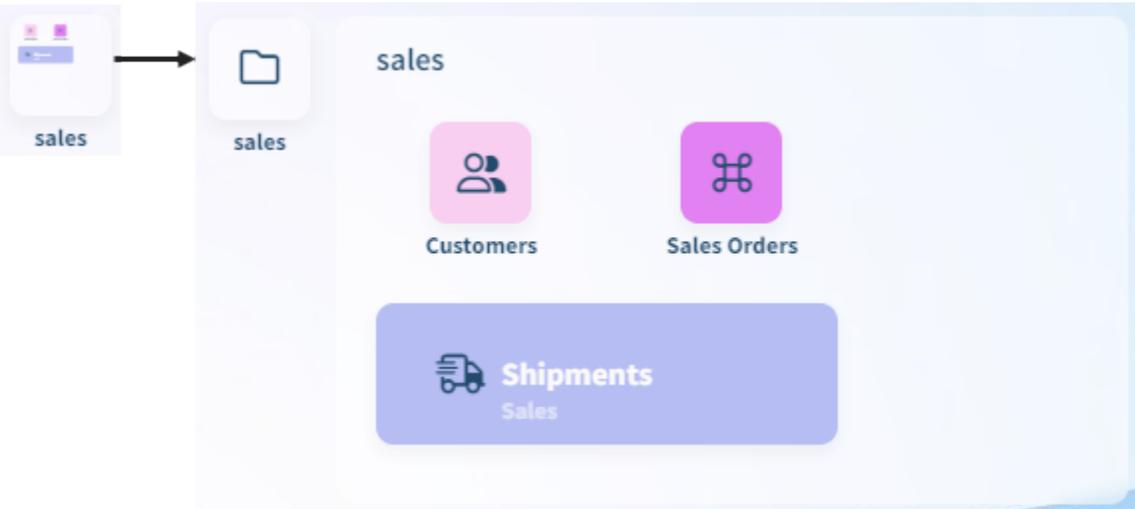Once the folder is added, click the gear icon to change its settings.

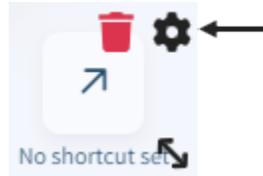| Field:	Description:
Title:	Enter a title for your folder.
Text color:	Select the title color for your folder.
Background color:	Select a background color for your folder.

Once your folder is created, select it to drag the desired shortcuts into it.

4. Widget "Shortcut"

Click on the "Shortcut" button and drag it into "My Space", a group or a folder to add a shortcut.

Once the shortcut is added, click the gear icon to configure it and make it functional.

↗ **Shortcut**

GENERAL

Type
- ◯ Menu
- ⦿ Navigation list
- ◯ Dashboard
- ◯ External link

Navigation list

[🔍]

Opening mode

[New window   ▾]

ICON

Icon

[🔍]

Style

[Medium   ▾]

Color

[⊠   ▾]

TEXT

Text

[   ]

Color

[■ #012f55   ▾]

BACKGROUND

Color

[□ #FFFFFF   ▾]

[✕ Close]

Field:	Description:
"General" section	This section allows you to configure your shortcut.

| Field:	Description:
Type:	Check the type to determine whether the shortcut should open a "Menu", "Navigation List", "Dashboard", or "External Link".
Navigation list:	Select the menu, navigation list, dashboard, or enter a URL based on the selected type.
Show module:	Check this box to display the module name under the menu name when the "Menu" type is selected.
Opening mode:	Select the shortcut"s opening mode: either in the current window, a new window, or a new tab. **NOTE:** If the shortcut opens in the current window, it will replace the "My Space" display when clicked.
"Icon" Section	**This section allows you to choose and configure your icon.**
Icon:	Select the desired icon for the shortcut display. Click the magnifying glass to search for the desired icon. **NOTE:** You can choose the style of the desired icon: "Medium", "Thin", or "Bold".
Style:	Select the icon line style: "Medium", "Thin", or "Bold".
Color:	Select the icon color.
"Text" Section	**This section allows you to configure your text.**
Text:	Enter the desired name. **NOTE:** If the field is empty, the name of the menu, navigation list, dashboard, or the URL address will be displayed by default.
Color:	Select the title color.
"Background" Section	**This section allows you to configure the background color of your shortcut.**
Color:	Select the background color of the shortcut.

Once your shortcut is created, you can move it into a folder or group as needed.

NOTE: The shortcut will be functional in "Usage" mode within "My Space".

5. Widget "Navigation List"

Click on the "Navigation List" widget and drag it into "My Space" to add it.
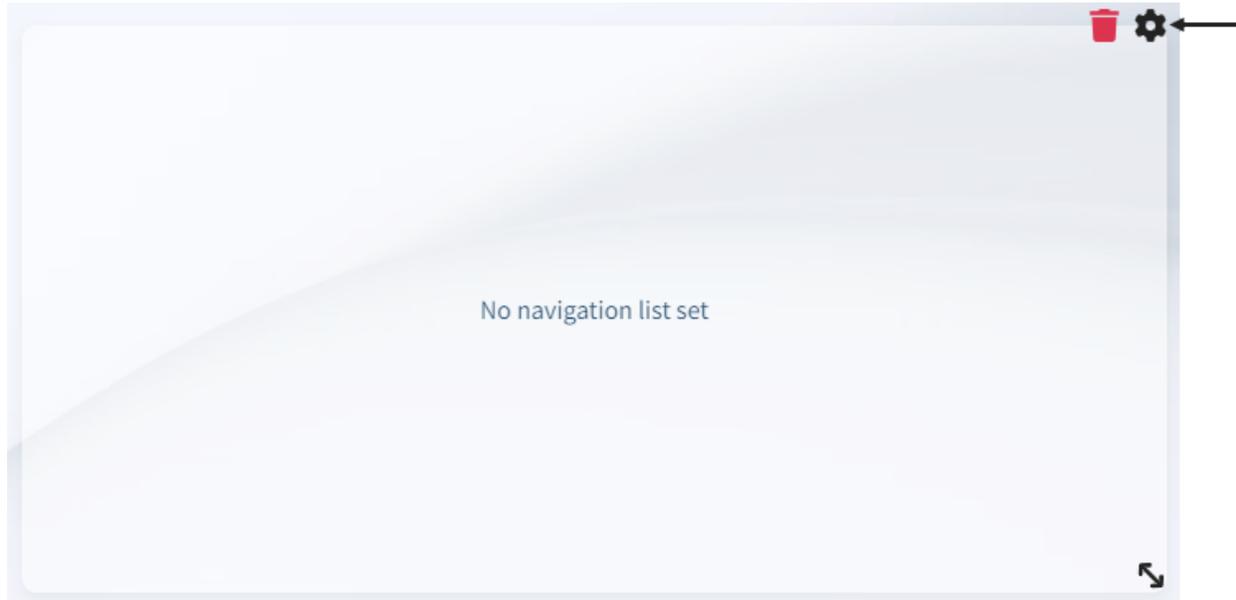
Once the widget is added, click on the gear icon to configure it and make it functional.

Navigation list

GENERAL

Navigation list

Suppliers 🔍

Show header

☑

Show footer

☑

Show "Active / Inactive" filter (if applicable)

☑

Refresh

☑

Refresh interval (min)

5

✕ Close

Field:	Description:
Navigation list:	Enter the name of the list or click on the magnifying glass icon to search for an add a navigation list.
Show header:	Uncheck this box to hide the header of the navigation list. **NOTE:** The header allows you to change views, perform a search, export to Excel, print, add, or delete information in the navigation list.
Show footer:	Uncheck this box to hide the footer of the navigation list. **NOTE:** The footer contains the page number and the "Active/Inactive" section of the navigation list.
Show "Active/inactive Filter (if applicable):	Uncheck this box to hide the "Active/Inactive" section at the bottom of the navigation list. **NOTE:** This box will appear only if the "Show Footer" box is checked.

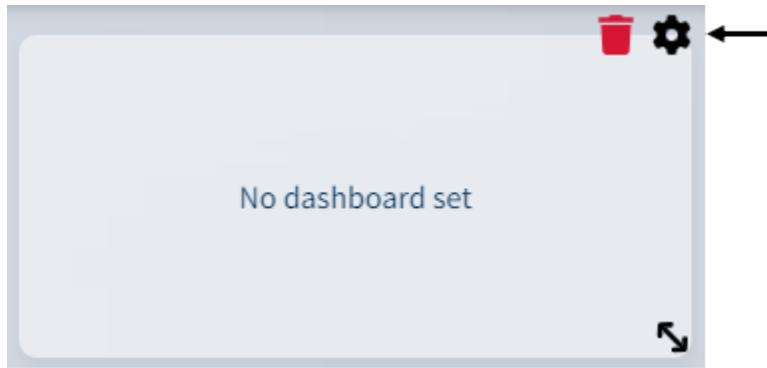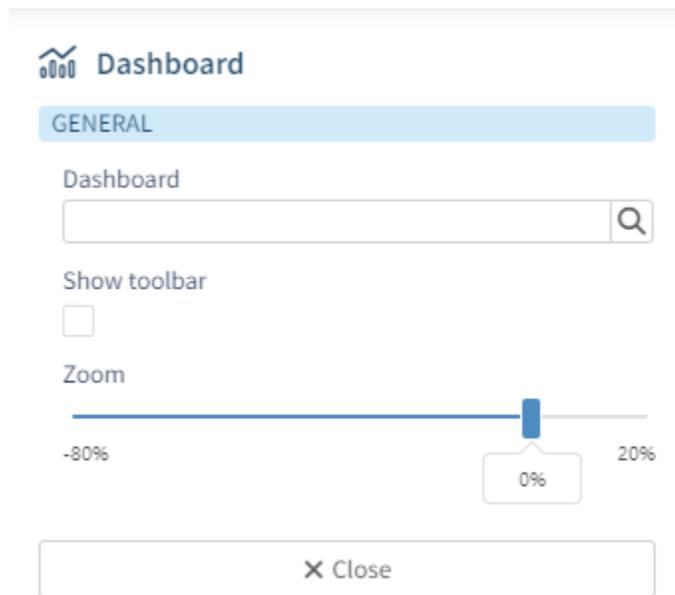| Field:	Description:
Refresh:	Check this box if you want the list to auto-refresh based on the interval set in the following field. **NOTE:** If the box is unchecked, you will need to manually refresh the screen to update the list.
Refresh interval (min):	Enter the number of minutes to set the refresh interval. **NOTE:** This field is displayed only if the "Refresh" checkbox is checked.

NOTE: In "My Space", you will have the option to switch to a previously created view. The ability to create a new view from "My Space" will depend on the width of the navigation list widget in "Usage" mode.

6. Widget "Dashboard"

Click on the "Dashboard" widget and drag it into "My Space" to add it.

Once the widget is added, click the gear icon to configure it and make it functional.

Field:	Description:
Dashboard:	Enter the name of the dashboard or click the magnifying glass icon to search for and select a dashboard. **NOTE:** Only the dashboards you have access to will appear in the list.
Show toolbar:	Check this box to display the dashboard toolbar at the top right. **NOTE:** The toolbar allows you to refresh the dashboard, reset filters, save changes, and change date settings.
Zoom:	Choose the zoom size to display the dashboard information. **NOTE:** The smaller the widget size, the lower the zoom level required to view the entire dashboard.

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NOTE: The dashboard refreshes in "My Space" according to the refresh rate set in your dashboard.

7. Widget "News"

Click on the "Communication" widget and drag it into "My Space" to add it.

You can then adjust the widget's size using the double-arrow icon.

This dynamic widget keeps you informed of the latest news, announcements, and important updates from Prextra. Briefly, you can view:

• New features and previews to stay informed about new functionalities and improvements.

• Server maintenance updates to stay informed about maintenance periods and better anticipate potential interruptions.

• Software updates to discover optimizations and new software versions.

• Various announcements to stay up to date with general information and helpful tips.
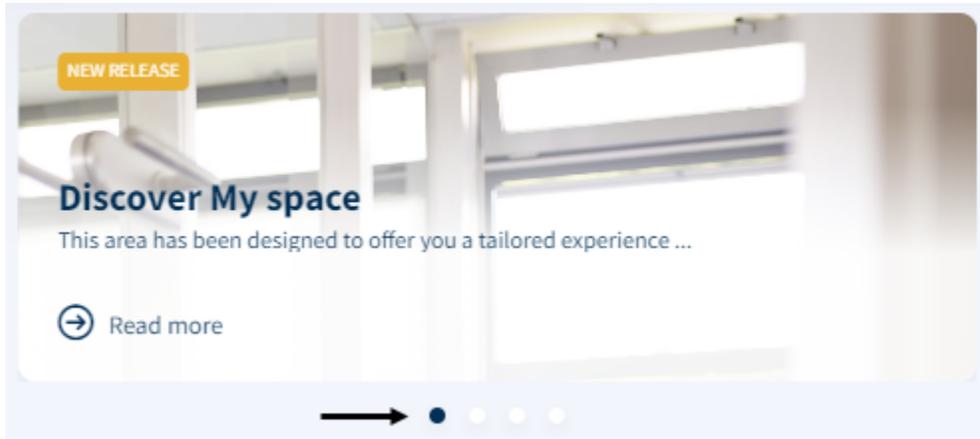
NOTE: The slide changes every 15 seconds. Use the radio buttons to navigate between different updates and stay informed about essential news.

NOTE: If you click "Read more" on a communication, you will be redirected to the partner portal in the "Communications" menu. In addition, you will have access to all available communications.