

Dashboard — Learning Path

July 28, 2026

Dashboard — Learning Path

Learning Paths > Dashboard

This learning path is for business users who need to access and use dashboards to review information in the application. After completing it, learners will be able to choose the appropriate dashboard experience, open the available dashboard screens, use them in day-to-day review scenarios, and establish a repeatable dashboard-checking routine.

Learning objectives

- By the end of this path you can identify when to use the Custom Dashboard versus the DevExtreme Dashboard.
- By the end of this path you can open the available dashboard screens from the Dashboard app.
- By the end of this path you can use a dashboard screen to support a daily information-review task.
- By the end of this path you can compare dashboard experiences for a given business-review scenario.
- By the end of this path you can create a consistent routine for reviewing dashboard information.

Prerequisites

- Access to the **Dashboard** app.
- Permission to open **Dashboard** and **DevExtreme Dashboard**.
- Basic familiarity with navigating applications and reviewing on-screen business information.

Module 1: Find the right dashboard experience

Goal: Learn the two dashboard entry points and choose an appropriate starting place for your review.

Lesson 1.1: Open the Custom Dashboard

When you need to begin a dashboard review using the Custom Dashboard experience, start by navigating to **Dashboard > Custom Dashboard**. Open **Dashboard** and confirm that you are in the dashboard experience intended for your review before you begin using its displayed information.

Practice task: Open **Dashboard** from the Dashboard app.

Lesson 1.2: Open the DevExtreme Dashboard

When your dashboard-review scenario calls for the DevExtreme experience, navigate to **Dashboard > DevExtreme Dashboard**. Open **DevExtreme Dashboard** and use this screen as the starting point for reviewing the information presented there.

Practice task: Open **DevExtreme Dashboard** from the Dashboard app.

Module 2: Use dashboards in daily review work

Goal: Use the available dashboard screens to begin and complete a regular information-review workflow.

Lesson 2.1: Start a daily review in the Custom Dashboard

When you are responsible for checking dashboard information at the start of a work period, open **Dashboard**. Review the information available on the screen and use it to orient yourself to the items or conditions that need your attention during the day.

Practice task: Open **Dashboard** and perform a daily review of the information displayed.

Lesson 2.2: Review information through the DevExtreme Dashboard

When you need to conduct the same type of business review using the DevExtreme dashboard experience, open **DevExtreme Dashboard**. Review the information shown on the screen and identify what you would follow up on outside the dashboard based on your normal business process.

Practice task: Open **DevExtreme Dashboard** and note one item of information you would review further.

Module 3: Select and standardize your dashboard workflow

Goal: Choose the dashboard experience that fits a review scenario and build a reliable review routine.

Lesson 3.1: Choose a dashboard for a review scenario

When preparing for a scheduled business review, decide which dashboard experience is appropriate for the audience or workflow. Access **Dashboard** when the Custom Dashboard is the agreed review location, or access **DevExtreme Dashboard** when the DevExtreme Dashboard is the agreed location. Use the selected screen consistently for that review session.

Practice task: Choose one dashboard screen for your next review and open it: **Dashboard** or **DevExtreme Dashboard**.

Lesson 3.2: Verify your review using the alternate dashboard experience

When a review requires you to confirm that you can access both available dashboard experiences, first open one dashboard and then open the other. Move between **Dashboard** and **DevExtreme Dashboard**, keeping the business purpose of the review the same while becoming comfortable with both entry points.

Practice task: Open **Dashboard**, then open **DevExtreme Dashboard**.

Final assessment

1. You are beginning a scheduled review and your team has specified that the Custom Dashboard is the review location. Which screen should you open?
2. A colleague asks you to use the DevExtreme dashboard experience for a business-information review. Where should you navigate?
3. You need to establish a daily routine for reviewing information in the Dashboard app. What is an appropriate first action?
4. During a review, you must confirm that you can access both dashboard experiences available in the app. Which two screens should you open?
5. Your team has not specified a dashboard experience for a new review scenario. What should you do before beginning the review?

Answers

1. **Open Dashboard.** Why: It is the Custom Dashboard screen under Dashboard > Custom Dashboard.
2. **Open DevExtreme Dashboard.** Why: It is the screen provided for the DevExtreme Dashboard experience.
3. **Open the dashboard screen selected for your routine and review its displayed information.** Why: A consistent review begins by accessing the agreed dashboard entry point.
4. **Open Dashboard and DevExtreme Dashboard.** Why: These are the two dashboard screens available in the app.
5. **Confirm which dashboard experience should be used, then open the corresponding screen.** Why: Selecting the appropriate dashboard entry point ensures the review follows the intended workflow.