

Dashboard — Learning Path

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This learning path is for business users who need to view and work with dashboard information in the Dashboard app. You will learn to recognize the available dashboard experiences, use the appropriate dashboard for routine monitoring, and inspect a dashboard record that contains data.

Learning objectives

- By the end of this path you can distinguish between the available dashboard screens.
- By the end of this path you can open the Custom Dashboard for dashboard-focused work.
- By the end of this path you can use the DevExtreme Dashboard to review dashboard information.
- By the end of this path you can inspect a Dashboard record that contains data.
- By the end of this path you can choose the appropriate screen for a given dashboard scenario.

Prerequisites

- Access to the Dashboard app.
- Permission to open the **Dashboard**, [DevExtreme Dashboard](#), and [Dashboard](#) screens.
- Familiarity with signing in to and navigating your business application.

Module 1: Get oriented to the dashboard experience

Goal: Identify the dashboard screens available in the app and select the right starting point for your task.

Lesson 1.1: Recognize the available dashboard workspaces

When you need to begin dashboard work, first identify whether you need the standard Custom Dashboard experience or the DevExtreme Dashboard experience. Open **Dashboard** to access the Custom Dashboard, and open [DevExtreme Dashboard](#) when your task calls for the DevExtreme Dashboard.

Practice: Open both **Dashboard** and [DevExtreme Dashboard](#), then note which dashboard experience each screen provides.

Lesson 1.2: Start in the Custom Dashboard

When your work is centered on the Custom Dashboard, begin from the **Dashboard** screen. Confirm that you are working in the Custom Dashboard before reviewing the information presented there.

Practice: Open **Dashboard** and verify that it is the Custom Dashboard screen.

Module 2: Perform daily dashboard review

Goal: Use the dashboard screens as starting points for reviewing the information relevant to your workday.

Lesson 2.1: Review information in the DevExtreme Dashboard

When you are asked to review information through the DevExtreme dashboard experience, open [DevExtreme Dashboard](#). Use the screen as your workspace for reviewing the dashboard information available to you.

Practice: Open [DevExtreme Dashboard](#) and review the information currently displayed.

Lesson 2.2: Choose the dashboard experience for a review request

When a colleague requests a dashboard review, use the name of the requested experience to choose the correct screen: use **Dashboard** for the Custom Dashboard and [DevExtreme Dashboard](#) for the DevExtreme Dashboard. This prevents you from reviewing information in the wrong dashboard workspace.

Practice: For a request to review the “DevExtreme Dashboard,” open [DevExtreme Dashboard](#).

Module 3: Inspect dashboard record data

Goal: Move from dashboard viewing to examining a dashboard record that contains data.

Lesson 3.1: Open a dashboard record with data

When you need to inspect a dashboard record rather than only work from a dashboard workspace, open [Dashboard](#). This screen provides a dashboard record in a state where data is present for review.

Practice: Open [Dashboard](#) and confirm that you are viewing the record-with-data screen.

Lesson 3.2: Use the record screen to support dashboard work

When a dashboard-related task requires you to examine the available record data, use [Dashboard](#). After inspecting the record, return to the appropriate dashboard experience—**Dashboard** or [DevExtreme Dashboard](#)—for the requested dashboard review.

Practice: Open [Dashboard](#), then open **Dashboard** to continue dashboard work.

Final assessment

1. You are asked to begin work in the Custom Dashboard. Which screen should you open?
2. A colleague specifically asks you to review information in the DevExtreme Dashboard. Which screen is the correct workspace?
3. You need to inspect a dashboard record in a state where data is available. Which screen should you use?
4. You opened the DevExtreme Dashboard, but the task says to work in the Custom Dashboard. What should you do next?
5. You have reviewed a dashboard record with data and now need to continue a request for DevExtreme Dashboard review. Which screen should you open?

Answers

1. **Dashboard** — its screen description identifies it as the Custom Dashboard.
2. [DevExtreme Dashboard](#) — this is the screen specifically identified as the DevExtreme Dashboard.

3. **Dashboard** — it is the available dashboard record screen that includes data.
4. ****Open **Dashboard.** — the task requires the Custom Dashboard rather than the DevExtreme Dashboard.
5. **DevExtreme Dashboard** — after record inspection, this is the correct workspace for a DevExtreme Dashboard review.