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COURSE BROCHURE

Advanced Interactive Dashboard Design and Report Development Training Course

24 May – 4 June 2027
New York

Advanced Interactive Dashboard Design and Report Development Training Course

Ref: 2637_100326 **Date:** 24 May – 4 June 2027 **Location:** New York **Fees:** 17000 GBP

Interactive Dashboard Design and Report Development is a 2-week advanced training course for business intelligence analysts and report developers who build decision screens, and it produces a tested dashboard release pack. Leaders now expect self-service screens that answer follow-up questions in seconds, so layout, filtering logic and load speed shape how quickly a business acts. The course is delivered by Jupiter Prime Training.

Why Interactive Dashboard Design Matters Now

Three pressures shape interactive dashboard design today. Executives want one screen per decision rather than sprawling report packs, report consumers on tablets and phones expect touch-friendly navigation, and accessibility duties mean every chart must work for colour-blind and keyboard-only readers. An organisation that handles this well gets faster sign-offs and fewer ad hoc data requests; one that handles it badly sees cluttered pages, slow filters and conflicting figures that erode trust. The course rests on the international web content accessibility guidelines and on a phased analytics delivery cycle running from business question to release and monitoring.

Who Gains Most from Interactive Dashboard Design

- Analysts responsible for turning stakeholder questions into page wireframes and interaction flows
- Developers who own calculated measures, semantic models and query performance behind each page
- Specialists accountable for publishing, workspace permissions and release versioning of shared reports
- Leads who set layout templates, colour themes and naming conventions across a reporting estate
- Practitioners who support finance, operations or sales users with self-service exploration screens

A central reporting centre of excellence gains most when its designers, model builders and release owners attend together and agree one shared design system.

Interactive Dashboard Design Capabilities

Participants leave able to move a dashboard from rough wireframe to tuned, accessible release without losing sight of the decision it serves.

- Design page wireframes that place the headline indicator, context and detail in a deliberate reading order — executive sponsors
- Build drill-through, bookmark and cross-filter paths that let users answer follow-up questions — operational managers
- Specify calculated measures with time intelligence and context transitions that return trusted figures — finance controllers
- Test page load and query timings, then remove the bottlenecks found — platform owners
- Apply contrast, alternative text and keyboard focus order to every visual — accessibility leads
- Communicate release notes, certification status and usage metrics for each report — data owners

Key Interactive Dashboard Design Terms

- Visual encoding — the choice of position, length, colour or shape used to represent a value on screen.
- Drill-through — a navigation path that opens a detail page filtered to the item a user selected.
- Semantic model — the curated layer of tables, relationships and measures that every report page queries.
- Context transition — the shift that turns a row being evaluated into a filter when a measure is calculated.
- Bookmark — a saved page state capturing filters, selections and visible objects for guided navigation.
- Certified dataset — a model formally endorsed by its owner as the approved source for shared reporting.

Interactive Dashboard Design Day by Day

Day 1: Decision Screens and Their Audiences

- Decision Inventory Interviews — Which Choices Each Dashboard Must Support
- Audience Personas by Seniority — Depth of Detail per Reader Group
- Key Question Hierarchy — Ordering Headline, Context and Detail Views
- Dashboard Versus Paginated Report Choice — Format Matched to Use Case
- Requirement Sign-Off Sheet — Agreeing Scope Before Any Build Starts

Day 2: Visual Encoding and Chart Selection

- Perceptual Ranking of Encodings — Position, Length or Colour for Accuracy
- Comparison, Trend and Composition Charts — Matching Visual to Question Type
- Colour Palette Rules — Sequential, Diverging and Categorical Use
- Indicator Cards With Targets — Signalling Variance at a Glance
- Small Multiples and Sparklines — Showing Many Series Without Clutter

Day 3: Layout Grids and Page Composition

- Twelve-Column Grid and Spacing Tokens — Consistent Alignment Across Pages
- Z-Pattern and F-Pattern Reading Paths — Placing the Headline Figure
- Responsive Phone Layouts — Reflowing Visuals for Small Screens
- Theme Files and Templates — Enforcing Brand Fonts and Colours
- Wireframe Prototyping on Paper — Validating Layout With Users Early

Day 4: Semantic Models for Reporting

- Star Schema Fact and Dimension Tables — Model Shape Behind Fast Pages
- Relationship Cardinality and Filter Direction — Avoiding Ambiguous Results
- Date Table Design — Enabling Reliable Period Comparisons
- Reusable Time Calculation Sets — Reusing Time Logic Across Many Measures
- Model Documentation Sheet — Recording Owners, Sources and Refresh Timing

Day 5: Measures and Calculation Logic

- Row Context Versus Filter Context — Predicting What a Measure Returns
- Time Intelligence Measures — Year-to-Date, Rolling and Prior-Period Views
- Dynamic Ranking and Top-N Logic — Focusing Attention on Leaders
- Variables in Measures — Readable Code and Fewer Repeated Calculations
- Measure Test Matrix — Reconciling Results Against Source Totals

Day 6: Interaction Design and Navigation

- Cross-Filter and Cross-Highlight Settings — Controlling How Visuals Respond
- Drill-Through Detail Pages — Moving From Summary to Transaction Level
- Bookmarks and Selection Panes — Guided Tours for Executive Briefings
- Measure Switch Parameters and Synced Slicers — Letting Users Swap Measures Safely
- Tooltip Pages — Adding Context Without Leaving the Main View

Day 7: Custom Visuals and Narrative Sequencing

- Custom Visual Vetting Checklist — Security, Support and Licence Review
- Annotation and Callout Layers — Explaining Spikes Directly on the Chart
- Guided Page Sequence — Ordering Screens From Situation to Recommendation
- Conditional Formatting Rules — Drawing the Eye to Exceptions
- Executive Briefing Mode — Presenting Live Pages in Leadership Meetings

Day 8: Performance Tuning and Load Speed

- Query Timing Traces — Locating Slow Visuals and Queries
- Imported, Live and Hybrid Storage Modes — Trading Freshness Against Speed
- Aggregation Tables — Answering Summary Queries Without Full Scans
- Visual Count Budgets per Page — Limiting Queries Fired on Load
- Incremental Refresh Policies — Shortening Data Load Windows

Day 9: Accessibility, Security and Report Release

- Contrast Ratios and Colour-Blind Safe Palettes — Readable Charts for All Users
- Alternative Text and Tab Order — Screen Reader and Keyboard Access
- Row-Level Security Roles — Showing Each User Only Permitted Records
- Development, Test and Production Workspaces — Controlled Promotion of Changes
- Usage Metrics and Endorsement Labels — Retiring Unused Reports

Day 10: Practising the Dashboard Release Pack

- Requirement Sheet to Wireframe Walkthrough — Applying Audience and Layout Methods
- Measure Reconciliation Run — Applying Calculation Tests to a Live Model
- Peer Accessibility and Speed Audit — Applying Tuning and Access Checks
- Stakeholder Demonstration Rehearsal — Applying Navigation and Briefing Techniques
- Dashboard Release Pack Completion — Wireframes, Model Notes, Test Logs and Release Plan

Applying Interactive Dashboard Design After the Course

- Lead a performance trace on the slowest shared dashboard and publish a tuning log of the fixes applied to its measures and visuals.
- Run a wireframe review with one executive sponsor and rebuild a crowded page around a single headline indicator and drill-through path.

Interactive Dashboard Design Questions FAQ

What is interactive dashboard design and report development, and why does it matter now?

It is the discipline of building screens that let decision makers filter, drill and compare figures themselves. It matters now because leaders expect instant answers on any device, and slow or cluttered pages push them back to spreadsheets and email requests.

Which roles gain most from interactive dashboard design and report development?

Report developers, business intelligence analysts and model builders gain most. You benefit if you turn business questions into pages, write calculated measures, or own the publishing and permissions of shared reports used across several departments.

How does interactive dashboard design differ from a course on statistical charting?

It focuses on building and releasing working report products rather than on statistical graphics theory. You spend the days on wireframes, semantic models, measures, navigation paths, load speed, access control and release steps instead of chart grammar alone.

What does a participant bring back from interactive dashboard design and report development?

You bring back a tested release pack for one real dashboard. It holds the requirement sheet, wireframes, model notes, measure test results, accessibility and speed audit findings, and a promotion plan your colleagues can reuse on the next report.

Interactive Dashboard Design: The Way Forward

The dashboard release pack first informs whether a draft report is ready for promotion to production. Report owners, sponsors and platform administrators use it to agree scope, check measures and approve release. After its first use, revisit the usage metrics and load timings, because real viewing habits often reveal pages to merge, visuals to drop and drill paths that deserve a shorter route.