

Tableau Visualization Style Guide

Adapted in part from [UW-Madison Brand & Visual Identity Guidelines](#)

For more information: <https://brand.wisc.edu/>

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1. Typography

Fonts should be taken from the UW-Madison [fonts for print and web](#). Since visualizations may be presented in both print and online formats, all fonts should be browser-agnostic and consistent within a visualization.

Two UW-Madison-associated fonts – Verlag and Vitesse – are not installed on Windows computers by default. Downloading these fonts costs an exorbitant per-desktop fee. Therefore, these are not appropriate to use on Tableau visualizations; they probably will not appear for the user. Note that Tableau displays its own default font whenever a custom font cannot be found.

Appropriate fonts and their uses are below. A suggested typographical hierarchy is also included, although it may need to be adjusted for a particular visualization’s needs.

Approved Fonts

Hierarchy	Font(s)	Usage
<h1>	Gill Sans MT Arial Georgia	Header. Appropriate for dashboard titles, chart titles, etc.
<h2>	Gill Sans MT Arial Georgia	Subhead. Chart titles, dashboard sections
<h3>	Gill Sans MT Arial Georgia	Smaller titles, primary figures, etc.
Body Copy	Times New Roman Georgia Garamond	For explainer text contained within a visualization.
Annotations	Times New Roman Georgia Garamond	For sources or small text appearing within a chart.
Controls	Times New Roman Georgia Garamond	Filter controls, axis labels, uniform data labels, most things Tableau auto-populates

General Rules:

- A step between hierarchies should correlate to, at minimum, a 2pt size difference. A step may be the same size if the two texts are differently bolded.
- Except for print, do not use true black for text.
- Do not use colors other than black and grey for text, except in rare visual accents (pull quotes, etc).

General Rules (Cont'd):

- In special cases not mentioned in this style guide, defer to the [UW-Madison Brand & Visual Identity](#) guidelines.
- The minimum legible font size for Tableau visualizations is 9pt. Text should be no larger than 48pt.
- No more than two font families should be used on one visualization/dashboard.
- Italicized text may be used for notes and references within a visualization, but should not appear any higher than the bottom of the visual hierarchy.

Example Typological Hierarchy: UW-Madison Debt Snapshot

View this dashboard on Tableau Public. This dashboard is simple, so I did not need as many stratifications; I omitted H3 from the hierarchy. In this case, fewer layers of hierarchy simplified the message of the dashboard.

Although this dashboard contains annotations, I used body copy style on them, as the annotations comprised almost 50 percent of the text on the screen and were a major component of the story. I wanted them to be higher on the visual hierarchy than annotations usually are. In this case, those annotations were used to explain how to read the chart.

Hierarchy	Font	Size	Style	Use
<h1>	Georgia	15 pt	Bold	Dashboard Title
<h2>	Georgia	12 pt	Regular	Auxiliary Chart Titles
<h3>				N/A
Body Copy	Georgia	11 pt	Regular	Body Copy explaining dashboard
Annotations				N/A
Controls	Georgia	9 pt	Regular (lighter color)	Filter Control, axis labels, data source information

2. Colors

Colors, when possible, should be taken from the [UW-Madison Brand & Visual Identity Guidelines](#). These colors are appropriate for text, backgrounds, and accent colors. However, when color is used to represent a variable, a colorblind-safe and web-safe custom color palette should be used. Consider using a tool such as [ColorBrewer](#) in such cases. Pick a sequential, diverging, or categorical color scheme according to the type of data represented.



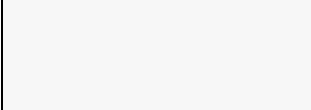
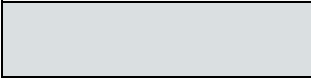

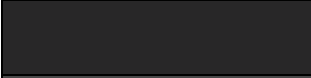
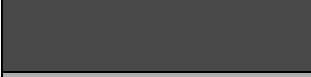

University Marketing does have a [palette of secondary colors](#), which may or may not be suitable for dashboards. Except for a dashboard created specifically for and about Wisconsin Union, do not use the trademarked colors of the Union, nor any visual element resembling the sunburst logo.

Cardinal Red

The official UW-Madison red is Cardinal Red (#c5050c). When red is used, it should be Cardinal Red. In the case that a dashboard is monochromatic, it should be done in Cardinal Red.

Approved Greys & Reds

The colors below are taken from the UW-Madison Brand & Visual Identity Guidelines. They are suitable for use on Tableau dashboards on backgrounds, titles, annotation boxes, etc, but they are not suitable for use as a categorical color ramp for data (except for the first, Cardinal Red, which should be used whenever red is used).

Color	Name	Hex	Usage
	Cardinal Red UW Red	#c5050c	Design elements, header bars, backgrounds (sparingly)
	UW Dark Red	#9b0000	Accent Color, design elements. Use sparingly.
	UW Page Background	#f7f7f7	Off-white web background color (use #f9f9f9 for 'true' white; do not use both in the same visualization)
	UW Gray Blue	#dadfe1	Grey alternate background color for UW-Madison websites
	UW Gray- Darker	#646569	Grey alternate background color for UW-Madison websites
	UW Gray- Darkest	#282728	Grey alternate background color for UW-Madison websites
	UW Body Font	#494949	Used for text on "UW Page Background" or white
	UW Gray Footer Text	#adadad	Used for text on "UW Gray-Darkest" background

3. Logos

A department logo of legible size should be present on internal and external visualizations. Under certain circumstances, a divisional logo or the university logo may be more appropriate. Institutional logos are [available online](#).

Logos should be hyperlinked to the department or institution they represent. In some cases, a logo can be sufficient to represent the data source.

4. Content

In all text items, defer first to the [UW-Madison](#) and [Wisconsin Union](#) style guides. Then defer to the latest edition of the AP Style Guide. If the content in question does not appear in either place, defer to the latest edition of Merriam-Webster's dictionary.

Source & Attribution Information

Dashboards must include sources for every piece of information contained within. If only one source is necessary, and that source is the same as the office of publication, that office's logo may be sufficient for attribution. Sources and attributions should fall last on the visual hierarchy.

Screen Size & Resolution

Dashboards should be designed in a fixed size—ideally the proper size for the viewing computer, if you know what that will be.

Dashboards should be no larger than 1200 pixels wide by 800 pixels tall, except when scrolling is desirable/allowable.

Graphic Considerations

Axes should start at zero, unless the goal of the visualization would be better served otherwise. Starting an axis at a point other than zero exaggerates variance and makes it difficult to see the true trend.

5. Workflow

The life cycle of an OSFA dashboard or visualization is as follows:

1. Create

The brainstorming, drafting, and first creation of a new dashboard with a new purpose. If a dashboard has been retired or scrapped, it must return to the 'Create' phase should it ever be needed again.

2. Revise

The editing, refining, and addition or subtraction of *new content* on a visualization or dashboard. A dashboard in the maintenance phase may return to the revision phase at any time, as needs and priorities shift.

3. Maintain

The sustaining of a working, published dashboard which OSFA staff use to perform regular job duties. In this phase, no new content is added to the dashboard, although it may be assigned to another round of revision (phase 2) before returning to the maintenance phase. Other updates do take place in this phase, at a lower priority level. These may include cosmetic or small functional edits, but generally not connections to new data sources or a complete redesign of the dashboard.

4. Retire

When a visualization is no longer necessary for ongoing job duties, it may be retired. This involves an assessment of all outstanding paths to access it, digital and physical, before the dashboard is removed from Tableau Public, Tableau Servers, the OSFA Dashboard Suite page, and any other web storage. The dashboard and any associated data extracts must be archived locally on OSFA-accessible hard disks. These dashboards may be 'raised from the dead' and returned to the creation phase. This would involve a compliance assessment against the Style Guide and, if necessary, a redesign of the main interface.

The order of these items outlines not only the process, but also the priority. In general, creation of a new visualization takes longer than revision of an existing one, which takes more time than regular maintenance, and retirement of a dashboard is the simplest of these. Therefore, **the phase of a dashboard will dictate the order in which it is addressed.**

At all times, every dashboard should fall discretely within one of these phases, and that phase should be clearly indicated in workflow documentation (Trello, JIRA, etc.).

Scrapping

To ensure the integrity of this process as well as OSFA dashboards and data, no project may be removed from this workflow and deleted. Instead, in the event that a dashboard becomes unneeded during work, it may be 'scrapped' by auto-forwarded to phase 4: retirement. All of the same retirement protocols must be followed, including an access assessment and archival.