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Department of Social Sciences

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Customizing Stata graphs made easy

Ben Jann

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Customizing Stata graphs made easy

Ben Jann
University of Bern

Abstract. The overall look of Stata's graphs is determined by so-called scheme files. Scheme files are system components, that is, they are part of the local Stata installation. In this note I argue that style settings deviating from default schemes should be part of the script producing the graphs, rather than being kept in separate scheme files, and I present a simple tool called `grstyle` that supports such practice.

Keywords: `st0001`, `grstyle`, `graph`, `graphics`, `scheme files`

1 Introduction

Graphs are ubiquitous in scientific research. They serve many purposes, be it in data analysis or presentation of results. Depending on properties of the data, the type of analysis, the nature of results, the context in which graphs are used, or the audience to which the graphs are presented, graphs may look very differently. There is no universal best style for graphs that serves all purposes and in many cases the style of graphs has to be tailored to the specific application. To reduce the amount of typing required to generate graphs conforming to a particular overall look, Stata features so called scheme files. Scheme files contain a series of statements that define the default shape, color, and size of the various elements that make up a graph. There are a number of official scheme files, such as `s2color` (the factory default), `sj`, or `s1mono`, that are part of any Stata installation (see [G-4] **schemes intro**), but users also have the possibility to create additional scheme files for their own needs and add them to the system. Furthermore, some users provide custom scheme files for public use that can, for example, be obtained from the Stata Journal net site or the SSC Archive (see [R] **ssc**). Examples are Juul (2003); Newson (2005); Atz (2011); Briatte (2013); Morris (2013, 2015); Bischof (2017a,b). Furthermore, Buchanan (2015) provides a very powerful framework for generating new schemes.

In essence, scheme files are system components that can be added to the local installation to extend Stata's functionality. Adding custom schemes to the system may make sense if one regularly produces specific types of graphs that differ substantially from the default looks provided by official Stata. In many cases, however, just a few small modifications of a default scheme would do. In such cases, I believe that the style settings determining the look of the graphs should be part of the script producing the graphs. Having to maintain a separate scheme file is unnecessarily complicated and, what is worse, may prevent researchers from customizing their graphs at all.

In this note I present a new command called `grstyle` that allows users to customize the overall look of graphs from within a do-file without having to fiddle around with

external scheme files. The advantage of using `grstyle` over manually editing a scheme file is that everything needed to reproduce the graphs can be included in a single do-file. No scheme files have to be copied around, for example, if the graphs are to be reproduced on a different computer.

`grstyle` does nothing that could not be done by manually editing a scheme file. In fact, `grstyle` simply creates a scheme file on the fly and loads it as the default scheme. The difference is that handling the scheme file is fully automated and the user does not have to worry about it. In this way, `grstyle` makes customizing Stata graphs easy.

2 Syntax

Syntax and usage of `grstyle` are as follows:

```
set scheme schemename

grstyle init [ newscheme, path(path) replace ]

grstyle scheme entry
:
graph command
:

grstyle clear [, erase ]
```

First select a scheme to be used as basis for the custom style settings; see [G-2] **set scheme**. The default scheme according to factory settings is `s2color`. Hence, `s2color` will be used as basis if you omit the `set scheme` command.

After that, initialize the custom settings typing `grstyle init`. Optionally, if *newscheme* is specified, a new scheme containing the custom settings will be created and stored in file `scheme-newscheme.scheme` in the current working directory; option `path()` specifies an alternative directory for storing the scheme file,¹ option `replace` allows overwriting the file if it already exists. If *newscheme* is omitted, `grstyle` manages the settings in the background; `path()` and `replace` are not allowed in this case.

Then record the custom style settings using one or more `grstyle scheme entry` commands. The syntax of *scheme entry* is described in `help scheme entries`; see below for examples.

After recording the desired settings, run the commands creating your graphs.

1. An absolute or relative path may be provided in `path()`. Note that the graphs using the scheme will only display correctly if the scheme file is stored in a location where it is found by Stata; see [U] 17.5 **Where does Stata look for adofiles?** and [P] `sysdir`.

At the end, if you want to drop the custom settings, type `grstyle clear`. `grstyle clear` is only needed if you want to restore the original settings within the same Stata session; changes made by `grstyle` are temporary and restarting Stata will remove the custom settings. Option `erase` causes the scheme file created by `grstyle` to be erased from disk. Use this option if you specified `newscheme` when calling `grstyle init` and do not want to hold on to the scheme file. The default is not to erase the scheme file.

▣ Technical note

A further command, `grstyle refresh`, can be used to refresh the custom style settings. This command is usually not needed. However, if you record some settings, create at least one graph, and then record further settings, you need to apply `grstyle refresh` for the further settings to become effective. `grstyle refresh` flushes the scheme memory so that the custom style settings will be reloaded when creating the next graph.

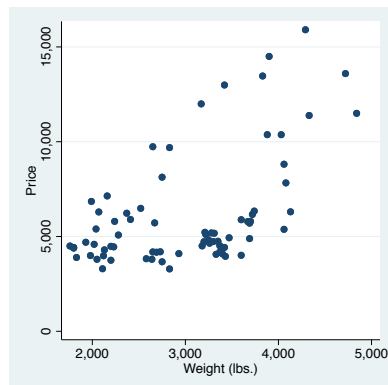
▣

3 Examples

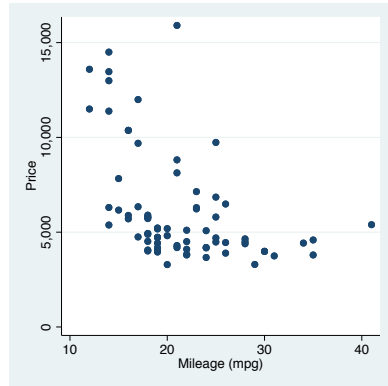
Basic usage

Say, you want the size of your graphs to be 2 by 2 inches instead of Stata's default 5.5 by 4 inches. Instead of adding options `ysize(2)` and `xsize(2)` to each graph command, you could use `grstyle` as follows:

```
. set scheme s2color
. grstyle init
. grstyle graphsize x 2
. grstyle graphsize y 2
. sysuse auto
(1978 Automobile Data)
. scatter price weight
```



```
. scatter price mpg
```



```
. grstyle clear
```

Some useful scheme entries

As illustrated, the usage of `grstyle` is straightforward and simple. The real difficulty, of course, is to know how the scheme entries have to look like. Type

```
. help scheme entries
```

to view the corresponding documentation. Scheme entries have their own idiosyncratic syntax, but the documentation is well structured and it usually does not take long to find the relevant information. Here is an example that illustrates a number of modifications I find useful:²

```
. set scheme s2color
. grstyle init
```

- change the graph size

```
. grstyle graphsize x 3.575
. grstyle graphsize y 2.6
```

- get rid of background shading

```
. grstyle color background white
```

- use horizontal text for tick labels on the Y (vertical) axis (the `s2color` default is to use vertical text, which makes the labels hard to read)

```
. grstyle anglestyle vertical_tick horizontal
```

² Also see the schemes provided by Bischof (2017b) that contain, among other things, similar modifications.

- draw vertical grid lines, that is, draw grid lines on the X (horizontal) axis (the `s2color` default is to draw horizontal grid lines only)

```
. grstyle yesno draw_major_hgrid yes
```

- always include minimum and maximum grid lines (by default, minimum and maximum gridlines are omitted if there is no data in the proximity of these grid lines; I find this behavior odd, especially if producing a series of graphs that use the same scale for the axes for sake of comparability)

```
. grstyle yesno grid_draw_min yes
. grstyle yesno grid_draw_max yes
```

- change color, width, and pattern of grid lines (by default, the gridlines have a bluish color, the same color as the background; this no longer makes sense if the background shading is removed)

```
. grstyle color major_grid gs8
. grstyle linewidth major_grid thin
. grstyle linepattern major_grid dot
```

- place the legend on the lower right of the plot region and remove the frame

```
. grstyle clockdir legend_position 4
. grstyle numstyle legend_cols 1
. grstyle linestyle legend none
```

- use thicker lines in line plots

```
. grstyle linewidth p medthick
```

- make markers transparent (only for the first two plot styles for case of exposition;³ transparency is not supported in Stata 14 or below)

```
. grstyle color p1markline navy%0
. grstyle color p1markfill navy%50
. grstyle color p2markline maroon%0
. grstyle color p2markfill maroon%50
```

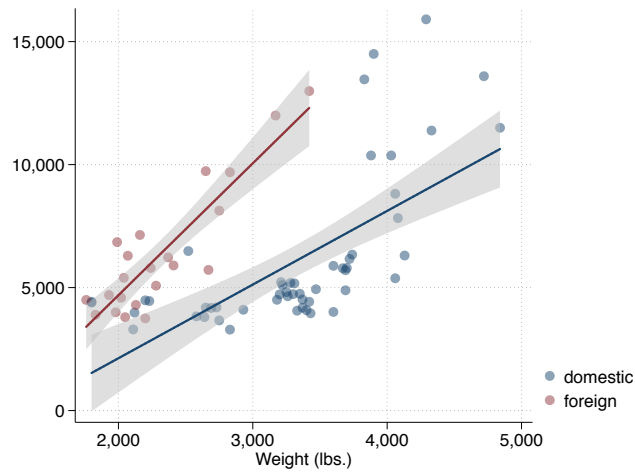
- make confidence intervals transparent (transparency is not supported in Stata 14 or below)

```
. grstyle color ci_area gs12%50
. grstyle color ci_arealine gs12%0
```

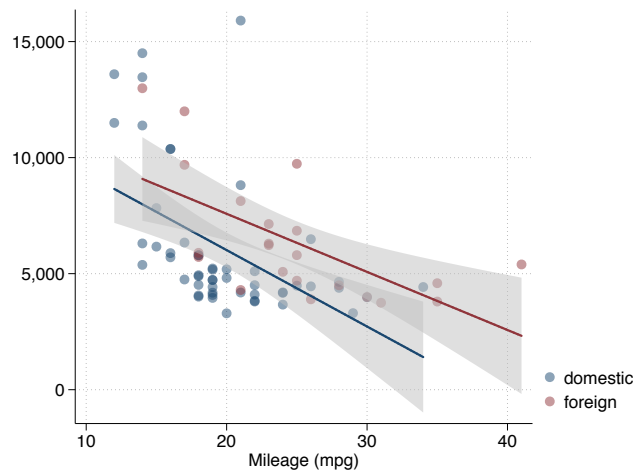
3. Unfortunately, the colors have to be spelled out explicitly for each plot style and it does not seem to be possible to just make all markers transparent while keeping the default colors; type `viewsource scheme-s2color.scheme` and look for entries such as `color p1` etc. to find out what the default colors are.

- now create some graphs using the modified style

```
. sysuse auto
(1978 Automobile Data)
. two (scatter price weight if foreign==0) ///
> (scatter price weight if foreign==1) ///
> (lfitci price weight if foreign==0, clstyle(p1)) ///
> (lfitci price weight if foreign==1, clstyle(p2)) ///
> , legend(order(1 "domestic" 2 "foreign"))
```



```
. two (scatter price mpg if foreign==0) ///
> (scatter price mpg if foreign==1) ///
> (lfitci price mpg if foreign==0, clstyle(p1)) ///
> (lfitci price mpg if foreign==1, clstyle(p2)) ///
> , legend(order(1 "domestic" 2 "foreign"))
```



Absolute text sizes and line widths

In some situations, for example, due to requirements by a publisher, one needs to set text sizes and line widths to specific absolute values. This is difficult to accomplish in Stata because the sizes of objects on a graph are determined relative to the size of the graph. That is, if you change the graph size, text sizes and line widths may change, and given a specific graph size it is difficult to know how large exactly the text sizes and line widths will happen to be.

If you want to control the absolute size of text and line widths you need to create a scheme that sets the relative sizes in a way such that for a given graph dimension the specified relative sizes lead to the desired absolute sizes. Furthermore, you need to create one such scheme for each graph size you intend to use. The formula to compute the relative sizes is not difficult, but it is a lot of work to do the computations and compile the corresponding schemes manually.

More convenient is to change the settings on the fly using `grstyle`. The width and height of Stata graphs is expressed in inches. One inch is equal to 72 points (or 2.54 centimeters). Relative sizes are expressed in percent of the minimum of width and height of the graph. That is, if a graph is 5.5 inches wide and 4 inches high, then the reference size is 4 inches (or $4 \cdot 72 = 288$ points) and a relative size of, say, 5 is equal to $5 \cdot (4 \cdot 72) / 100 = 14.4$ points. Conversely, if you want the size of an object on this graph to be 10 points, you need to set its relative size to $10 / (4 \cdot 72) \cdot 100 = 3.472222$. Here is an example in which `grstyle` is used to set various text sizes and line widths according to this formula. The goal is to construct a graph that is 9 cm wide and 7 cm high, uses 0.5pt lines for axes etc., and uses text sizes between 6 and 10 points depending on object:⁴

```
. local xsize = 9 / 2.54           // 9cm wide
. local ysize = 7 / 2.54           // 7cm high
. local rsize = min(`xsize', `ysize') // reference size
. foreach pt in .5 3 6 8 10 {      // compute relative sizes
2.     local nm: substr local pt "." "_" // so that ".#" is "_#"
3.     local `nm'pt = `pt' / (`rsize'*72)*100
4. }

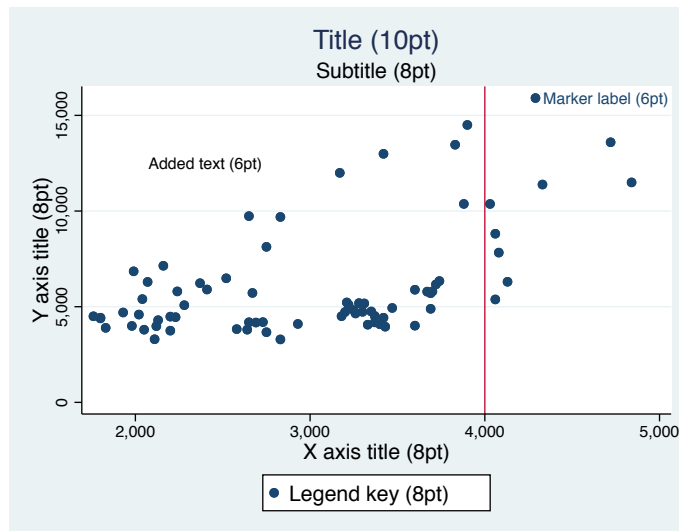
. grstyle init
. grstyle graphsize x      `xsize'
. grstyle graphsize y      `ysize'
. grstyle gsize heading    `10pt' // title
. grstyle gsize subheading `8pt'  // subtitle
. grstyle gsize axis_title `8pt'
. grstyle gsize tick_label `6pt'
. grstyle gsize key_label  `8pt' // key labels in legend
. grstyle gsize plabel     `6pt' // marker labels
```

4. The list of scheme entries in this example covers some of the most common elements, but is not exhaustive. Depending on application you may need to set the size of additional elements. Furthermore, to fully control the layout of the graph you would also have to set elements such as gaps, margins, and tick length.


```

. grstyle gsize text_option    `6pt' // added text
. grstyle symbolsize p        `3pt' // marker symbols
. grstyle linewidth axisline   `_5pt'
. grstyle linewidth tick      `_5pt'
. grstyle linewidth major_grid `_5pt'
. grstyle linewidth legend     `_5pt' // legend outline
. grstyle linewidth xylene     `_5pt' // added lines
. sysuse auto
(1978 Automobile Data)
. generate str mlab = "Marker label (6pt)" if price>15000
(73 missing values generated)
. twoway (scatter price weight, mlabel(mlab)), title("Title (10pt)") ///
>       subtitle("Subtitle (8pt)") xtitle("X axis title (8pt)") ///
>       ytitle("Y axis title (8pt)") legend(on order(1 "Legend key (8pt)") ) ///
>       text(12500 2400 "Added text (6pt)") xline(4000)

```



To generate a graph with different dimensions that uses the same sizes for text and line widths, simply change the `xsize` and `ysize` macros on the first two lines. An alternative is to wrap the `grstyle` commands into a little program as follows:

```

program graphsetup
  args x y
  local xsize = `x' / 2.54
  local ysize = `y' / 2.54
  local rsize = min(`xsize', `ysize')
  foreach pt in .5 3 6 8 10 {
    local nm: subinstr local pt "." "_"
    local `nm'pt = `pt' / (`rsize'*72)*100
  }
  grstyle init
  grstyle graphsize x    `xsize'
  grstyle graphsize y    `ysize'

```

```

grstyle gsize heading      `10pt'
grstyle gsize subheading   `8pt'
grstyle gsize axis_title   `8pt'
grstyle gsize tick_label   `6pt'
grstyle gsize key_label    `8pt'
grstyle gsize plabel       `6pt'
grstyle gsize text_option  `6pt'
grstyle symbolsize p       `3pt'
grstyle linewidth axisline `_5pt'
grstyle linewidth tick     `_5pt'
grstyle linewidth major_grid `_5pt'
grstyle linewidth legend   `_5pt'
grstyle linewidth xyline   `_5pt'
grstyle linewidth xyline   `_5pt'
end

```

You can then use the program to quickly switch between different graph dimensions, while keeping text sizes and line widths fixed:

```

. graphsetup 9 7 // 9cm wide and 7cm high
. graph commands
. graphsetup 9 12 // 9cm wide and 12cm high
. graph commands
. etc.

```

It is not necessary to run `grstyle clear` between the `graphsetup` commands because `grstyle init`, which is called within `graphsetup`, will clear the previous `grstyle` settings.

4 Limitations and further remarks

Unless a custom scheme name is specified, `grstyle` works by creating a new scheme called `_GRSTYLE_` and storing it in file `scheme-_GRSTYLE_.scheme` in the `PERSONAL` ado-file directory (see [U] 17.5.2 **Where is my personal adodirectory?** and [P] `sysdir`). The relevance of this information is that there may be two complications:

- Stata must have writing rights in the `PERSONAL` ado-file directory. Furthermore, if the `PERSONAL` ado-file directory does not exist, Stata must have the necessary rights to create the directory.
- If multiple Stata sessions are executed in parallel and the sessions use the same `PERSONAL` ado-file directory, then the `grstyle` commands in the different sessions will all write to the same file. To keep the style settings distinct in this case it may be a good idea to provide a unique custom scheme name with `grstyle init` in each session.

Finally, note that `grstyle` maintains three global macros, `GRSTYLE_FN` (path and name of the scheme file used to store the custom settings), `GRSTYLE_SN` (the corresponding scheme name), and `GRSTYLE_SNO` (name of the scheme that was active when

initializing `grstyle`). Do not modify these globals. To remove the globals and restore initial settings, type `grstyle clear`.

5 References

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