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Customizing Stata graphs made easy (part 2)

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Abstract. In Jann (2018b, *Stata Journal* 18: 491–502), I presented a command called `grstyle` that simplifies changing the default look of Stata graphs. The command, however, still relies on idiosyncratic scheme file syntax, which may not be well known to many users. In this article, I therefore present an extension called `grstyle set` that automates the creation of sets of scheme file entries for a number of potentially useful adjustments, without much typing and without requiring much knowledge about scheme file syntax. Covered topics include, for example, the rendering of the background and coordinate system, the placement and look of the legend, the assignment of colors, symbols, and line patterns, and the assignment of relative or absolute sizes.

Keywords: gr0073_1, `grstyle`, `grstyle set`, graph, graphics, scheme files

Some of the examples in this article make extensive use of colors, so the electronic copy has been published in color, while the printed copy is in monochrome. If you are reading the printed copy and are having trouble following the text, you may want to switch to the electronic copy.

1 Introduction

Stata graphics are flexible, but customizing their appearance can be tedious. In consequence, many people stick to the default `s2color` scheme, which may not always be the best choice. The difficulty with customizing Stata graphics is that the settings determining the default look of graphs are kept in external files—so-called scheme files—and that these scheme files use their own idiosyncratic language. Users who want to change the look of their graphs without adding a long list of options to each graph command have to create their personal scheme file and store it in an appropriate place in the file system. In Jann (2018b), I argued that style settings should be part of the script creating the graph rather than being kept in separate scheme files, and I provided a command called `grstyle` that supports such practice. Some of the arguments made in Jann (2018b) are that having to maintain separate scheme files is unnecessarily tedious, complicated, and confusing and that it is very convenient to have all code needed to produce a graph in a single do-file, especially when sharing code or trying to reproduce a graph on a different computer.

However, `grstyle` still relies on scheme file syntax, which is different from other Stata syntax and is only rudimentarily documented (see `help scheme entries`). To make things easier, I now present an extension called `grstyle set` that can be used to generate custom styles without knowing much about scheme file syntax.

To install the software associated with this article as it existed when the article was published, type

```
. net install http://www.stata-journal.com/software/sj18-3/gr0073/
```

Updated versions of the software may be available on the SSC archive. To install from there, type

```
. ssc install grstyle, replace
```

Some of the functionality of `grstyle set` relies on commands provided by the `palettes` package (Jann 2018a). To install these commands, type

```
. ssc install palettes, replace
```

2 Basic usage and syntax

First, use `grstyle init` to initialize the custom style settings (see Jann 2018b). Second, apply one or several `grstyle set` commands, and possibly some other `grstyle` commands, to record the desired settings. In case of conflict, later settings take precedence over earlier settings. The syntax of `grstyle set` is

```
grstyle set subcommand [arguments] [, options] [: elements]
```

where *arguments*, *options*, and *elements* depend on *subcommand*. A full list of subcommands and their syntax is provided in the online help (see `help grstyle set`). Below, I focus on a selection of subcommands and options that I find most useful.

3 Subcommands and examples

3.1 Rendering of background and coordinate system

`grstyle set plain` applies a plain overall look to the graph: white background, no shading of by-labels or matrix labels, black titles, and grid lines in gray. The syntax is

```
grstyle set plain [, horizontal compact [no]grid minor dotted noextend  
box]
```

where

`horizontal` sets the orientation of tick labels on the *y* axis to horizontal.

`compact` reduces the symbols size, some font sizes, and the graph margin.

`grid` turns all (major) grid lines on (horizontal, vertical, minimum, maximum).

`nogrid` turns grid lines off.

minor adds a minor grid (one minor grid line between each pair of major grid lines).

minor has an effect only if **grid** is specified.

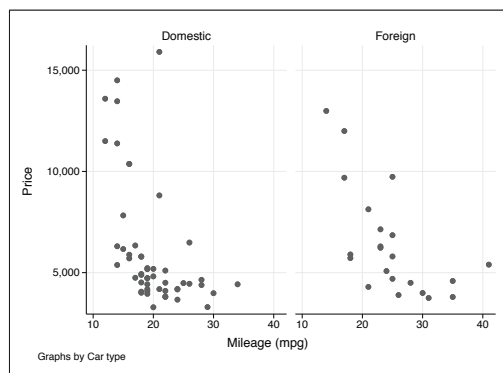
dotted requests dotted grid lines.

noextend draws axis lines only to the smallest and largest tick marks.

box draws a frame around the plot region. The default is to omit the frame.

An example is as follows:

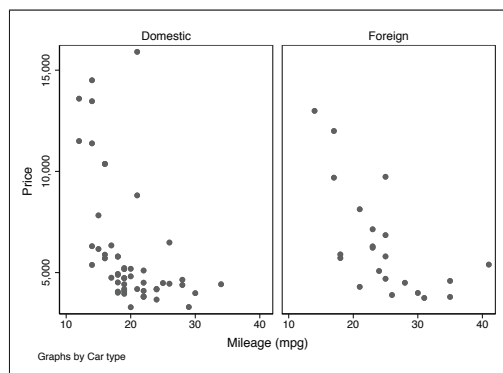
```
. set scheme sj
. grstyle init
. grstyle set plain, horizontal grid
. sysuse auto, clear
(1978 Automobile Data)
. scatter price mpg, by(foreign)
```



By default, Stata only prints horizontal grid lines and sometimes omits the lines at the minimum and the maximum. Option **grid** was specified to request that all grid lines be printed. Furthermore, Stata's default is to print the labels on the *y* axis vertically. Option **horizontal** changes the orientation of these labels to horizontal.

We could now continue producing more graphs in the same style, because any subsequent graph command would inherit the specified **grstyle** settings, until new settings are defined using additional **grstyle** commands or the settings are deactivated using **grstyle clear**. However, the purpose of this article is to introduce the available options, so I move on providing a further example that illustrates the use of option **nogrid** to turn grid lines off and option **box** to draw a frame around the plot region:

```
. grstyle init
. grstyle set plain, nogrid box
. scatter price mpg, by(foreign)
```

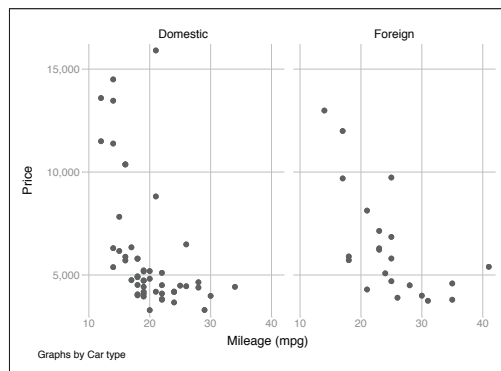


A second command is `grstyle set mesh`. It also applies a plain background but renders the coordinate plane as a mesh (or inverted mesh) of gridlines. Its syntax is

```
grstyle set [i]mesh [, horizontal compact minor]
```

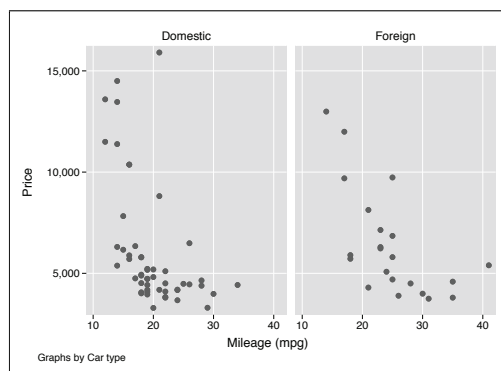
where `horizontal`, `compact`, and `minor` are as above. An example is as follows:

```
. grstyle init
. grstyle set mesh, horizontal
. scatter price mpg, by(foreign)
```



Alternatively, to use an inverted mesh, type `imesh` instead of `mesh`:

```
. grstyle init
. grstyle set imesh, horizontal
. scatter price mpg, by(foreign)
```



3.2 Placement and rendering of the legend

`grstyle set legend` determines the position and some style aspects of the legend. The syntax is

```
grstyle set legend [clockposstyle] [, nobox stacked inside
    klength(textsizestyle) ]
```

where *clockposstyle* sets the position of the legend according to [G-4] *clockposstyle* and

`nobox` removes the box around the legend (including background color).

`stacked` stacks keys and labels (and makes some adjustments to the gaps between keys).

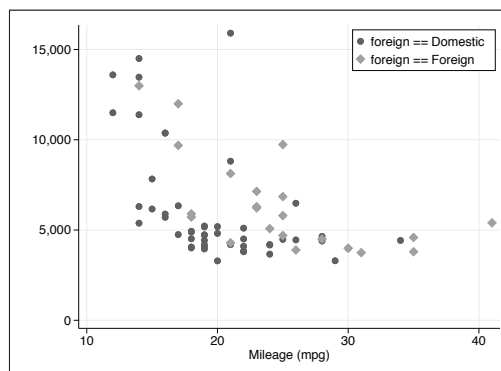
`inside` places the legend inside the plot region.

`klength`(*textsizestyle*) changes the length of legend keys, where *textsizestyle* is a size specification according to [G-4] *textsizestyle*. The default is `klength(huge)`.

This is considerably shorter than Stata's built-in setting, which is equivalent to `klength(13)`.

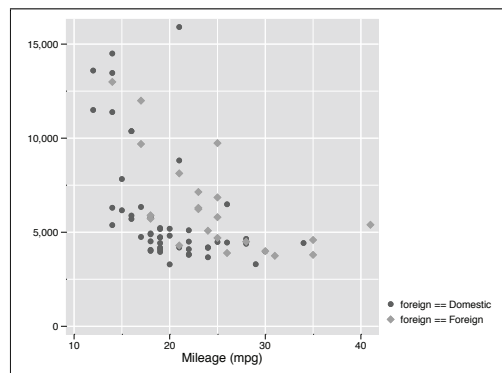
The default *clockposstyle* is 6, which places the legend at the bottom. For example, type `grstyle set legend 4` to place the legend at the lower-right side of the plot. If the legend is placed at the side (positions 2, 3, 4, 7, 8, and 9), the number of legend columns will be restricted to 1. Here is an example in which the legend is placed inside the plot region (option `inside`) at the top right (position 2):

```
. set scheme sj
. grstyle init
. grstyle set plain, horizontal grid
. grstyle set legend 2, inside
. sysuse auto, clear
(1978 Automobile Data)
. separate price, by(foreign) shortlabel
(output omitted)
. scatter price0 price1 mpg
```



In the following example, the legend is placed at the lower-right side of the plot region (position 4), and the frame around the legend is removed (option `nobox`):

```
. grstyle init
. grstyle set imesh, horizontal
> compact minor
. grstyle set legend 4, nobox
. scatter price0 price1 mpg
```



3.3 Assigning colors

Colors can be assigned using the command `grstyle set color`. Its syntax is

```
grstyle set color [argument] [, plots(numlist) palette_options] [: elements]
```

where *argument* is

```
palette [ [, palette_options] / [ palette [, palette_options] / ... ]]
```

and *palette* is a color palette or list of colors as described below. Options are as follows:

`plots(numlist)` specifies the plot numbers for numbered elements.

palette_options are palette options such as `n()` to set the palette size, `select()` to select elements from a palette, `reverse` to use the palette in reverse order, `intensity()` to apply color intensity adjustment, or `opacity()` to set opacity (which requires Stata 15). See [Jann \(2018a\)](#) for details on these options.

elements is a space-separated list of scheme entry elements to be set (see `help scheme entries`). Examples are `background` for the background color, `plotregion` for the color of the plot region, or `xyline` for the color of added lines. See the entry on `grstyle set color` in `help grstyle set` for a more extensive list of possible elements. If *elements* is omitted, the overall default colors for plot objects such as markers, lines, bars, etc., are set (elements `p1`, `p2`, etc.).

□ Technical note

Numbered elements, that is, elements that apply to specific plots, can be specified as `p#[stub]`. Examples are `p#` for the overall default colors, `p#lineplot` for the colors used in line plots, or `p#label` for the colors of marker labels. Such syntax will be expanded to a set of numbered elements (for example, `p1`, `p2`, etc.) using the numbers provided by the `plots()` option or, if `plots()` is omitted, using numbers 1 to n , where n is the number of provided colors. The values will be assigned one by one to the expanded elements (recycling the list of colors if necessary and starting over for each set if multiple sets are specified). Naturally, numbered elements can also be specified directly as individual elements, for example, `p1label`, `p2label`, etc. Furthermore, note that numbered elements always also have an unnumbered form, `p[stub]`, that can be used to set the default for all plots. For example, to use the same color for marker labels in all plots, you can simply set `plabel` instead of `p1label`, `p2label`, etc. However, numbered elements will take precedence over unnumbered elements. That is, if, say, `p3label` has been set, setting `plabel` will have no effect on marker labels in the third plot.

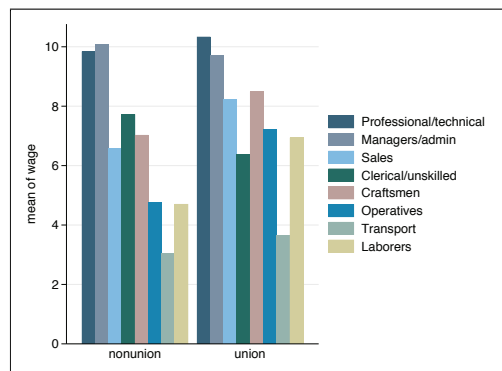
□

Using a predefined color palette or a color generator

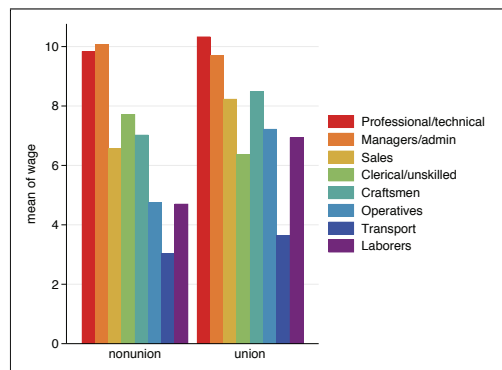
If *argument* is omitted, `grstyle set color` uses the same colors as are assigned to elements `p1` to `p15` in Stata's `s2color` scheme ([G-4] **scheme s2**). Alternatively, specify one of the color palettes or color generators provided by the `colorpalette` command (see [Jann 2018a](#)).

Here are examples using the `economist` palette ([G-4] **scheme economist**), the `rainbow` palette from the `ptol` collection ([Tol 2018](#)), and the `Greens` palette from the ColorBrewer collection ([Brewer, Hatchard, and Harrower 2003](#); [Brewer 2015](#)), respectively:

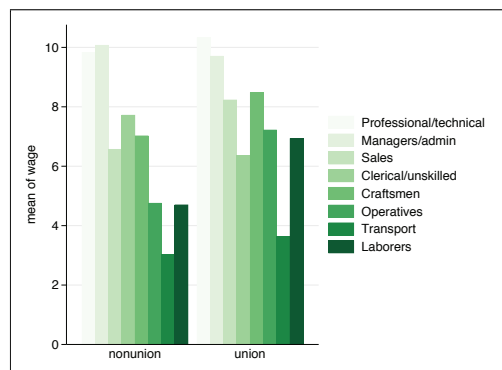

```
. set scheme sj
. grstyle init
. grstyle set plain, horizontal
. grstyle set legend 3, nobox
. grstyle set color economist
. sysuse nlsw88, clear
(NLSW, 1988 extract)
. graph bar wage if occ<9, over(occ)
> asyvars over(union)
```



```
. grstyle set color ptol, rainbow
> n(8) reverse
. graph bar wage if occ<9, over(occ)
> asyvars over(union)
```



```
. grstyle set color Greens, n(8)
. graph bar wage if occ<9, over(occ)
> asyvars over(union)
```

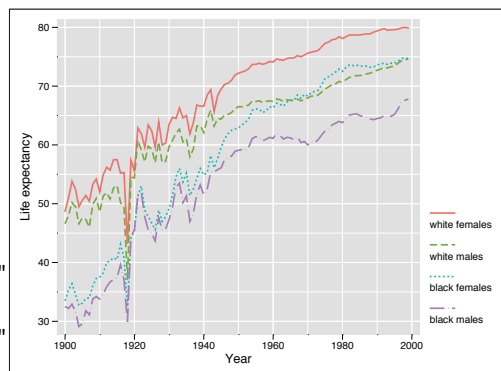


Option `n(8)` has been specified in the 2nd and 3rd variants because 8 colors are required for the graph. Like many of the palettes provided by `colorpalette`, the `ptol` and `Greens` palettes are adaptive in the sense that the returned colors depend on how many colors are requested. The same is true, for instance, for the hue-chroma-luminance (HCL) color generator that returns colors with evenly spaced hues around the color wheel (the `hue` palette), as illustrated in the following example:

```

. grstyle init
. grstyle set imesh, horizontal
> compact minor
. grstyle set legend 4, nobox stack
. grstyle set color hue, n(4)
> : p#lineplot
. sysuse uslifeexp, clear
(U.S. life expectancy, 1900-1999)
. label variable le_wfemale "white females"
. label variable le_wmale "white males"
. label variable le_bfemale "black females"
. label variable le_bmale "black males"
. line le_wfemale le_wmale le_bfemale
> le_bmale year, lwidth(*1.5 ..)
> ytitle(Life expectancy)

```



In this example, we need to specify `p#lineplot` because the `sj` scheme sets the color for `plineplot` to black. We need to override this by assigning colors to `p1lineplot`, `p2lineplot`, etc. (In the `s2color` scheme, we could omit `p#lineplot` because the scheme does not set `plineplot`; hence, the colors from `p1`, `p2`, etc., are used for line plots.)

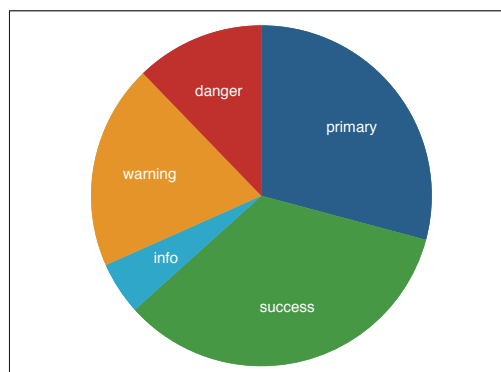
Specifying custom colors

Instead of using a named palette, you can provide custom colors by specifying a list of *colorstyles* (named colors, RGB codes, CMYK codes, or HSV codes; see [G-4] *colorstyle*). In addition, `grstyle set` supports colors specified as hex triplets (such as `#87ceeb` for sky blue) or as HCL codes (such as `"hcl 135 100 65"` for green); see Jann (2018a) for details. Here is an example using hex codes of semantic colors of buttons in Bootstrap v3.3 (getbootstrap.com/docs/3.3/):

```

. grstyle init
. grstyle set plain
. grstyle set color #286090 #449d44
> #31b0d5 #ec971f #c9302c
. drop _all
. input primary success info warning
> danger
.
. primary success info
> warning danger
1. 12 14 2 8 5
2. end
. graph pie primary success info
> warning danger, legend(off)
> plabel(_all name, size(*1.5)
> color(white))

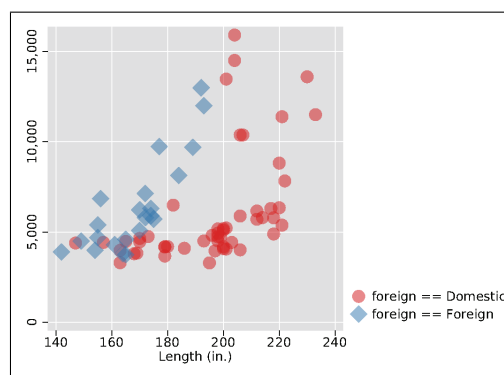
```



Making markers transparent (requires Stata 15)

Making marker symbols transparent is a bit tricky. If you just make colors transparent, the marker outline will look different than the marker fill because the outline is printed on top of the fill. A solution is to make the outline fully transparent. To set the fill colors of markers, use scheme entry elements `p1markfill`, `p2markfill`, etc.; for the outlines, use `p1markline`, `p2markline`, etc. Here is an example using the `Set1` palette from the ColorBrewer collection (Brewer, Hatchard, and Harrower 2003; Brewer 2015):

```
. grstyle init
. grstyle set imesh
. grstyle set legend 4, nobox
. grstyle set color Set1, opacity(50)
>   : p#markfill
. grstyle set color Set1, opacity(0)
>   : p#markline
. grstyle symbolsize p vlarge
. sysuse auto, clear
(1978 Automobile Data)
. separate price, by(foreign) shortlabel
  (output omitted)
. scatter price0 price1 length
```



The `opacity()` option was used to determine the degree of transparency. An opacity value of 100 means fully opaque (no transparency); a value of 0 means fully transparent (invisible).

Changing the color intensity

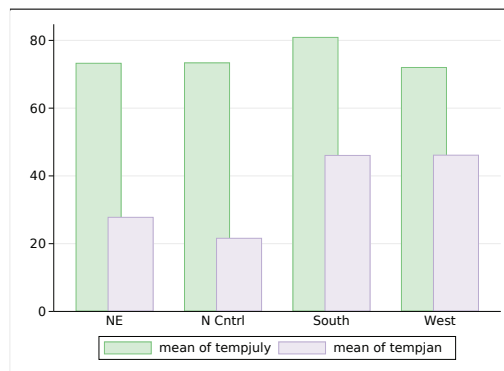
Color intensity can be set using the `intensity()` option when calling `grstyle set color`. For some elements, however, color intensity can also be set as a separate scheme entry using `grstyle set intensity`. The syntax is

```
grstyle set intensity [intlist] [, plots(numlist)] [: elements]
```

where *intlist* is a space-separated list of intensity specifications according to [G-4] *intensitystyle* (the default is 100, that is, full intensity), option `plots()` specifies the plot numbers for numbered elements, and *elements* is a space-separated list of scheme entry elements to be set. Examples of elements are `pie` for the fill intensity of pie slices or `histogram` for the fill intensity of histogram bars. See the entry on `grstyle set intensity` in `help grstyle set` for a more extensive list of possible elements. If *elements* is omitted, the intensity of bars and areas in two-way graphs is set (element `p` or, if `plots()` is specified or multiple intensities are provided, elements `p1`, `p2`, etc.).

The following example uses the `Accent` palette from the ColorBrewer collection (Brewer, Hatchard, and Harrower 2003; Brewer 2015) but then sets the fill intensity of bars for `graph bar` ([G-2] `graph bar`) to 30%:

```
. grstyle init
. grstyle set plain, horizontal
. grstyle set color Accent: p#bar
> p#barline
. grstyle set intensity 30: bar
. sysuse citytemp, clear
(City Temperature Data)
. graph bar (mean) tempjuly tempjan,
> over(region) bargap(-30)
```



3.4 Transparent confidence intervals (requires Stata 15)

Confidence intervals can be made transparent using `grstyle set color` with the option `opacity()`. Alternatively, for convenience, use `grstyle set ci`. The syntax is

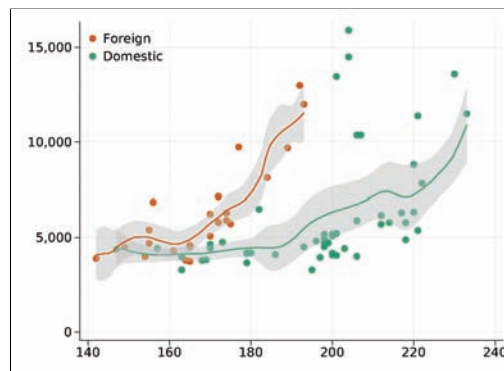
```
grstyle set ci [colors] [, opacity(numlist) palette_options]
```

where *colors* is a list of colors or a color palette as described in section 3.3, option `opacity()` sets the level of opacity (0: fully transparent; 100: fully opaque), and *palette_options* are palette options as described in section 3.3. Specify one or two colors, depending on whether you want only the primary or the primary and the secondary confidence intervals to be affected. If no colors are specified, `gs12` is used for primary confidence intervals and `ltkhaki` for secondary confidence intervals (same colors as in the `s2color` scheme). The default opacity is 50. Specify two opacity values if you want to use different transparency levels for primary and secondary confidence intervals. An example is as follows:

```

. set scheme s2color
. grstyle init
. grstyle set plain, horizontal grid
. grstyle set color Dark2
. grstyle set legend 10, inside nobox
. grstyle set ci
. sysuse auto, clear
(1978 Automobile Data)
. twoway
> (scatter price length if foreign==0)
> (scatter price length if foreign==1)
> (lpolyci price length if foreign==0,
>   clstyle(p1))
> (lpolyci price length if foreign==1,
>   clstyle(p2))
> , legend(order(2 "Foreign"
>               1 "Domestic"))

```



3.5 Assigning marker symbols and line patterns

The syntax to assign marker symbols and line patterns is

```
grstyle set symbol [palette] [, plots(numlist) palette_options] [: elements]
```

```
grstyle set lpattern [palette] [, plots(numlist) palette_options]
[: elements]
```

where *palette* is a symbol palette or a line-pattern palette provided by commands `symbolpalette` or `linepalette` (Jann 2018a), respectively, or a list of symbols or line patterns as documented in [G-4] *symbolstyle* and [G-4] *linepatternstyle*. If *palette* is omitted, the same sequence of symbols and line patterns as in Stata's monochrome schemes is used. Options are as follows:

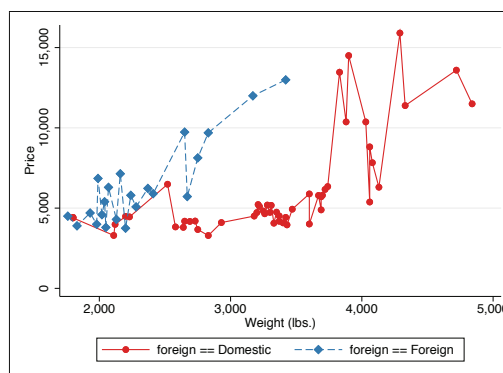
`plots(numlist)` specifies the plot numbers for numbered elements.

palette_options are palette options such as `n()` to set the palette size, `select()` to select elements from a palette, or `reverse` to use the palette in reverse order. See Jann (2018a) for details.

elements is a space-separated list of scheme entry elements to be set (see `help scheme entries`). Examples are `matrix` to set the marker symbol used in matrix graphs, `plineplot` to set the line pattern for line plots, `pline` to set the line pattern for connected-line plots, or `xyline` to set the line pattern for added lines. See the sections on `grstyle set symbol` and `grstyle set lpattern` in `help grstyle set` for more extensive lists of possible elements. If *elements* is omitted, the overall default symbols and line patterns are set (element `p` or, if `plots()` is specified or multiple symbols or line patterns are provided, elements `p1`, `p2`, etc.).

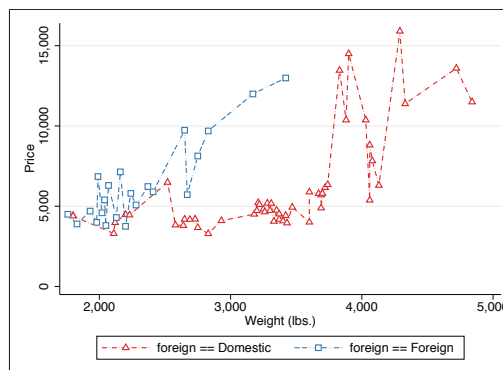
Stata's default color schemes use filled circles for marker symbols and solid lines for all plots, which makes the graphs hard to read on black-and-white printouts. To improve readability, you could change the symbols and line patterns as in the following example:

```
. set scheme s2color
. grstyle init
. grstyle set plain
. grstyle set color Set1
. grstyle set symbol
. grstyle set lpattern
. sysuse auto, clear
(1978 Automobile Data)
. separate price, by(foreign) shortlabel
(output omitted)
. two connect price0 price1 weight,
> ytitle(Price) sort
```



If you are not happy with the default sequence of symbols and line patterns, use one of the alternative palettes provided by `symbolpalette` and `linepalette` (Jann 2018a), or specify a custom sequence as in the following example:

```
. grstyle set symbol T S
. grstyle set lpattern "-." "--.."
. grstyle set color white, p(1 2)
> : p#markfill
. two connect price0 price1 weight,
> ytitle(Price) sort
```



3.6 Assigning sizes

A final group of subcommands is concerned with setting the overall size of graphs, the size of text and markers, the thickness of lines, and the width of margins. In Stata, sizes of graph objects are determined relative to the overall size of the graph (the minimum of the height and the width of the graph, to be precise). This makes it difficult to control the size of objects in absolute terms (for example, to ensure that a certain text object uses, say, a 10-point font). As a key feature, `grstyle set` provides an easy way to assign absolute sizes.

Overall graph size

The syntax to set the overall graph size is

```
grstyle set graphsize [height [width]]
```

where the units for *height* and *width* can be inch (inches), pt (points; 1 inch = 72 points), cm (centimeters; 1 inch = 2.54 centimeters), or mm (millimeters; 1 inch = 25.4 millimeters). inch is assumed if the units are omitted. The default height is 4 inches, and the default width is 5.5 inches.

For example, to set the size of graphs to 10 by 12 centimeters, you could type

```
. grstyle set graphsize 10cm 12cm
```

□ Technical note

Apart from setting the graph size, `grstyle set graphsize` also creates a global macro called `GRSTYLE_RSIZE`. The macro contains information that will be used by `grstyle set` when assigning absolute sizes (see below).

□

Relative and absolute sizes of objects

The commands to set the size of text objects, the size of marker symbols, the thickness of lines, and the width of margins are

```
grstyle set size sizelist [, units plots(numlist)] [: elements]
```

```
grstyle set symbolsize sizelist [, units plots(numlist)] [: elements]
```

```
grstyle set linewidth sizelist [, units plots(numlist)] [: elements]
```

```
grstyle set margin sizelist [, units plots(numlist)] [: elements]
```

where *sizelist* is a space-separated list of absolute (in pt, mm, inch, or cm) or relative sizes (according to [G-4] *textsize*style, [G-4] *markersize*style, [G-4] *linewidth*style, and [G-4] *margin*style, respectively; excluding multiplication syntax and excluding *marginexp*). Options are as follows:

units can be pt, mm, inch, or cm and determines how numbers without units are interpreted. The default is to interpret them as relative sizes and pass them through to the scheme file as is.

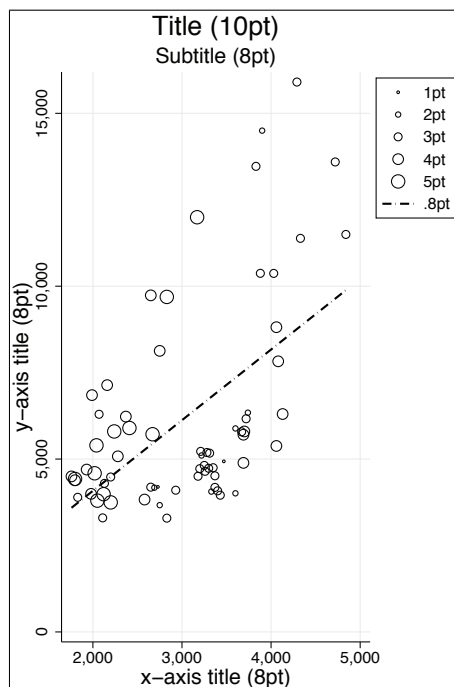
plots(*numlist*) specifies the plot numbers for numbered elements.

elements is a space-separated list of scheme entry elements to be set. See `help grstyle set` for details on possible elements.

The procedure to assign absolute sizes is to first set the overall graph size using `grstyle set graphsize`, which defines the reference value used by `grstyle set` for the computation of absolute sizes. After that, apply `grstyle set size`, `grstyle set symbolsize`, etc., with size specifications in absolute units. If `grstyle set graphsize` has not been run, `grstyle set` will determine absolute sizes with respect to a 4-inch graph size.

An example is as follows:

```
. set scheme sj
. grstyle init
. grstyle set plain, grid
. grstyle set legend 2
. grstyle set symbol Oh, p(1/5)
. grstyle set color black, p(1/5)
. grstyle set graphsize 9cm 6cm
. grstyle set size 10pt: heading
. grstyle set size 8pt: subheading
> axis_title
. grstyle set size 6pt: tick_label
> key_label
. grstyle set symbolsize 1 2 3 4 5, pt
. grstyle set linewidth .8pt: plineplot
. grstyle set linewidth .4pt: pmark legend
> axisline tick major_grid
. grstyle set margin zero
. quietly sysuse auto, clear
. quietly separate price, by(rep)
> shortlabel
. twoway (scatter price? weight)
> (lfit price weight),
> title("Title (10pt)")
> subtitle("Subtitle (8pt)")
> xtitle("x-axis title (8pt)")
> ytitle("y-axis title (8pt)")
> legend(order(1 "1pt" 2 "2pt" 3 "3pt"
> 4 "4pt" 5 "5pt" 6 ".8pt"))
```



The text size of the title is set to 10 points (`heading`); the subtitle (`subheading`) and axis titles (`axis_title`) are set to 8 points; and the tick labels (`tick_label`) and legend key labels (`key_label`) are set to 6 points. Marker symbols are set to sizes from 1 to 5 points for the 1st to the 5th plot. The line thickness for line plots (`plineplot`) is set to 0.8 points; the line thickness of marker symbol outlines (`pmark`), the legend outline (`legend`), the axis lines (`axisline`), the ticks (`tick`), and the grid lines (`major_grid`) are set to 0.4 points (the same line thickness is used by L^AT_EX for the frame around the graph). Finally, the margin of the graph region is set to 0.

□ Technical note

Sizes in Stata graphs are always relative to the physical graph size. This implies that the requested absolute sizes will be achieved only as long as you do not change the graph size.

□

3.7 Providing custom subcommands

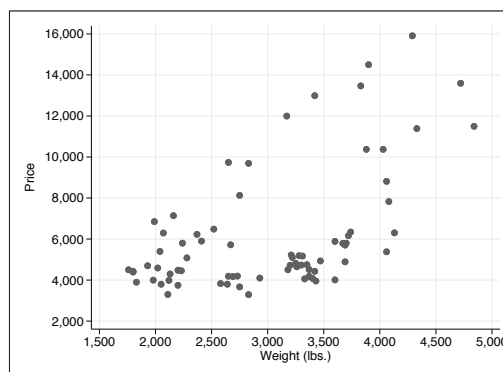
A personal collection of graph settings can be provided by defining a program called `grstyle_set_myname`. `myname` will then be available to `grstyle set` like any other subcommand.

When calling your program, `grstyle set` provides global macro `GRSTYLE_FH` containing the file handle of the temporary scheme file to be written to. Use `file write` with this handle to add your scheme entries. For example, the following program would set the default approximate number of labeled ticks:

```
program grstyle_set_nticks
    syntax [, n(int 5) ]
    file write $GRSTYLE_FH "numticks_g horizontal_major `n'" _n
    file write $GRSTYLE_FH "numticks_g vertical_major   `n'" _n
end
```

After you define the program (or store it in file `grstyle_set_nticks.ado`), it can be used as follows:

```
. set scheme sj
. grstyle init
. grstyle set plain, horizontal grid
. grstyle set nticks, n(10)
. sysuse auto, clear
(1978 Automobile Data)
. scatter price weight
```



4 References

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