TPC Graph Styles Excel Add-In

Formatting graphs at the Urban Institute takes time and effort. Researchers often spend time trying to follow TPC's style guide, but it often falls to editors and members of the Communication staff to make sure graphs follow TPC's branding guidelines. While Excel, PowerPoint, and Word templates are available to the entire staff, they do not completely satisfy the styling requirements such as title placement, gridline appearance, and chart size.

The *TPC Graph Styles* add-in creates a new tab to the user's Excel ribbon that they can use to completely style an Excel chart following the guidelines detailed in the Tax Policy Center Style Guide (http://apps.urban.org/tpc-styleguide/public.html). The styling applies the correct Avenir font; changes text size, colors, and appearance of axes and gridlines; moves the chart title to the top-left position; applies the appropriate color palette; and makes other changes.

With a single press of a button, users can apply full TPC styles—to both Web and Print graphs—to **14** chart types: Column, Line, Bar, Area, Scatterplot, and Pie. Another button enables the user to change all of the data elements in a chart to gray, so that they can strategically add color or emphasis. Another button applies labels to the last point in a graph. A section of small buttons allows the user to apply Fill and Outline colors from the TPC color palette.

The *TPC Graph Styles* ribbon tab also includes two buttons that will generate a new worksheet with dummy data values and create a **Slope Chart** or a **Dot Plot**. Neighboring buttons allow the user to apply TPC style guidelines.

Upon selecting any of the graph style buttons, the user is prompted to select whether the output graph is meant for Web or Print. Web graphs include placeholders for title, subtitle, and y-axis label, as well as a text box for the Source and Note, and TPC logo in the upper-right corner. Print graphs only include a y-axis label, as the title, sources, etc. are included in the text document directly. Graphs are automatically duplicated so the user can go back and start over, or move text over from the original to the new graph.
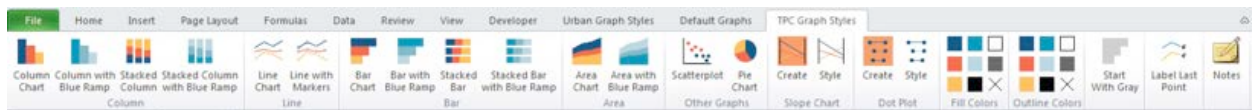
A few important caveats:

1. The add-in cannot be used to *create* an original Excel chart—that must still be done using Excel's usual *Insert Chart* menu and options; however, the Create Slope Chart and Create Dot Plot buttons do allow users to create those chart types with placeholder data that can be replaced with real data.
2. The add-in does not provide a full TPC color palette to apply colors to tables or cells—that must be done by using the standard Excel options or the TPC Template provided to all Excel users at TPC.
3. *Once the styling is applied using the add-in, those changes cannot be undone through the standard undo button or CTRL+Z keyboard shortcut.*
4. *The add-in does not solve* all *possible formatting issues or certain special cases. Hopefully, using this add-in will reduce much of the formatting needs faced by TPC researchers and communications staff. Any questions about installation or other add-in specific issues, can be directed to Jon Schwabish (jschwabish@urban.org).*

**Add-In Installation Procedures**

The remainder of this document describes how to install the *TPC Graph Styles* add-in to 2010, 2013, and 2016 versions of Microsoft Excel on PCs and the 2016 version of Excel of Macs (this add-in does not work with Excel 2011 on the Mac). The add-in is contained in a ".xlam" file format, which can be loaded directly into Excel following the directions below.
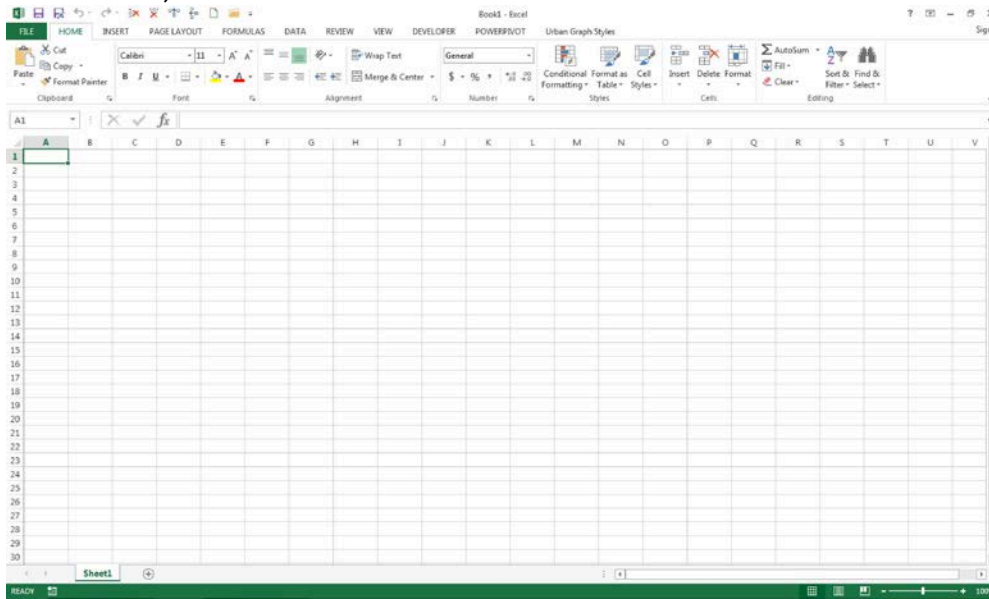
Which version of Excel do I have?

Most TPC employees use the 2010 version of Excel on PCs; others use the 2011 version of Excel on Macs. Some users have already moved to Excel 2016 on Mac or PC. Use the screenshots below to determine which version of Excel you have before following the add-in installation directions.
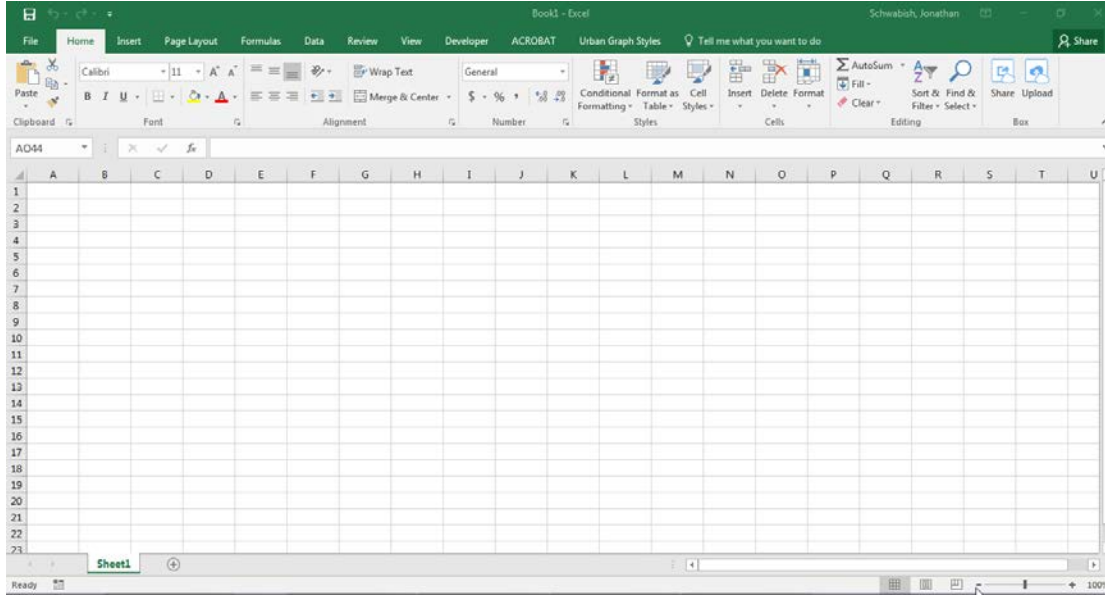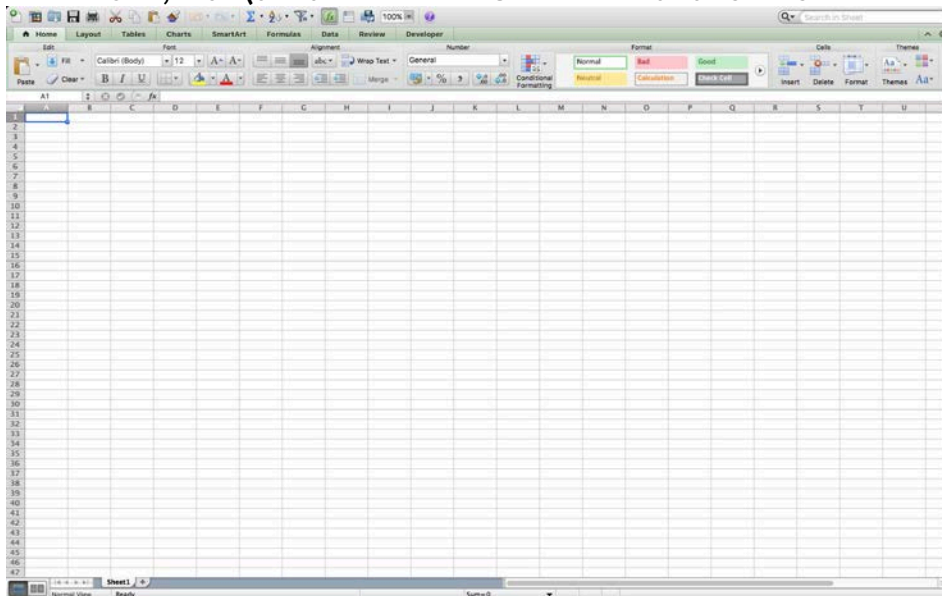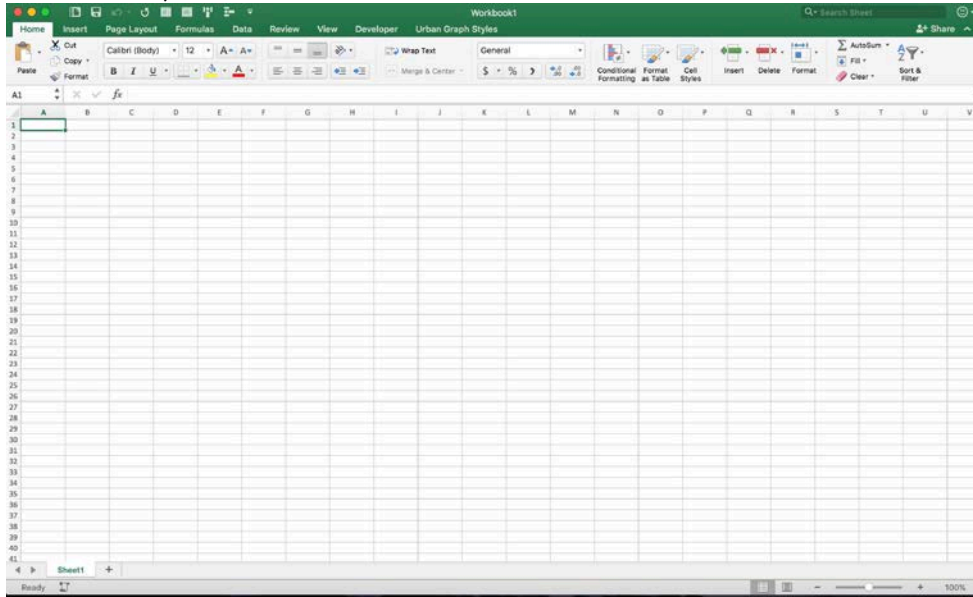
Excel 2010, PC
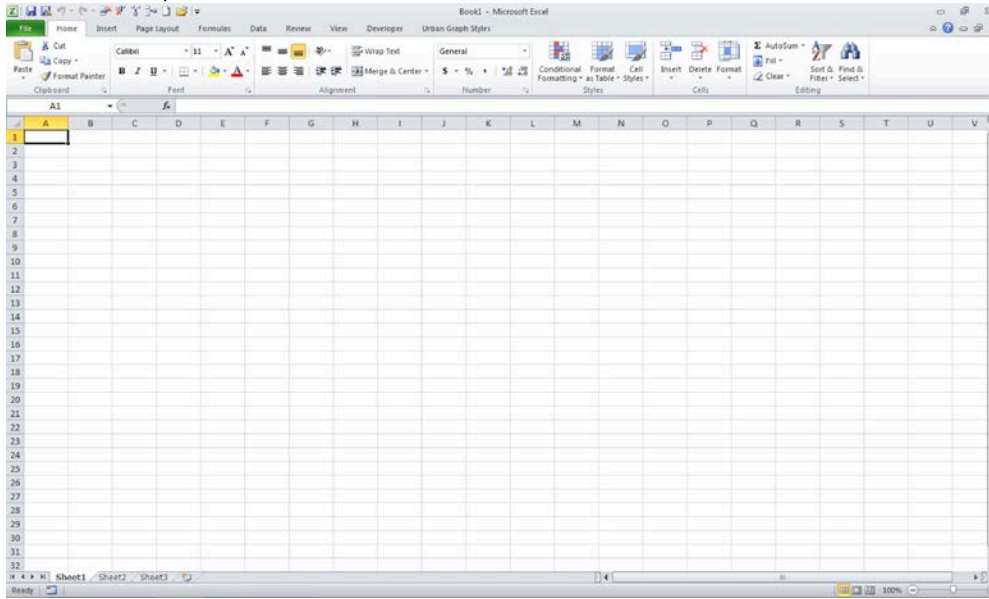
Excel 2013, PC

Excel 2016, PC

Excel 2011, Mac (the add-in will NOT work with this version of Excel)
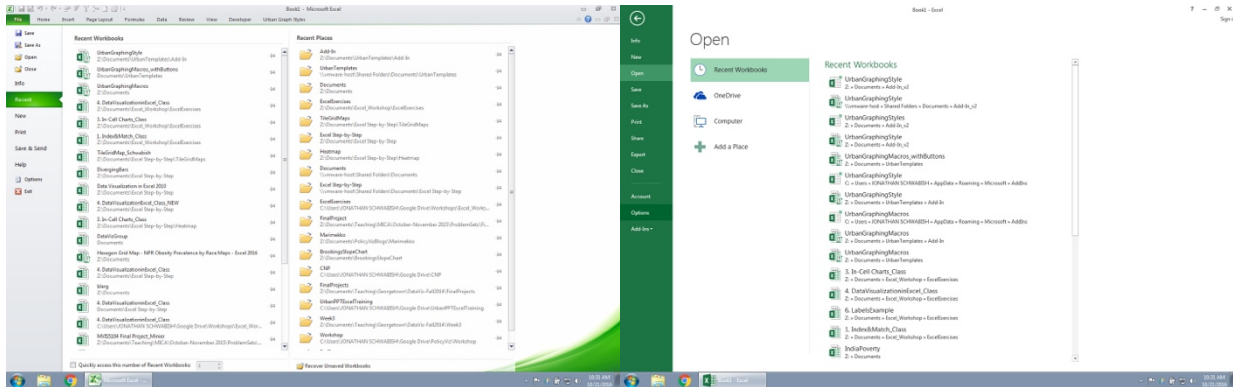
## Excel 2016, Mac

Installation Instructions

PC
Excel 2010, 2013, and 2016
You will basically follow the same steps to install the add-in in Excel 2010, 2013, and 2016. The menus look only slightly different.

1. Save the add-in to a location on your computer. (Alternatively you can save the file directly in the add-in folder:
   C:\Users\USERNAME\AppData\Roaming\Microsoft\AddIns\.)
2. Select the *File* tab in the Ribbon.

3. At the bottom of the File window, select *Options*.
4. In the *Options* window, select the *Add-Ins* option near the bottom of the left pane, and then select the "*Go…*" button at the bottom of the larger window.
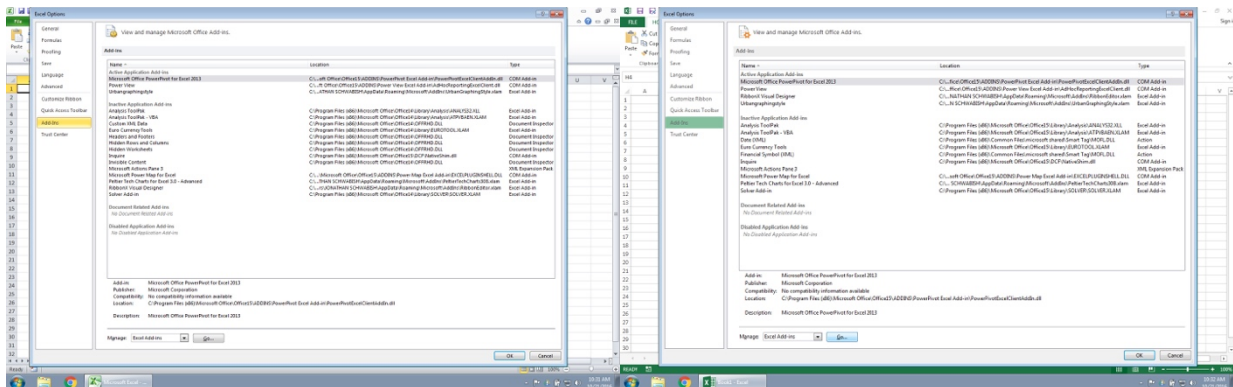
5. At this point, a menu will load. If you saved the add-in file to the "AppData" folder location, the add-in should already be located in this list. You can simply check the box and select OK. If you saved it anywhere else, select *Browse...* and navigate to the location where you saved the **TPCGraphingStyle.xlam** file. (Excel may ask you if you'd like to place the add-in in your *Roaming* folder; it is fine to select OK here.) Select *OK*.

   You will now see the *TPC Graph Styles* tab in your Excel ribbon. The tab will appear every time you open Excel (see the ****Security Note** below).
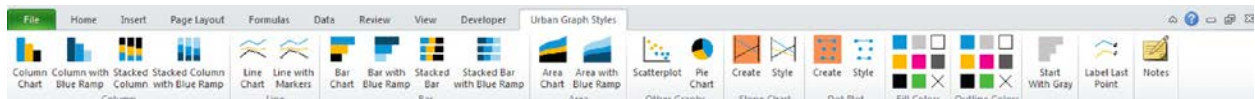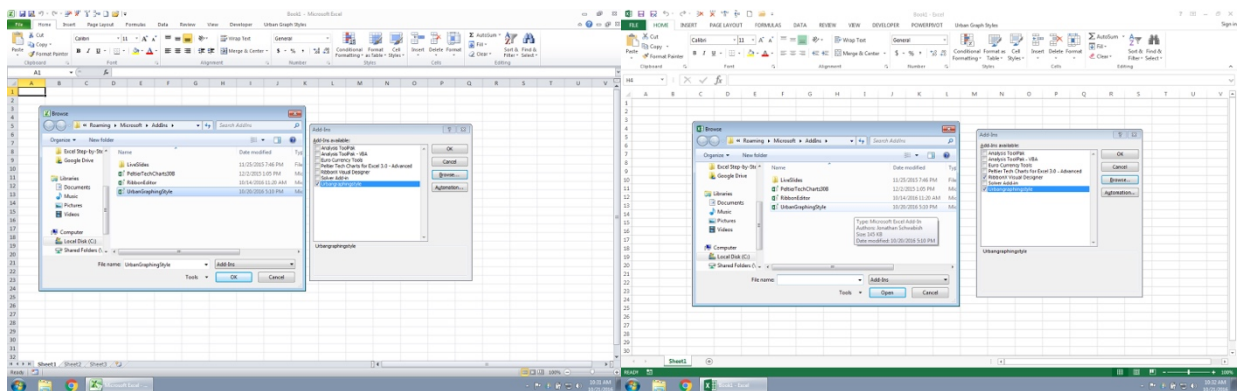

**SECURITY NOTE: If the ribbon tab does not appear after installing the add-in (typically happens in a later session), it may be due to a security update from Microsoft (and can affect Windows 7, 8, or 10 operating systems). A detailed description on how to solve this issue can be found here:
http://peltiertech.com/Utility30/Documentation30/RibbonDisappears.html.

Mac
Excel 2013 and 2016

1. Save the add-in to a location on your computer.
2. Under the *Tools* menu in the top toolbar, select the *Excel Add-Ins…* option.
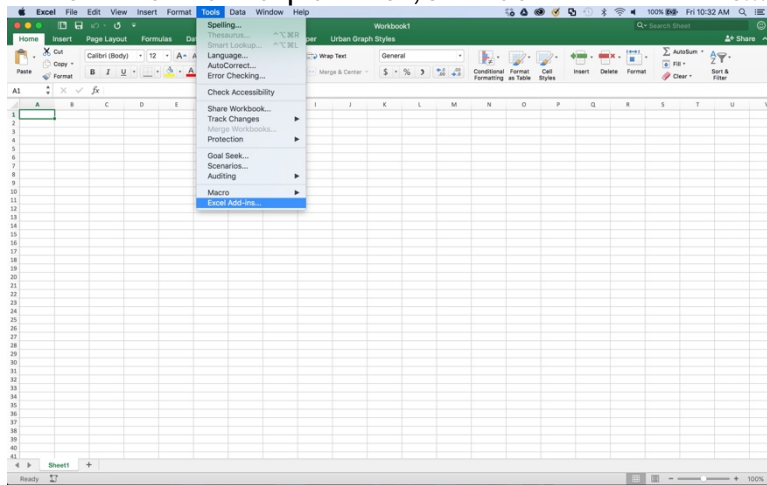
1. Select *Browse…* and navigate to the *TPCGraphingStyle.xlam* file. Select *Open*. The box next to the *TPCgraphstyle* add-in should now be checked. In this smaller menu, select *OK*. You will now see the *TPC Graph Styles* tab in your Excel ribbon. The tab will appear every time you open Excel (see the ****Security Note** below).
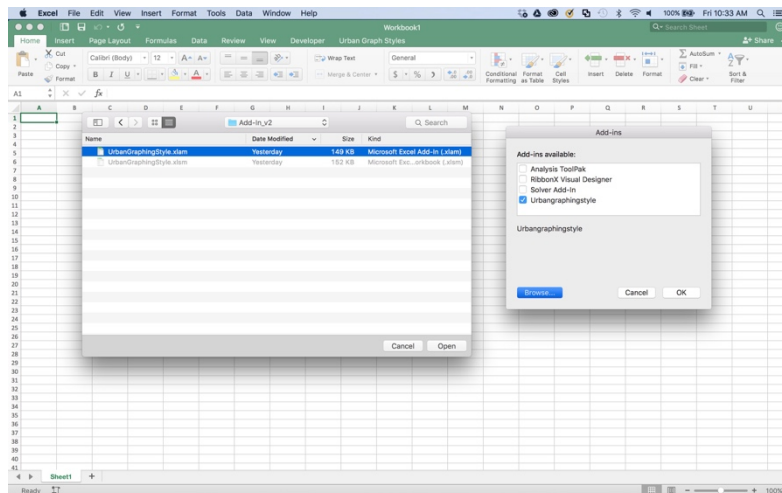
Two special notes on using this add-in on the Mac OS.

1. The Mac OS is not particularly kind to Excel add-ins. You may find that you receive some kind of error upon opening Excel. There is no actual problem with Excel, so click OK, and move into the program. Uninstalling the add-in (by repeating the steps above and deselecting the checkbox next to the *TPCGraphStyles* option) will fix the problem.

2. You may find that sub-menu labels don't appear in the Mac ribbon.

In this case, you need to adjust your *View* preferences. To do so, select *Preferences* under the main *Excel* button in the top menu. In the *Preferences* menu, select the *View* option, and check the box next to the "Group Titles" option under the "In Ribbon, Show" section at the very bottom.
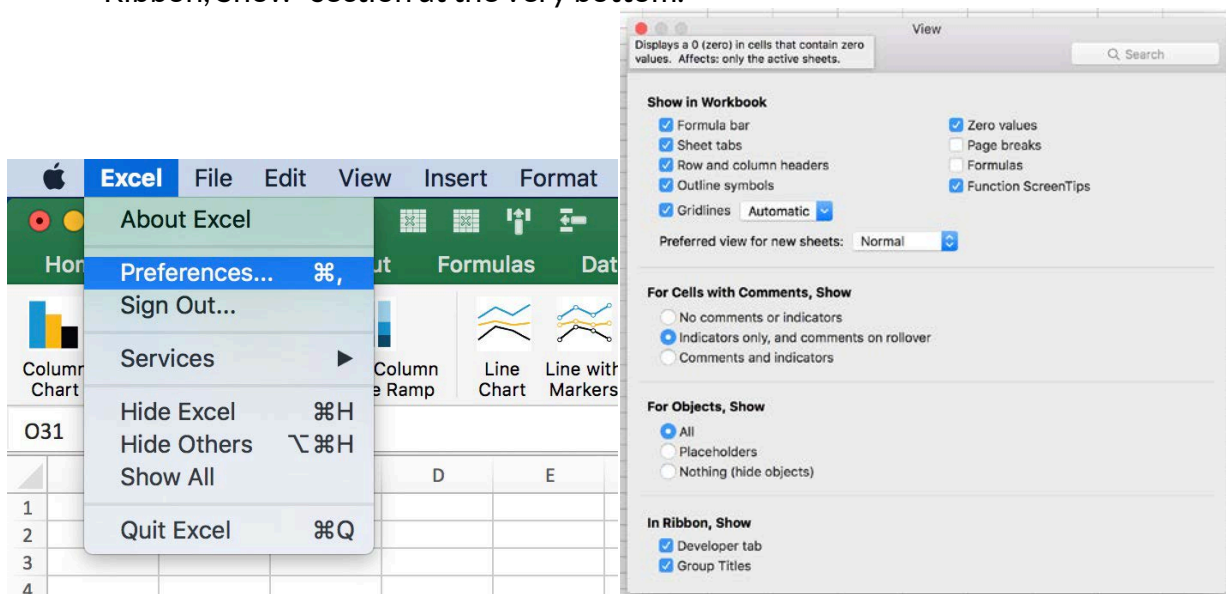

**SECURITY NOTE: Furthermore, if the ribbon tab does not appear after installing the add-in (typically happens in a later session), it may be due to a security update from Microsoft (and can affect Windows 7, 8, or 10 operating systems). A detailed description on how to solve this issue can be found here: http://peltiertech.com/Utility30/Documentation30/RibbonDisappears.html.

Error When Replacing the Add-in

It is possible that you receive an error if you try to replace an older version of the add-in. For example, if you save the add-in to a folder location on your computer other than in the \Roaming\Microsoft\AddIns\ location, and then try to install the add-in following the steps above, Excel will first ask you to copy the file to your *Addins* folder:
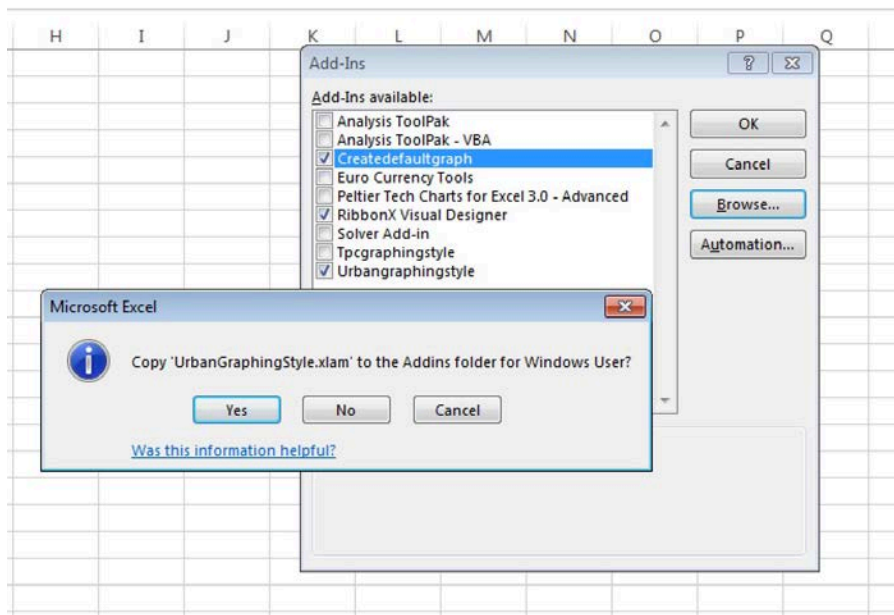
Because a previous version of the add-in already exists in that location, Excel may prompt you to overwrite that version:
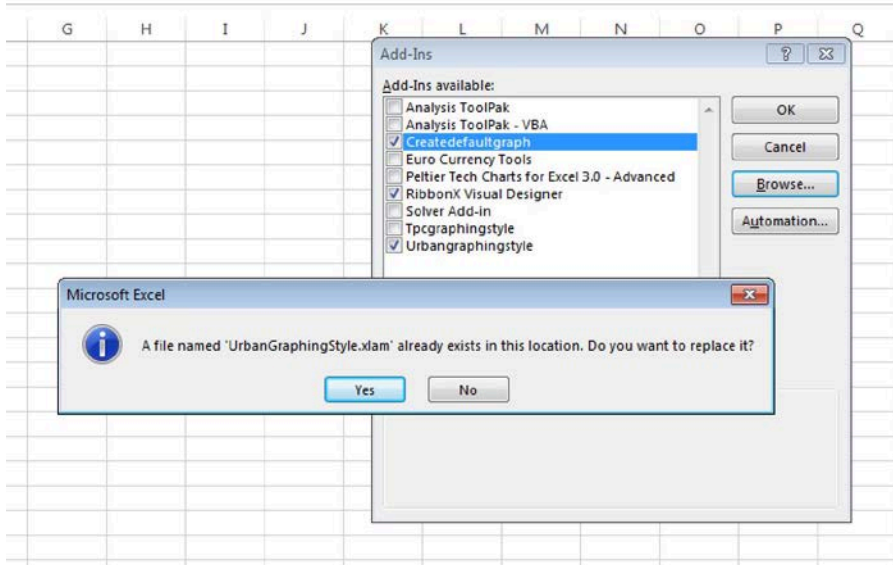
If, at this stage, you select *Yes*, Excel may give you the following error message:
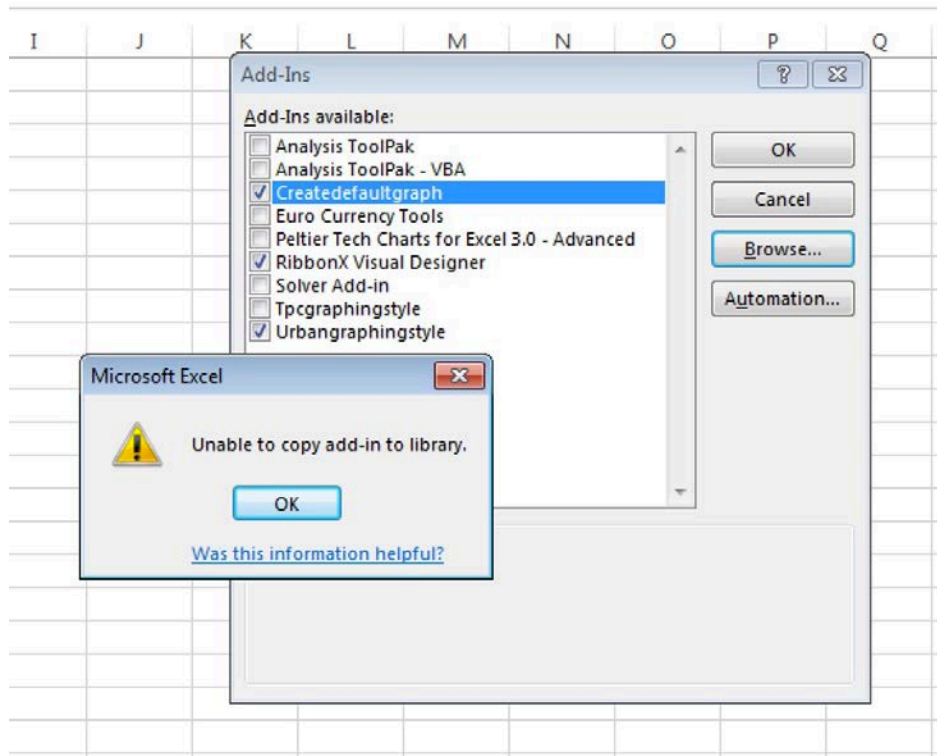
To install the new add-in, you need to navigate to the folder location (C:\Users\USERNAME\AppData\Roaming\Microsoft\AddIns\) and manually delete the old add-in. You can then install the new add-in as described above.