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**MICROSOFT EXCEL  
TEMPLATE MODELLING  
TOOLKIT**

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**DCS DATA VISUALISATION TEAM  
TRAINING GUIDE PART 1**

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**GETTING STARTED  
WITH BASIC TEMPLATES**

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# Getting Started.

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## Installing Your Templates

### 1. Automatic Installation of the Full Excel DV Template Bundle (Monthly Revision)

#### a) Run the Setup file (dcsdvtools.exe)

All Colours, Font Schemas and Templates will be installed on your computer automatically; the setup will also copy the files into your "My Documents" folder;

Your fonts will be located in: (Open this location with the run dialog; Windows key+R)

```
C:\Users\%USERNAME%\Documents\dcsdvtools\Fonts
```

Copy the fonts from this location, open the run dialog (Windows Key +R ) enter "fonts"; and into the fonts folder, paste the font files from the setup location.

#### b) If the Setup does not work or if .exe files are blocked on your system

Download the dcsdvtools.zip file option instead of the .exe executable, copy the .zip file to your "My Documents" Folder and unzip to the same location.

Open the unzipped dcsdvtools folder, open the install.bat file; this should automatically copy all the relevant files to appropriate locations for you. Make sure to install the fonts as described above in section a

#### c) If the install.bat file is unable to run; then follow the instructions below to copy manually

To install Templates; Enter the following path into the Run Dialog and Paste into it the contents from "dcsdvtools/Excel Templates"

```
C:\Users\%USERNAME%\AppData\Roaming\Microsoft\Templates\Charts
```

To install the color schema; Enter the following path into the Run Dialog and Paste into it the contents from "dcsdvtools/Theme Colors"

```
C:\Users\%USERNAME%\AppData\Roaming\Microsoft\Templates\Document Themes\Theme Colors
```

To install the Font schema; Enter the following path into the Run Dialog and Paste into it the contents from "dcsdvtools/Theme Fonts"

```
C:\Users\%USERNAME%\Documents\dcsdvtools\Theme Fonts
```

#### d) Installing the fonts

Download the fonts bundle (link provided) and unzip the compressed file provided,

With Administrator Privileges; Press (Windows Key + R) to open Run Dialog and Paste the following

```
Fonts
```

Paste the fonts into the fonts folder

#### 2. Manual installation of individual DV templates (interim releases)

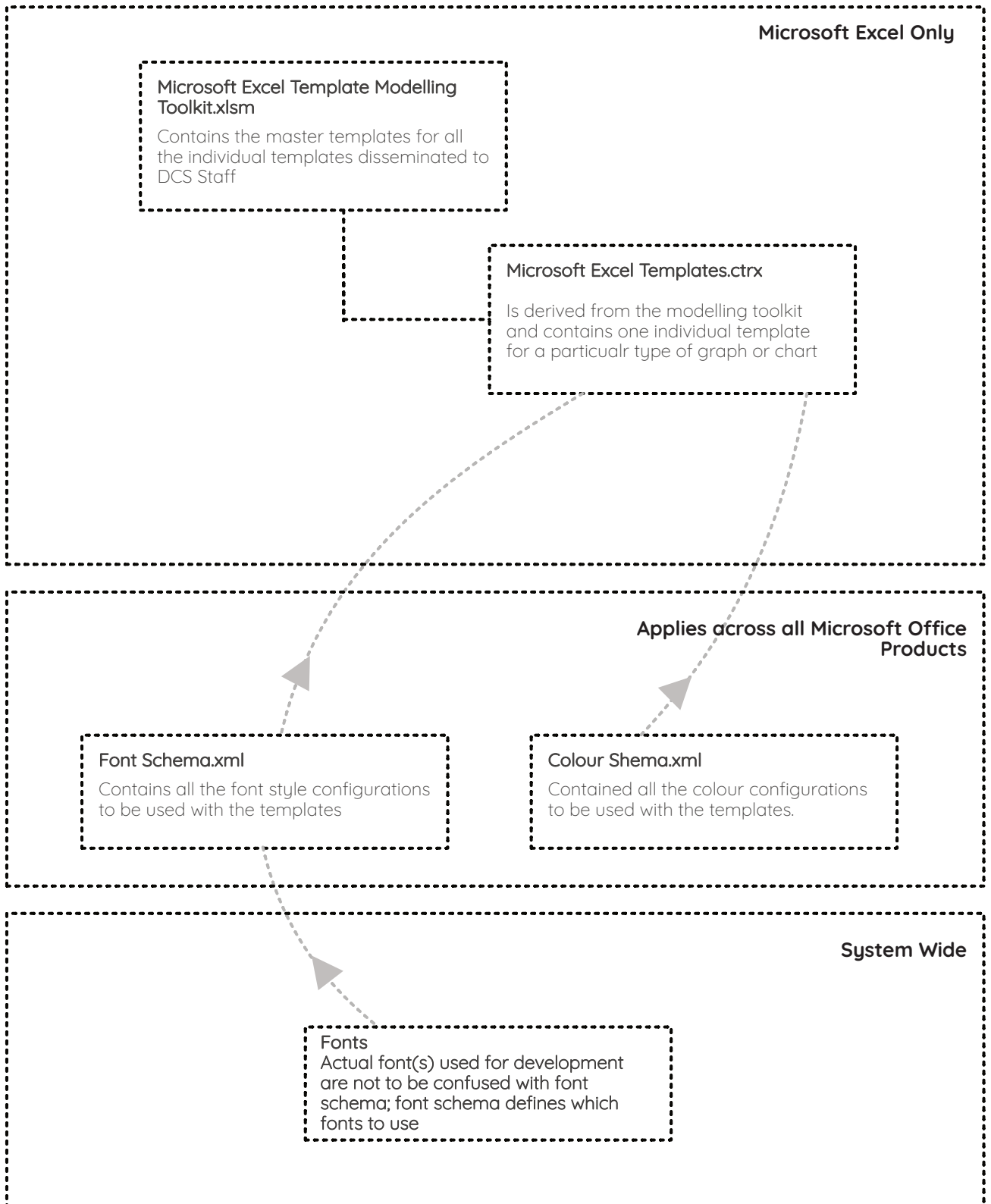
(Please note that for individual DV Template to work properly, you should have the necessary fonts, font schema and colour pallets installed first; individual templates are incremental add-ons to a system where the Full bundle is already installed (See section 1))

Copy the downloaded template ending with the extension .ctrx into the following destination

The destination can be opened up by copying the following line into the RUN Dialog on Windows (Windows Key + R)

```
C:\Users\%USERNAME%\AppData\Roaming\Microsoft\Templates\Charts
```

# Understanding dependancies



# Understanding the structure of the program

## Microsoft Excel Template Modelling Toolkit.xlsm

Contains the master templates for all the individual templates disseminated to DCS Staff

1

### Base Tables

Contains dummy data with which users can practice and create graphs

2

### General Use

Contains all the graphs from which templates are derived

3

### Report Layout

Contains an A4 size report layout for the user to check the graphs for size and layout compatibility.

4

### Infographic Toolkit

Contains infographic creations templates for facebook and instagram.

1

### Simple graphs

Templates that can be designed within Excel's default capabilities

2

### Complex Templates

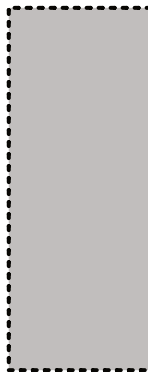
Templates that require additional work and are beyond Excel's default offerings.

Wide



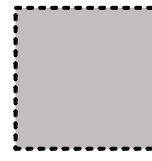
These graphs take the entire width of an a4 sheet and are no taller than  $\frac{1}{2}$  the a4 sheet

Narrow



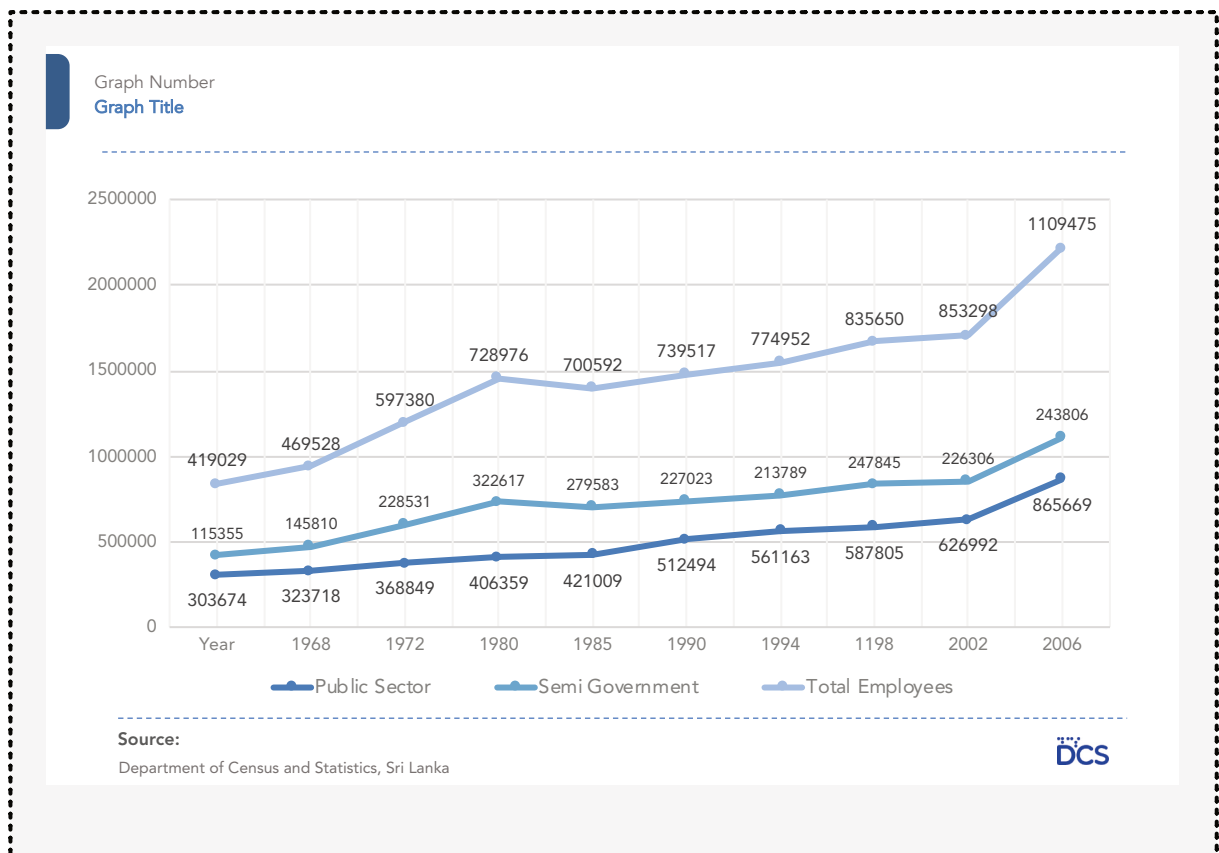
These graphs are no wider than  $\frac{1}{2}$  of the a4 sheet and can take upto  $\frac{4}{5}$ th of the height of the page

Compact

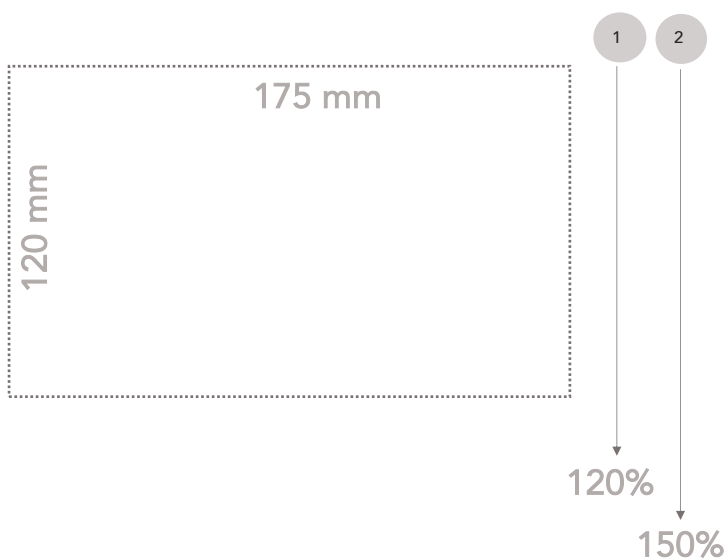


These graphs take roughly  $\frac{1}{4}$  of an a4 sheet, and are often contained in a 1:1 aspect ratio.

# General Formatting Guidelines



## Wide Configuration



### Size

175 mm x 120 mm are the recommended minimum a chart of this category, however the user is free to stretch the height upto 150% when the graph is unable to accommodate all the data at the minimum recommended height.

X Axis ◯ Vs Y Axis ◯

### Axis Titles

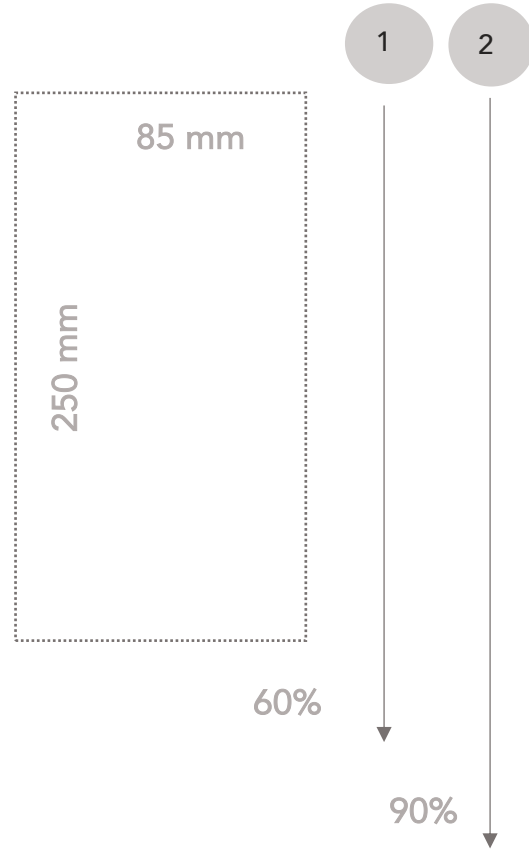
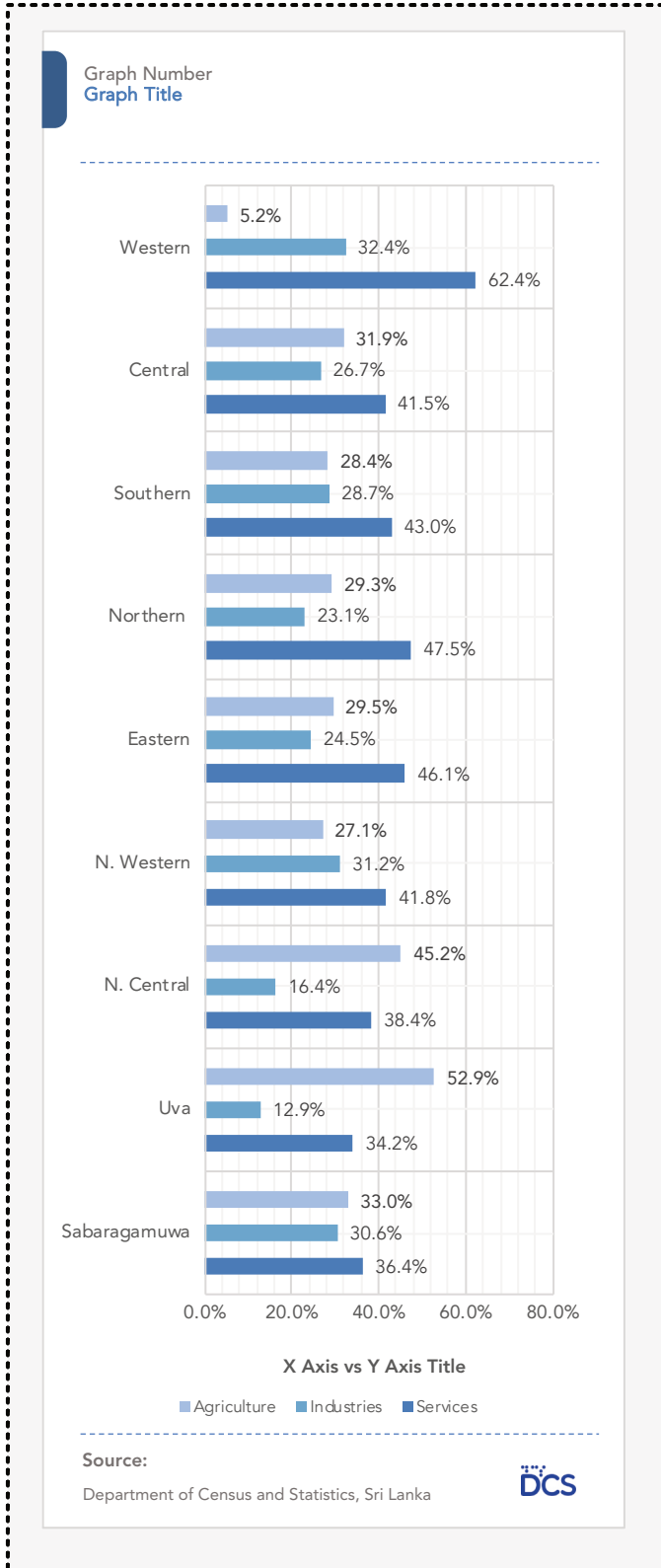
When space is insufficient to accommodate X and Y Axis titles along the axes; both titles must be placed at the bottom of the graph using the above format

### Overflow

If the recommended length of the graph is insufficient to accommodate all the data, the graph must be drawn full page in landscape orientation. This is usually recommended for large datasets which might contain in excess of 20 categorical variable that cannot be accommodated in a thin, vertical format.

# General Formatting Guidelines

## Narrow Configuration



### Size

These graphs take up 45% of the width of the page, and upto 70-90% of the page length; this aspect ratio is usually recommended for single horizontal bar graphs.

X Axis () Vs Y Axis ()

### Axis Titles

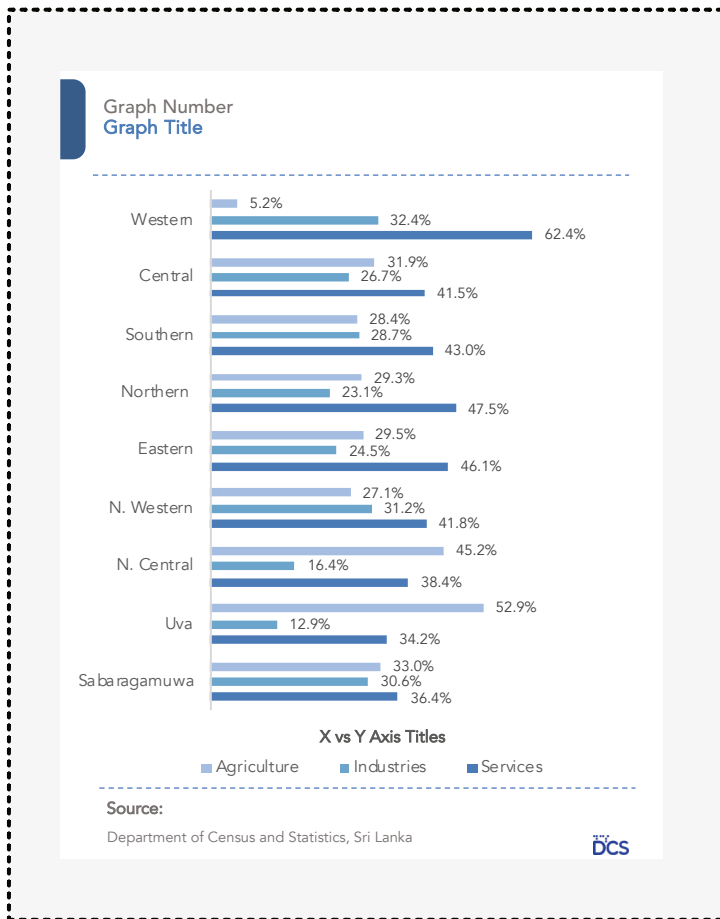
When space is insufficient to accommodate X and Y Axis titles along the axes; both titles must be placed at the bottom of the graph using the above format

### Overflow

If the recommended width of the graph is insufficient to accommodate all the data, the graph must be given full width, and aligned to the vertical midline.



# General Formatting Guidelines



## Compact Configuration



1

### Size

These graphs take up 45% of the width of the page, and up-to 70-90% of the page length; this aspect ratio is usually recommended for single horizontal bar graphs.

X Axis ◯ Vs Y Axis ◯

### Axis Titles

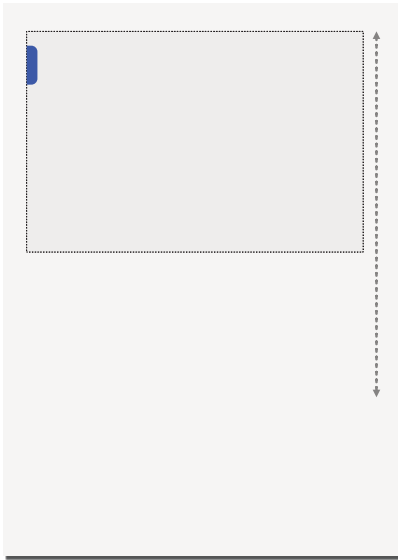
When space is insufficient to accommodate X and Y Axis titles along the axes; both titles must be placed at the bottom of the graph using the above format

### Overflow

if a graph of this nature is insufficient to accommodate all the data, use the other, 1/2 page formats provided in the module.

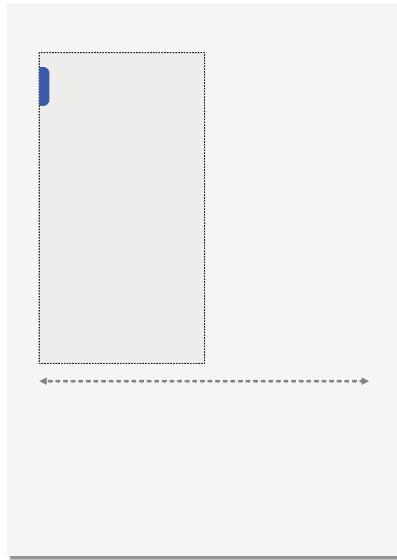
# Summary of permitted resizing options

Wide



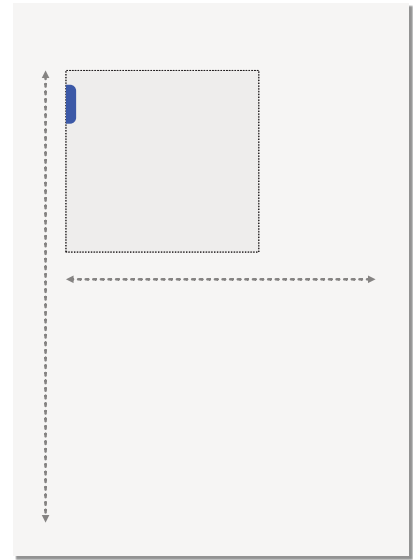
A4 sheet

Narrow



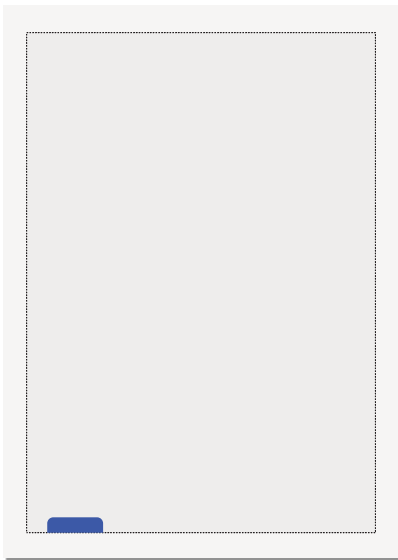
A4 sheet

Compact



A4 sheet

Wide



Or use a landscape layout

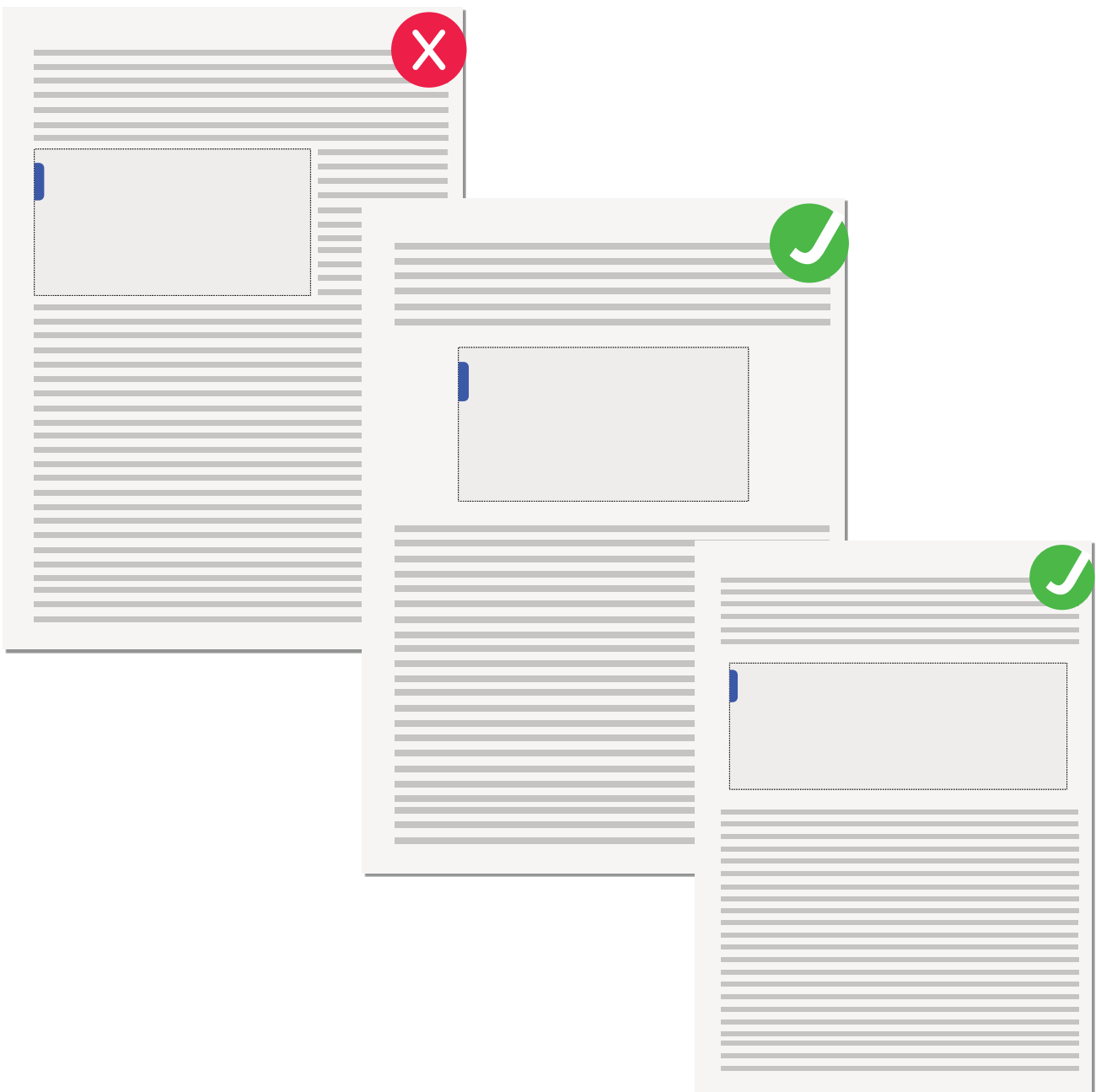
## Important : Layout and Text Wrapping

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Do not Attempt to squeeze standard size charts into smaller spaces, if there is not enough space available on a page, move to next page

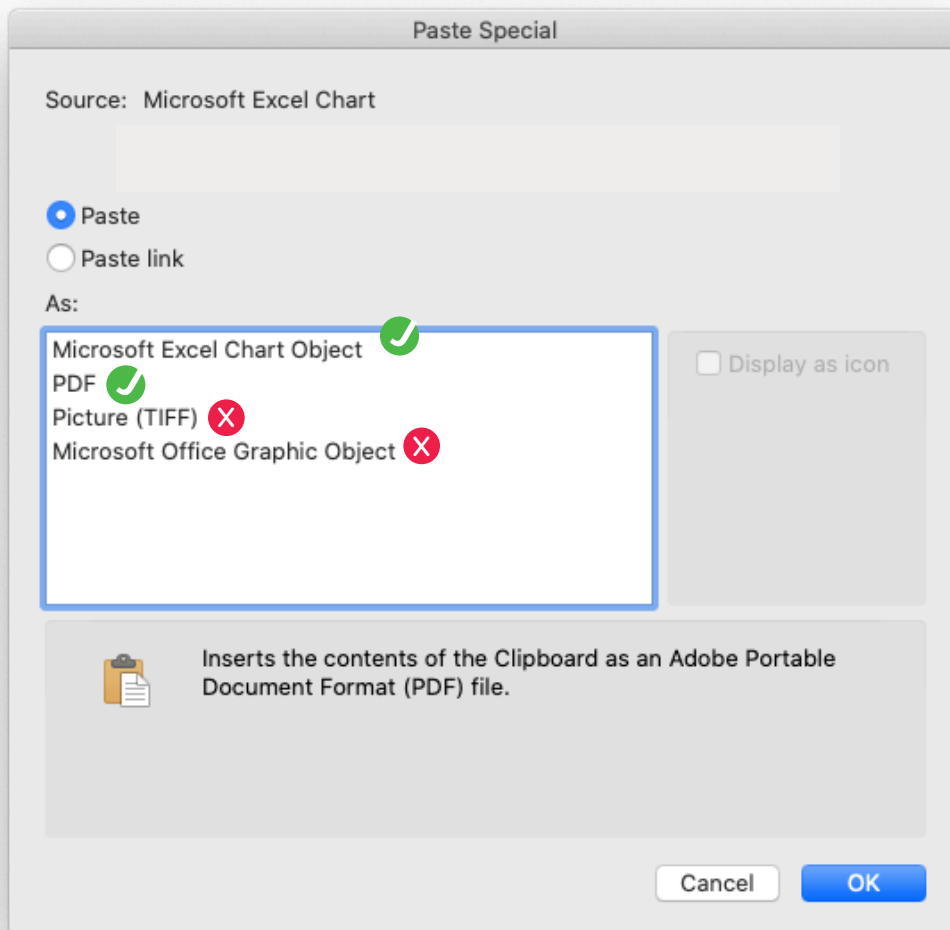
Ensure that if a page is divided into two columns, a graph either occupies both columns or an entire section of a single column; do not wrap text around a graph that overlaps the centre line; if a graph overlaps the centre line,

- A) Either stretch if across the entire width of the page
- B) Center the graph and wrap text on top and bottom



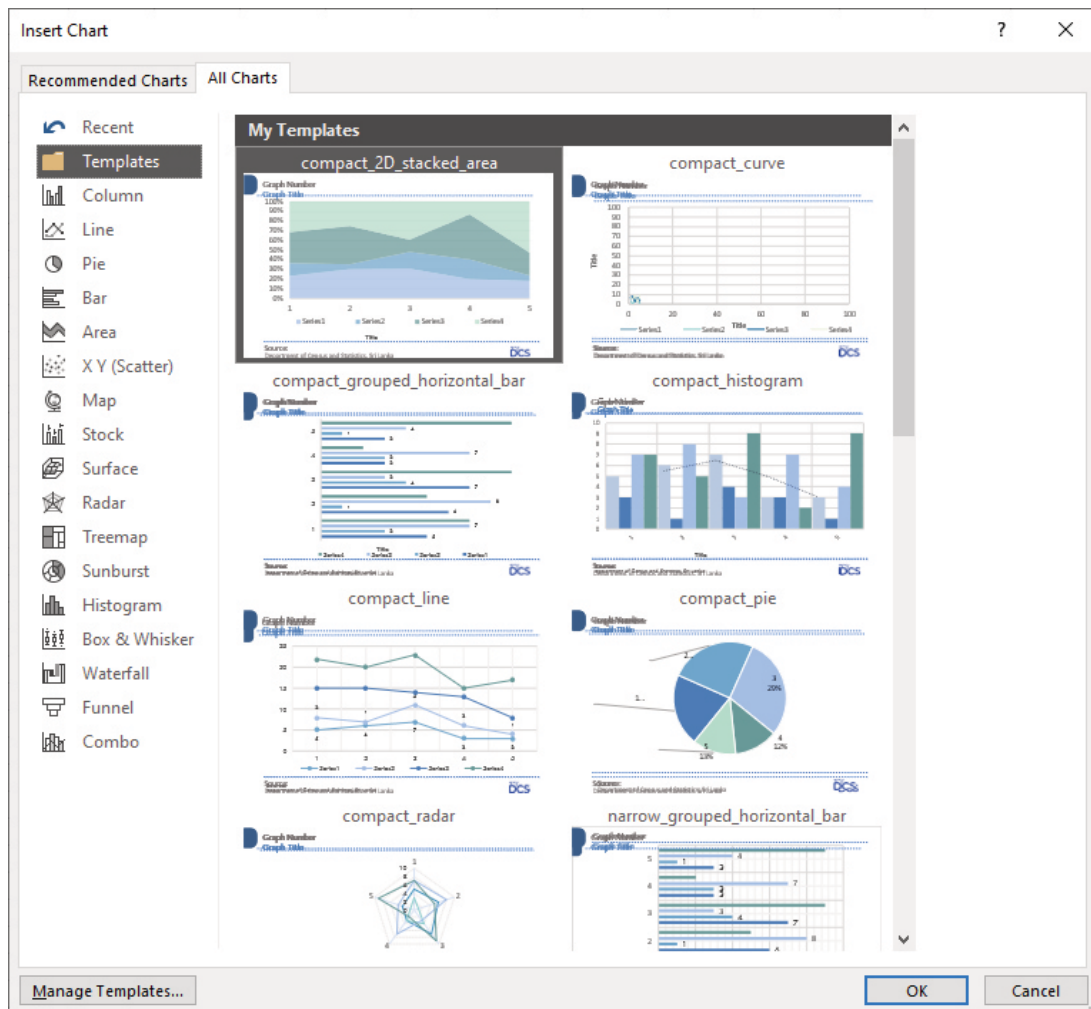
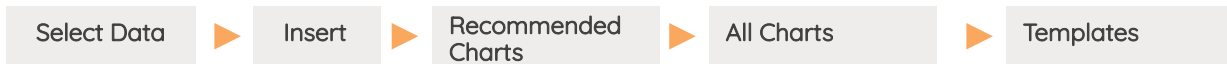
## Important : Copying your visualisations

Always Copy and paste your graphs as either Microsoft Objects or PDFs, pasting as images will lead to a reduction in the image quality of the end product.



- A) If the object is copied over as an image, ensure to preserve the aspect ratio of the image at all times.
- B) Ensure that all branding accents remain intact when copying a visualisation over
- C) Ensure that the font and colour scheme of the destination document matches with the source document

# Loading your templates



Ensure that the chart type corresponds not only with the data, but also the desired size

Charts are named as follows

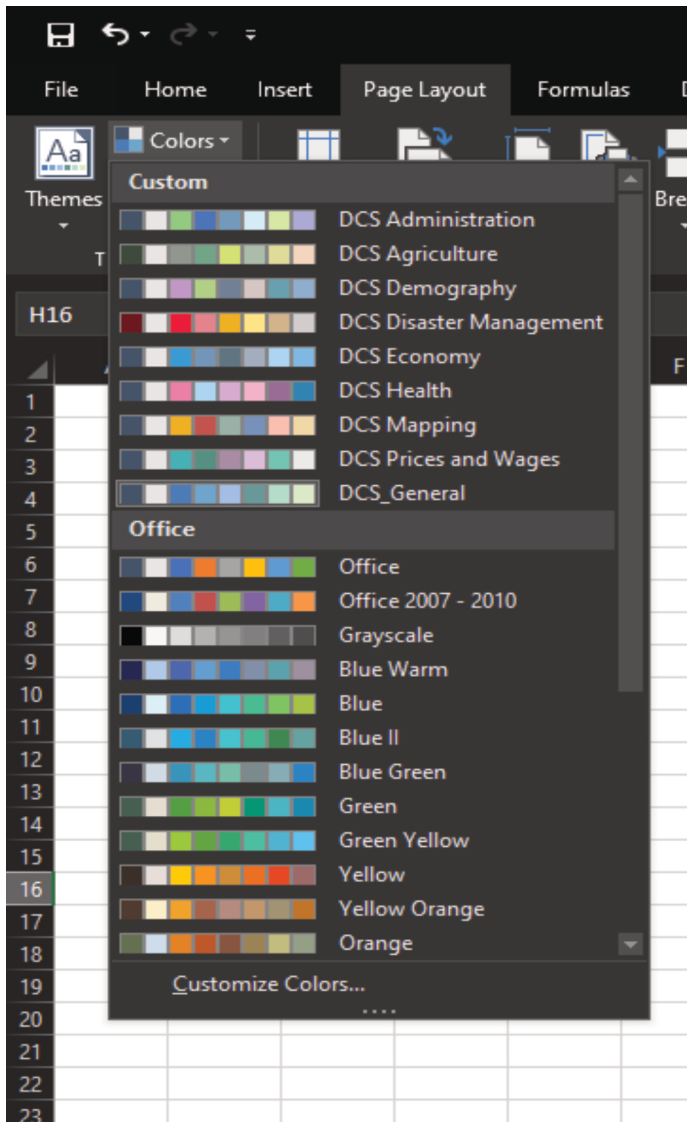
SizePrefix\_graphtype

Eg:

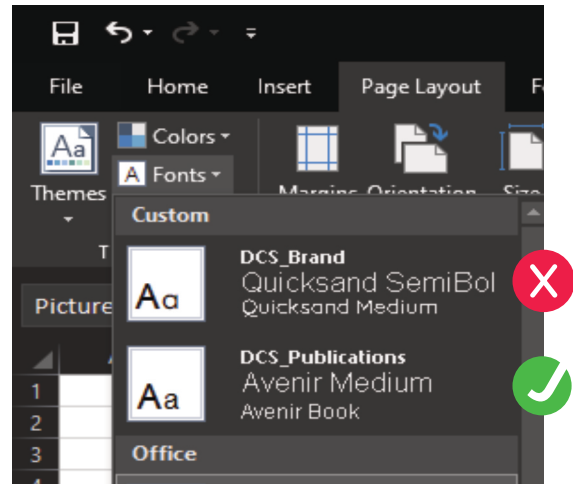
compact\_pie

## Changing colour scheme to match publication type

Page Layout ▶ Colors



Page Layout ▶ Fonts



### Changing color

Select appropriate scheme from the menu, if the graph colours do not change, right click the graph and click “Reset to Match Style”

### Font Sizes

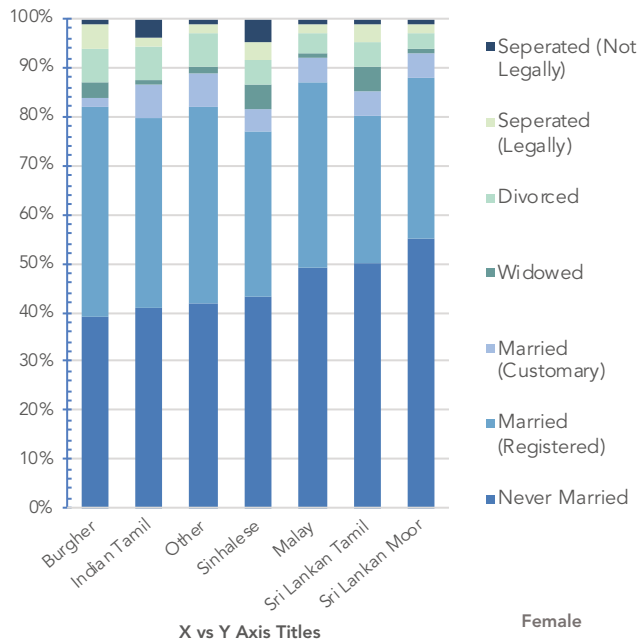
The range of acceptable font sizes for an a4 based visualisation is from 8pts to 10 pts.

# Non standard graphs

Example 1:

Graph Number  
Graph Title

Excel only allows for 1 graph on 1 canvas at a time; therefore the standard template only contains one graph

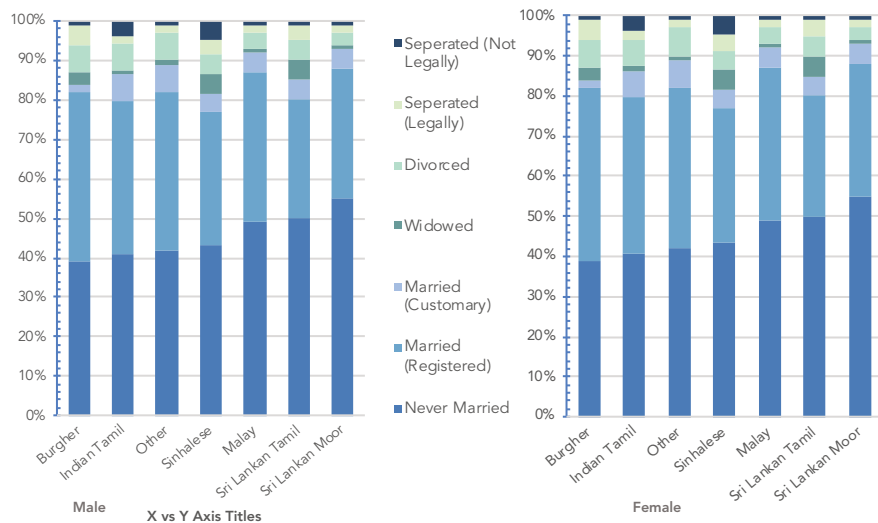


Source:  
Department of Census and Statistics, Sri Lanka



Graph Number  
Graph Title

If we need a second graph for comparison, we can repeat the process, generate the second graph, then place it on the canvas and group the graphs together

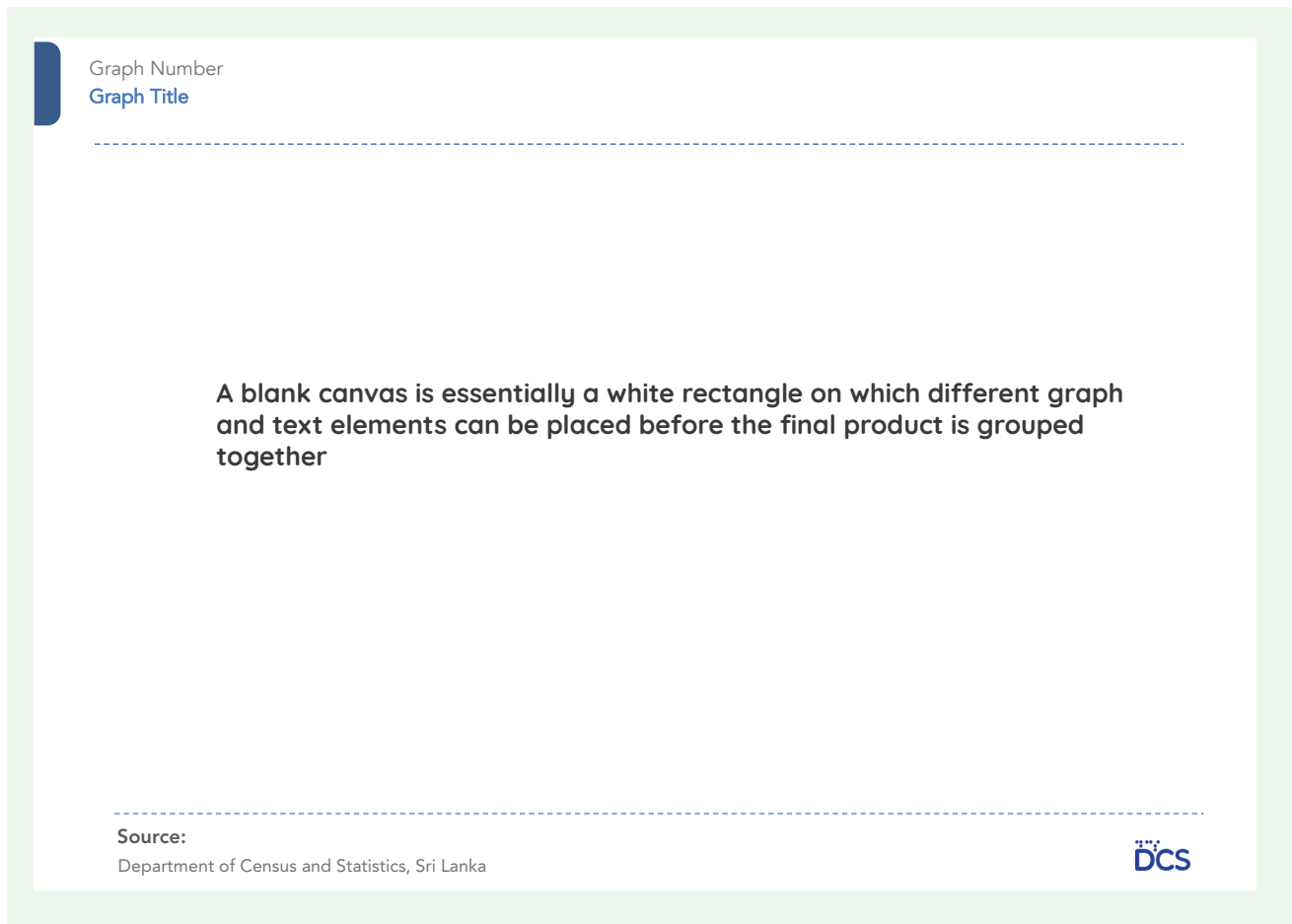


Source:  
Department of Census and Statistics, Sri Lanka



## Graphs without canvases

Due to limitations of Excel, some graphs do not come with stretchable canvases, therefore, we will need to place the graphs manually on a canvas, a premade canvas can be found on the Nidahas Website, in the downloads section.



A blank canvas contains four text fields, for the graph number, title, source, and the line “Department of Census and Statistics”

A canvas has in its upper left corner an accent graphic



On its lower right corner the DCS logo



And divides the graph area from the detail area using two dotted lines





# Graphs without canvases

Graph Number  
Graph Title

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X vs Y Axis Titles

Source:  
Department of Census and Statistics, Sri Lanka

Eg: combined use of two graphs on the canvas.