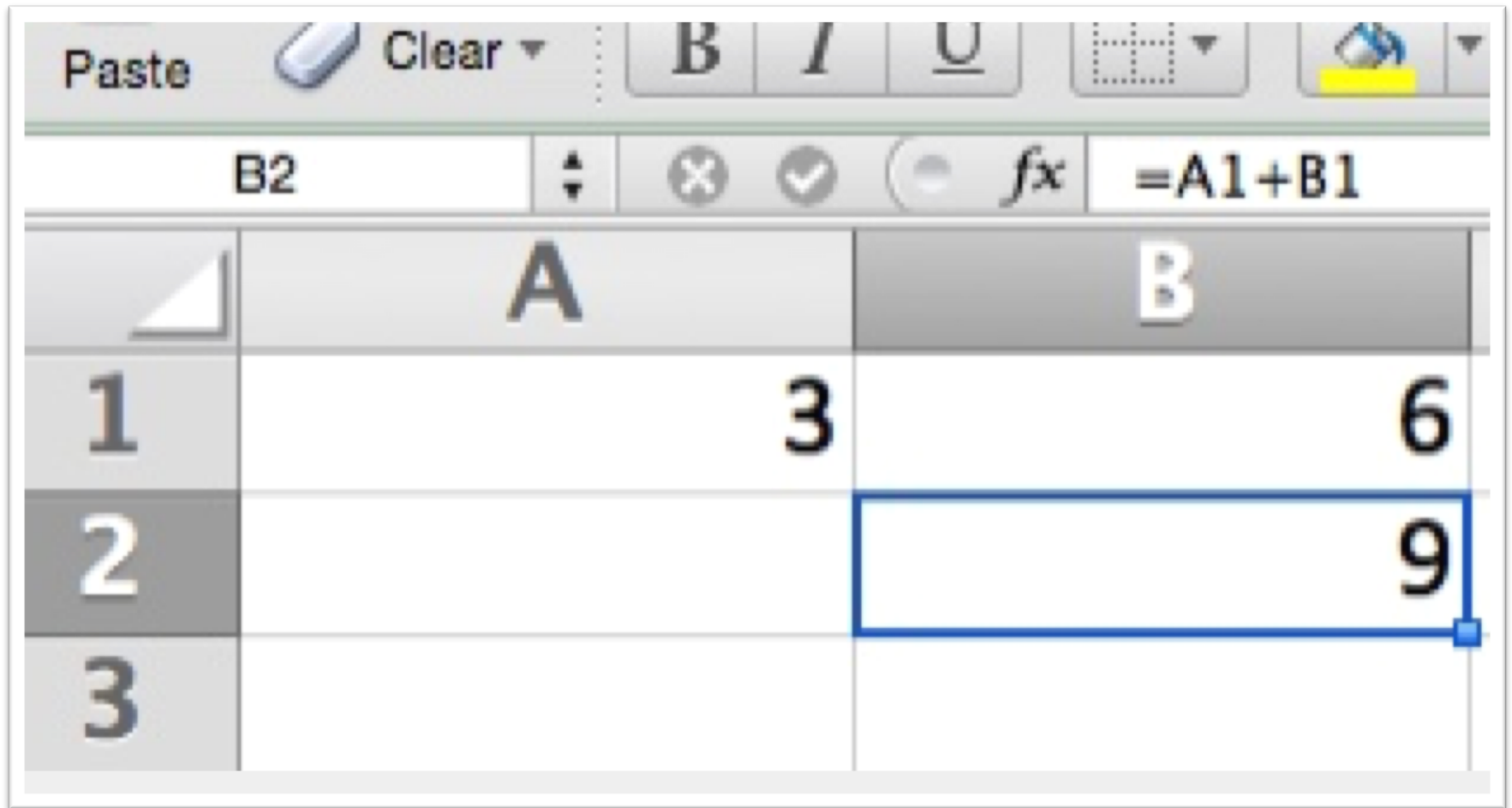# Improve Your Workflow Using Spreadsheet and Macro Programs

Naomi J. Sutcliffe de Moraes, PhD

Portuguese and Italian into English Translator

Talk Outline

- How to use Excel, rather than specialized programs, for translation/interpretation business management

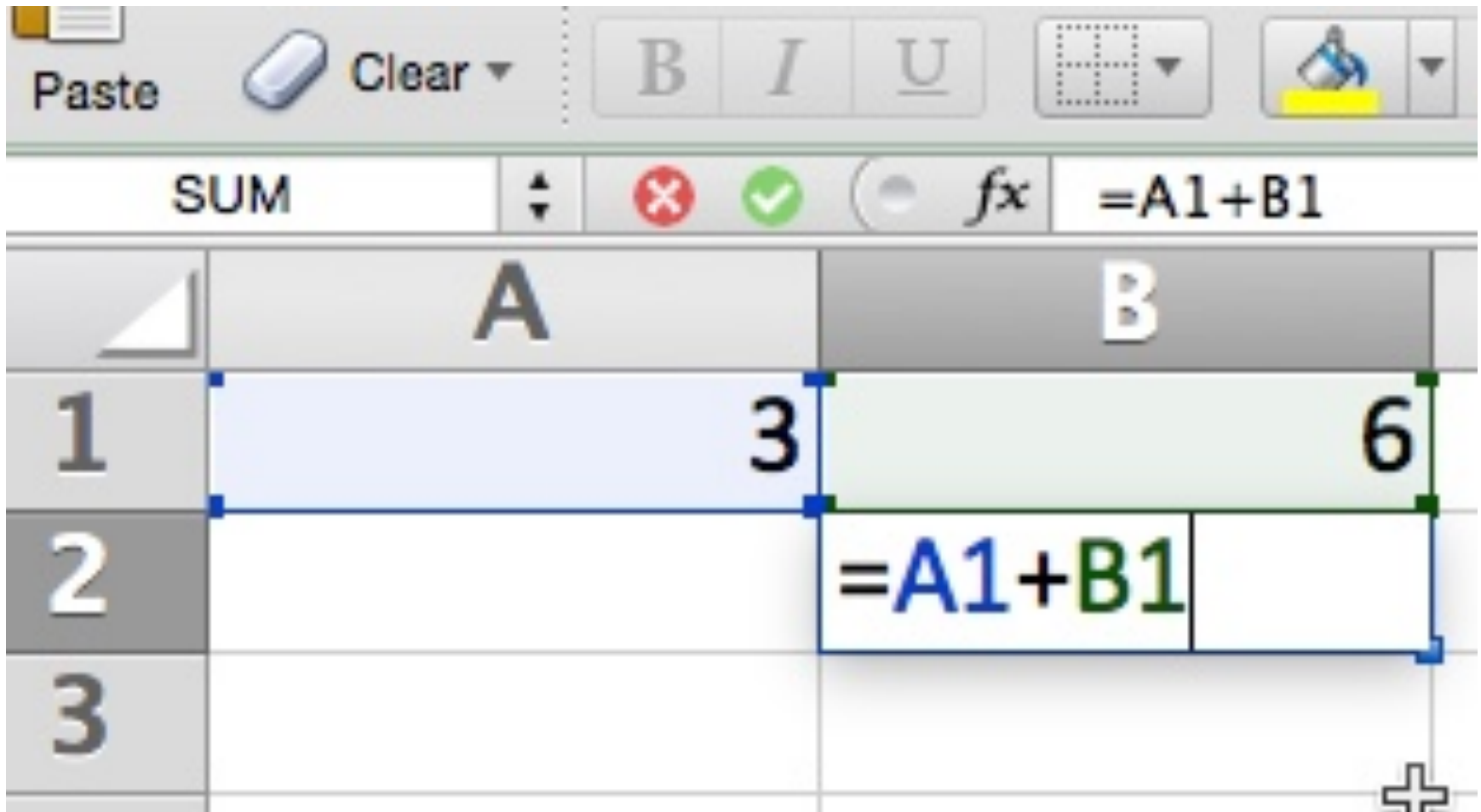- How to use macro and text expander programs to type faster and more accurately

Excel Entry Line

Double-Click on Cell

Workflow

- Request for quote
- Start job
- Track time spent
- Add terms to glossary
- Invoice client
- *Record tax-deductible expenses*

Initial Client Contact Quote Worksheet

- Worksheet v Workbook
- Text and formulas treated differently
- Simple calculations
- Formatting X.XX
- Sync with a mobile device
- Excel app
- Export to pdf (GoodReader on iOS)

Export to PDF for phone

Date Job Due	Bank	Tax location	Client	units	cost/unit	Currency
			US agencies	source word	100,00	USD
			US agencies	minimum charge	5000,00	USD
			UK agencies	source word	50,00	UKP
			US individuals	source word	90,00	USD
			US direct clients	source word	180,00	USD
			BZ individuals	source word		BZR
02/01/15	Itaú	BR	Trad something	5	600	BZR
05/01/15	Credit Unic	US	Lingua Something	600	50	USD
13/01/15	Credit Unic	US	Words something	min	2	EUR

After Quote Has Been Accepted Job Worksheet

- Color coding v. sorting

- Hiding columns

- Selecting entire worksheet, line, column

- Automatic number generation

- Pasting as text

- Fill down and right

- Sum function

Keeping Track of Time Spent Project Timesheet

- Being "on the clock"

- Are you charging enough for that job?

- Dollar signs create a permanent reference

- How to copy a worksheet (tab)

- Changing the name of a tab

Terminology Management
Terminology Workbook

- Keeping the header at the top

- Importing/exporting to TEnT (tab-delimited)

- Exporting to mobile: Excel app, text*

- Better than Word – smaller, better searching

Text Output to Mobile Device

```
English Portuguese
rescission  rescisão
termination  rescisão
cancellation rescisão
```

Billing a Client
Invoice Template

- One tab per invoice type/language/bank

- Calculate totals automatically

- For regular clients, save a copy to use as a template

- Alternative: use word-count software program for invoicing

More Advanced Statistics
Advanced Job Worksheet

- Time spent on job
- Tax hit – different for different jurisdictions?
- Averages

Tax Time
Business Expenses Worksheet

- Add expenses throughout the year

- Sorting on different columns

- Copying a tab from one spreadsheet to another.

Text Expanders and Macros

- Why use system-wide tools
- Windows
  - AutoHotKey (free)
- MacOS
  - aText ($5)
  - Typinator (25€)
  - TypeIt4Me ($20)
  - TextExpander ($45)
  - Keyboard Maestro ($36)

AHK Script File

- Simple text format
- Just copy header from example
  - www.sutcliffe.com.br
- Macros format
  - ::govt::government
  - ;::rer::researcher
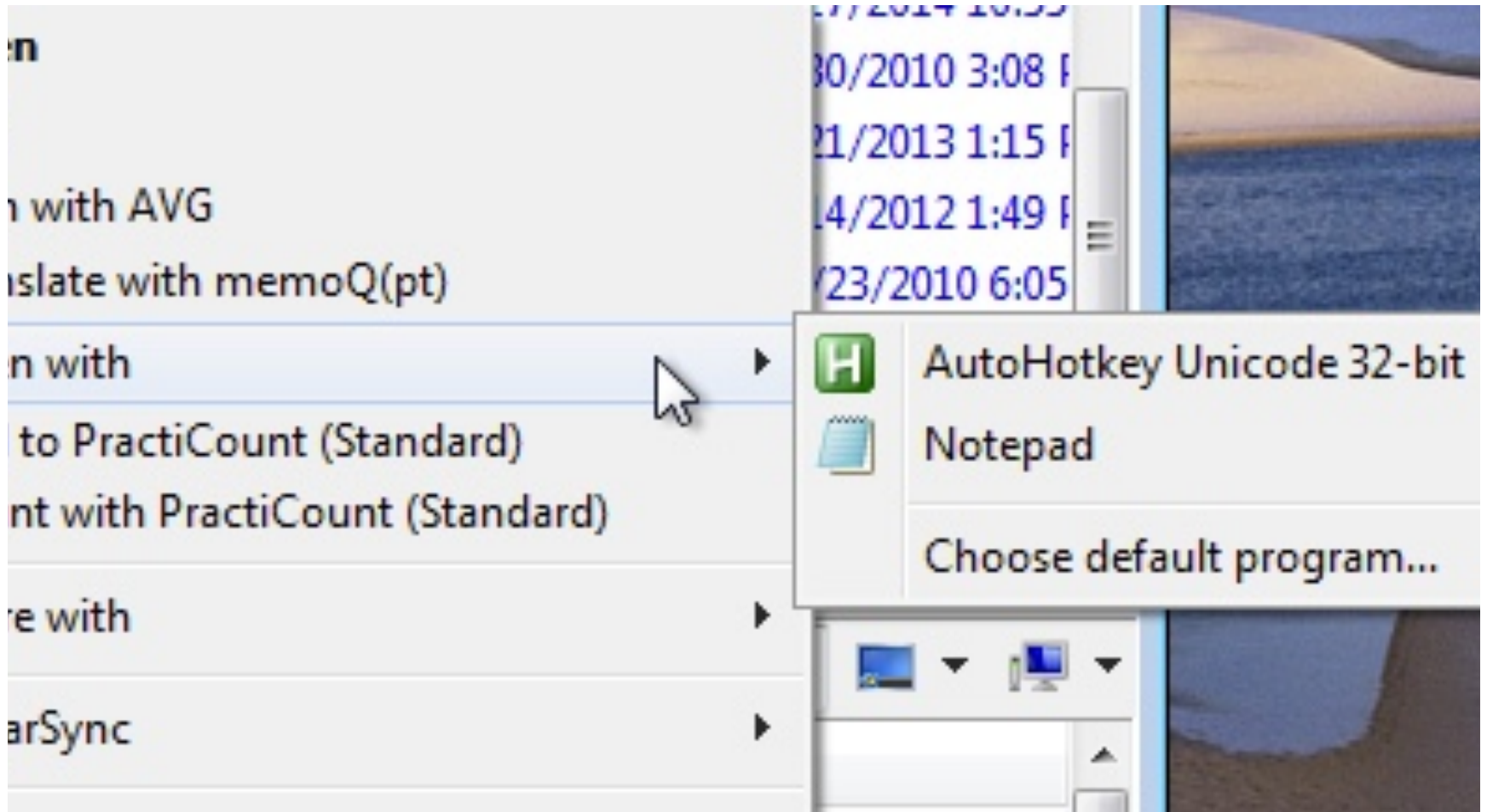 - (; deactivates the macro)

Types of Macros

- Abbreviations (project-specific too)
- Common typos
- Entire sentences/multiword expressions
- Punctuation (dashes, brackets)
- Automatic capitalization (CNPq)
- Days of week, months
- Writing out numbers 1212 = 1kf 200f 45f
  Instead of one thousand two hundred forty-five

Case sensitivity

- ::ast::astrophysics
- Type Ast -> Astrophysics
- Type AST -> ASTROPHYSICS
- ::co::Company
- Type co -> Company
- Type CO -> COMPANY

How to Activate an AHK Script

How to Reload an AHK Script

Resources to Download

- Excel Templates on my site
  - Sample_jobs.xls
  - Sample_project_timesheet.xls
  - Sample_glossary_template.xls
  - Summary of Excel operations
- Sample AHK macro file
  - AHK-scriptHfile-PC.ahk

Thank you for coming!

www.sutcliffe.com.br/publications