



# Users Guide for WoodCite

## A Product Cost Quotation Tool for Wood Component Manufacturers

**Jeff Palmer**  
**Adrienn Andersch**  
**Jan Wiedenbeck**  
**Urs Buehlmann**



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## Abstract

WoodCite is a Microsoft® Access-based application that allows wood component manufacturers to develop product price quotations for their current and potential customers. The application was developed by the U.S. Forest Service and Virginia Polytechnic Institute and State University, in cooperation with the Wood Components Manufacturers Association.

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## The Authors

JEFF PALMER is an information technology specialist with the U.S. Forest Service, Northern Research Station, in Princeton, WV. He received a B.S. in business management and computer science from Bluefield State College in Bluefield, WV.

JAN WIEDENBECK is a research forest products technologist with the U.S. Forest Service, Northern Research Station, in Princeton, WV. She received a B.S. in forestry from the University of Michigan in 1980, an M.S. in forest products from the Virginia Polytechnic Institute and State University in 1988, and a Ph.D. in forest products from Virginia Polytechnic Institute and State University in 1992.

ADRIENN ANDERSCH is a graduate research assistant and a doctoral degree candidate in wood science and forest products at the Virginia Polytechnic Institute and State University. She graduated from the Faculty of Economics at the University of West Hungary, Sopron in 2007 and has an M.S. in economics. Her research interests include cost accounting, and product and process pricing within the primary and secondary wood industry.

URS BUEHLMANN is an associate professor of wood science and forest products at the Virginia Polytechnic Institute and State University. He obtained an industrial engineering degree from the Swiss Institute of Wood Technology, an MBA in finance and management, and a Ph.D. in wood processing from the Department of Wood Science and Forest Products of the Virginia Polytechnic Institute and State University.

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Email: nrspubs@fs.fed.us

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## WHAT IS WOODCITE?

WoodCite is a Microsoft® Access-based application that allows you to create a product price quotation for your customers. It uses your production data such as materials, labor, and overhead costs (along with your product margin) to compute the total product cost. Before starting, make sure you have the appropriate records and documents handy, such as income statements and employment records (number of hired employees, wages, salaries, etc).

WoodCite computes your product cost information based on your entries. In addition to creating a product price quotation, you can use WoodCite to run various scenarios to see where you can improve productivity or add a new machine to your plant, or simply perform a what-if analysis to understand how shifts in materials and resources may impact product costs.

## SYSTEM AND SOFTWARE REQUIREMENTS

WoodCite, developed using Microsoft® Access 2007, uses Microsoft® Excel to perform statistical computations. Although Microsoft® Office 2007 (including Access and Excel) provides the ideal environment for running WoodCite, earlier versions of Microsoft® Office (such as, but not less than, Microsoft® Office 2002 on Windows XP) will support the application. The minimum requirements are as follows:

- IBM-compatible PC with Microsoft® Windows 2000 to Windows 7 (latest service packs) installed
- Microsoft® Access 2002 to 2007 (latest service packs)
- Microsoft® Excel 2002 to 2007, with the data analysis tools installed

## INSTALLATION PROCEDURES

### Pre-Installation Checklist

If your computer's security settings prohibit you from installing programs, then the WoodCite installation should be performed by a user or administrator who has full administrative rights and privileges to your computer. Installing WoodCite without administrative rights may cause errors.

Before running the installation utility, make sure that you are aware of the version of your computer's Microsoft Windows operating system and the version of the Microsoft Office package that is installed onto your computer. If you are running Windows 2000, make sure that your system's default font size is set to "Small fonts." If you are running Windows XP, make sure the default font size is set to "Normal" (Fig. 1). These font settings will ensure that the installation instructions are readable and fully contained within the document window from where they are displayed. In Windows 2000, use the following steps to adjust your system's default font size:

- Open the *Control Panel* and select the *Display* icon.
- Select the *Settings* tab and click the *Advanced* button near the bottom of the dialog box.
- Select the *General* tab and set the *Font Size* to "Small fonts."
- Click the *Apply* button to accept the changes.

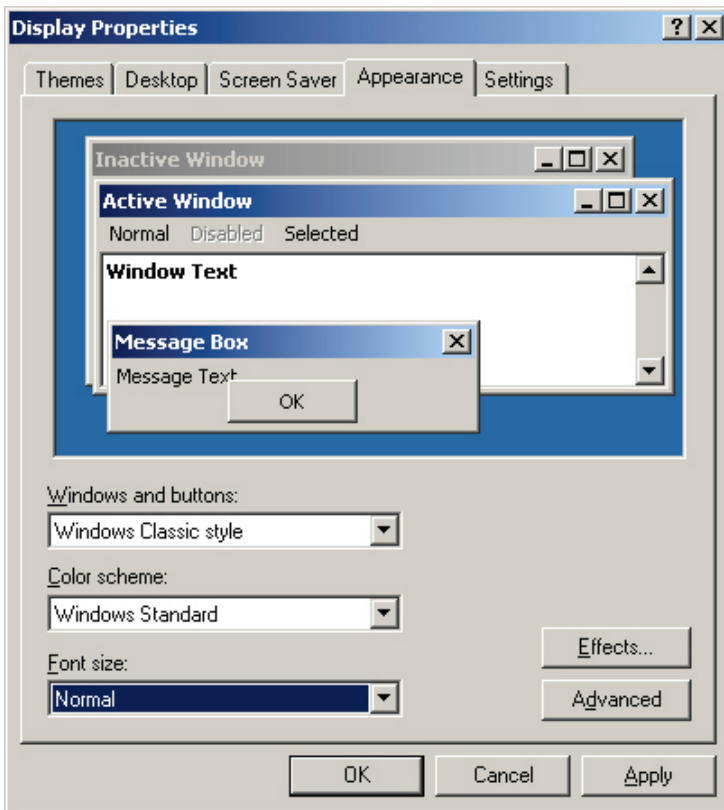


Figure 1.—The Display Properties dialog box for Microsoft Windows XP systems.

To change the system font size for Windows XP, use the following steps:

- Open the *Control Panel* and select the *Display* icon.
- Select the *Appearance* tab and set the *Font size* to “Normal.”
- Click the *Apply* button to accept the changes.

For more information on changing your computer’s system settings, refer to your computer’s users guide or your Microsoft Windows operating system manual.

## Downloading, Unzipping, and Running the Installation Routine

To download WoodCite’s installation utility, open your Internet browser and type “woodproducts.sbio.vt.edu/woodcite” in your browser’s address bar. This will take you to the WoodCite Download Center. Follow the instructions provided on the page. If you are installing WoodCite from a CD (which is available upon request), browse the CD for the “index.htm” file, open it, and follow the instructions provided. When you execute the “install.exe” file, the WoodCite installation utility will appear (Fig. 2). During installation, be sure to note the location in which WoodCite is being installed because you will have to set the application folder (where WoodCite is installed) as a trusted location in Access 2007 and greater. If you are using Access 2002-2003, you may have to adjust the macro security settings.

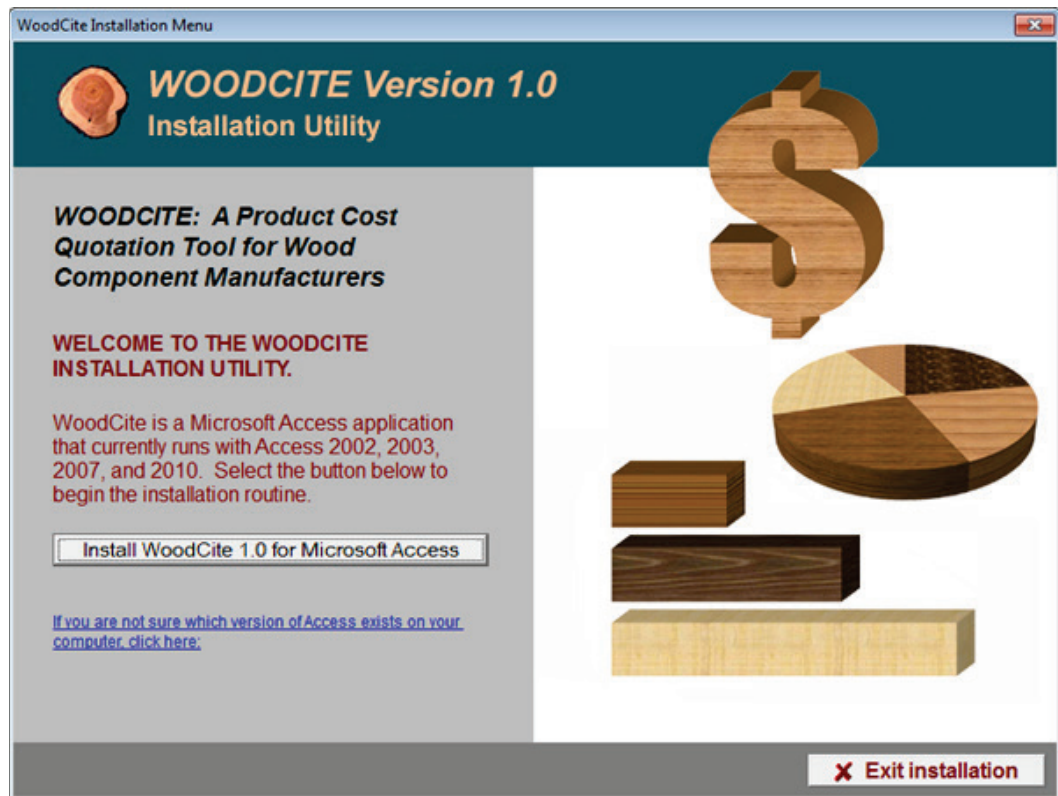


Figure 2.—The WoodCite installation utility.

### Defining a Trusted Location with Microsoft® Access 2007 and 2010

If you are using Microsoft® Access 2007 or 2010, you will have to define the *Version\_1\_Access* folder as a trusted location. To do so, follow these steps:

1. With Microsoft® Access 2007
  - a. Click the Office button at the upper left-hand corner of the window
  - b. Select the *Access Options* button from near the bottom-right side of the menu. The *Access Options* dialog will appear.
2. With Microsoft® Access 2010
  - a. Select the *File* tab near the upper left-hand corner of the window.
  - b. Select the *Options* icon near the bottom of the navigator (on the left side of the window). The *Access Options* dialog will appear.
3. Select the *Trust Center* option at the left side of the *Access Options* window.
4. At the right side of the *Access Options* window, select the *Trust Center Settings* button.
5. At the left side of the *Trust Center* window, select the *Trusted Locations* option and then select the *Add new location* button near the bottom of the window.
6. Browse for the *Version\_1\_Access* folder. Be sure to select the checkbox that is labeled “Subfolders of this location are also trusted.”
7. Select the *OK* button for each window.
8. Restart Microsoft® Access.

## Adjusting Macro Security Settings in Earlier Versions of Microsoft® Access

Although WoodCite was developed with Microsoft® Access 2007, it will run with older versions of Access, but this may yield unpredictable results. If you are running WoodCite with an earlier version of Microsoft® Access such as Access 2003, you may have to adjust the macro security settings (keep in mind that this feature may not be available in all earlier versions of Access). To do this, open Microsoft® Access 2003, and from the main menu, select *Tools|Macro|Security* and set the security level to “Medium” or “Low.” Be sure, however, to adjust these back to their original settings before exiting WoodCite. For more information on macro security, refer to the users guide or other documentation that came with your version of Access.

## Dragging and Dropping the Application Folder

If for some reason the above installation procedures do not work on your computer, you can drag and drop the WoodCite application folder to your hard drive. To do this, browse through the directory in which you decompressed the installation utility files, and look for the *Version\_1\_Access* folder. The WoodCite application (*woodcite.mdb*) and supporting files reside in this directory. Before you can run WoodCite, you may have to adjust your macro security settings with Access 2002 and 2003 (if the feature is available), or if you are using Access 2007 or 2010, you must allow Microsoft Access to recognize the *Version\_1\_Access* directory as a trusted location (see the previous section entitled “Defining a Trusted Location with Microsoft® Access 2007 and 2010” for instructions. For technical support, please refer to the contact information listed in the last section of this publication).

## USING WOODCITE

If the above procedures were successful, then you can start using WoodCite immediately by selecting the program icon from the Windows *Start* menu. If you performed the drag-and-drop routine and followed the procedures to define the *Version\_1\_Access* directory as a trusted location, then you can open WoodCite by opening the *Version\_1\_Access* folder, opening the *Source* subfolder, and double-clicking the *WoodCite\_1\_0.mdb* icon, which should be shown as a Microsoft® Access application, depending on the properties of the *Source* subfolder. Please keep in mind that you cannot enter customer quotation data until you enter information about your company, which is explained in the “Entering Company Information” section of this guide.

Note that because data entry is required throughout the application, there may be times where you will need to make changes to various field values. To navigate between fields, you generally use the *Tab* key. In doing this, the fields are automatically highlighted, and changes can be made instantly. If you wish to use your mouse to highlight a field value for editing, however, you will have to double-click the field value to highlight it, or drag the mouse cursor over the value to select all of the contents of the field. This is especially important for fields where values must be in specific formats (i.e., decimals, whole numbers).



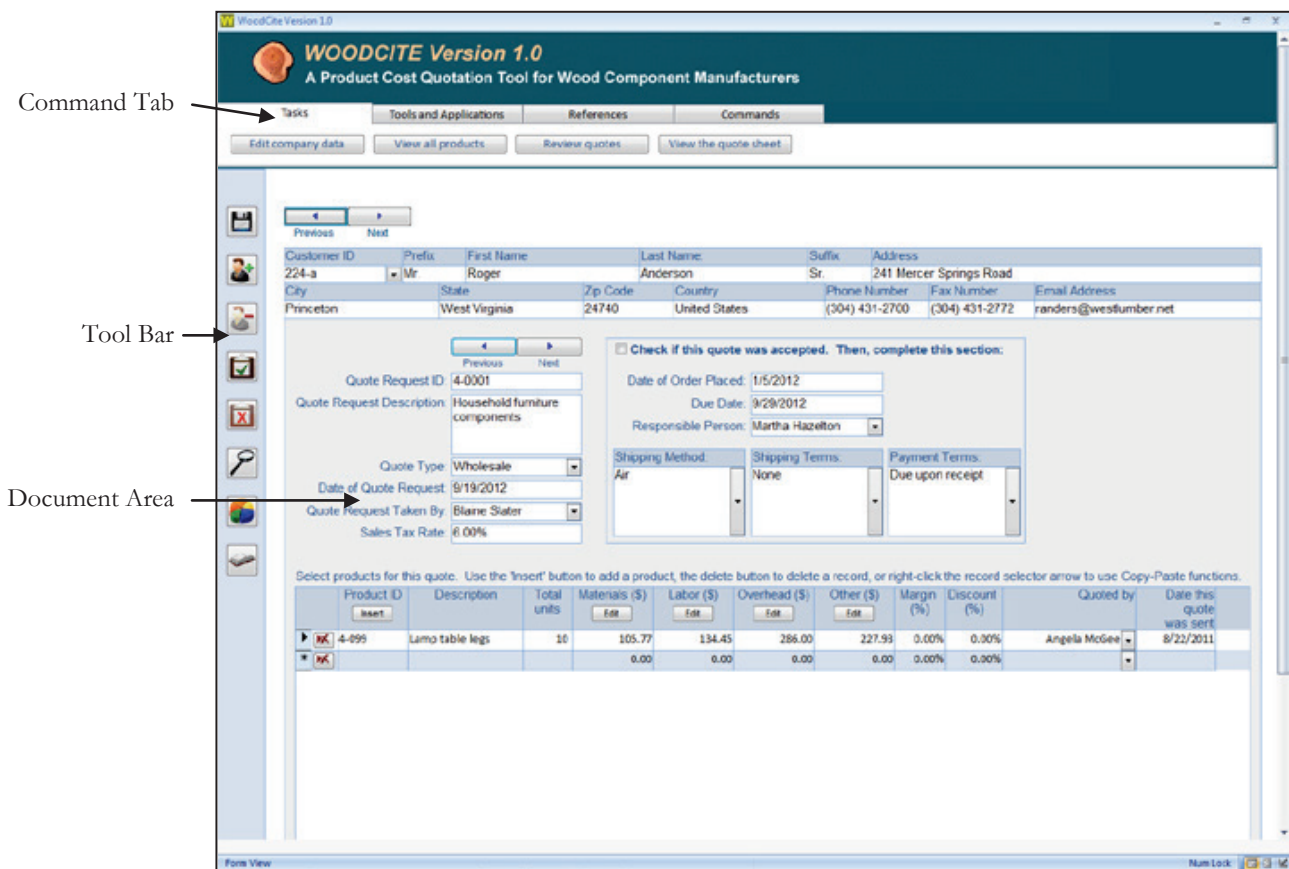


Figure 3.—The WoodCite user interface.

## The User Interface

At startup, WoodCite’s welcome page appears and provides you with basic instructions on using the application. When you are finished with the page, click the *Proceed* button near the bottom left area of the window. You will then see the main application window that contains command tabs, a tool bar, and the document area where customer, quotation, and product information is entered (Fig. 3).

### Command Tabs

WoodCite’s interface contains four command tabs: *Tasks*, *Tools and Applications*, *References*, and *Commands* (Fig. 3). They are located near the top of the application window and allow quick access to WoodCite’s functions. Each command tab contains a series of buttons that perform specific functions, as shown in Table 1.

### The Tool Bar

At the left side of the WoodCite window is a shaded vertical tool bar that contains a series of command buttons (Fig. 3). An illustration of the buttons and the function of each are shown in Figure 4.



**Table 1.—The command tabs and the functions associated with each**

| Tab Name               | Associated Function(s)   |
|------------------------|--|
| Tasks                  | Edit company data (edit your company's basic information)  |
|                        | View all products (view the product list)  |
|                        | Review quotes (view the quotations for the current customer)   |
|                        | View the quote sheet (view the customer's quotation form)  |
| Tools and Applications | Run ROMI 3.0 (execute the ROMI application — requires the latest version of Java to be installed onto your computer) |
|                        | Metric conversions (run the Foresters' Metric Conversions application)   |
|                        | System calculator (run the system calculator)  |
| References             | Current version (view your current version of WoodCite)  |
|                        | Database properties (view the database properties)   |
| Commands               | Import (import a WoodCite database that is saved in a Microsoft Excel format)  |
|                        | Backup (save your database to a Microsoft Excel spreadsheet format)  |
|                        | Delete all data (empty the database)   |
|                        | Exit (close WoodCite and Microsoft® Access)  |

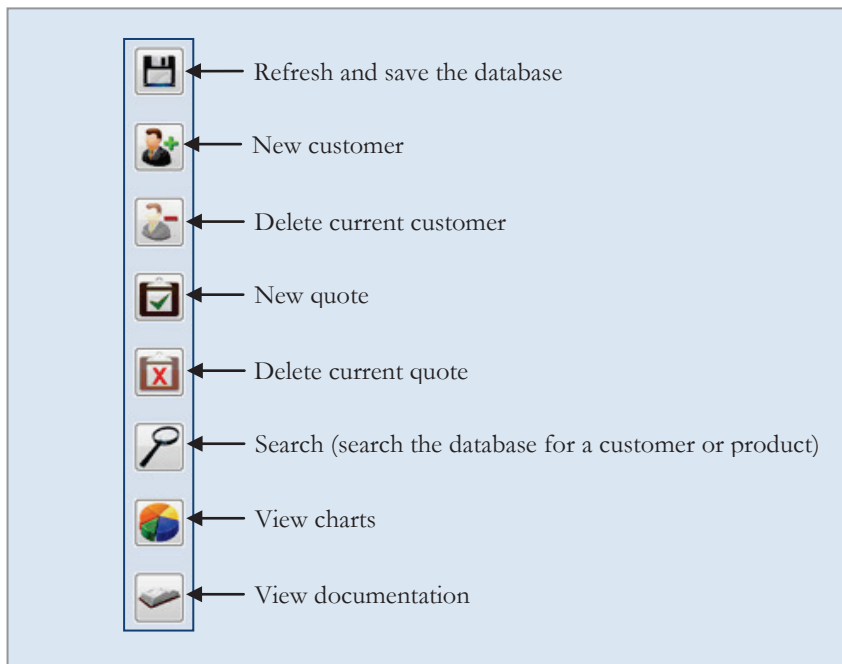


Figure 4.—WoodCite's tool bar buttons and a description of each.

Customer Information:

|             |               |            |               |                |                         |
|-------------|---------------|------------|---------------|----------------|-------------------------|
| Customer ID | Prefix        | First Name | Last Name     | Suffix         | Address                 |
| 224-a       | Mr.           | Roger      | Anderson      | Sr.            | 241 Mercer Springs Road |
| City        | State         | Zip Code   | Country       | Phone Number   | Fax Number              |
| Princeton   | West Virginia | 24740      | United States | (304) 431-2700 | (304) 431-2772          |
|             |               |            |               |                | Email Address           |
|             |               |            |               |                | randers@westlumber.net  |

Quotation Information:

Check if this quote was accepted. Then, complete this section:

Date of Order Placed: 1/5/2012  
 Due Date: 9/29/2012  
 Responsible Person: Martha Hazelton

Shipping Method: Air  
 Shipping Terms: None  
 Payment Terms: Due upon receipt

Product Information:

|   | Product ID | Description    | Total units | Materials (\$) | Labor (\$) | Overhead (\$) | Other (\$) | Margin (%) | Discount (%) | Quoted by     | Date this quote was sent |
|---|------------|----------------|-------------|----------------|------------|---------------|------------|------------|--------------|---------------|--------------------------|
|   | 55-003     | Oak table tops | 2           | 306.97         | 80.00      | 665.27        | 214.00     | 0.00%      | 0.00%        | Myra Stevens  | 2/29/2012                |
|   | 6-222      | Chair legs     | 1           | 54.54          | 38.50      | 106.93        | 150.00     | 0.00%      | 0.00%        | Blaine Slater | 8/22/2011                |
| * |            |                |             | 0.00           | 0.00       | 0.00          | 0.00       | 0.00%      | 0.00%        |               |                          |

Figure 5.—The document area contains fields for entering customer, quote, and product data.

## The Document Area

WoodCite’s document area contains the tables and fields needed for data entry. The top of the document area contains fields for entering customer information, the center part allows you to enter quotation information for the current customer, and the table at the bottom of the document area allows you to specify products requested for the current customer quotation (Fig. 5).

## Entering Company Information

Before entering customer, quotation, and product data into WoodCite, you will have to perform a one-time setup for your company by entering your company’s name and address, workforce information, manufacturing activities, overhead cost data, shipping standards, materials utilized, and products manufactured. The data you enter will be used to develop cost information for your customer quotation sheets, and you can edit your company information at any time, if necessary. On the *Tasks* tab, click the *Edit company data* button. The *Company Information* dialog will appear (Fig. 6). Table 2 shows a description of the tab pages and an explanation of the contents of each.

When you are ready to set up your company, begin with the *Company Data* tab and enter data into the fields under each consecutive tab, as required. Click the dialog’s *Close* button when you have finished entering your company’s information.

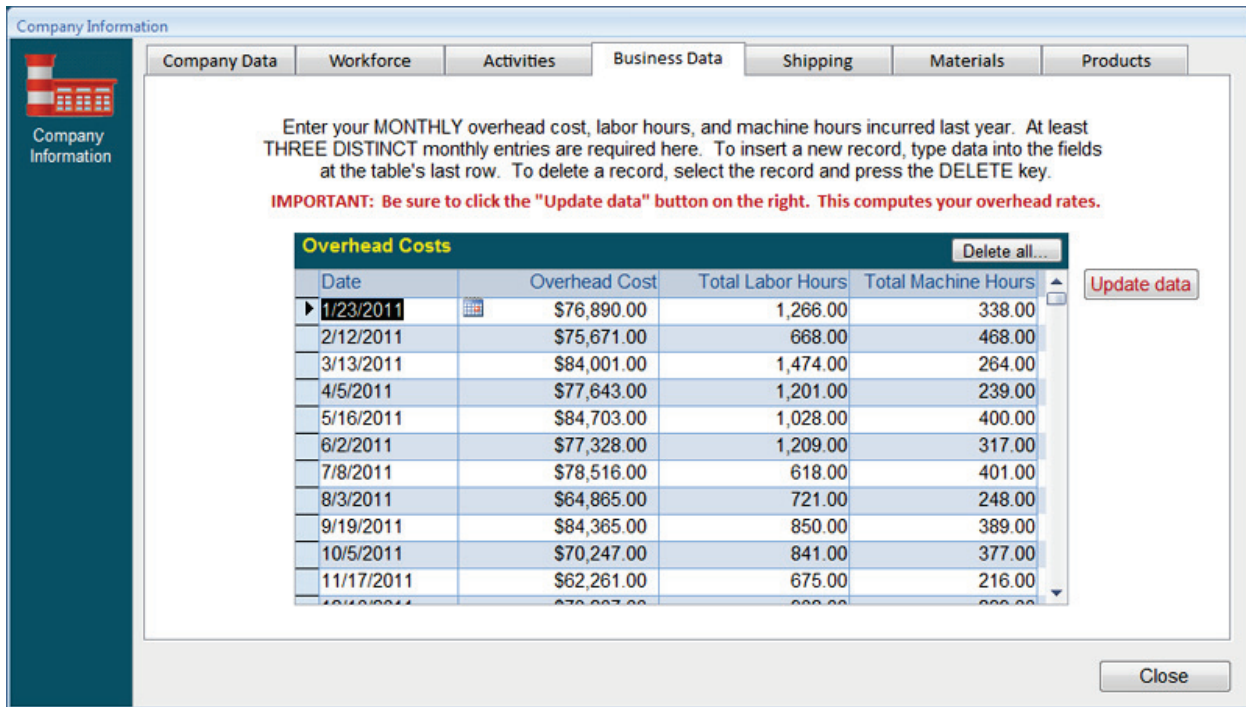


Figure 6.—The Company Information dialog allows you to enter or edit information about your business. In this illustration, the Business Data tab is selected.

Table 2.—The *Company Information* tabs and a description of the content of each

| Tab Name      | Content   |
|---------------|---|
| Company Data  | Company name, address information, email address, Web site, and optional company motto.   |
| Workforce     | Employee name, job title, and hourly wage rate.   |
| Activities    | Manufacturing activities (activity or machine) and description/comments.  |
| Business Data | Monthly historical manufacturing overhead data: date, overhead cost, total labor hours, and total machine hours. <b>When entering overhead data, you must enter at least three DISTINCTIVE rows of data (the rows cannot be the same). Also, be sure to select the "Update" button once you have finished entering data</b> (this will compute your labor-hour and machine-hour rates). This is the only area in WoodCite that requires you to enter historical data. |
| Shipping      | Shipping methods, terms, and payment terms.   |
| Materials     | Material type, unit measure, species, size, quality, cost per unit, and percent yield.  |
| Products      | This is a list of all products that your company manufactures. Be sure to enter a record number, product ID, and description for each product.  |

## Entering Customer Quotation Data

You are now ready to create a product cost quotation for your customer. Recall that the document area consists of three parts: customer information, quote information, and product information (please refer back to Figure 3 to see the screen shot of the user interface).

Begin entering your customer's information near the top of the document window. Be sure to enter the customer ID in the designated field. For fields that may not apply, simply enter the word "none." **Do not leave any fields blank.** To navigate between customer records, use the *Previous* and *Next* buttons at the top left part of the customer data entry fields. Use the *New customer* or *Delete current customer* command buttons at the left (Fig. 4) to add or delete a customer record as needed.

Next, enter quotation information in the center of the document area. WoodCite asks for a quote request ID, quote request description, quote type (retail, wholesale, other), date of quote request, responsible person, and the tax rate for this potential order. To navigate between the current customer's quotes, use the *Previous* and *Next* buttons just above the *Quote Request ID* field. Use the *New quote* or *Delete current quote* command buttons at the left (Fig. 4) to add or delete a customer's quotation record as needed. The next column contains a field that is labeled "Check if this quote was accepted" (Fig. 7). For now, do not place a checkmark in this field until this customer quotation has been accepted.

**Check if this quote was accepted. Then, complete this section:**

Date of Order Placed: 1/1/2012

Due Date: 4/1/2012

Responsible Person: Pete James

| Shipping Method: | Shipping Terms: | Payment Terms:            |
|------------------|-----------------|---------------------------|
| Ground           | None            | Payment due upon delivery |

Figure 7.—Complete this section only if a quotation has been accepted by the customer.

Finally, use the product table near the bottom of the document area to select the products you will manufacture for your customer. Only predefined products can be selected into the *Product ID* field. If you need to define new products into the database, select the *Tasks* tab, the *Edit company data* button, and then the *Products* tab. Enter or edit your product list as needed and click *Close* when you are finished.

To insert a product from your product list, click the *Insert* button in the *Product ID* field.

Click a product record in the list and click the dialog's *Insert* button. A new product record should appear in the product table. Because the products are selected directly from your list of standard products, you should not attempt to modify the data in the *Product ID* field. As for the remaining fields, however, you can enter quantity, material, labor, overhead, and other data

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 Email: info@waspforestproducts.net  
 Web: www.wasp\_forest.net

**Product Quote**  
 Date: 9/19/2012  
 Customer ID: 224-a  
 Number of Days This Quote is Valid: 30

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SALESPERSON: Angela McGee  
 LOCATION: USA

TO: Mr. Roger Anderson Sr.  
 241 Mercer Springs Road  
 Princeton, West Virginia 24740  
 (304) 431-2700

| Quote ID | Shipping Method | Shipping Terms | Estimated Shipping Date           | Payment Terms    | Requested Delivery Date |
|----------|-----------------|----------------|-----------------------------------|------------------|-------------------------|
| 4-0001   | Air             | None           | Between 09/22/2012 and 09/30/2012 | Due upon receipt | 9/29/2012               |

| Product ID | Description    | Units | Unit Price | Total Price | Discount | Line Total |
|------------|----------------|-------|------------|-------------|----------|------------|
| 55-003     | Oak table tops | 2     | \$633.31   | \$1,266.61  | 0.00%    | \$1,266.61 |
| 6-222      | Chair legs     | 1     | \$349.97   | \$349.97    | 0.00%    | \$349.97   |

Quotation prepared by: Blaine Slater

Subtotal: \$1,616.58  
 Sales Tax Rate: 6.00%  
 Total: \$1,713.57

This document is a quotation on the goods and/or services described, and is subject to the conditions and terms of the seller.

Figure 8.—The product quotation sheet.

associated with the manufacturing of each product. For the *Materials*, *Labor*, *Overhead*, and *Other* fields, use the *Edit* buttons to compute each of these costs, if needed. If you wish to apply a margin or discount, enter each item in the appropriate fields.

## Viewing the Customer Quotation Sheet

Now that you have entered order and product information for your customer, you can now view the quote sheet. Select the *Tasks* tab and click the *View the quote* sheet button. Your customer's quotation form should look similar to the screen shown in Figure 8. The information you see on the form is based on the data you entered into WoodCite. You can save, send (via email), or print the quotation form. If you are using a version of Microsoft Access that is older than Access 2007, the *Save* and *Send* command buttons at the top of the quote window may not be available. You can, however, still save the quotation sheet by printing it to a PDF file (your computer must have a PDF writer installed to achieve this).

## Closing WoodCite

When you are finished using WoodCite, you can exit by selecting the *Commands* tab and clicking the *Exit WoodCite* button. WoodCite will ask if you wish to backup your database before exiting. If you click the *Yes* button, then WoodCite will back up the database to a Microsoft Excel worksheet to a disk or network location of your choice. If you click the *No* button, WoodCite will terminate, but not discard your information.

## **APPLICATION INFORMATION AND SUPPORT**

The computer program described in this publication is available on request with the understanding that the U.S. Forest Service cannot ensure its accuracy, completeness, reliability, or suitability for any other purposes than that reported. The recipient may not assert any proprietary rights thereto nor represent it to anyone as other than a Government-produced computer program.

If you have questions, comments, or other issues concerning this computer application, our contact information is as follows:

### Application Content

Dr. Urs Buehlmann or Adrienn Andersch  
Virginia Polytechnic Institute and State University  
Department of Wood Science and Forest Products  
Brooks Forest Products Center  
1650 Ramble Road  
Blacksburg, VA 24061  
Phone: (540) 231-7107; Fax: (540) 231-8868

### Technical Support

Jeff Palmer  
U.S. Forest Service  
241 Mercer Springs Road  
Princeton, WV 24740  
Phone: (304) 431-2732; Fax: (304) 431-2772  
Email: jpalmer01@fs.fed.us

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**KEY WORDS:** wood, components, quotation, manufacturing costs

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