



# How do I specify Holidays?

These instructions show how to set up a specification for an event/special occasion:

Special Occasion: This is an event that is reoccurring. This is any date that can be entered into Morphis which will reoccur each year at the same time. Example: Fourth of July, Easter, Thanksgiving

Special Event: This is an unplanned event that does not have a reoccurring date. Example: Natural Disaster

Forecasted Time Periods: This is a planned event that may occur multiple times per year. Example: Baseball games, car races, etc.

## Specification of Holidays (Events/Special Occasion): Customer/Vendor Management

1. When setting up a **Specification of Holidays (Events/Special Occasion)** the user will need to enter each of the reoccurring holidays in Customer/Vendor Management. We set up holidays to indicate to Morphis which days are designated **non-working days**
2. This setting can be customized for specific groups or all terminals

## Specification of Holidays

Specification of Holidays

To find **Specification of Holidays**

1. Choose Tasks > Customer/Vendor Management
2. Specification of Holidays

## Specification of Holidays

Specification of Holidays



For optimal results, the **Specification of Holidays** must be set correctly if you are using the **Cash/Item Management Module**

1. Choose a Country
2. Enter the name of the holiday and the date of when the holiday occurs

If you hover your mouse over the start date column, the user can see the following instructions in a dialog box:

*Supported date formats are m/d (or d/m depending on system local settings), m/d/y (or d/m/y or y/m/d depending on system local settings), and m/x/w where m is a month (1 to 12), d is a day number of the month (1 to 31), y is a year, x is a short weekday which depends on system local settings (for example: Sun, Mon... Sat in English) and w is the number of occurrence of the day (1 to 4 or LT for the last occurrence.)*

**Example1:** In the US Labor Day is celebrated on the 1st Monday in September. The correct setting in Morphis is 9/mon/1

**Example2:** In the US Christmas is celebrated on the 25th of December. The correct setting in Morphis is 12/25

3. The default setting is for all holidays to apply to all organizations. If a holiday is to apply to only a specific organization. 1. Choose the type. 2. Choose the Organization.

Once finished, click **OK**

## **Event/Special Occasion Specification (Special Event): Cash/Item Management**

1. When setting up a **Special Event** the user will need to enter each event in Cash/Item Management. We set up events in order to influence the forecast and load decision (either up or down)
2. The user can then enter the type of special event, the time period and what terminal(s) to apply the event to

## **Cash/Item Management**

Cash/Item Management

1. Go to Tasks, then Cash/Item Management
2. Then choose Estimation Methods & Special Events
3. Event/Special Occasion Specification



## Event/Special Occasions

Event/Special Occasions

Here you can add a special event or edit a special event that has already been created.

## Event/Special Occasions

Event/Special Occasions

### 1. Event/Special Occasion:

Event Type: Choose an event type from the drop down box

Event Name: Enter a name of the event

Description: Enter a description of the event

### 2. Time Period:

Start Date: Enter the Year, Month, Day, Weekday, Week and Duration of days

The user can check the **Automatic** button, to increase/decrease the start date, if the time period is on a holiday or weekend

### 3. Apply To:

If the user wants to apply the specification to **All Terminal Locations**, check the radio button

Country: The user can specify settings by Country

State: The user can specify settings by State

City: The user can specify settings by City

Location: The user can specify settings by Location

Group: The user can specify settings by Group

### 4. Estimate Change:

Change: The user can enter a percentage to increase or decrease the forecasted amount based on the daily average of a specific start and end date

Ignore Year: The user can choose the most recent period for that month between the start and end date.

## Forecasted Time Periods for Events

Forecasted Time Periods for Events

1. Go to Tasks, then Cash/Item Management
2. Then choose Estimation Methods & Special Events
3. Forecasted Time Periods for Events

Click on Add or Edit to review an event

## Forecasted Time Periods for Events

Forecasted Time Periods for Events

### 1. Event/Special Occasion:

Event Type: Choose an event type from the drop down box

Event Name: Enter a name of the event

Description: Enter a description of the event

### 2. Time Period:

The Specification of a time period is required on "Forecasted Time Periods for Events" screen. If you choose to add "Forecasted Time Periods for Events" because a particular event occurs multiple times a year, you DO NOT need to key in any time period on the main event screen. If you do, we also consider that time period. On the other hand, if an event occurs only once per year, you do not have to use the "Forecasted Time Periods for Events". Usage of "Forecasted Time Periods for Events" is also OPTIONAL.

Start Date: Enter the Year, Month, Day, Weekday, Week and Duration of days

The user can check the **Automatic** button, to increase/decrease the start date, if the time period is on a holiday or weekend

### 3. Apply To:

If the user wants to apply the specification to **All Terminal Locations**, check the radio button

Country: The user can specify settings by Country

State: The user can specify settings by State

City: The user can specify settings by City



Location: The user can specify settings by Location

Group: The user can specify settings by Group

#### **4. Estimate Change:**

Change: The user can enter a percentage to increase or decrease the forecasted amount based on the daily average of a specific start and end date

Ignore Year: The user can choose the most recent period for that month between the start and end date.