

Oracle® Sales for Handhelds

User Guide

Release 12

Part No. B25169-01

December 2006

Overview of Oracle Sales for Handhelds

Oracle Sales for Handhelds is an enterprise application for traveling sales professionals that simplifies and optimizes the task of planning and managing the sales process. Oracle Sales for Handhelds simplifies the sales process by providing visibility into key sales cycle activities helping sales professionals plan and manage effective selling activities. It is fully integrated in the E-Business Suite and complements the online and disconnected editions of the Oracle Sales application.

Key Features

Oracle Sales for Handhelds has the following key features:

- The application uses the HTML browser available on the handheld device to provide real-time access to enterprise information.
- Users can leverage familiar native Personal Information Management (PIM) applications available on handheld devices to manage appointments, contacts, and tasks.
- The application provides contextual hyperlinks within the note section of appointments and contacts that provides a conduit to real-time enterprise information.
- Outlook integration
- Alerts feature sends information about critical business events via Short Message Service (SMS) or e-mail.

Browser Based Application

Oracle Sales for Handhelds provides real time access to enterprise information via a connected browser on a wireless handheld device.

The supported browsers are:

- Pocket PC handheld devices running Pocket IE on Windows Mobile 2003 or Windows

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Mobile 5.0

- Palm based handheld devices running Blazer 3.0 browser or higher
- Palm based devices running Windows Mobile 5.0
- Nokia running Internet Browser for HTML 4.01/xHTML on Symbian 7.OS operating system
- Blackberry devices version 4.0 or higher running native HTML browser

Accessing Oracle Sales Via Connected Handheld Browser

Users can log into the Oracle Sales application using the browser in their handheld devices. Links in the notes section of Contacts and Appointments in Pocket PC also open related Oracle Sales pages.

You need the Wireless Sales User responsibility

Steps:

1. Open the web browser on your handheld device.
2. Go to the URL for Applications login for your environment.
3. Enter your username and password. You are taken directly to Oracle Sales for Handhelds.

Customer Management Features

The connected handheld browser provides the following features for customer management:

- Search customers
- View customer information
- Create and update information associated with customers such as notes and tasks.

Contact Management Features

The connected handheld browser provides the following features for contact management:

- Search contacts
- View, update, and create contact information
- Create and update information associated with contacts such as notes, tasks, and appointments

Opportunity Management Features

The connected handheld browser provides the following features for opportunity management:

- Search for opportunities
- View the list of opportunities closing within the current forecast period defined for the user including all opportunities owned by the user across all operating units the user has access to
- Ability to drill down to opportunity details
- View opportunities and opportunity related information associated with customers and contacts
- Add and update products or product categories for an opportunity. The Add Product page includes list price and operating unit information.
- Create and update information associated with opportunities, such as notes, tasks, and appointments
- Add opportunity contacts

Appointment Wrap-Up

A customer visit may result in follow-up actions such as a new appointment, creating a note or task against the customer, or even updating the opportunity. Depending on the appointment context, the following actions can be enabled for users:

- Create a follow-up appointment for the customer or contact
- Create a note for the customer, contact, or opportunity that is associated with the appointment
- Create a task
- Update key opportunity details, such as status or probability

Appointments and Task Management

Sales representatives synchronizing with the enterprise application can get their appointments and tasks into Outlook. However, for non-Outlook users, the Oracle Sales for Handhelds also provides real-time information about schedules via connected handheld browser. The following functionality allows users to manage their schedules online:

- Create and edit appointments and tasks

- View the schedule (appointments) and tasks
- Wrap up appointments

Oracle Sales Synchronization

Users can use Oracle Sales synchronization to synchronize information between laptop, desktop, or Pocket PC devices and the eBusiness Suite. Oracle Sales Synchronization can be used to synchronize:

- Appointments
- Tasks
- Contacts
- E-mail interactions (Desktop only)

Synchronization functionality is provided specifically for:

- Pocket PC devices running Windows Mobile 2003 or Windows Mobile 5.0
- Palm devices running Windows Mobile 5.0
- Laptops or desktops with Windows 2000 or Windows XP operating systems running Outlook 2000, Outlook 2002 (XP), Outlook 2003

Downloading and Installing the Pocket PC Synchronization Client

To use the synchronization with Oracle Sales you need to install the client on your Pocket PC.

Prerequisites

- You need the Wireless Sales User responsibility

Steps:

1. Open Internet Explorer on your handheld device.
2. Go to the URL for Applications login for your environment.
3. Enter your username and password. You are taken directly to Oracle Sales.
4. Select Pocket Outlook Client Download from the menu.
5. Click the link for Step 1 in the browser page.

6. In the Download window, deselect Open File After Download. Download the file.
7. In the browser page, select the link in Step 2.
8. In the Download window, leave Open File After Download selected. Download the file.
The client loads and installs automatically in your Pocket PC.

Restrictions

When the server version of the synchronization software is upgraded to a new version, (for example, from version 1.0 to 2.0) all users need to download the new version in order to remain compatible with the server and be able to perform synchronizations. Changes in build number do not cause incompatibility.

Downloading and Installing the Desktop Outlook Synchronization Client

Download the client to be able to synchronize appointments, tasks, and contacts between Microsoft Outlook on your desktop and Oracle Sales.

To initialize custom category:

If you have your own custom category added to the Master Category List, then proceed with the installation steps. If you do not have your own custom category added to the Master Category List, then you need to create one and remove it using the following steps.

1. In Outlook select Edit > Categories from the menu .
2. Click **Master Category List**.
3. Add a new Category called Outlook Category.
4. Click **Add**.
5. Click **OK**.
6. Click **Master Category List**.
7. Select Outlook Category from the list.
8. Click **Delete**.
9. Click **OK**.
10. Click **OK**.

Installation Steps:

1. Login to Oracle Applications and select your Sales User responsibility.

2. On the Dashboard, go to Preferences > Outlook Synchronization > Client Download.
3. Follow the instructions on the page.

Your Outlook toolbar includes "Oracle Sales Synchronization" which launches the synchronization program.

If you see a security permission message while synchronizing, answer Yes to continue the synchronization.

Restrictions

When the server version of the synchronization software is upgraded to a new version, (for example, from version 1.0 to 2.0) all users need to download the new version in order to remain compatible with the server and be able to perform synchronizations. Changes in build number do not cause incompatibility.

Overview of Business User Flows

The following sample business scenarios describe salespeople using Oracle Sales for Handhelds in different situations. The steps include the behavior of the application for different types of information upon synchronizing.

Contacts in Outlook or Pocket PC

Scenario:

1. As a Sales User, sales representative Jerry Weinberg logs into Oracle Sales to prepare his list of contacts for his trip next week.
2. Jerry navigates to Preferences > Outlook Synchronization > Contacts and reviews his current list of contacts to synchronize. He removes the contacts he doesn't need for the trip. Then he searches and adds the contacts he will be visiting as well as those he may speak to by phone during the week. Only address information that is selected as the Identifying address will synchronize.
3. While Jerry is meeting with Tom Watkins at Business World, Tom mentions that his title has changed to VP. Jerry updates his Pocket PC with the new job title.
4. Jerry synchronizes and checks his log. There is an error for his change to Tom Watkins contact information because today someone else changed the fax number for the same contact. His change is replaced with the one on the server. (His preference is set to Server Wins - Replace Client Data.) Jerry changes the title and synchronizes again.
5. Tom introduces Jerry to a new contact at Business World, Jack Black. Jack gives him his business card and Jerry adds the contact information into his Pocket PC and assigns him the synchronization category (for example, *Oracle Contacts*).

Note: This is the only category that should be assigned to the contact. If additional categories are assigned, then the contact will not synchronize.

6. Jerry synchronizes. During synchronization, new contacts are sent to Oracle Trading Community Architecture and checked for duplicates using Data Quality Management. Jerry checks his log. Jack Black's organization already exists and DQM found no potential duplicates for Jack Black, therefore there is no error in the log and Jack Black is added as a contact in the enterprise.
7. That evening Jerry opens contact information for Jane Bond in his Pocket PC and in the Notes he selects the link to view contact detail information in Oracle Sales. His browser window opens, and after logging in, he views the associated opportunities and notes on line while making his call.
8. Jerry determines he doesn't need to call Jane again for six months. He deletes the contact from his Pocket PC. He synchronizes and the contact is removed from his list of contacts to synchronize.

Restrictions

If you change the customer name in your client, then the change will not be applied to the enterprise application data. The next time the record is synchronized, the customer name in the enterprise data will overwrite the value in Outlook.

The resolution of conflicts depends upon your setting in Outlook Synchronization: Preferences.

Related Topics

Oracle Trading Community Architecture User Guide

Appointments in Outlook or Pocket PC

When you create, update, or delete appointment in Outlook or Pocket PC and then synchronize, your changes are reflected in your Oracle Calendar. Also, Oracle Calendar appointments or invitations appear in your Outlook or Pocket PC.

Notes

- **Category:** Oracle appointments created in Outlook or Pocket PC must be assigned the synchronization category (Oracle Appointments) to make appointment details available in the Oracle Sales Calendar.
- **Invitation:** The word indicates an invitation to an appointment created by someone else. To accept the appointment, remove the word *Invite* and synchronize.
- **Personal Appointments:** Non-Oracle appointments created in Outlook or Pocket PC

appear in the Oracle Calendar as read-only appointments with the notation "This is a Non-Oracle Appointment" followed by the appointment name.

- **Recurring Personal Appointments:** Recurring non-Oracle appointments created in Outlook or Pocket PC create recurring appointments for a maximum of five years in the Oracle Calendar after synchronization.
- **Time Zone:** Appointments and repeating appointments created in Outlook or Pocket PC synchronize time zone information with the server. The time zone is converted to saved in the server time zone. When synchronized, the appointment in Outlook and Pocket PC is converted to the individual user's time zones.

Scenario:

1. Customer Tom Watkins from Business World calls to request a demonstration. He talks to sales agent Jerry Weinberg. Using Oracle Sales, Jerry creates an appointment for Thursday at 2:00, adds attendees, and associates the related opportunity. He also assigns the synchronization category (for example, *Oracle Appointments*).

Note: This is the only category that should be assigned to the appointment for the appointment details to display in the Oracle Sales Calendar. If a different category is used, then the appointment displays as a Time Booking in the Oracle Sales Calendar after synchronization.

2. Jerry then synchronizes his Pocket PC. In the calendar, he sees the appointment he created in Oracle Sales and another appointment with the word *Invite* in the subject line. The appointment was set up by product specialist John Smith for Thursday at 1:00. In the appointment notes, he sees that the appointment is for discussing the upcoming demo. He sees the list of attendees as well as information about the opportunity and Business World.
3. In his Pocket PC, Jerry removes the word *Invite* from the subject line to accept John's appointment.
4. Jerry then realizes that he has a dentist appointment Thursday at 2:00. In his Pocket PC, he creates a personal appointment from 2:00 to 4:00 on Thursday. He then updates his original demonstration appointment with Tom Watkins to occur on Friday at 10:00.
5. Jerry then synchronizes his Pocket PC. After synchronization, Jerry's Oracle Sales calendar shows that he accepted John's appointment, moved the original demonstration appointment, and has a "Non-Oracle Appointment Dentist."
6. Friday morning, Jerry synchronizes his Pocket PC to make sure his calendar is up to date with the latest information in Oracle Sales. He wants additional information concerning the 10:00 meeting. In the appointment notes, he sees several links to Oracle Sales.
7. Jerry taps each link on his Pocket PC causing it to open the web browser. After logging

into Oracle Sales, Jerry accesses real-time detailed information about Tom Watkins, Business World, and the opportunity.

8. The meeting goes well, and Jerry wants to close out the appointment. In his Pocket PC, he taps the Appointment Wrap-Up link in the notes section of the appointment. This opens Oracle Sales in the web browser to a page that allows Jerry to add notes, set up a follow-up task, set up a follow-up appointment, and update the opportunity.
9. Jerry then synchronizes his Pocket PC. The follow-up appointment and task now appear on his Pocket PC.

Restrictions

Repeating appointments with more than 1 year between appointments do not synchronize from the server.

Appointments can repeat up to 99 weeks on the client.

Outlook does not support more than one repeating appointment in a month.

The resolution of conflicts depends upon your setting in Outlook Synchronization: Preferences.

Tasks in Outlook or Pocket PC

Scenario:

1. Jerry Weinberg's manager assigns a task to both Jerry and to John Smith to write a report about their visit to Business World. The task is created using Oracle Sales and is associated to the contact at Business World and assigned to John and Jerry.
2. Jerry and John both synchronize their Pocket PCs in the morning and see their task. Both update the status of the task and add to the description using their remote devices. John synchronizes at 1:00. When Jerry synchronizes at 2:00 his task on his device is updated with John's information and his own updates are placed in the Oracle Conflicts category. He updates the task with his information and synchronizes again.
3. During a meeting with Tom at Business World, Jerry agrees to have technical specialist Harvey Mathers call Tom. He enters this as a task in his Pocket PC, assigns the synchronization category (for example, *Oracle Tasks*), and synchronizes.

Note: This is the only category that should be assigned to the task. If additional categories are assigned, then the task will not synchronize.

4. Back in the office, Jerry goes to the task summary in Oracle Sales using his laptop and associates the task to Tom at Business World and assigns the task to Harvey Mathers. (Associations and assignments cannot be done on the wireless device.)

5. On the road, Jerry changes the category for a task on his Pocket PC so it is no longer the default category for synchronized tasks (for example, "Oracle Tasks"). He synchronizes, and the task is deleted from Oracle Sales.

Restrictions

Recurring tasks are not supported for synchronizing and will generate an error.

The resolution of conflicts depends upon your setting in Outlook Synchronization: Preferences.

E-Mail Interactions with Desktop Outlook

Sales representatives working in a collaborative environment need to be aware of various sales activities. Many interactions with contacts occur using e-mail. You can include e-mails in your synchronization of Desktop Outlook which results in the e-mails being recorded in interaction history and becoming available for viewing in Oracle Sales.

- E-mails sent to contacts using Desktop Outlook become available to Oracle Sales users in interaction history, including the contents of the e-mails.
- E-mails received from contacts via Desktop Outlook also become viewable interactions in Oracle Sales.
- When synchronizing, new contacts are created in the enterprise data and any e-mails with the new contacts become interactions for the new contacts.
- If there are duplicate contacts and e-mail addresses in the database, then the interactions are associated with all duplicate contacts.
- E-mails for an existing contact with an unrecognized e-mail address are not placed in interaction history. An error message appears in the synchronization log.

To record an e-mail communication with a contact as an interaction

- In the Desktop Outlook compose window, click the Flag for Interaction icon. It changes to a Flagged for Interaction icon, which when clicked, deselects the e-mail so that it will not be synchronized as an interaction.
- While reading an e-mail in Desktop Outlook, click the Flag for Interaction icon. It changes to a Flagged for Interaction icon, which when clicked, deselects the e-mail so that it will not be synchronized as an interaction.
- In the Desktop Outlook e-mail list, such as your Inbox, highlight one or more e-mails and click the Flag for Interaction icon.
- If you move an e-mail from one IMAP folder to another, then the first e-mail is marked for deletion and the e-mail in the new folder is a copy. The copy does not include the flag for interaction. The first e-mail will synchronize until it is purged. The e-mail copy must be

flagged before it will synchronize as an interaction.

To enable e-mail interactions

- There is an option in your Outlook preferences for Oracle Sales Synchronization that enables e-mail interactions being recorded in Interaction History.
- If you are using OL2000, then the interaction flag does not update automatically unless you make the following change to the parameter that controls the cache used by Outlook.
 1. Quit Outlook.
 2. Start the Registry Editor (regedt32.exe).
 3. Go to the following key in the registry:
`HKEY_LOCAL_MACHINE\software\microsoft\office\9.0\outlook`
 4. In the Edit menu, click Add Value and add the following:
Value Name: DontCacheInspectors
Data Type: REG_DWORD
Value: 0x1
 5. Click OK and quit the Registry Editor.
 6. Start Outlook.

Synchronization Preferences

A situation can occur where you update information for an appointment, contact, or task in Outlook, and also someone else updates the same record either directly on the server or also by synchronizing with the server. If the updated field was blank on either the client or the server, then no conflict occurs. If both users updated the same field with the same value, then there is no conflict.

However, if you update a field for an appointment, contact, or task in Outlook, but someone else also updated the same field with a different value on the server since your last synchronization, then there is a conflict.

Example

The following table shows what happens when fields are updated for the same record, and where conflict occurs.

| Field | Server | Client | Synchronized |
|-------|---------------|---------------|---------------|
| Name | Sandy Johnson | Sandy Johnson | Sandy Johnson |

| Field | Server | Client | Synchronized |
|---------------|----------------|---------------------|---------------------|
| Organization | Business World | Business World | Business World |
| Phone Number | 650-607-6062 | 650-607-5000 | CONFLICT |
| Fax Number | 650-607-6000 | | 650-607-6000 |
| Email Address | | sjohnson@bworld.com | sjohnson@bworld.com |

How conflicts are resolved is determined by your settings in Outlook Synchronization: Preferences. Your choices are:

- **Server Wins - Duplicate Data:** The appointment, task, or contact in your Oracle category used for synchronization is replaced by the object on the server. Your updated object is moved to an Oracle Conflicts category on the client. You can then compare the two as a reminder of what you changed when you updated the object, make the same edits to the object in the Oracle category, and synchronize again. Your client and the server now reflect both changes to the appointment, task, or contact. Your log notes the fact.
This is the default setting.
- **Server Wins - Replace Client Data:** Your information is automatically replaced with the information from the server. Your log notes the fact.
- **Client Wins - Replace Server Data:** The information on the server is automatically replaced with your client data. Your log notes the fact.

Subscribing to Alerts

Short Message Service (SMS) is a feature available with some wireless phones that allow you to send or receive short alphanumeric messages up to 160 characters. You can receive alerts through SMS or via e-mail, or both.

Example

Some examples of alerts are:

- A service contract is about to expire in a few days. This alert is essential for organizations where the sales representatives are also responsible for selling services. The alerts act as reminders for the sales representative who can track the selling or renewal of the service as a new opportunity.
- Escalated Service Request is helpful for the sales representative to maintain customer relationships. Using the alerts for these events, a sales representative can work with contacts when a service request is escalated.

- The Invoice Overdue alert provides the sales representative information about accounts for which invoices are past due. This allows the sales representative to refrain from selling more into accounts that have delinquencies.

Notes

- **Navigation:** Oracle Sales > Preferences > Alerts > Subscriptions
- **Available Alerts:** To subscribe to an alert, select your delivery method. To unsubscribe, deselect the delivery method.
- **Mobile Phone Number:** Enter your mobile phone number for receiving text messages.
- **Service Provider:** Select the service provider you use for your mobile phone and text messages.

E-mail Alert Example

The subject line for a past due invoice says "Overdue invoice #10020885 for Business World." The body of the e-mail contains details about the customer including contact information and amount overdue, as well as invoice details including line items.

Text Message Alert Example

The text message for a past due invoice says, "Customer 'Business World' has overdue invoice. Transaction 10020885 expires on 10-Dec-2007."

Prerequisites

- Define the user's e-mail address in Oracle HR.

Synchronizing Pocket PC

Synchronize whenever you want to update information between your Pocket PC and the enterprise database. Review the business flows for examples of what happens with different types of information during synchronization.

Steps:

1. Start menu > Programs > Oracle Sales Synchronization.
2. Your user name is defaulted. Enter your password.
3. Perform the synchronization.
4. Review the log if you see any warning messages to find out what information did not synchronize and why.
5. If your synchronization preferences are set to Server Wins - Duplicate Data on Client, then go to the Oracle Conflicts category. If one of your objects had a conflict, then your client version was moved to the Oracle Conflicts category and the live version was updated

from the server. You need to again update the object and synchronize again for your changes to take place on the server.

Restrictions

If information on the enterprise server was updated since your last synchronization, then the conflict resolution depends upon your synchronization preference settings.

Use Advanced > Full Synchronization only if something is not working right on your Pocket PC. If your synchronization fails or you stop it before completing, then you need to run a full synchronization. Full Synchronization replaces all enterprise data on your Pocket PC with data from the enterprise database.

Synchronizing Desktop Outlook

Synchronize whenever you want to update information between your Desktop Outlook and the enterprise database. Review the business flows for examples of what happens with different types of information during synchronization.

Steps:

1. Outlook Toolbar > Oracle Sales Synchronization
2. Your user name is defaulted. Enter your password.
3. Perform the synchronization.
4. Review the log if you see any warning messages to find out what information did not synchronize and why.
5. If your synchronization preferences are set to Server Wins - Duplicate Data, then view the Oracle Conflicts category in Outlook. If one of your objects had a conflict, then your client copy was moved to the Oracle Conflicts category and the live version was updated from the server. You need to again update the object and synchronize again for your changes to take place on the server.

Restrictions

If information on the enterprise server was updated since your last synchronization, then the conflict resolution depends upon your synchronization preference settings.

Use Options > Advanced > Full Synchronization only if something is not working right. If your synchronization fails or you stop it before completing, then you need to run a full synchronization. Full Synchronization replaces all enterprise data in Outlook with data from the enterprise database.

Usage Scenarios for Handheld Devices

This section describes different usage models available for various handheld devices and serves as a guideline for leveraging the Outlook integration feature and real-time access to sales information.

Pocket PC/Palm Devices Using Windows Mobile

The following usage scenarios are supported for Oracle Sales synchronization:

- Users synchronize only their Pocket PCs with Oracle Sales. Then Microsoft ActiveSync synchronizes the data from their Pocket PCs to their Desktop Outlook.
- Users synchronize only their Desktop Outlook with Oracle Sales. Then Microsoft ActiveSync synchronizes the data from Desktop Outlook to their Pocket PCs.
- Users synchronize both their Desktop Outlook and Pocket PCs with Oracle Sales. To prevent duplicate data, Microsoft ActiveSync cannot be used to synchronize contacts, appointments, and tasks.

Note: You can use the hyperlinks available in the note section of appointments and contacts to access real-time information.

BlackBerry, Palm Treo, and Nokia Communicator

The following describes the usage model for BlackBerry (version 4.0 or higher), Palm Treo (600 or 6500) and Nokia Communicator (9300 or 9500) devices:

1. Synchronize Desktop or Laptop Outlook directly with Oracle Sales using the Oracle Sales Synchronization program.
2. Use HotSync Manager for Palm Treo, or Nokia PC Suite for Nokia Communicator, or BlackBerry Desktop Manager to synchronize Desktop or Laptop Outlook with the native Personal Information Management (PIM) application.
3. Use the browser available within the device to access real-time information.

Devices and Supported Functionality

Oracle Sales for Handhelds currently utilizes a blended model for providing enterprise data on handheld devices. Oracle Sales Synchronization provides enterprise information directly into Microsoft Outlook and Pocket PC devices. The Oracle Sales for Handhelds connected pages provide enterprise information via an HTML browser and OA framework. The following matrix discusses which devices can be used with the Oracle Sales for Handhelds functionality.

| Device | Direct Synchronization | Connected Pages |
|--|-------------------------------|------------------------|
| Microsoft Pocket PC Devices (Windows Mobile CE, XScale or ARM Processors only) | Yes | Yes |
| Microsoft Smartphone Devices (Windows Mobile SE) | No | Yes |
| Palm OS (Blazer Browser) | No | Yes |
| Palm (Windows Mobile 5.0) | Yes | Yes |
| Nokia Communicator (Symbian OS with Opera browser support) | No | Yes |
| Nokia Smartphone (Symbian OS without Opera browser) | No | No |
| RIM Blackberry (Blackberry Browser) | No | Yes |

Note that wherever direct synchronization is not provided, synchronization can still be done by synchronizing to Desktop Outlook and using the appropriate Outlook connector.

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Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

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