



The Centers

Integration with Outlook® Users Guide

We are pleased to provide you with the Centers web conferencing services. There is an Centers solution to fit your need, including Meeting Visuals, TrainingCenter, SupportCenter and EventCenter™. Because the Centers are powered by WebEx, this guide makes several references to the company name, platform and features.

Integration with Outlook

Integration with Outlook provides a convenient way for you to schedule, start or join online meetings using Microsoft® Outlook. Using Integration with Outlook, you can perform these activities without the need to use the Centers websites.

Integration with Outlook is a plug-in program for Microsoft Outlook, which you download from the Centers websites and then install on your computer. Once you install Integration with Outlook, new options appear in Outlook allowing you to quickly schedule an online meeting.

When scheduling a meeting, you can invite attendees using any of your Outlook address lists, including the Global Address List, Personal Address List or Contacts folder. Attendees whom you invite to a meeting need not use Integration with Outlook to join the meeting.

INTEGRATION WITH OUTLOOK ALSO PROVIDES:

- + Quick access to My WebEx on the Centers websites, which includes your personal list of meetings, user profile and other account.
- + Quick access to the One-Click Meeting Wizard on your Centers websites, with which you can set up an instant meeting that you can start at any time, as often as you want.
- + A template for meeting invitations, which you can modify with any information you want. To provide security for your meetings, Integration with Outlook uses 128-bit SSL (Secure Sockets Layer) encryption for all data it sends to and retrieves from the Centers websites.
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System Requirements

WebEx™, the WebEx logo, WebEx and WebEx Event Center™ are either registered trademarks or trademarks of WebEx Communications Inc. in the United States and other countries.

Before installing Integration with Outlook, ensure that your computer meets the following system requirements.

- + Windows 98, 2000, ME, XP, or NT
- + Intel x86 (Pentium 400 MHZ+) or compatible processor
- + Microsoft Internet Explorer 5, 6, Mozilla 1.6 or later, or Netscape 4.7, 7.x
- + JavaScript and cookies enabled for the browser
- + 56K or faster Internet connection
- + Microsoft Outlook 2000 or later

Installing Integration with Outlook

To install Integration with Outlook on your computer, you must first download the Setup program from a Centers website. Before installing Integration with Outlook, ensure that your computer is connected to the Internet and have the following information handy:

- + The web address or URL
- + Your user name and password

TO INSTALL INTEGRATION WITH OUTLOOK:

- 1 Quit Microsoft Outlook if it is running on your computer.
- 2 Go to the preferred Centers website.
- 3 Click on Resource Center.
- 4 Click on the Outlook Plug-in.
- 5 Save the Setup program to your computer.
- 6 Run the Setup program by doing either of the following:
 - In the Download Complete dialog box, click Open.
 - Double-click the Setup program, which has the file name olkInt.msi.
- 7 Follow the instructions in the Setup program.
- 8 Once installation is complete, start Microsoft Outlook.

About Integration with Outlook Options

Once you install Integration with Outlook, the following new items appear in Microsoft Outlook.

TOOLBAR



New options appear on the Outlook toolbar.

The following table describes the toolbar buttons:

BUTTON	DESCRIPTION
Schedule Meeting/Session/Event	Opens the Outlook Meeting window, which now contains Integration with Outlook options for scheduling an online meeting.

One-Click Meeting	Opens the One-Click Meeting Wizard on the Centers websites, with which you can set up a One-Click Meeting. A One-Click Meeting is an instant meeting that you can start at any time, as often as you want, by clicking a shortcut on your computer.
WebEx	<p>Opens a menu on which you can:</p> <ul style="list-style-type: none"> + Access your MyWebEx™ area on the Centers websites. + Specify your user account information, that is - the URL and your user name and password. + Open the template for meeting invitations and customize the template for your needs. + Check for updates to Integration with Outlook

WEBEX TAB

A new WebEx tab appears in the Meeting and Appointment windows for your Outlook calendar, as follows:

Specifying your WebEx account settings

To schedule an online meeting in Outlook or use the One-Click Meeting feature, you must specify your WebEx account information.

TO SPECIFY ACCOUNT INFORMATION:

- 1 In the Microsoft Outlook, on the toolbar, click WebEx.
- 2 On the menu that appears, choose Account Settings. The WebEx Account Settings dialog box appears.



- 3 In the WebEx site address text box, enter the URL for your Centers website.

Note: The URL is typically <http://companyname.webex.com>. If you do not know your branded website URL, please contact your site administrator or your sales representative.

- 4 In the User name text box, enter your user name.
- 5 In the Password text box, enter your password.
- 6 Optional. Click Verify to ensure that your account information is correct.
- 7 Optional. To let Outlook log you in automatically when you schedule a meeting, select the Remember my user name and password check box.
- 8 Click OK to save your account settings.

Scheduling a Meeting

Before scheduling an online meeting using Integration with Outlook, be aware of the following:

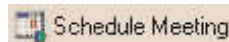
- + Integration with Outlook provides basic options for scheduling a meeting. Thus, some options that appear in the Schedule a Meeting Wizard on the Centers website are not available in Integration with Outlook.
- + Integration with Outlook does not support all of the recurrence options that are available in Outlook.
- + In any meeting invitations that you send via Outlook, the meeting's starting time appears in the time zone that is set on your computer, not in your site preferences for the Centers.
- + On the Centers website, all meeting times appear in the time zone that you set in your site preferences, regardless of the time zone that is set on your computer.
- + For Integration with Outlook, to schedule a meeting on the Centers website, your computer must be connected to the Internet. Otherwise, Integration with Outlook saves the scheduled meeting in your Outlook Outbox and automatically schedules the meeting on your site the next time your computer connects to the Internet.

Setting Up a Scheduled Meeting

To schedule a meeting using Integration with Outlook, you simply open a new meeting request or appointment in Outlook and then specify information about the meeting, as follows:

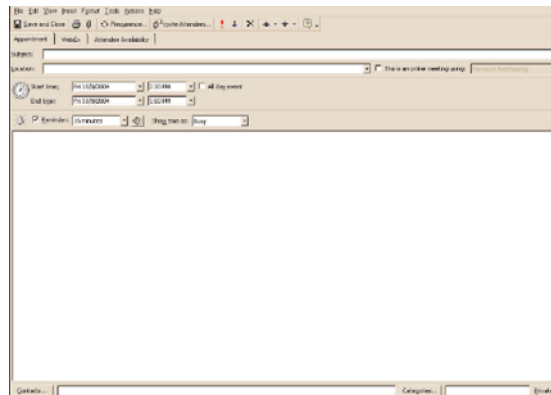
Start a new meeting request in Outlook:

- 1 Ensure that your computer is connected to the Internet.
- 2 Do either of the following:
 - Click Schedule Meeting on the toolbar.



- On the File menu, point to New and then click Meeting Request.

The Outlook Meeting window appears.



Specify general meeting information:

- 1 In the Outlook Meeting window, type a topic for the meeting in the Subject box.
- 2 In the Start time and End time drop-down lists, specify the starting and ending times for the meeting, respectively.
- 3 Optional – To specify a recurrence pattern for your meeting, click Recurrence and then select recurrence options

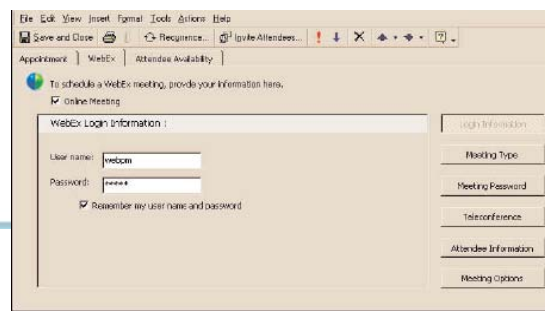
NOTE: Integration with Outlook supports only the recurrence options that are available on the Centers website. Optional – On the Appointment tab, specify other options that Outlook provides. For example, you can set reminder options.

Invite attendees to the meeting:

- 1 Click the Attendee Availability tab.
- 2 Specify attendees who you want to invite to the meeting

Provide your account information:

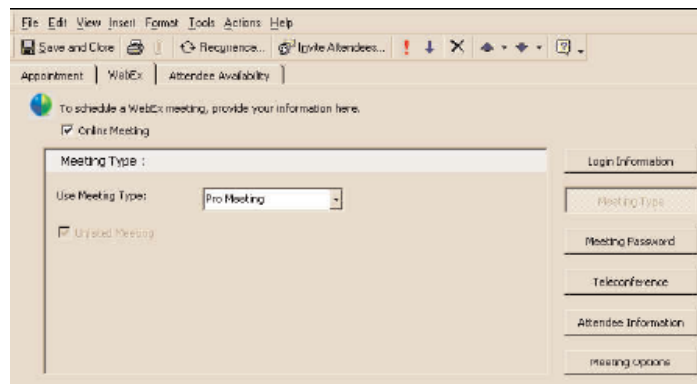
- 1 Click the WebEx tab. The login panel appears.



- 2 Provide your account information
- 3 Optional – To automatically log in whenever you schedule a meeting using Integration with Outlook, click the Remember user name and password check box.

Specify general meeting information:

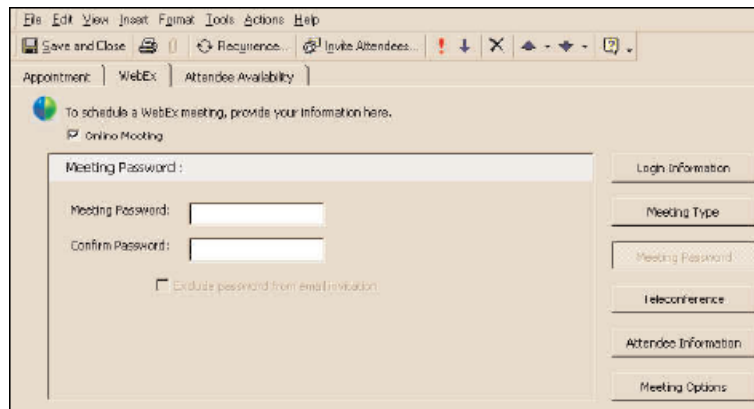
- 1 Click Meeting Type and select the Center that you are using. The Meeting Type panel appears.
- 2 Select the Online Meeting check box.



- 3 In the Use Meeting Type drop-down menu, select Pro Meeting or Pro+MPV (Multipoint Video)
- 4 Specify whether the meeting appears on the meeting calendar on your Centers branded website or if it is unlisted. (Available only on branded Centers sites.)
- 5 Specify tracking codes, if tracking codes are set up. NOTE: Centers per minute users do not utilize tracking codes.

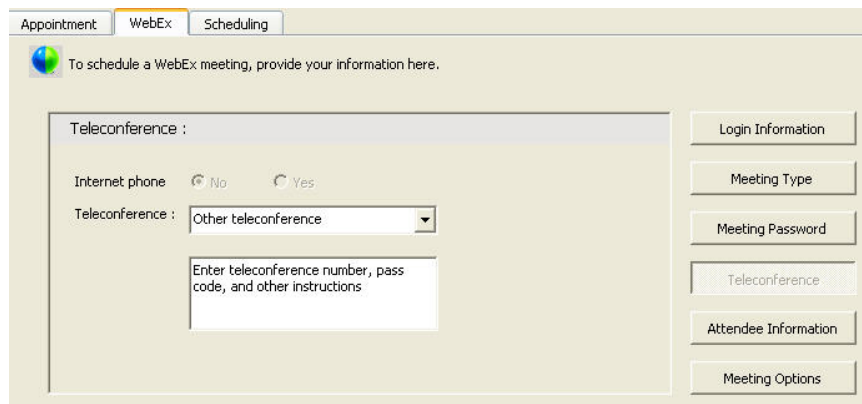
Specify a Meeting Password:

- 1 Click Password. The Password panel appears.
- 2 Specify a password, if applicable, for the meeting in the Meeting Password box.
- 3 Type the password again, if applicable, in the Confirm Password box.
- 4 Optional – To prevent the meeting password from appearing in the invitation email messages that attendees receive, select the Exclude meeting password from email invitations check box.



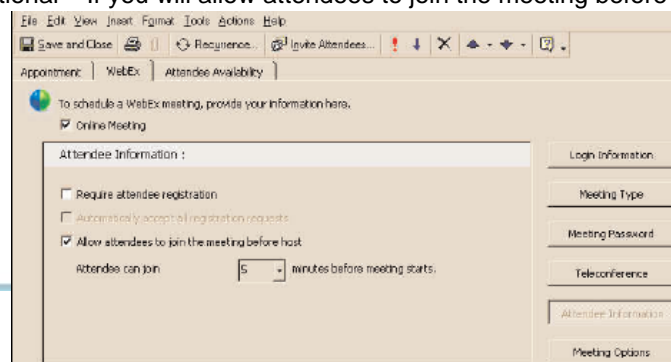
Setup an audio conference for the meeting:

- 1 Click Teleconference. The Teleconference panel appears.
- 2 Click the Teleconference drop-down menu. Select either None or Other Teleconference.
- 3 If you select Other Teleconference, enter your audio conference Dial-In Number(s) and Conference Code (if applicable).



Specify attendee information:

- 1 Click Attendee Information. The Attendee Information panel appears.
- 2 Optional – If you require attendees to register for the meeting, select the Require Attendee Registration check box.
- 3 Optional – If you require registration, avoid having to manually accept registration requests by selecting the Automatically accept all registration requests check box.
- 4 Optional – If you will allow attendees to join the meeting before you start it, select the Allow

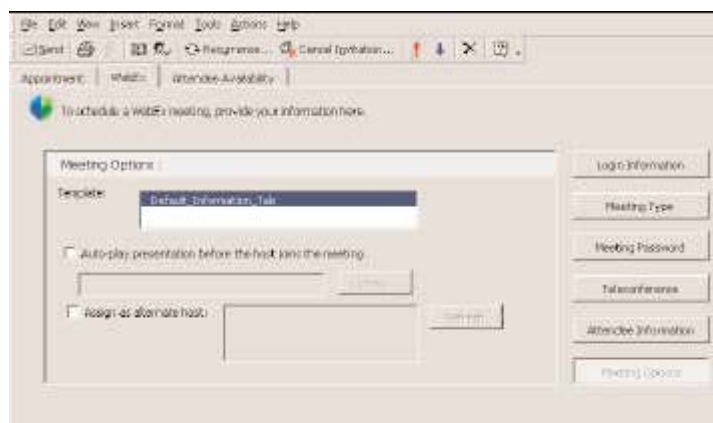


the Allow

attendees to join the meeting before host check box and then select a number of minutes in the box.

Specify meeting options:

- 1 Click Meeting Options. The Meeting Options panel appears.
- 2 Optional – Choose a template for the Info tab, which appears in the content viewer once you start the meeting.
- 3 Optional – To specify a file that you want to open automatically in each attendee's Meeting window once he or she joins the meeting, select the Auto-play presentation before the host joins the meeting check box and then choosing a presentation file. If you select this check box, an Outlook security message may appear.
- 4 Optional - To allow another user to host the meeting for you, by selecting the Assign as Alternate Host check box, and then selecting one or more names in the list box. If you select this check box, and Outlook security message may appear.



Note: The Assign Alternate Host feature is only available on branded Centers sites.

Send meeting invitations:

- 1 Once you have finished setting up the meeting, click Send. Integration with Outlook contacts the Centers website and then adds the scheduled meeting to your Outlook calendar and to your list of meetings on your website. A message then appears confirming that the meeting was scheduled on the Centers website.
- 2 Click OK to close the confirmation message.

ABOUT SPECIFYING A RECURRENCE PATTERN FOR A MEETING

Using Outlook recurrence options, you can specify a recurrence pattern for your meeting. For example, you can specify that a meeting recurs every Wednesday at 2:00 PM until a specific date. Integration with Outlook schedules the meeting on each day that you specify in the recurrence pattern.

The recurrence options that you can use in Outlook are limited to the options that are available on the Centers website. The following are the recurrence options in Outlook that Centers does not support:

- + Recur every [X] week(s) on [Monday/Tuesday/Wednesday/Thursday/Friday/Saturday/Sunday]. For this option, the value of X must always be 1.
- + The [first/second/third/fourth/last] [day/weekday/weekend day] of every [X] month(s). For this option, you can select only a specific day of the week, not day, weekday or weekend day.

ABOUT INVITING ATTENDEES

When using Integration with Outlook to schedule a meeting, you can invite attendees by selecting them in any of your Microsoft Outlook contact lists. For example, if your organization maintains a Global Address List, you can invite attendees by selecting their names in that list. You can also invite attendees who are not in an Outlook contacts list by providing their email addresses.

Once you invite an attendee to a scheduled meeting, he or she receives an invitation email message. The invitation includes information about the meeting – including its password (if applicable) – and a link that the attendee can click to join the meeting. It is good practice to send a copy of the invitation to yourself for reference.

NOTE: Any attendees that you invite using Outlook do not appear in the attendees list for the meeting on the Centers website.

ABOUT THE MEETING TYPES PANEL

The Integration with Outlook Meeting Types panel contains the following options:

- + Online meeting - Specifies that you are hosting the meeting using the Centers. You must select this option to schedule the meeting on your Centers website.
- + Use meeting type - Available only if your site provides different meeting types (for example: Pro Meeting and Pro+MPV). Each meeting type provides a different set of available options.
- + Unlisted meeting - Specifies that the scheduled meeting does not appear on the calendar on your Centers website. An unlisted meeting prevents visitors to the site from viewing information about the meeting, such as its host, topic and starting time, and helps to prevent unauthorized access to the meeting. To join an unlisted meeting, an attendee must provide a unique meeting number.

If you invite an attendee to an unlisted meeting, the meeting invitation includes complete instructions for joining the meeting - including the meeting number and a link to the web page in which the attendee can join the meeting.

- + Tracking codes - If your organization uses tracking codes, options for your project, division, department and so on, appear in the panel. To specify tracking codes, do one of the following:
 - If a list of codes appears in the box on the right, select a code from the list.
 - Type a code in the box on the right.

ABOUT THE MEETING PASSWORD PANEL

On the Integration with Outlook Meeting Password panel, you can require that attendees provide a password to attend a meeting. If you require a password, all participants must provide the password to attend the meeting. Thus, requiring a password helps to secure a meeting from unauthorized access. If you invite a participant to a meeting that requires a password, the participant receives an invitation email message that includes the password, unless you specify that passwords do not appear in email invitations.

If you choose to exclude the password from email invitations, then you must provide the password to attendees by another method – for example, by phone. To exclude the password from the invitation, on the WebEx tab, select the Exclude password from email invitation check box.

ABOUT THE TELECONFERENCE PANEL

The Integration with Outlook Teleconference panel contains the following options:

- + None – The meeting does not include an audio conference.
- + Other Teleconference – If you select this option, you can provide the instructions for joining your audio conference call. The instructions will appear in the meeting invitations that you send to attendees.

USING AUDIO CONFERENCING OPTIONS

Once you schedule a meeting, instructions for joining the audio conference automatically appear:

- + On the Meeting Information page on your site, which participants can view before you start the meeting
- + In invitation email messages, if you invite participants using Outlook
- + In the Join Teleconference dialog box, which appears in participants' meeting windows once they join the meeting.

ABOUT THE ATTENDEE INFORMATION PANEL

The Integration with Outlook Attendee Information panel contains the following options:

- + **Require attendee registration:** Specifies that all attendees must register to attend the meeting. An attendee cannot attend the meeting until you accept his or her registration request. To register for a meeting, attendees must provide the following information:
 - First name
 - Last name
 - Email address

NOTE: You can require attendees to provide additional information when registering for a meeting by editing the meeting on the Centers website and using the registration options in the Schedule a Meeting Wizard. If you require registration, the Exclude password from email invitation check box on the Meeting Password panel is automatically selected. Once you approve an attendee's registration request, the attendee receives another automatic email message that includes the password. Thus, it is recommended that you customize your invitation email message with instructions about registering for the meeting.

- + **Automatically accept all registration requests:** Accepts all registration requests automatically and lets all registrants attend the meeting. You do not receive registration requests. If this option is not selected, you must accept or reject each registration request individually using the options on the Centers website.
- + **Allow attendees to join meeting before host:** Specifies that participants can join the meeting a specified number of minutes before the meeting's scheduled start time.
- + **Attendees can join [x] minutes before meeting starts:** Specifies the number of minutes before a meeting's scheduled start time that attendees can join the meeting.

NOTE: If you let participants join the meeting early – that is, before its scheduled start time – you can automatically share a presentation once a participant joins the meeting. This option is useful if you want to share information or entertain participants while they wait for you to start the meeting.

ABOUT THE MEETING OPTIONS PANEL

The Integration with Outlook Meeting Options panel contains the following options:

- + **Template:** Lets you choose a template for the Info tab, which appears in the content viewer during the meeting. The Info tab contains information about the meeting, including the host, audio conference phone numbers and host key (if you are the host). You can choose another template only if your site administrator has provided one or more customized Info tab templates for Centers. (available only for branded Meeting Visuals sites)
- + **Auto-play presentation before host joins the meeting:** Specifies that a presentation or document that you select is shared automatically for participants who join the meeting before you start it. The presentation appears in each participant's content viewer once he or she joins the meeting. If the presentation has multiple slides or pages, they advance automatically every twenty seconds. The file that you select must:
 - Be in the WebEx Universal Communications Format (UCF).
 - Reside in your personal folders (My Files) on the Centers website. You can select a UCF file that already resides in your folders or you can upload a new file to your folders and then select it while schedule a meeting.
- + **Upload:** Opens the Add/Select Presentation page on the Centers website on which you can select a presentation or document that resides in your personal folders or upload a new file to your folders.

- + Assign as alternate host: Lets you designate one or more attendees as alternate hosts for the meeting. An alternate host can start the meeting and act as the host. Thus, an alternate host must have a user account on your Centers website.

If you select this check box, the Microsoft Outlook security message shown to the left may appear, depending on your organization's Outlook Exchange Server security policies. In this case, the security warning appears because you are attempting to access your organization's Outlook contacts database.



Do either of the following:

- + Click Yes. Depending on how many attendees you have invited, you may need to click Yes several times to close the warning message.
- + Click Allow access for, and then select a number of minutes. Usually, 1 minute is sufficient for Outlook Integration to retrieve the list of invited attendees. Then click Yes.

Once you select the check box, the list box shows all invited attendees. Select from the attendees in the list those you would like to be alternate hosts. To select multiple attendees, hold down your keyboard's Ctrl key.

Once you invite an attendee to a meeting as an alternate host, the attendee receives an invitation email message that provides information about acting as the alternate host. Your scheduled meeting appears on the alternate host's My WebEx Meetings page on your Centers website.

If you join the meeting after an alternate host has started or joined it you do not automatically assume the host role. However, the alternate host can designate you as the host upon your arrival.

ADDING INFORMATION TO YOUR MEETING

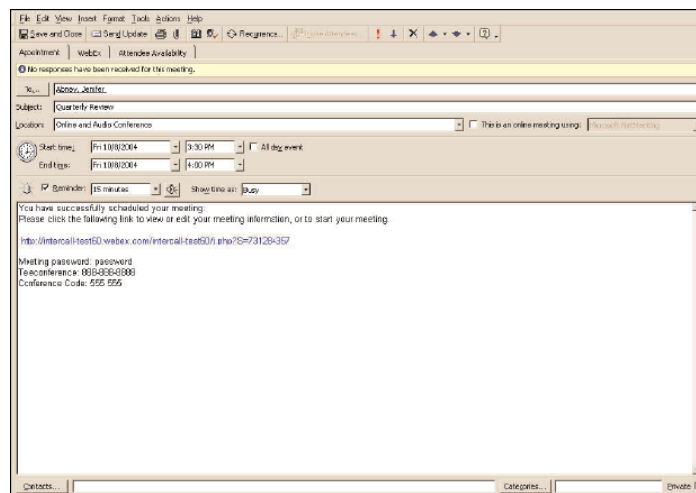
If you invited attendees to your meeting, you can add information to the meeting invitation that they receive before you send it. For example, you can provide additional information about the meeting that Integration with Outlook does not automatically provide for you, such as an agenda, information about the presenters and so on. Any text that you add automatically appears on the Agenda page for the meeting on the Centers website.

To add information to your meeting invitation:

- 1 Once you have finished setting up a meeting and inviting attendees, choose Save in the Outlook Meeting window on the File menu. Integration with Outlook

- contacts your Centers website and then adds the scheduled meeting to your Outlook calendar and to your list of meetings on the Centers website. A message then appears confirming that the meeting was scheduled on the Centers website.
- 2 Click OK to close the confirmation message. On the Appointment tab of your invitation, information about your meeting automatically appears in the text box, such as the URL, the meeting password, if required and the audio conference information.
- 3 On the Appointment tab, type any additional information about the meeting in the text box below the information that automatically appears.
- 4 Click Send.

NOTE: Ensure that you add information below the meeting information that Integration with Outlook automatically provides in the message area on the Appointment tab. Do not type any text in the area in which meeting information automatically appears. If you format the text that you add to the invitation, the formatting does not appear on the Agenda page for the meeting on the Centers website.



Modifying a Scheduled Meeting

Once you schedule a meeting using Integration with Outlook, you can use Outlook to modify it at any time. For example, you can change its starting time, specify a new password, change the audio conference number and so on. Once you modify a scheduled meeting, Integration with Outlook sends an updated meeting invitation to any attendees whom you invited to the meeting and updates the meeting information on the Centers website.

IMPORTANT: If you modify a meeting using the Centers website, your changes do not appear in Outlook. For example, if you change the meeting's start time using your site, the starting time does not change on your Outlook calendar. Thus, we recommend that you only use Outlook to modify a meeting.

To modify a scheduled meeting:

- 1 On your Microsoft Outlook calendar, open the item for the scheduled meeting.
- 2 Modify the information and options on either the Appointment tab or WebEx tab.
- 3 Click Send Update.

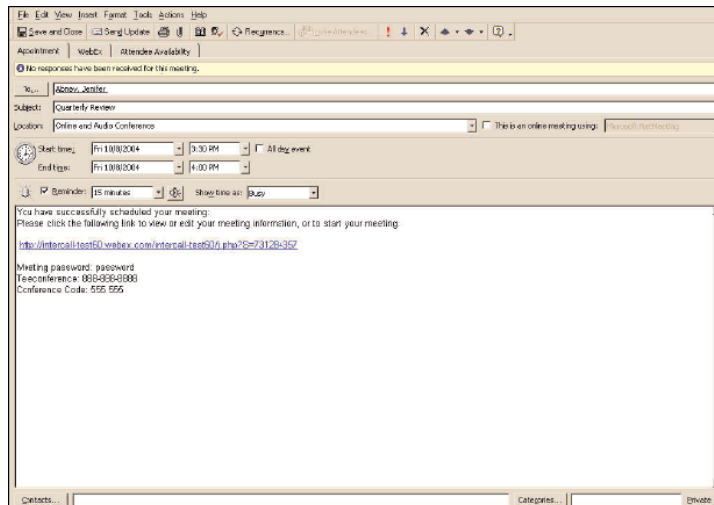
Integration with Outlook contacts the Centers website and updates the meeting on the site. A message appears confirming that your meeting was updated.

Starting a Meeting

Once you schedule a meeting using Integration with Outlook, you can start the meeting in either of the following ways:

- + On your Microsoft Outlook calendar, open the meeting item then click the link to start the meeting.
- + Log in to the Centers website and then start the meeting from your My WebEx Meetings page.

NOTE: The link that appears in your meeting item is for meeting hosts only. The link that appears in attendee's invitations is a different link, which attendees can click to join the meeting.



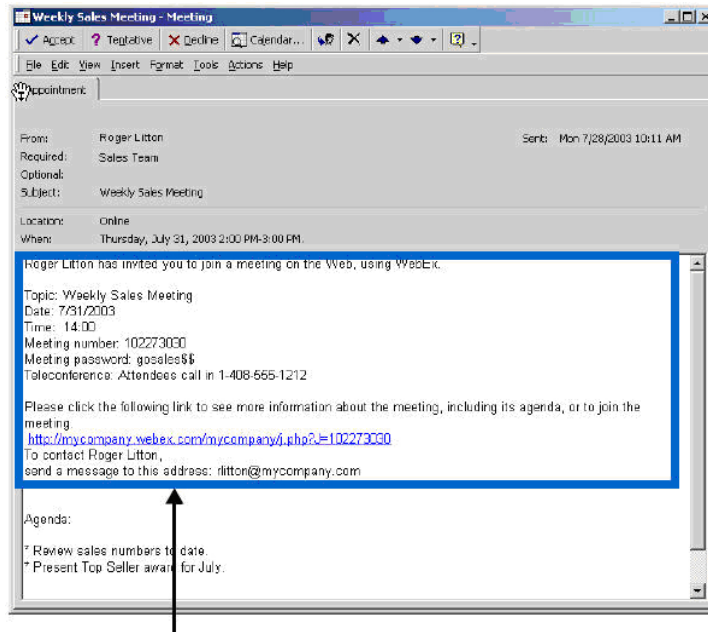
Canceling a Meeting

You can cancel a meeting in Microsoft Outlook. All attendees whom you invited to the meeting automatically receive a cancellation notice. If your computer is connected to the Internet, Integration with Outlook also contacts the Centers website and cancels or removes the meeting from the site. A message appears confirming that your meeting was removed from the Centers website. You also receive a cancellation notice in an email message.

NOTE: If you cancel a meeting using the Centers website, your site does not automatically cancel the meeting on your Outlook calendar. Thus, we recommend that you cancel meetings using Outlook instead of the Centers website.

Customizing the Meeting Invitation Template

Integration with Outlook provides a template for meeting invitations that you send to attendees. The information in the template appears in the text area of the Microsoft Outlook invitation email messages, as follows:



This area contains information from the invitation template.

This template includes both default text and variables - codes that your meeting service recognizes and substitutes with your specific meeting information. You can customize this template by editing the default text, rearranging variables and removing variables.

The default meeting invitation template provides the following variables:

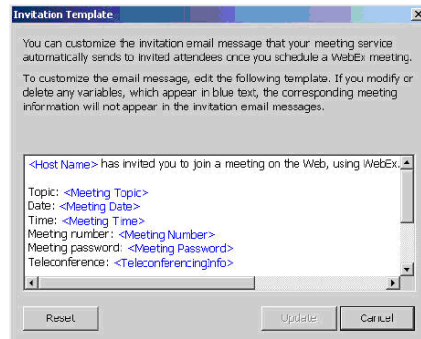
VARIABLE	DEFINITION
<Host Name>	Displays your full name, as it appears in your user profile on your web conference website.
<Meeting Topic>	Displays the topic for the meeting, as it appears in the Subject box in your meeting invitation.
<Meeting Date>	Displays the date on which the meeting occurs, as it appears in the Start Time box in your meeting invitation.
<Meeting Number>	Displays the unique number that your meeting service assigns to a meeting. For an unlisted meeting, participants must provide the meeting number to attend the meeting.
<Meeting Password>	Displays the password for the meeting, as you specified it on the Meeting password panel when scheduling the meeting.
<Teleconferencing Info>	Displays information about how to join the audio conference for the meeting.
<Meeting Link>	Displays the Web address, or URL, that attendees can click to join the meeting.
<Host Email>	Displays your email address as it appears in your user profile on your web conference website.

Once you customize the template, you can reset it to its default state at any time, regardless of whether you removed any variables.

To customize the meeting invitation template:

- 1 In Microsoft Outlook, on the toolbar, click WebEx.

- 2 On the menu that appears, choose Invitation Template. The Invitation Template window appears.



- 3 Modify the message as necessary.
- 4 Click Update.

To reset the meeting invitation template to its default state:

- 1 In Microsoft Outlook, on the toolbar, click WebEx.
- 2 On the menu that appears, choose Invitation Template. The Invitation Template appears.
- 3 Click Reset.

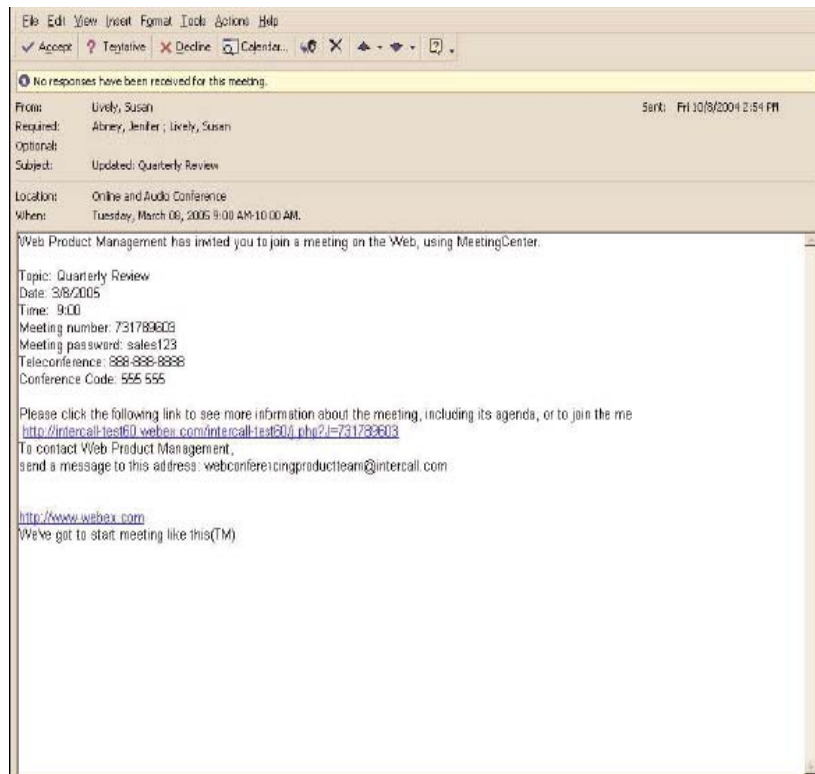
Joining a Meeting

If a meeting host uses Integration with Outlook to invite you to a meeting, you receive an invitation email message that includes a link that you can click to join the meeting. The invitation differs depending on whether or not you use Microsoft Outlook.

If you use Microsoft Outlook, you receive an invitation email message in your inbox. Once you accept the invitation, it appears on your Outlook calendar.

To join the meeting, open the invitation on your calendar and then click the link to join the meeting.

The figure below shows an example of a meeting invitation in Outlook:



Checking for Updates to Integration with Outlook

You can periodically check for updates to Integration with Outlook. If an update is available, Integration with Outlook asks you whether or not you want to install the update.

To check for updates to Integration with Outlook:

- 1 If necessary, start Microsoft Outlook
- 2 On the Outlook toolbar, click WebEx.
- 3 On the menu that appears, choose Check for Update.

Removing the Outlook Plug-In

You can do either of the following:

- + Temporarily remove the WebEx tab that appears in your Meeting and Appointment windows in Microsoft Outlook.
- + Remove, or uninstall, the Outlook plug-in from your computer

Temporarily Removing the WebEx Tab From Outlook:

If you selected the Integration with Outlook form to be your default Meeting and Appointment forms in Microsoft Outlook, a WebEx tab always appears in the Meeting and Appointment windows in Outlook. However, you can remove this tab at any time without uninstalling the Outlook plug-in.

To remove the WebEx tab, you must choose another form to be your default Meeting and Appointment form in Outlook. You can switch between Integration with Outlook form and another form at any time.

To remove the WebEx tab from the Meeting and Appointment windows:

- 1 In Microsoft Outlook, in the folder list, right-click Calendar.
- 2 If the Folder List is not visible, choose Folder List on the View menu
- 3 On the menu that appears, choose Properties. The Calendar Properties dialog box appears.
- 4 Ensure that the General tab is selected.
- 5 In the When posting to this folder use drop-down list, select Appointment – which is the default form for meetings and appointments in Outlook – or another form that your organization uses.
- 6 Click OK. The WebEx tab no longer appears in the Meeting and Appointment windows in Outlook.

Uninstalling Integration with Outlook

You can remove the Outlook plug-in from your computer at any time using either the Windows Add/Remove Programs utility or the Setup program that you downloaded when installing the Outlook plug-in.

To uninstall Integration with Outlook:

- 1 Quit Microsoft Outlook.
- 2 Ensure that no Outlook processes are still running on your computer. To do so, you can reboot your computer or you can terminate any running Outlook processes, as follows:
 - Press Ctrl+Alt+Delete on your computer's keyboard.
 - Click Task Manager.
 - Click on the Processes tab
 - Select the OUTLOOK.EXE process.
 - Click End Process.
- 3 Do either of the following:
 - Open the Windows Add/Remove Programs utility on your computer, select My WebEx Integration with Outlook and then select the option to remove the program.
 - Double-click the Integration with Outlook Setup program (olkInt.msi) and then follow the instructions to remove the program.