



How to Start a New Guidebook with LeaderGuide Pro



User Guide

Course ID: LGP_UG_H2-Start

How to Start a New Guidebook with LeaderGuide Pro

Copyright © 2023 Great Circle Learning

Revision Date 3/21/2023

Acknowledgements

This user guide was developed by Great Circle Learning to support users of LeaderGuide Pro, the premiere ILT & VILT development tool.

Trademarks & Copyright Acknowledgements

- LeaderGuide Pro™ is a trademark of Great Circle Learning, Inc.

This user guide was created with:

LeaderGuide Pro 

A product of Great Circle Learning, Inc.

www.greatcirclelearning.com

Contact Us

Great Circle Learning

PO Box 5159, Marco Island, FL 34145 USA

info@greatcirclelearning.com

239-389-2000

Table of Contents

Overview	1
Purpose	1
Learning Objectives	6
How to Start a New Guidebook	7
How to Start a New Guidebook	7
How to Use the Start a New Guidebook Dialog Box	9
After You Click OK	16

Overview

Purpose



LeaderGuide Pro builds Word documents that are:

- Consistently organized & professionally formatted as:
 - Facilitator Guides
 - Participant Guides
 - Content Parts
- These documents are structured with:
 - Modules and Lessons
- Lessons are built with:
 - Content Blocks

Always:

- Use the LeaderGuide Pro ribbon buttons to build your document ...
 - Even though you are in Word.



Terminology

- LGPro
 - LeaderGuide Pro
- Guidebook
 - Facilitator Guide
 - Participant Guide
- Modules and Lessons:
 - Topics and subtopics
- Training Program:
 - The Course or Class or Session you are building.
- Content Blocks:
 - Table rows with two or three cells.
 - The first cell always holds a LeaderGuide Pro™ icon.
 - The second and third cells hold your instructional content and images.

Ribbon buttons

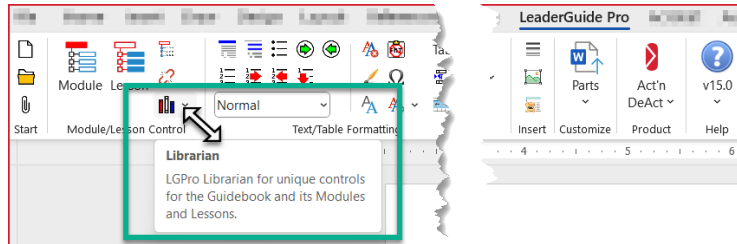
- Hover your cursor over any of the buttons on the LGPro ribbon to see what the button does for you.

Purpose



Ribbon buttons

- Hover your cursor over any of the buttons on the LGPro ribbon to see what the button does for you.



Screen Tips

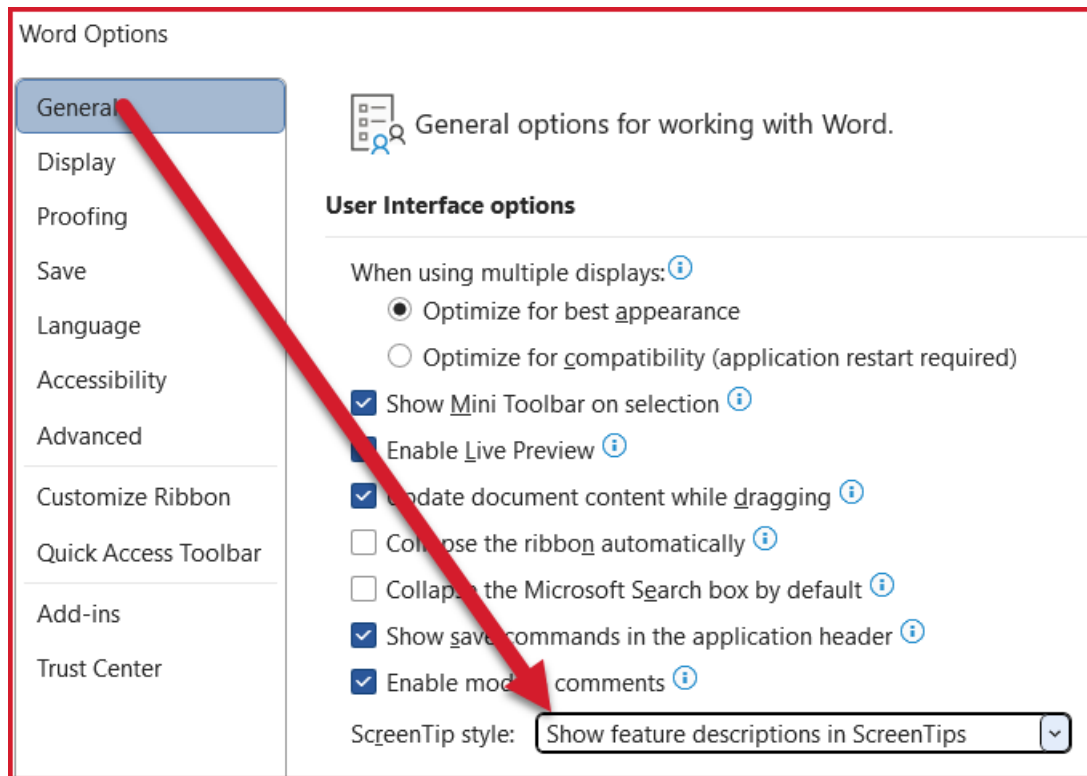
You must have Screen Tips turned on in Word to see the button information.



To show Screen Tips:

In Word, click **File > Options > General**

Next to **“Screen Tip Style”** select **“Show feature descriptions in Screen Tips”**



Purpose



Facilitator Guides have a consistent organizational structure.

These are the “parts” that come together to form a Facilitator Guide.

- Cover page
- Acknowledgements page
- Table of Contents
- Introductory Materials
 - Getting Started
 - About This Guide
 - The Program in Perspective
 - Program Preparation
 - Training at a Glance
- Modules
 - New Module
 - New Lesson

This document:

- Was built using the Participant Guide option.

Participant Guides have a simpler document structure:

- Cover page
- Acknowledgements page
- Table of Contents
- Modules
 - New Module
 - New Lesson



Key point:

Unless you create a custom Collection that excludes any of the standard parts:

- Every new Facilitator Guide or Participant Guide you create always sets up the same way, with all the parts listed above, in the same order.

Customizing

You will find help on Customizing under the Parts button on the LGPro ribbon.

Also, feel free to contact us for help with customizing:

info@greatcirclelearning.com

Purpose



Participant Guides have a simpler, but still consistent organizational structure.

Every new Participant Guide you create always sets up the same way.

These are the “parts” that come together to form a Participant Guide.

- Cover page
- Acknowledgements page
- Table of Contents
- Overview
 - Purpose
 - Objectives
- New Module
 - New Lesson

You can extract a Participant Guide from a Facilitator Guide.

If you extract a Participant Guide from a Facilitator Guide:

- The Program Purpose you enter in the Introductory Materials section of the Facilitator Guide is copied into the Purpose lesson in the Overview module of your new Participant Guide.
- And the Learning Objectives you enter in the Introductory Materials of the Facilitator Guide is copied into the Learning Objectives lesson in the Overview module of your new Participant Guide.



Modules and Lessons

- Modules and Lessons are the heart & soul of your Facilitator & Participant Guides.
- Every Facilitator Guide and Participant Guide is built with Modules and Lessons.
- Every Module has at least one lesson.

Content Parts

When you choose the option to start a new Content Part you will be building either a Module and its Lessons, or just a Lesson.

Purpose



Content Parts:

A Content Part is either:

- a Module and Lesson
- or just a Lesson.

Building a Content Part allows you to:

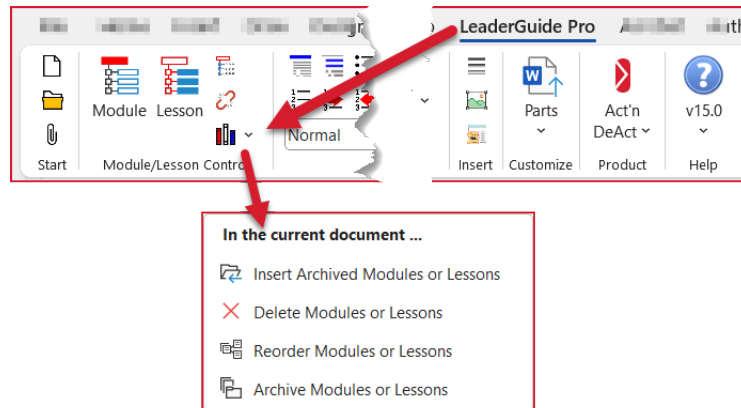
- work on a chunk of a Guidebook without being in the full document.

Using **Librarian** to **Archive** Modules and Lessons from an existing Guidebook allows you to:

- isolate content to work in and to reuse.

Anyone with LeaderGuide Pro can:

- **Insert** Content Parts into an existing Guidebook using the LeaderGuide Pro **Librarian** feature.



Reusable:

Content parts are reusable chunks.

- You can build them as stand-alone documents by selecting the Content Part option as you start something new.
- And you can create them by using Librarian to “Archive” Modules and Lessons from an existing Facilitator Guide or Participant Guide.

Learning Objectives



This User Guide will teach you how to:

1. Locate and use the New function on the LeaderGuide Pro ribbon to start a new guidebook, meaning a Facilitator Guide or a Participant Guide or a Content Part.
2. Save your new guidebook in a location you can easily return to.
3. Add PowerPoint slides and notes as you start a new guidebook, if desired.

Video help:

Please also watch our video:

- [How to Start a New guidebook with LeaderGuide Pro](#)

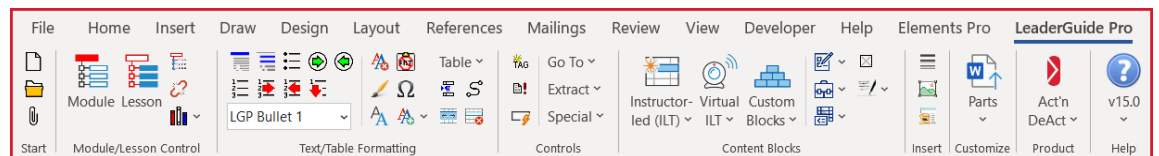
How to Start a New Guidebook

How to Start a New Guidebook



Open Word

- LeaderGuide Pro (**LGPro**) runs within MS Office 365 Word.
- Click on the **LeaderGuide Pro tab** along the top of your screen
 - This will bring up the **LeaderGuide Pro ribbon**.



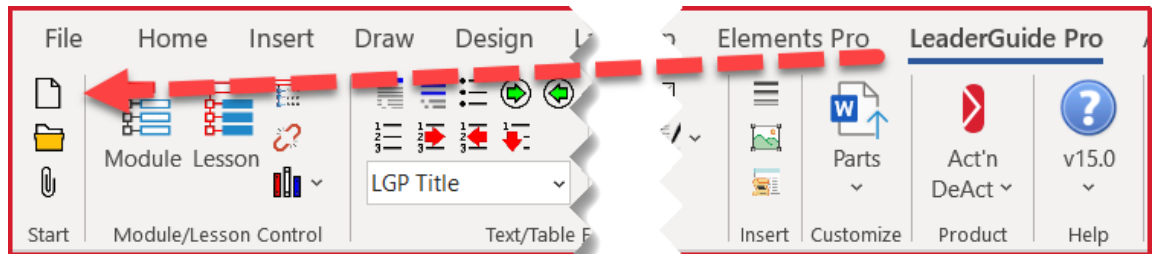
TIP: Hoover your cursor over the LGPro buttons to find out what they do.



When to use Word vs. LeaderGuide Pro:

- **You will be using** the buttons on the **LGPro ribbon** to start, format & build your Facilitator Guide or Participant Guide.
- **Always use** the buttons on the **LGPro ribbon** rather than regular Word functions.
- The **only time** to use regular **Word** functions is **when LeaderGuide Pro does not offer** that function.
 - For example, LGPro does not offer these functions, so you should use Word to:
 - Save
 - Copy
 - Cut/Delete

How to Start a New Guidebook



1. Click on the **Blank Page (New)** button in the top left corner of the **LGPro** ribbon.
2. This will bring up the **Start a New Guidebook** dialog box.
3. Click **OK** in the **Start a New Guidebook** dialog box to start building your new Facilitator Guide or Participant Guide or content part.
4. Follow the prompts from **LGPro** to **Save** your new facilitator guide or participant guide.
5. After Saving your file, **wait for a message** asking if you would like to **add images** (slides or pictures) to the document now. Say **Yes** or **No**.
6. If you say **No**, you will see a **message** telling you that your new **document is ready**.
7. If you say **Yes**, you will see a dialog box asking you **which slide file** (or pictures) you would like to add.

There will be three more dialog boxes that will walk you through the rest of the image import.

Next, you will see a **message** telling you that your new **document is ready**.

8. See **Detailed Instructions** on “How to Use the Start a New Guidebook Dialog Box” begin on the next page.



NOTE:

- When starting a new Facilitator Guide or Participant Guide, you are always given the option to import slides (or pictures) as your new document is set up.



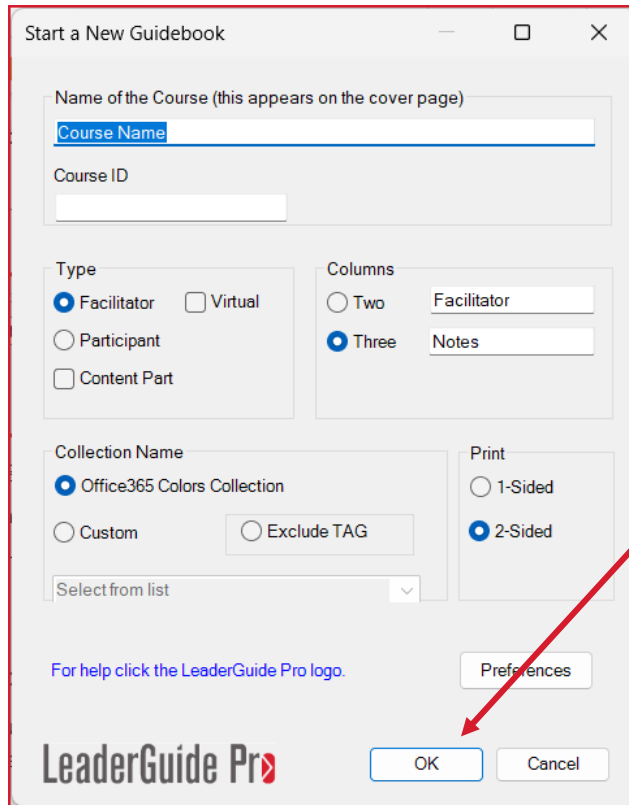
TIP:

- If you know you are going to add slides as you start a new guidebook:
 - Open your slide file before you start your guidebook & close any other open PowerPoint files.
 - This will make it easy to select the slide file to import.

How to Use the Start a New Guidebook Dialog Box



This is the Start a New Guidebook dialog box.



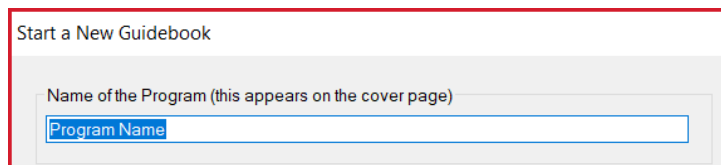
TIP:

All you absolutely must do to get started is click **OK**



To begin:

- Enter the name of your training program.



- Type over or paste over **Program Name** with the name of your training program/class/course.
- This will appear on your Cover page and:
 - even numbered page footers, and
 - the Getting Started section in a facilitator guide.



Good to Know:

You can change this name whenever you need to.

- Go to your cover page.
- Edit the name there.
- It will update everywhere else automatically.

How to Use the Start a New Guidebook Dialog Box



Next:

- Choose your guidebook type.

Type

Facilitator Virtual

Participant

Content Part

- Facilitator Guide
 - Includes Introductory Material to help the facilitator get oriented and prepare for delivery.
- Virtual Facilitator Guide
 - Automatically sets up 3-column Lesson pages with
 - Slides as thumbnails in column one
 - Facilitator Notes in column two
 - Producer Notes in column three.
 - Parses imported slide notes accordingly if you use [Scripter](#) to set up your PowerPoint file.
- Participant Guide
 - If you build your facilitator guide first, you can extract a participant guide instead of starting from scratch.
- Content Part
 - A Content Part is either:
 - A Module & Lesson, or just a Lesson
 - Both facilitator guides and participant guides are built with Modules and Lessons.
 - Module = Topic
 - Lesson = Subtopic



Good to Know:

No matter what **Type** you choose:

- You can Extract from it to create a new guidebook of a different type.



Content Parts:

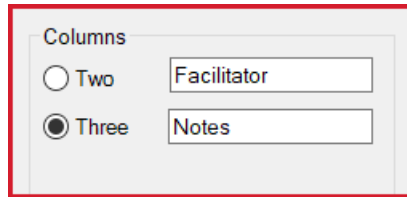
- Allow you to work in a smaller file.
- Allow multiple contributors to work on different parts of the same project.
- Can be inserted into Facilitator or Participant Guides.

How to Use the Start a New Guidebook Dialog Box



Choose your Lesson page setup.

- Lesson pages are built with table rows.
 - They look like what you see on this page.
- We call these table rows “Content Blocks.”
 - This page is showing an example of a 3-column setup.



You have options:

- **Two** means a 2-cell table row.
- **Three** means a 3-cell table row.
- A LeaderGuide Pro **icon** is always in the first column.
- **Facilitator** is the column two header on each page.
- **Notes** is the column three header on each page.



Good to Know:

No matter which setup you choose:

- You can always merge or split cells within a particular Content Block to best suit your needs.



Note:

- You can change the references to “Facilitator” and “Notes” to anything you prefer.
- These words appear at the start of the Content Blocks table that you will be building on each page of your Lesson.

How to Use the Start a New Guidebook Dialog Box



Choose your Collection.

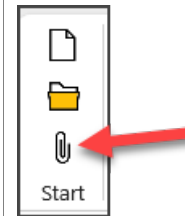
- A Collection contains all the Parts needed to build your Facilitator Guide or Participant Guide.
- Each Collection contains the same parts, but they look different because of different fonts, icons, and cover pages.

- The **Office 365 Colors Collection** is set as your default.
 - It is used automatically unless you click Custom and select a different Collection.
 - You can change your “default” Collection by clicking the Preferences button in the dialog box. See our guidance on Customizing LeaderGuide Pro for help with this, or [contact us](#).
- Select **Custom** to see your additional options.
 - Select the Collection you prefer from the list.
- Select **Exclude TAG** to build a Facilitator Guide without a Training at a Glance.
 - The Training at a Glance is an Advance Organizer for your instructor.
 - The Training at a Glance is a high-level course outline that is built for you by LeaderGuide Pro after you start adding content to the Module Overview pages that start each new topic in your training program.



Good to Know:

After you start a guidebook, if you wish you had chosen a different Collection, you can easily change the Collection by using the **Attach** function.



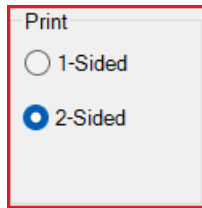
As you become comfortable with LeaderGuide Pro you can:

- Create your own custom Collections, using one of the included Collections as your starting point.

How to Use the Start a New Guidebook Dialog Box



Set your Print preference



- Print refers to how the headers, footers, and margins are set.
 - **2-sided** sets your document up like a book.
 - **2-sided** is the recommended setup.



Good to Know:

If you aren't sure whether to choose 1-sided or 2-sided:

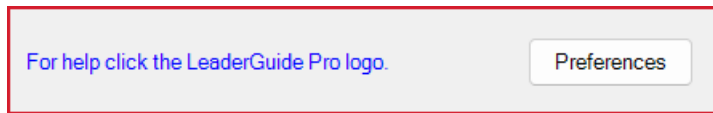
- choose 2-sided.

You can edit the copyright and revision date on the Acknowledgements page in your Facilitator Guide or Participant Guide.



To set up or edit your Copyright and Revision Date

- Click **Preferences**

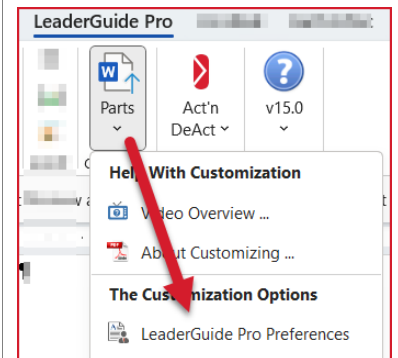


- This will open the LeaderGuide Pro™ global **Preferences dialog box**, shown on the next page.
- Use the **Preferences dialog box** to:
 - Change the copyright from Great Circle Learning to:
 - the name of your company
 - or the name of the copyright holder.
 - Edit the Copyright Year to the correct year
 - Edit the phrase “Revision Date” to read as you prefer, such as “Version” or “Release Date”



Good to Know:

- You can open the Preferences dialog box at any time by clicking on **Parts > LeaderGuide Pro Preferences**



How to Use the Start a New Guidebook Dialog Box



This is the LeaderGuide Pro global Preferences Settings dialog box:

The screenshot shows the 'Preferences Settings' dialog box with the following sections:

- General:**
 - Automatic Check for Updates
 - Start Modules on Odd # Pages
 - Automatically Insert Lesson Time Block
 - Automatically Insert Lesson Objective Block
 - Include Revision Date
 - Include Copyright
 - Add Slide Borders
 - Add Lesson Column Label Borders
 - Put Synced Page Refs in Column 3
- Slide Numbering:**
 - Sequential
 - Absolute
 - Restart by Module
- Column Headings:**
 - Column 2: Facilitator
 - Column 3: Notes
- Script Icons:**
 - Height: 0.33 Inches
- Brandings:**
 - Logo: GCL_Logo.png
 - Preferred Collection: Office365 Colors Collection
 - Copyright: Copyright © 2023 Great Circle Learning
 - Revision: Revision Date

At the bottom, there is a note: "This is LeaderGuide Pro. All "LGPro" options are enabled." and the LeaderGuide Pro logo with the text "For help click the logos." and "OK" and "Cancel" buttons.

- Change the copyright from Great Circle Learning to:
 - the name of your company, or the name of the copyright holder.
 - If needed, edit the Copyright Year to the correct year
- You can edit the phrase “Revision Date” to read as you prefer, such as “Version” or “Release Date”



Note:

A copyright and a revision date are automatically included.

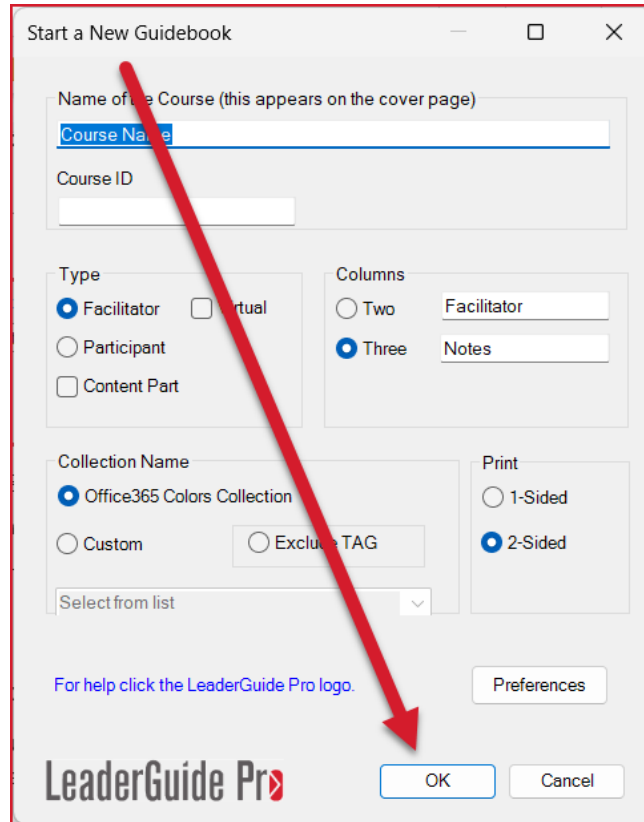
- The **Copyright and Revision Date** will appear on:
 - The Acknowledgements page ...
 - And repeat in the odd-numbered page footers.
 - Look at the bottom of this page to see an example.
- For the **Revision Date**, LeaderGuide Pro automatically adds:
 - The date of the day you are creating the document.
 - This is a fixed date and does not change each time you open the document.
- You can edit the **Revision Date** on the Acknowledgements page.

How to Use the Start a New Guidebook Dialog Box



To create your new guidebook:

- Click **OK**

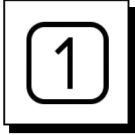


- When you click **OK**:
 - You set off a series of actions as LeaderGuide Pro builds your new Facilitator Guide or Participant Guide.
 - You will receive several prompts as LeaderGuide Pro moves through the document creation process.
 - These prompts are described on the following pages.

Important:

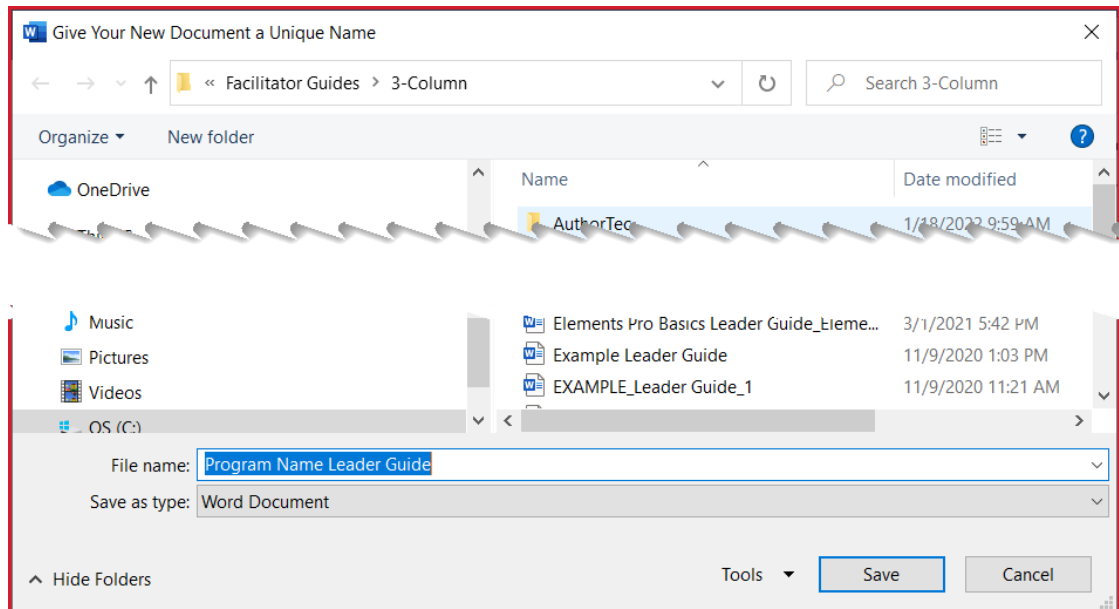
Please do not do anything else on your computer while LeaderGuide Pro is working to create your new document.

After You Click OK



After You Click OK:

- You will see the following Prompts.
- **SAVE** is the first prompt you will see after you click **OK**.
- And **Windows Explorer/Search** will open so that you can Save your file.



Note:

- You **MUST** save your new file.
 - You will be taken to your LeaderGuide Pro Local Library, which was added when LeaderGuide Pro was installed.
 - Its purpose is to make it easy for you to find your LeaderGuide Pro™ documents.
 - However, you can save your file wherever you prefer.

If you Save to One Drive – Use it for Storage Only

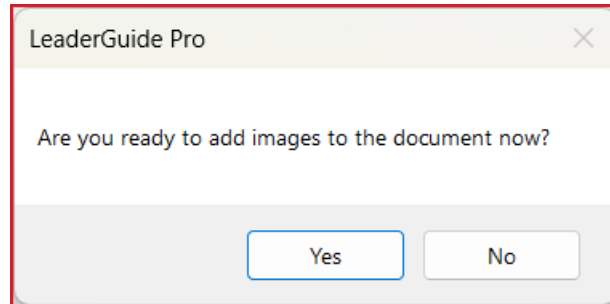
- While you can save your LeaderGuide Pro files to One Drive:
 - Do not work in your LeaderGuide Pro files on One Drive.
 - Instead, save a copy of your file to a local drive and do your work locally.
 - You can then save back to One Drive for storage.

After You Click OK



Next:

- You will see this message:



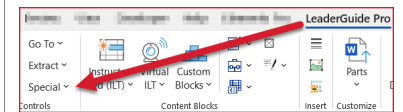
- LeaderGuide Pro™ asks this question because it is common to have slides as a starting point for your training program.
- This gives you the option to bring your slides in right away, to help set up and organize your document.
- Alternatively, you can also bring in pictures.



Good to Know:

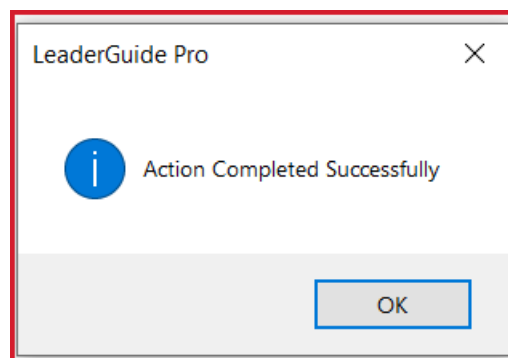
You can add images at any time as you are building your guidebook.

- You do this by clicking **Special** on the **LGPro ribbon** and then choosing the option to **Add Slides** or **Add Pictures**.



If you say NO:

- If you say **No** to the question about adding images, you will see this message:



- LeaderGuide Pro is telling you that your new Facilitator or Participant Guide is ready.
- Click **OK** and your new document will be on your screen and ready for you to use.

If you say No by accident:

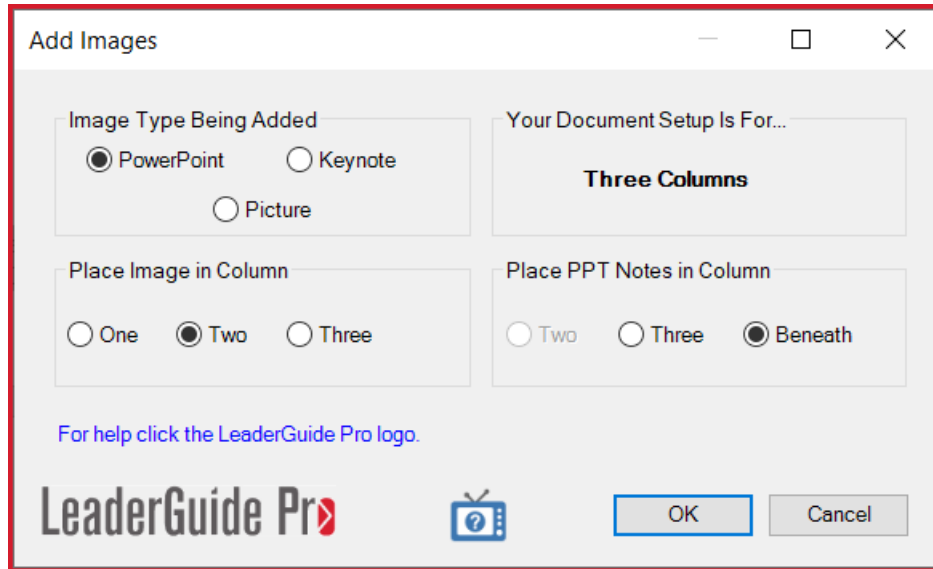
- You still must click **OK** and your new document will be on your screen and ready for you to use.
- Now you can use **Special > Add Slides** or **Add Pictures** and you will move through the same four dialog boxes that are shown on the following pages.

After You Click OK

4

If you say YES:

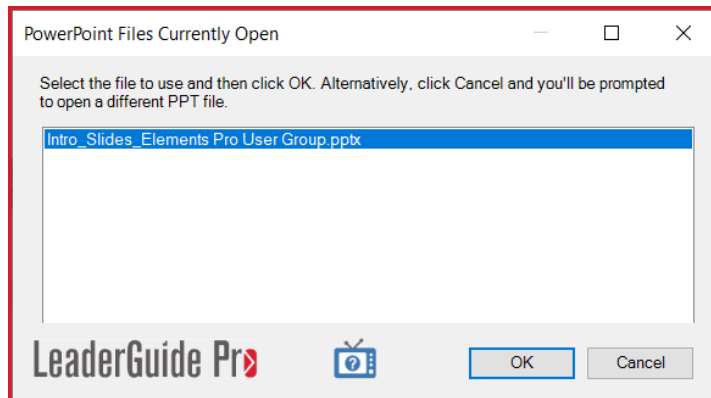
- You will see this message:



- This is the first of four dialog boxes you will move through to set up your slide import.

5

If you have any PowerPoint files open, you will see this message:



- This dialog box will list all your open PowerPoint files.
 - **Select** the file you want to use
 - Click **OK**.

If you do not see the file you need:

- Click **Cancel**
- Then **Navigate** to the PowerPoint file you want to import

After You Click OK



If you do not have any PowerPoint files open, or ...

Or if you clicked Cancel to the list of open files:

- You will be prompted to find the PowerPoint file you need
- PowerPoint will open if it is not already open
- Navigate to the PowerPoint file you want to import.

Best Practice:

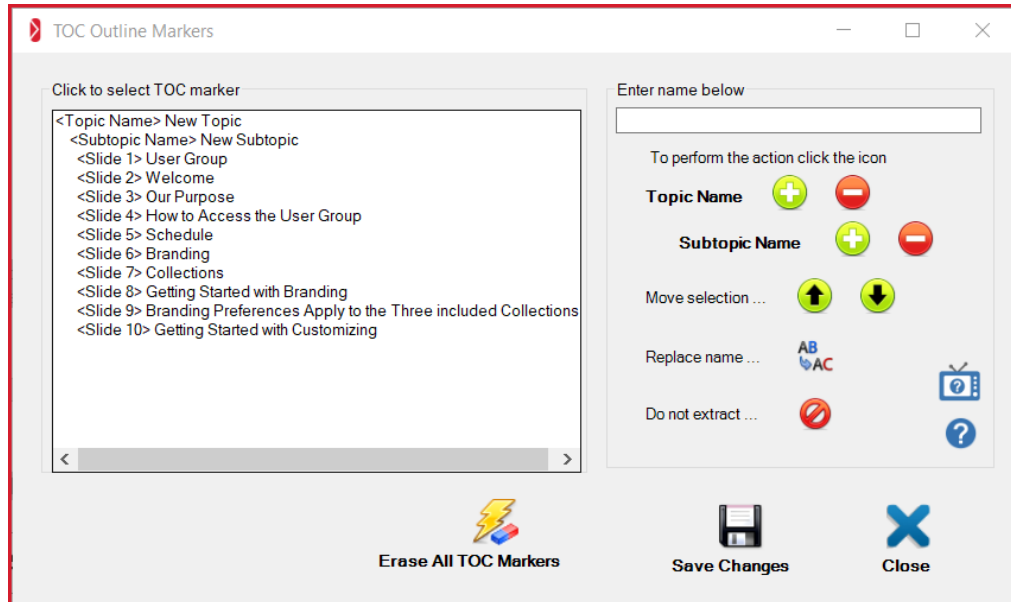
- Open the PowerPoint file you want to import before you start your new guidebook.
- That way it will appear in the **PowerPoint Files Currently Open** dialog box and be easy to select.

After You Click OK



Once your PowerPoint file is open:

- You will see the **TOC Outline Markers** dialog box:



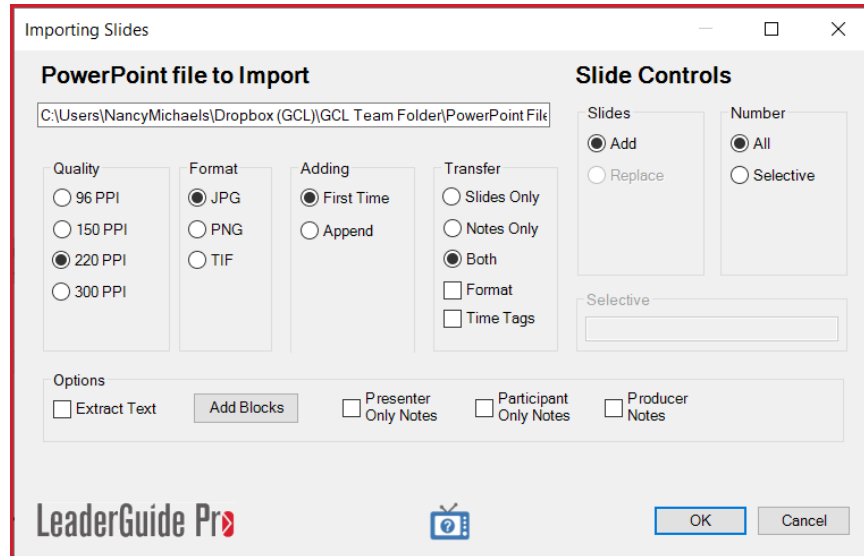
- You can simply click the **blue X to CLOSE**, and:
 - your slides and notes will be added to the first Lesson in your new guidebook.
- To truly jump start your new guidebook:
 - use this dialog box to set up your Module and Lesson...
 - Modules and Lessons are referred to as Topics and Subtopics in this form.
- For **help** on working in the TOC Outline Markers dialog box:
 - click the little blue TV or the blue circle with the question mark.

After You Click OK



After you close the TOC Outline Markers dialog box:

- After you click the **blue X** in the **TOC Outline Markers** dialog box, you will see this:



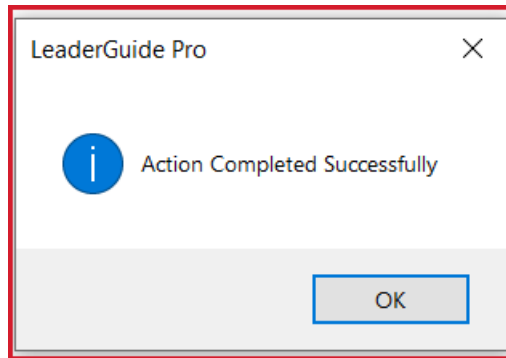
- This is the final dialog box you will see before LeaderGuide Pro begins your slide import.
 - There are several advanced options that you can ignore for now.
 - LeaderGuide Pro defaults to your best options for image quality & image file format.
- All you need to focus on is whether you are importing:
 - slides only, or
 - notes only, or
 - both slides & notes
- Click **OK** to start the import process
- Take your hand off your mouse and give LeaderGuide Pro a moment to work for you.
- You will see a message telling you the import is complete once your new guidebook is all set.

After You Click OK, continued



After you click OK to start the slide import:

- You may see your screen jump and flash. This is normal.
- Give LeaderGuide Pro a moment to complete the slide import.
- Once your new Facilitator Guide or Participant Guide is ready, you will see this message:



- Click **OK** to begin working in your document.



Once your new guidebook is ready:

- Take a moment to look at each page, to see what you now have
- Resist the urge to start manually formatting or moving or removing things
 - There are lots of ways to easily update the look & feel of your document using automated features built into LeaderGuide Pro
 - Feel free to contact us for an orientation on how to manage the look & feel of your guidebooks
- Focus on your content, which begins in the first lesson, which is in the first module in your guidebook.

Use Print Preview

- To see your document without Word's formatting marks
- Or click the **Show/Hide** button in the Paragraph group on **Word's Home tab ribbon** to turn the formatting marks off