

Your Guide to Success

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### Acknowledgements

This LeaderGuide Pro<sup>™</sup> user guide is designed to promote the success of **LeaderGuide Pro** users by providing step-by-step instructions on how to use a key time-saving feature of **LeaderGuide Pro**<sup>™</sup>.

### **Trademarks & Copyright Acknowledgements**

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## **Overview**

### Purpose



#### Your success is our success.

**LeaderGuide Pro** began as a proprietary tool for Great Circle Learning. Its purpose was, and still is, to help developers of instructor-led training and VILT:

- Work more productively
- Establish & maintain consistency
- Build professionally formatted, icon-driven Facilitator Guides and Participant Guides that are easy to:
  - Edit
  - Share
  - Reuse

In addition to the fact that **LeaderGuide Pro** is the ONLY tool dedicated to building Facilitator Guide and Participant Guide to support ILT & VILT:

- Great Circle Learning offers world-class customer support. You will always:
  - Receive support from a live human being
  - Who is a Great Circle Learning employee
  - And an expert in everything LeaderGuide Pro and that's a lot!



## With LeaderGuide Pro<sup>™</sup> you will work smarter, work faster, and change for the better.

We know that Word & PowerPoint are programs you already use. LeaderGuide Pro:

- Runs within Word in Microsoft Office 365.
- Interacts robustly with PowerPoint to import, update & even create slides & notes.

When using LeaderGuide Pro we ask that you:

- Suspend your usual Word work habits.
- Use the automation that **LeaderGuide Pro** provides.
- Discover the power of working with a professional tool designed to develop training materials that are consistently organized, professionally formatted, and easy to share, edit, and reuse.

### **Get LeaderGuide Pro**



- If you are just learning about LeaderGuide Pro<sup>™</sup> we welcome you!
- Download LeaderGuide Pro<sup>™</sup> from the Great Circle Learning website
- Try LeaderGuide Pro for free
- Use this link:

https://www.greatcirclelearning.com/download-leaderguide-pro



To set up a live demo and discuss your needs:

■ Use this link:

https://meetings.hubspot.com/patrick-michaels/leaderguide-pro-demo-discussion

### **Learning Objectives**

Upon completion of following the instructions in this user guide you will be able to use LeaderGuide Pro to:

- Quickly create a participant guide from a facilitator guide.
- Add the last-minute touches to ensure both roles of a participant guide are met.
- Make revisions in one guidebook and send those changes to the other guidebook.



What are you doing now? How would you like to change or improve?

## Extract

### **Overview**



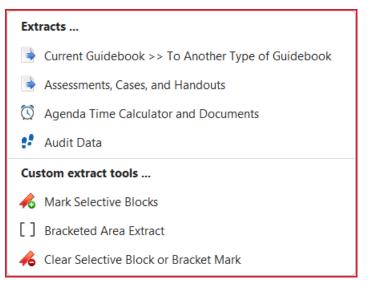
### Write it once and then Extract to reuse!

The **LeaderGuide Pro Extract** function is nothing short of miraculous. It allows you to **create one master Ruling document** and instantly repurpose any of the content.

The **Extract button** is in the Controls group on the LGPro ribbon.



When you click the **Extract** button you see this **menu of options**:





### Anything you extract can be repurposed easily. If you need to:

- Change the look & feel, use the Attach function, in the Start group.
- Change the page layout from two-column to three-column or vice versa, use Extract: Current Guidebook >> Another Type of Guidebook – and select the column setup you need in the Start a New Guidebook dialog box.
- Add the extracted content to another guidebook, use Librarian Insert in the Module/Lesson Control group or the Insert Pictures and Text function in the Insert group on the LGPro ribbon.

Extract



### **Quick steps**

- Open the **LeaderGuide Pro** Facilitator Guide you want to extract from.
- Click Update All Fields in the Controls group on the LGPro ribbon and use Word's Save function.
- Click Extract in the Controls group on the LGPro ribbon.
- Select Current Guidebook > > To Another Type of Guidebook.
- Use the **Extract to a New Guidebook** dialog box to set up your extract.
- Click **Start** to run the Extract.
- **Save** your new Participant Guide.
- Select the **Content Blocks** to extract.



### **Get ready to Extract**

- **Restart** your computer & open **Word**.
- Use the Open button in the Start group on the LGPro ribbon to open the Facilitator Guide you want to extract from.



Click **Update All Fields** and then use Word's **Save** function.

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#### Extract

### How to Extract a Participant Guide from a Facilitator Guide

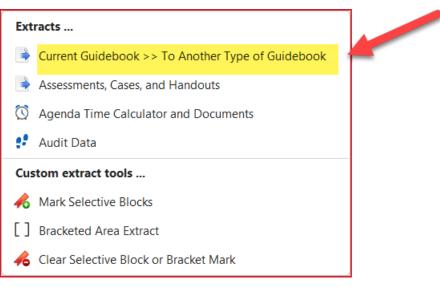


#### Step One

With your Facilitator Guide open and on your screen, click Extract in the Controls group on the LGPro ribbon

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In the drop-down menu you will see, select Current Guidebook > > To Another Type of Guidebook





#### Step Two

You will now see the **Extract to a New Guidebook** dialog box. Use it to set up your Extract.

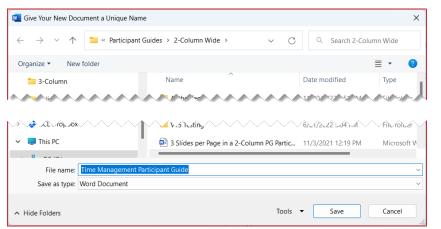
- Under Type, select Participant
- Under **Columns**, select your page layout
  - A two-cell table row setup, like this document
  - Or a three-cell table row setup
- Select your Collection
  - You can extract into a different Collection than the Collection your Facilitator Guide was built with
- Click **OK** to start the Extract
- Give LeaderGuide Pro the time it needs to run the Extract
  - You will see a progress bar
  - Do not do anything else on your computer while the extract is running

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For help click the LeaderGuide Pro logo. Preferences			es	
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#### **Step Three**

**Save** your new Participant Guide.





### **Step Four**

- Select the **Content Blocks** to extract & place into your new Participant Guide.
  - As you click on a **Content Block name**, an **image** of the Block will display.
  - If you've marked selected Content Blocks for extract, click Manually Selected (see next page for more information)
- Click Start to run the Extract

Extract and Create a New Guidebook	—		×
Check the blocks you want extracted	Select		
When ready click start		O Cle	ar
Activity Case Study Instructions Case Study: Content Check Data Table: 4-Column Empty Evaluation Instructions Evaluation: Fill In Content Evaluation: True/False Content Flipchart KeyPoints Objective QA SavThis For help click the LeaderGuide Pro logo.	Manual	ly Selecter	d
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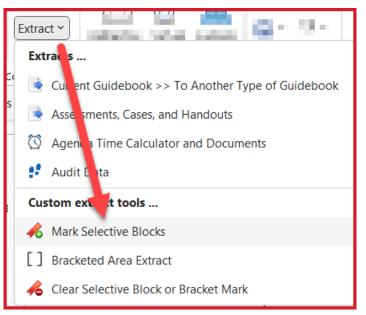


When you select a Content Block type to Extract:

Every Content Block of that type will be extracted.

If you only want a few select Content Blocks of a certain type:

- Use Manually Selected
  - Mark your Manually Selected Blocks before you start the extract process
    - For each Content Block you want to extract:
      - o One by one, place your cursor at the start of the Block
      - Click Extract on the LGPro ribbon
      - Select Mark Selective Blocks



- Then, as you run the Extract:
  - Select **Manually Selected** in the Extract dialog box.
- Manually Selected is helpful for Say blocks because:
  - Say blocks are used to provide a script for the facilitator.
  - Thus, you wouldn't want to extract all the Say blocks into a Participant Guide.
  - But certain Say blocks might contain key information that you do want to transfer into the Participant Guide. So, a Manually Selected extract is perfect for that.

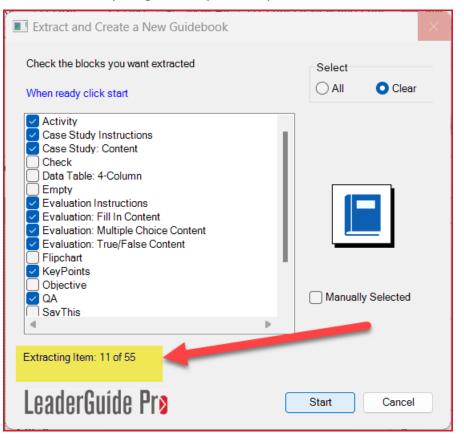
### To quickly go from one Say block to the next:

- On the LGPro ribbon, click Go To > Content Blocks > Next Say This



#### **Step Five**

- Once you have started the Extract, you can see the extract progress in the lower portion of the Extract dialog box.
- Do not do anything else on your computer while the Extract is running.



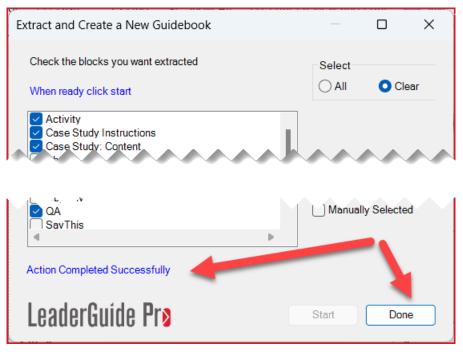
### LeaderGuide Pro will tell you when the Extract is complete.

- Extracting is pretty fast, especially compared to how long it would take you to locate and copy and paste all of this content by hand, but how long the Extract takes depends on:
  - How long your computer has been on
  - How big your Facilitator Guide is
  - How many Content Block types you are extracting
- Best Practice: Close everything and restart your computer before running an extract from a large Facilitator Guide.



### **Step Six**

- Click **Done** when you see the message "Action Completed Successfully"
- The Facilitator Guide you were extracting from will be open and on your screen.
- Your new Participant Guide will be open but minimized.





#### Sync:

Syncing helps you in two important ways:

- Syncing allows you to drop Participant Guide page number references quickly and easily into the appropriate spots in your Facilitator Guide. This makes it easy for the facilitator to direct participants to specific pages in the Participant Guide.
- Syncing also allows you to make edits in one document and transfer the edits to the companion file quickly and easily.



#### For syncing to work correctly:

- Both guidebooks must have the same number of each type of Content Block in use in the files.
- For example, when syncing content in Key Points blocks:
  - If your Facilitator Guide has 27 Key Points blocks
  - Then your Participant Guide must have 27 Key Points blocks



### **Quick Steps**

- **Open** the Facilitator Guide and companion Participant Guide you want to sync.
- In both documents, click **Update All Fields** and then **Save** the file.
- Click the Special button in the Controls group on the LGPro ribbon
- From the drop-down menu, select Sync Guidebook Blocks
- Use the Sync Guidebooks dialog box to set up your sync
- Select the **Blocks to sync**
- ALSO: Select whether to sync content or page number references, or sync both
- Say "Yes" or "No" to the option to save a backup copy of your destination file before running the Sync (We recommend saving a copy.)
- Receive a message that the Sync is Complete & check your guidebooks to verify the updates you requested.



#### Get ready to sync

- Open the Facilitator Guide and companion Participant Guide you want to sync.
- In both documents, click **Update All Fields** and then Save.

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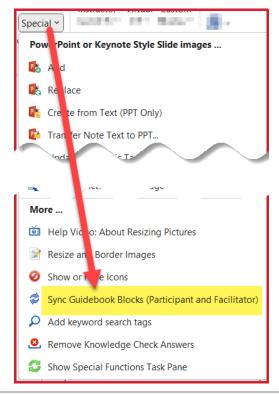


### **Step One**

Click the Special button in the Controls group on the LGPro ribbon



From the drop-down menu, select Sync Guidebook Blocks





#### Step Two

Use the Sync Guidebooks dialog box to set up your sync.

- The dialog box will list all open Word documents.
  - Minimize confusion by closing everything except the Facilitator Guide and Participant Guide you want to work with before you start the Sync.
    - You can click Cancel in the **Sync Guidebooks dialog box** to give yourself the opportunity to go back and close unnecessary Word documents.

Sync Guidebook Blocks	—	
From the list on the left select the open guidebook that will be the source for the sync process. C button and the file name is confirmed in the text box on the right. Follow the same procedure for o destination file. Only one source and one destination file can be processed at a time. Use the Browse button to add files to the list.		
A How to Use LGPro Participant Guide Particip How to Use LeaderGuide Pro_2.docx Build Better Training with LeaderGuide Pro P Document3 B Source Facilitator Facilitator Facilitator Facilitator	Particip	
Select the Source and Destination Guidebooks to Sync		
LeaderGuide Pr≥ □	к	Cancel

- A. Select your **Participant** Guide from the list in the white box, which will show all open Word documents
- B. Click the Source button
  - a. The name of your Participant Guide will populate the area to the right, and the Participant box will light up
- C. Select your **Facilitator** Guide from the list in the white box and click the **Destination** button
  - a. The name of your Facilitator Guide will populate the area to the right, and the Facilitator box will light up
- D. Click OK to start the Sync



### **Step Three**

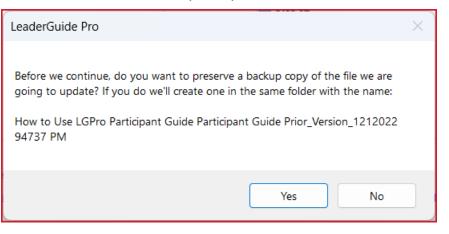
- Select the **Blocks to sync** and whether to:
  - Sync content (to transfer edits)
  - Sync page number references
  - Or sync both
- Click OK

Sync Participant Guide with Facilitator Guide	- D X
Select Blocks Individ	ually or Use the Select All Buttons Below
Blocks to Sync Content	Include Page Number References
<ul> <li>DoThis</li> <li>Step 00</li> <li>Step 01</li> <li>Step 02</li> <li>Step 03</li> <li>Step 04</li> <li>Step 05</li> <li>Step 06</li> <li>Step 07</li> <li>Step 08</li> <li>Step 09</li> </ul>	DoThis Step 00 Step 01 Step 02 Step 03 Step 04 Step 05 Step 06 Step 07 Step 08 Step 09
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#### **Step Four**

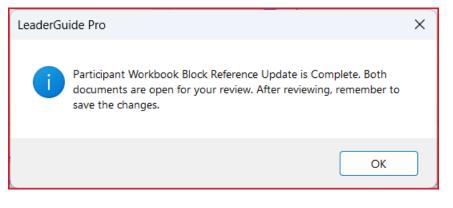
- Say "Yes" or "No" to the option to save a backup copy of your destination file before running the Sync
  - We recommend that you say "Yes"





### **Step Five**

- Receive a message that the Sync is Complete.
- Check your guidebooks to verify the updates you requested are complete.



## **Contact Great Circle Learning**

### **Contact Us**



To request assistance or to set up a demo: Use Chat or Contact Us at: https://www.greatcirclelearning.com

Set up a **web meeting** with our Great Circle Learning Certified Instructor, Pat Michaels <u>https://meetings.hubspot.com/patrick-michaels/leaderguide-pro-demo-discussion</u>

**Connect** with Pat on LinkedIn: www.linkedin.com/in/patrick-j-michaels