



# LeaderGuide Pro

## How to Use the Start a New Guidebook Dialog Box

User Guide

# How to Use the Start a New Guidebook Dialog Box

Copyright © 2024 Great Circle Learning

Revision Date 4/27/2024

---

## Trademarks & Copyright Acknowledgements

- PowerPoint® is a registered trademark of Microsoft Corporation.
- 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](http://www.greatcirclelearning.com)

---

# Table of Contents

<b>The Start a New Guidebook Dialog Box</b>	<b>1</b>
Introduction	1
<b>How to Use the Start a New Guidebook Dialog Box</b>	<b>5</b>
Quick Steps	5
Detailed Steps	6
What To Do After You Click OK	12



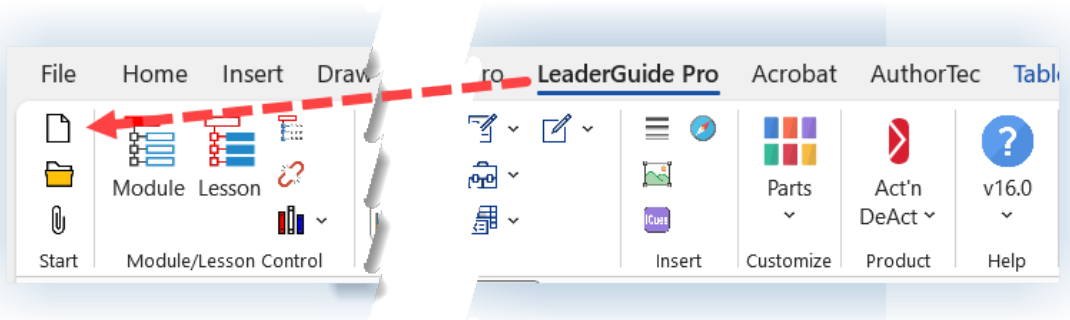
# The Start a New Guidebook Dialog Box

## Introduction

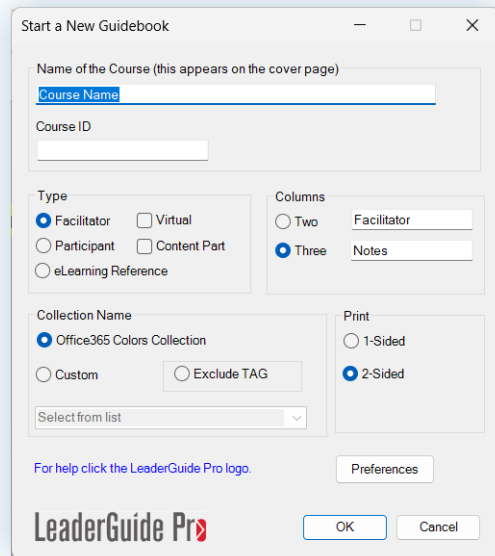


**Begin with the end in mind:**

When you click **NEW** in the **Start group** on the **LeaderGuide Pro ribbon**:



- You are taking the first step in initiating the automated build of a new Facilitator Guide or Participant Guide, or a Module and Lesson chunk that will become part of a full guidebook.
- You are presented with the **Start a New Guidebook** dialog box, which you will use to tell LeaderGuide Pro how to set up your new document.



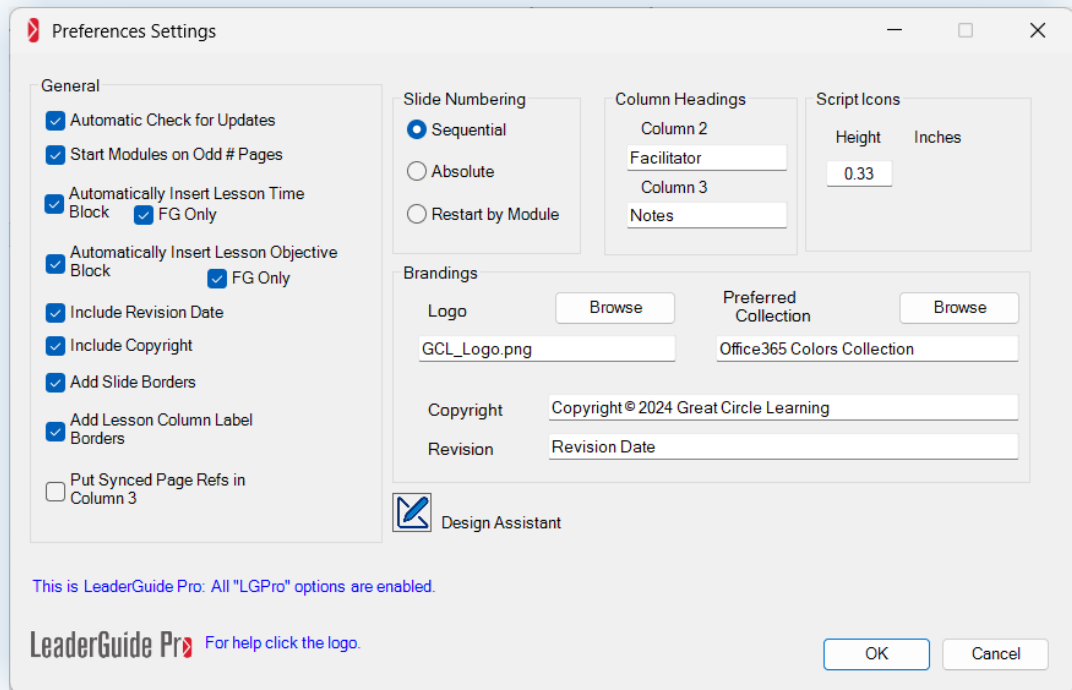
- Knowing what you need to build is helpful. Try a few of the combinations to see what might work best for your course.

## Introduction



### You have some choices to make:

- What are you going to name your course?
- Would you like to include a Course ID to make your course easy to find in Windows Explorer?
- What type of guidebook are you going to build first?
- How do you want the Lesson pages laid out?
- Which of the included Collections do you want to use, to determine the document's look and feel?
- Would you like the document set up to print one-sided, or 2-sided -like a book?
- What other preferences would you like to set up?



- You get to these **Preferences Settings** by clicking **Preferences** in the **Start a New Guidebook** dialog box
  - Or by clicking **Parts** in the **Customize group** on the **LeaderGuide Pro ribbon** and selecting **LeaderGuide Pro Preferences**.

## Introduction

---

**Key points:**

- Once your new guidebook is created, you can edit and modify it.
  - You can change your preferences at any time, and they will apply to any new LeaderGuide Pro documents you create.
  - You will save time going forward by taking time, as you start, to consider your new document setup and preferences.
-





# How to Use the Start a New Guidebook Dialog Box

## Quick Steps

---



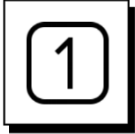
### Quick steps:

1. Start a new Facilitator Guide or Participant Guide
2. Save your new document when prompted
3. Use the Guidebook Design Template to jumpstart the build of your document
4. Say “YES” or “NO” to the question about adding images now
  - a. If you do not have a slide file that you want to import, say “NO”
  - b. If you have a PowerPoint file ready to import, say “YES” and then:
    - i. Select the PowerPoint file to import
    - ii. Decide how you want your slide images and notes set up on your lesson pages
    - iii. Select additional slide import options
    - iv. Assign Slides to Lessons
    - v. See a message telling you your slides have been added
5. See a message telling you your new guidebook is ready

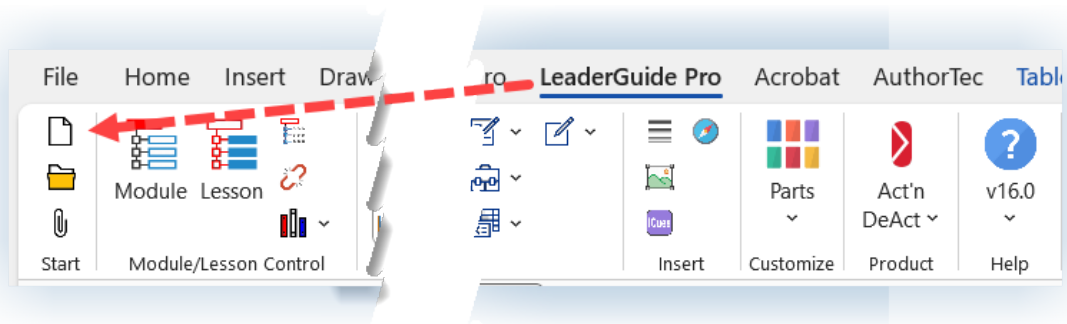
**For detailed guidance, follow the steps on the next few pages.**

---

## Detailed Steps



**Click NEW on the LeaderGuide Pro ribbon to start a new Facilitator Guide or Participant Guide**



- Open **Word** and bring up a **blank new document**
- Click on the **LeaderGuide Pro tab** along the top of your screen
- Click **NEW** on the left end of the **LeaderGuide Pro ribbon**
- You will see the **Start a New Guidebook dialog box**, which you will use to initiate the setup of your document

Start a New Guidebook

Name of the Course (this appears on the cover page)

Course ID

Type  
 Facilitator  Virtual  
 Participant  Content Part  
 eLearning Reference

Columns  
 Two   
 Three

Collection Name  
 Office365 Colors Collection  
 Custom  Exclude TAG

Print  
 1-Sided  
 2-Sided

[For help click the LeaderGuide Pro logo.](#)

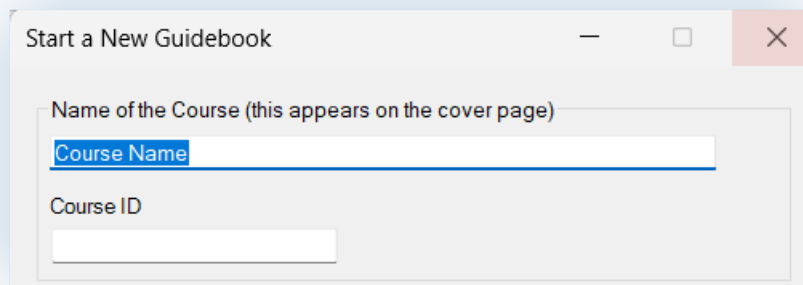
**LeaderGuide Pro**

## Detailed Steps



### In the Start a New Guidebook dialog box:

- Start by typing in the name of your Course
  - This will appear on the front cover of your guidebook
  - And it will repeat **as a field** in other reference places throughout the document, including:
    - the top of the Acknowledgements & Table of Contents pages
    - the even-numbered page footers
    - the About this Guide & Program in Perspective pages in the Getting Started section of a Facilitator Guide.



- Add a Course ID – Optional
  - Use this optional feature to tie your document to an internal identification number that your organization uses in an LMS or other document control system.
  - The course ID you enter is stored as a document property that is discoverable by the Windows search engine in Windows Explorer.
  - The course ID you enter is automatically associated with any other documents you Extract (create) from your guidebook.



### Note:

“**Course Name**” is also referred to as “**Program Name**” and because it **is a field**:

- You can **edit the Program Name on the Cover page** and the change will automatically update everywhere else in your document where the course name is referenced

## Detailed Steps



Next, select the type of guidebook you are creating & the Lesson page setup:

- We recommend that you build your **Facilitator Guide first**
  - With **LeaderGuide Pro** you can easily **Extract a Participant Guide**
- We recommend:
  - the **Three-Column** page layout for **Facilitator Guides** and
  - the **Two-Column** page layout for **Participant Guides**.



### About the Type Choices

- A **Facilitator Guide** includes:
  - Cover page, Acknowledgements page, Table of Contents
  - Getting Started Section – to orient your facilitators to the Facilitator Guide and to help them prepare for the training delivery
  - Training at a Glance – a table built by LeaderGuide Pro, drawing from your Module Overview pages, to give your facilitators an advance organizer
  - Module Overview pages – to orient your facilitators to the content chunk they are about to teach
  - Lesson pages – to guide your facilitators through the live delivery

## Detailed Steps

---

- A **Participant Guide** includes:
    - Cover page, Acknowledgements page, Table of Contents
    - Overview Module – Contains Lesson page placeholders for the training program rationale and the learning objectives. If you extract a Participant Guide from a Facilitator Guide, then the program rationale and the learning objectives that you entered in the Program in Perspective section of the Facilitator Guide will be copied into these placeholders
    - Module & Lesson pages and Lesson Continued pages – to support your participants through the training session and serve as a post-training resource/reference/job aide
  - A **Content Part** includes:
    - A Module & Lesson – that is set up for either a Facilitator Guide or a Participant Guide. To allow individuals in project teams to work on discrete chunks of content that can be easily integrated into a full Facilitator Guide or Participant Guide using the LeaderGuide Pro™ Librarian function.
  - An **eLearning Reference** is:
    - A Facilitator Guide designed to hold content imported from an eLearning course created with Articulate.
  - **Virtual** refers to:
    - A special age layout for a Facilitator Guide designed to support VILT.
-

## Detailed Steps



**Next, select the Collection you would like to use:**

- If you are new to **LeaderGuide Pro version 16:**
  - We recommend that you start a new Facilitator Guide using each of the included Collections, and try both the 2-column and 3-column page setups
  - **Tip:** Use the **Collection name** as the **Course Name**

**To use a Collection other than the default Office 365 Colors Collection:**

- Select **Custom** and click **Select from list**
- Select **one** of the **included Collections**

**Exclude TAG:**

- This refers to Not including the **Training at a Glance**, which is a table that LeaderGuide Pro builds for you automatically **in a Facilitator Guide** to give the facilitator an **advance organizer**, showing the modules in your training program, along with the module times and brief module overviews.
- We recommend that you **do not select this option** until you fully understand what you give up by excluding it.

**Print:**

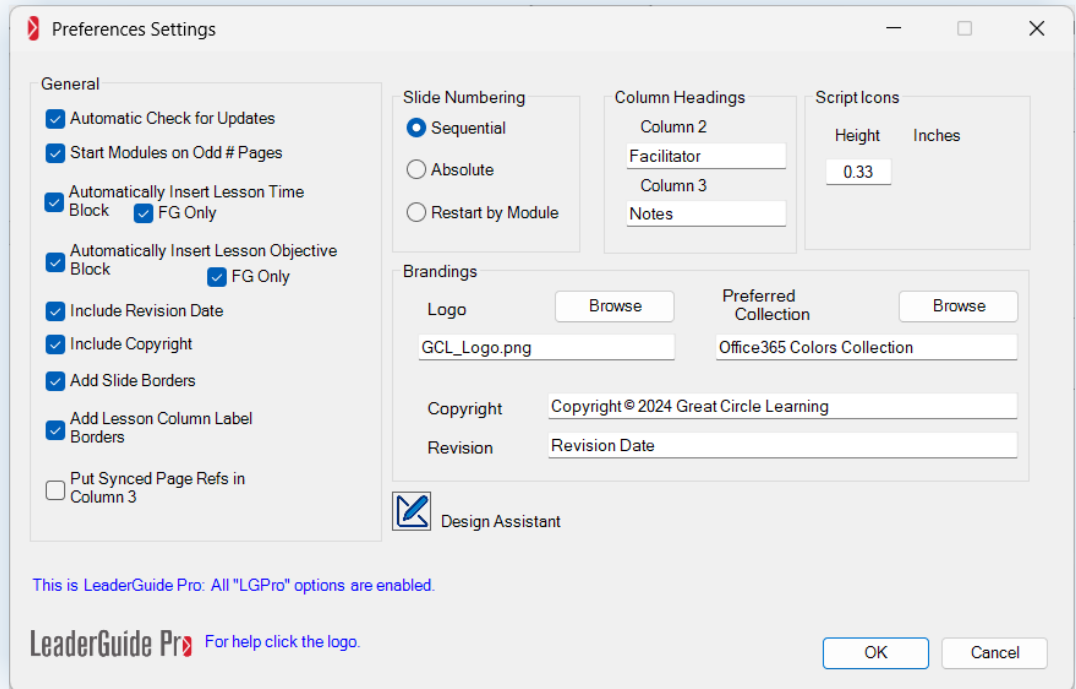
- We recommend that you leave the print option set to **2-sided**

## Detailed Steps



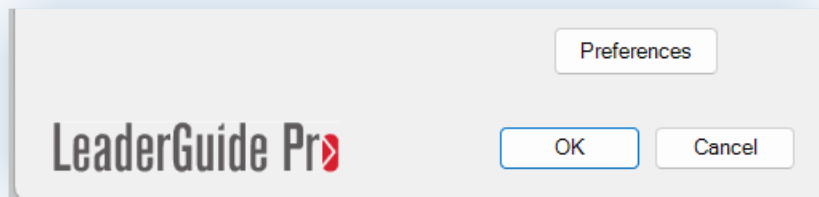
Next, review and set your preferences if you haven't already done so:

- Click **Preferences** to open the **Preferences Setting** dialog box

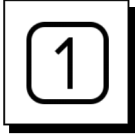


Once everything is all set:

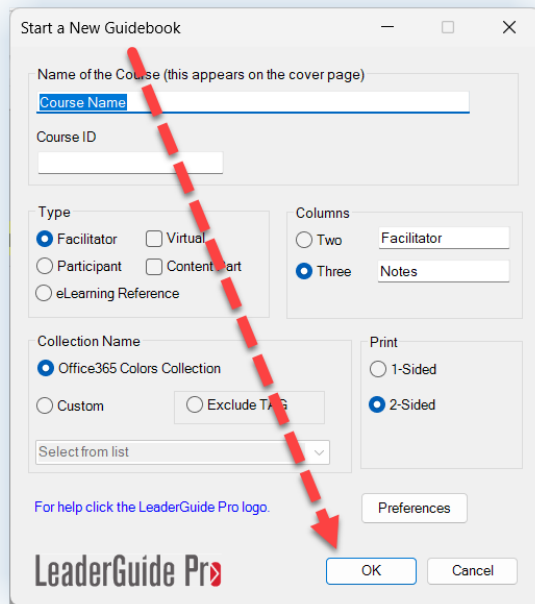
- Click **OK** to start the build of your new Facilitator Guide



## What To Do After You Click OK



Once you have the Start a New Guidebook dialog box all set & you click OK ...



- LeaderGuide Pro gets to work, moving through a series actions, to compile your new Facilitator Guide or Participant Guide
- Keep your eye on your screen, because LeaderGuide Pro will be asking you some questions and prompting you to take some actions



### Save your new document when prompted

After you click **OK** to initiate the build of your new Facilitator Guide:

- File Explorer will open, and you will be prompted to **SAVE your new document**
- You **MUST Save** the file
  - We suggest you simply save to the location LeaderGuide Pro has defaulted to for now
  - To easily find your file after you close it, click **OPEN** on the **LeaderGuide Pro ribbon**, which is located immediately **NEW**

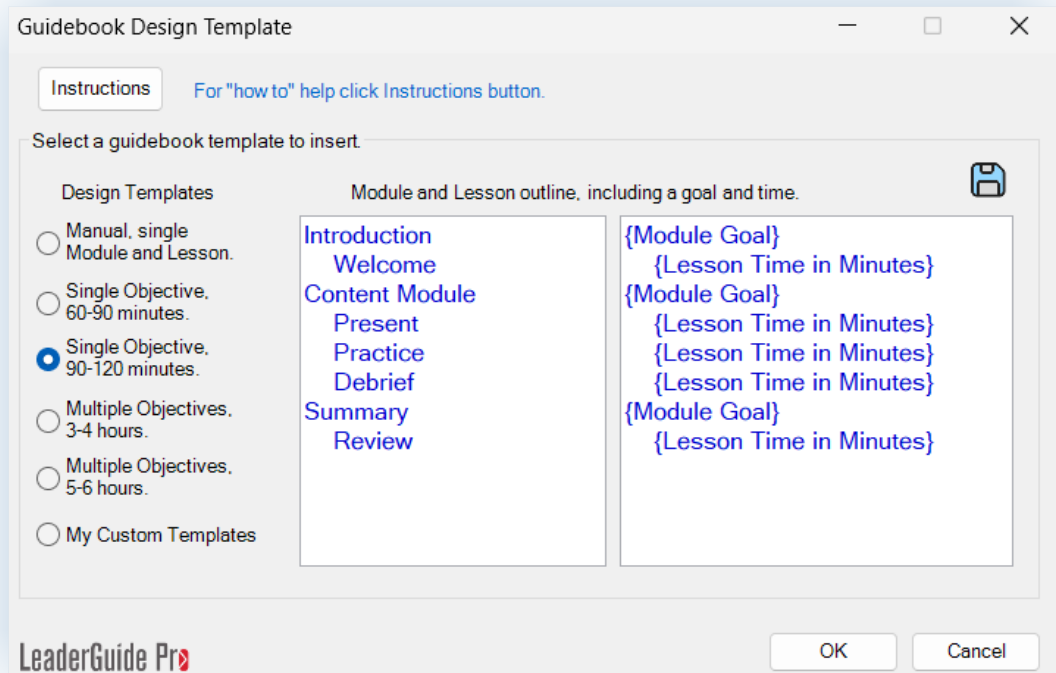


## What To Do After You Click OK



### After you Save you will see the Guidebook Design Template

Use the **Guidebook Design Template** to jumpstart the build of your document



- You can simply **select a template** and click **OK**
- Better yet:
  - **Select a template**
  - **Overwrite the blue text** with your Module and Lesson names, Module goals, and lesson times
    - Where text is indented, maintain the indenting structure
  - Click **OK**

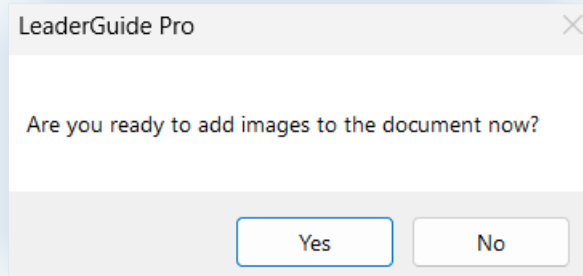
## What To Do After You Click OK

---



### Say “YES” or “NO” to the question about adding images

- After you finish working with the Guidebook Design Template and click OK, you will see this question:



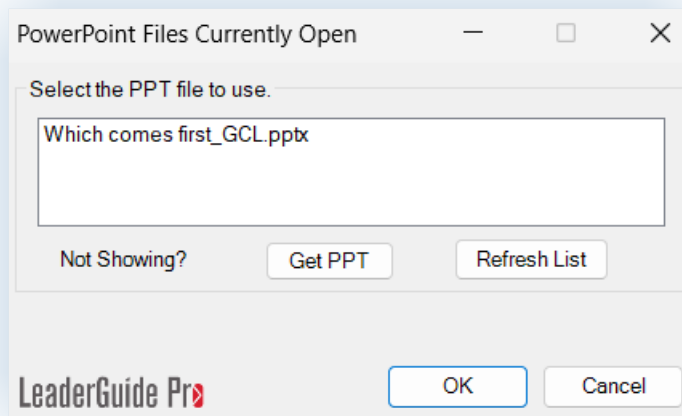
- If you have a PowerPoint file you’d like to import, then click **YES** and follow steps 5 – 9 below
  - Otherwise click **NO** and skip ahead to step 10
- 



### Select the PowerPoint file to import

After saying “yes” to the option to import images:

- You will see a dialog box listing any PowerPoint files you currently have open
- Click the **PPT file name** to select it, and then click **OK**
- If you don’t see the file you need, click **Get PPT** and select the file from File Explorer



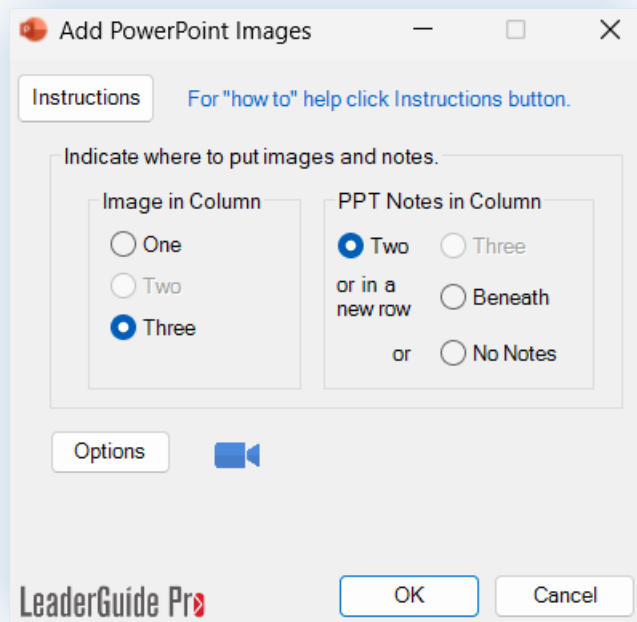
## What To Do After You Click OK



### Decide how you want your slide images and notes set up on your lesson pages

After you select your PowerPoint file, you will use this dialog box to tell LeaderGuide Pro™ which column to put your slide images into

- Select Column One, Column Two, or Column Three
- Then, select where you want your slide notes to sit on the lesson pages
- Or select the option to not include the slide notes



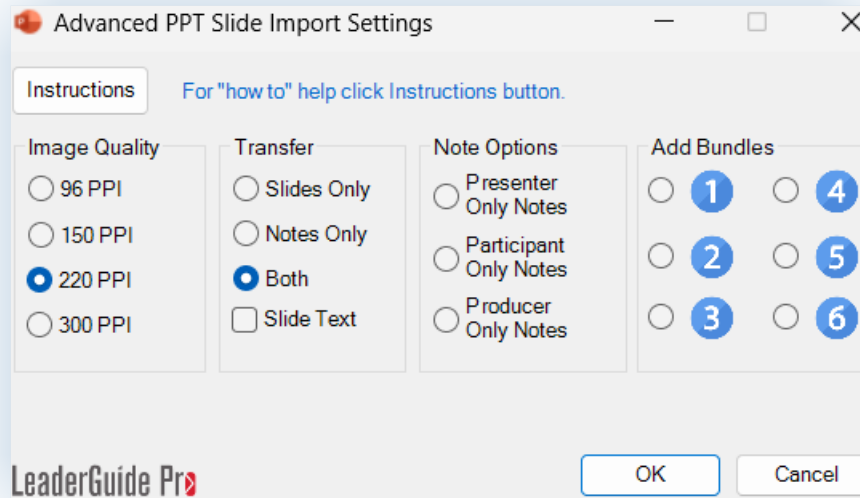
### Before clicking OK:

- Click **OPTIONS** to open a dialog box that will allow you to:
  - Control the image quality of your imported slides
  - Control whether to import slides only, notes only, both
  - Specify whether to only import slide notes marked for facilitators, participants, or producers
  - Import slide text
  - Add Content Block Bundles after each imported slide

## What To Do After You Click OK



### Select additional slide import options:



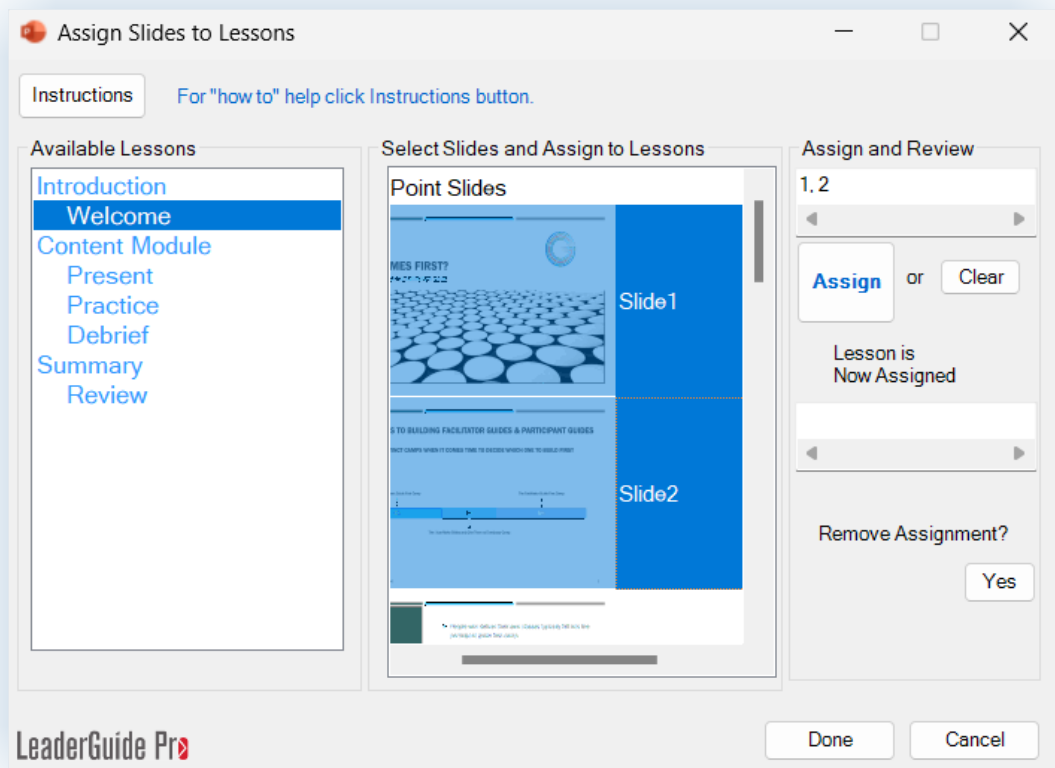
- Select your preferences and click OK
  - Control the image quality of your imported slides
  - Control whether to import slides only, notes only, both
  - Specify whether to only import slide notes marked for facilitators, participants, or producers
    - Requires tagging the notes in PowerPoint using our Scripter tool, which is included in our AuthorTec software
  - Import slide text
  - Add Content Block Bundles after each imported slide

## What To Do After You Click OK



### Assign Slides to Lessons

- Highlight a lesson name
- Select one or more slides
- Click Assign
- Repeat as needed
- When done, click DONE

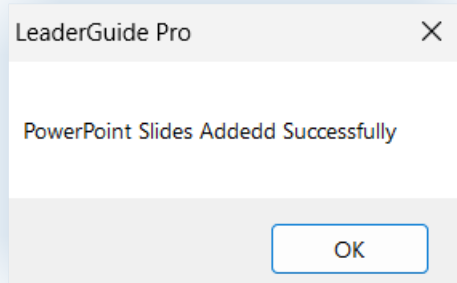


## What To Do After You Click OK

---



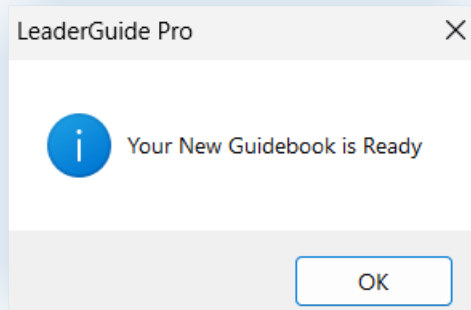
**See a message telling you your slides have been added**



- Click **OK**



**See a message telling you your new guidebook is ready**



- Click **OK**
-