



How to Create a Participant Guide from a Facilitator Guide

Your Guide to Success

How to Create a Participant Guide from a Facilitator Guide

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Acknowledgements

This LeaderGuide Pro™ 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™**.

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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™** 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™ we welcome you!

- Download **LeaderGuide Pro™** 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>

Extract

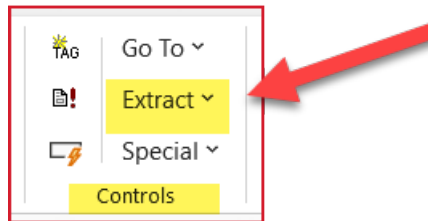
Overview



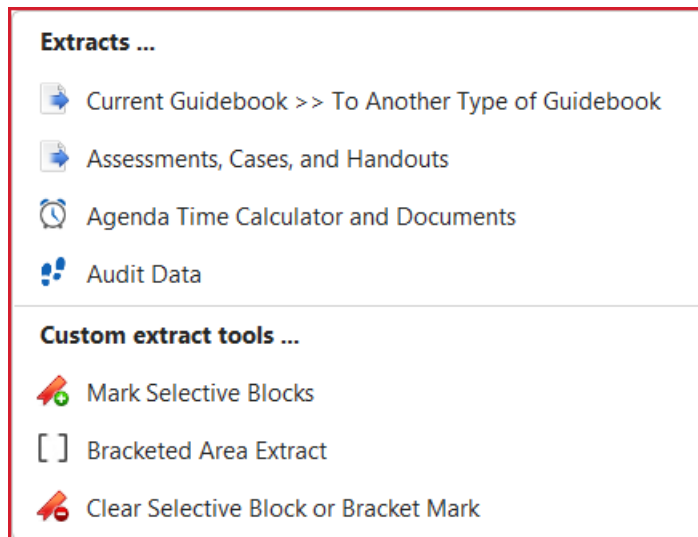
Write it once and then Extract to reuse!

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.

How to Extract a Participant Guide from a Facilitator Guide



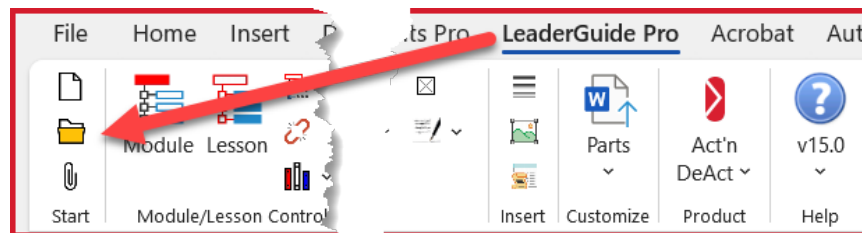
Quick steps

- 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.

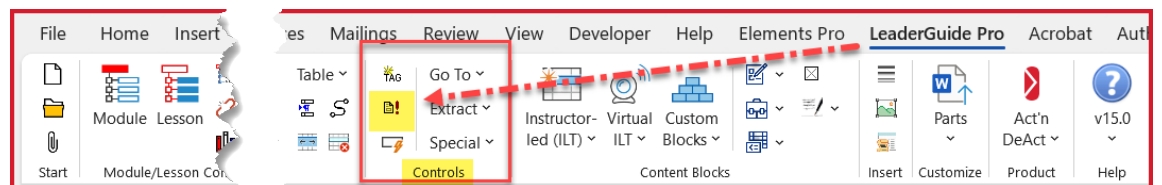
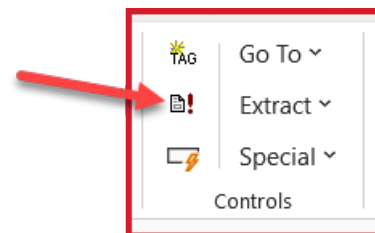


Get ready to Extract

- **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.

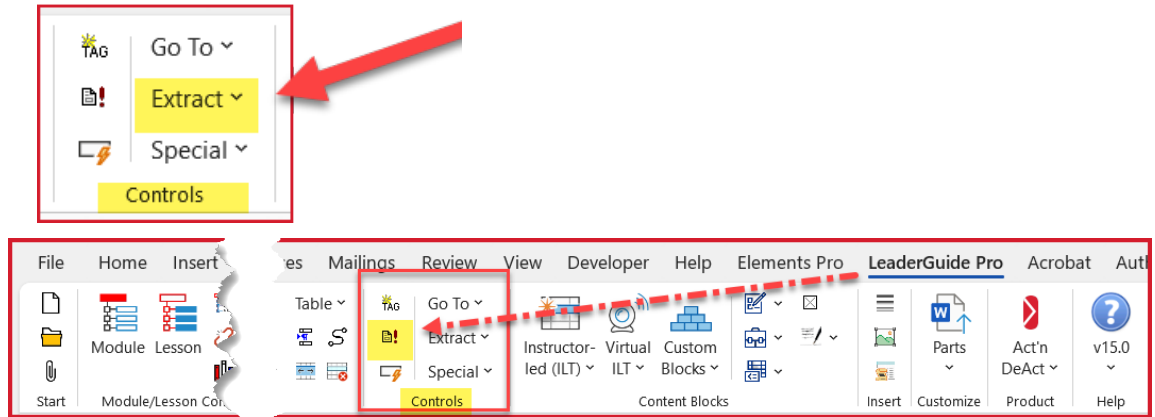


How to Extract a Participant Guide from a Facilitator Guide

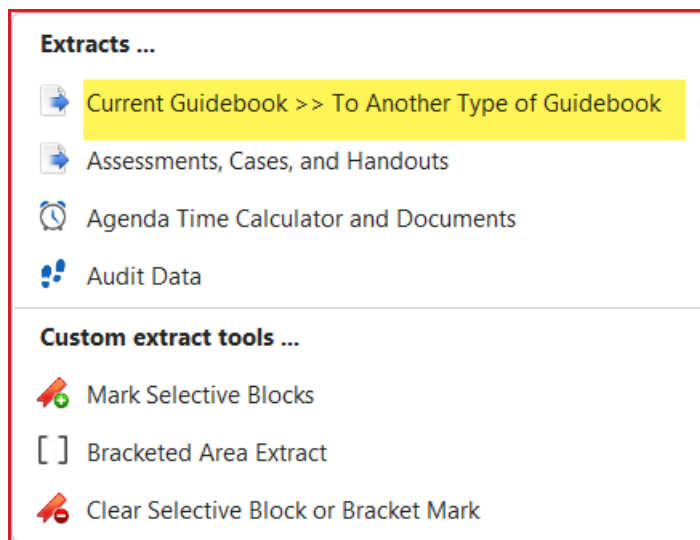


Step One

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



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



How to Extract a Participant Guide from a Facilitator Guide



Step Two

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

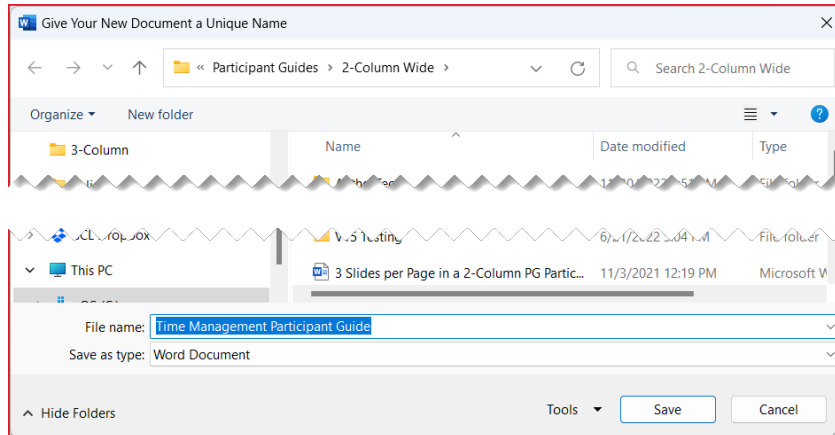
- Under **Type**, select **Participant**
- Under **Columns**, select your page layout
 - A two-cell table row setup, like this document
 - Or a three-cell table row setup
- Select your **Collection**
 - You can extract into a different Collection than the Collection your Facilitator Guide was built with
- 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

How to Extract a Participant Guide from a Facilitator Guide

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Step Three

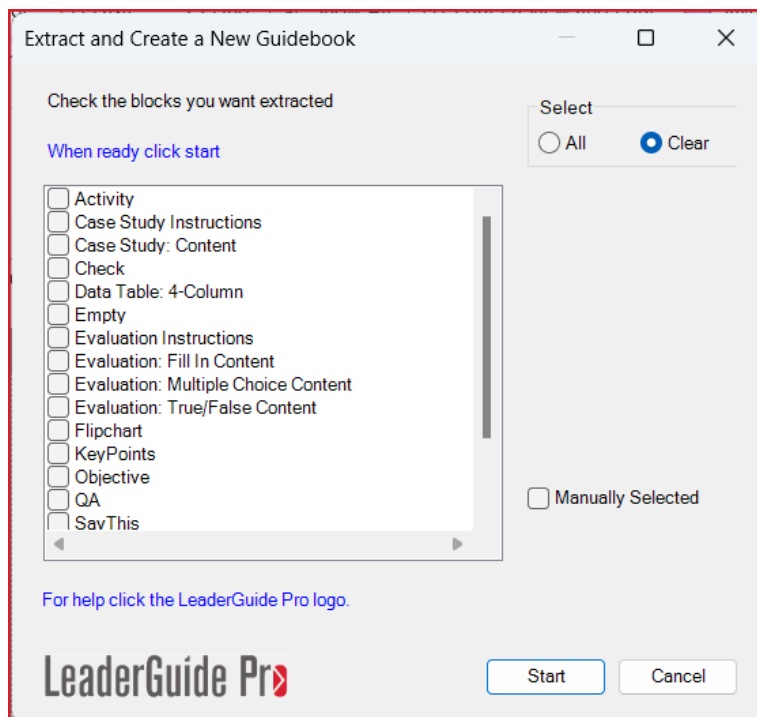
- **Save your new Participant Guide.**



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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



How to Extract a Participant Guide from a Facilitator Guide



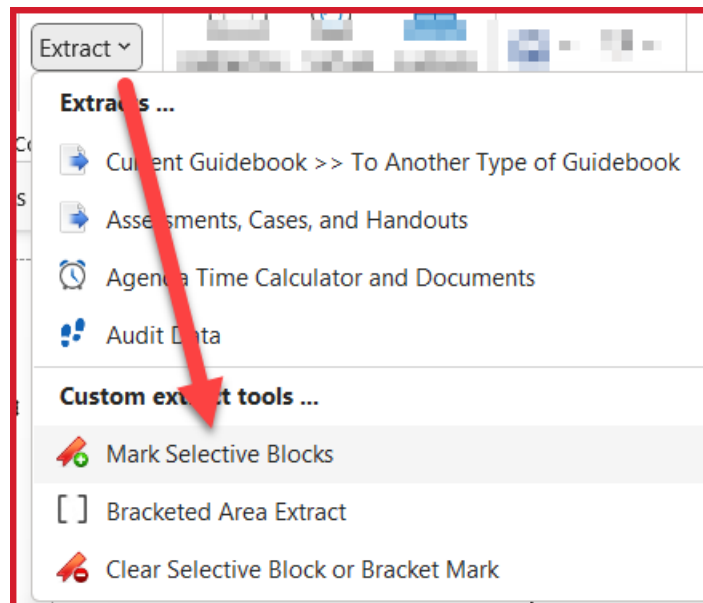
When you select a Content Block type to Extract:

- 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:
 - **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:

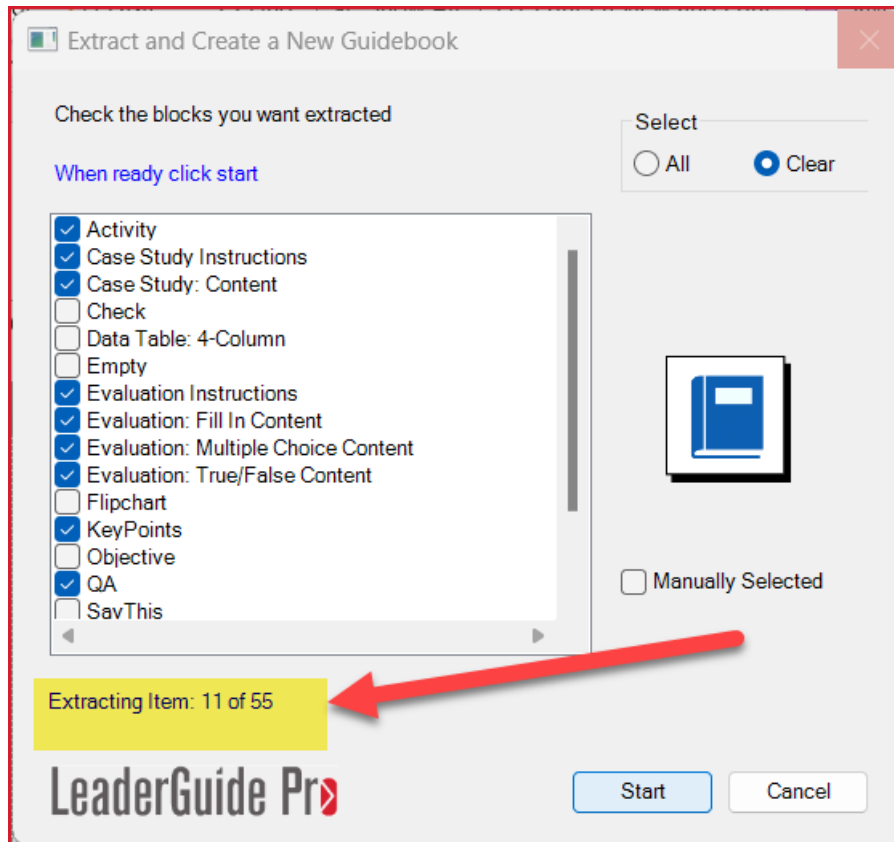
- On the LGPro ribbon, click **Go To > Content Blocks > Next Say This**

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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.

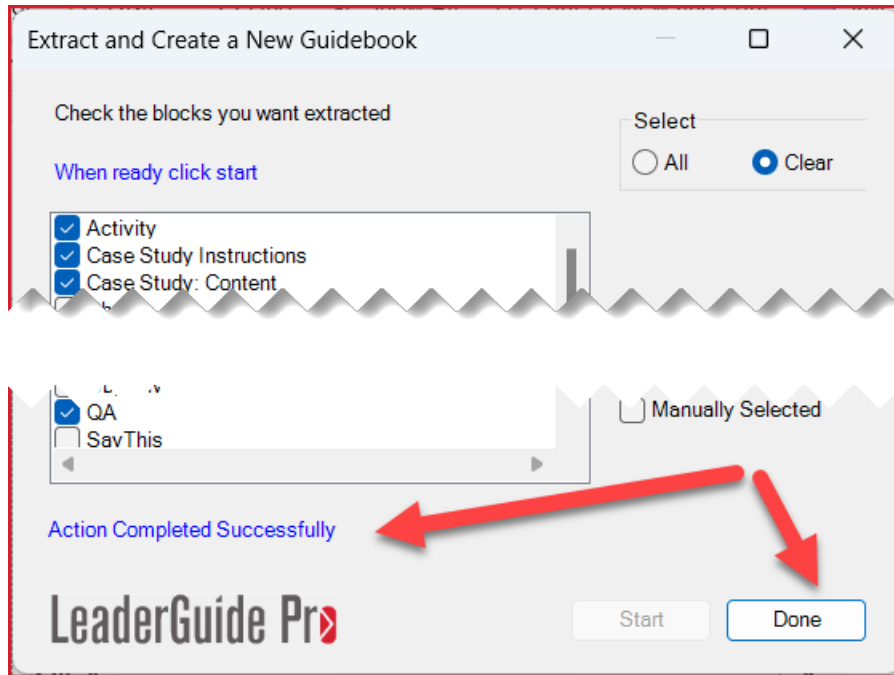
- Extracting is pretty fast, especially compared to how long it would take you to locate and copy and paste all of this content by hand, but how long the Extract takes depends on:
 - How long your computer has been on
 - How big your Facilitator Guide is
 - How many Content Block types you are extracting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

How to Extract a Participant Guide from a 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.



How to Sync a Participant Guide and a Facilitator Guide



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

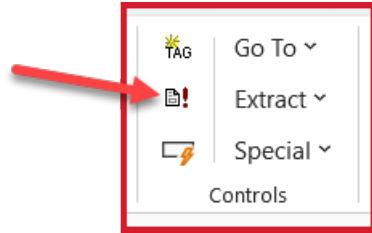
- **Open** the Facilitator Guide and companion Participant Guide you want to sync.
 - In both documents, click **Update All Fields** and then **Save** the file.
 - Click the **Special** button in the **Controls** group on the **LGPro ribbon**
 - From the drop-down menu, select **Sync Guidebook Blocks**
 - 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.
-

How to Sync a Participant Guide and a Facilitator Guide



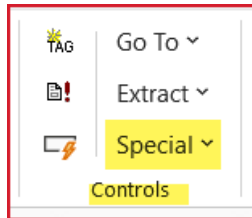
Get ready to sync

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

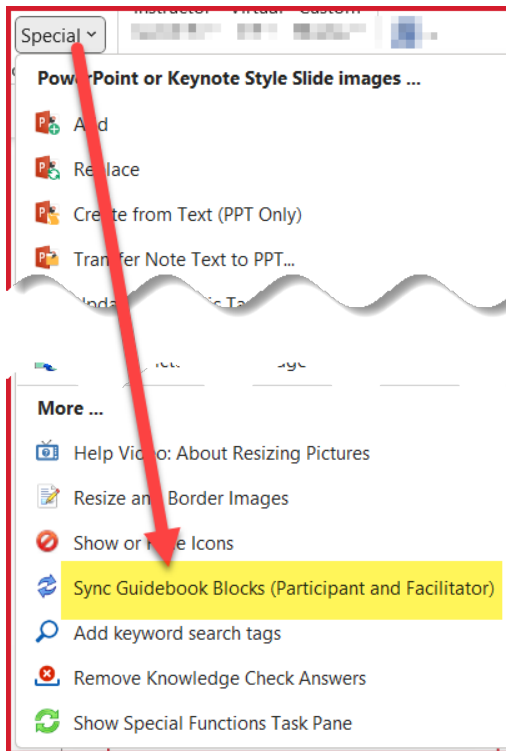


Step One

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



- From the drop-down menu, select **Sync Guidebook Blocks**



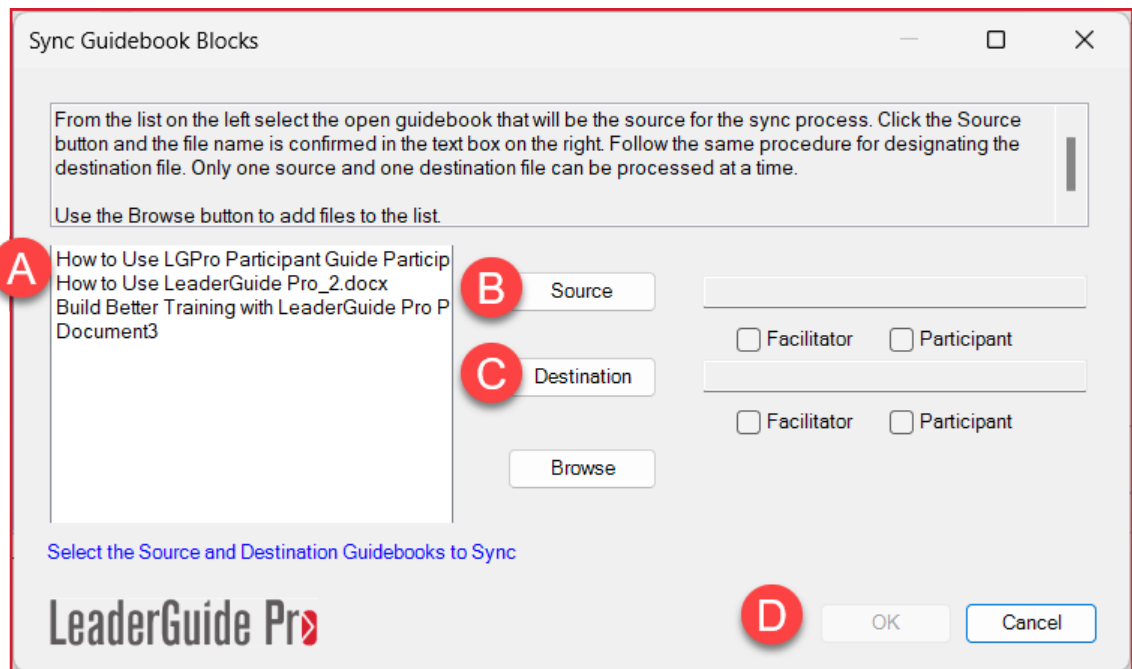
How to Sync a Participant Guide and a Facilitator Guide



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.



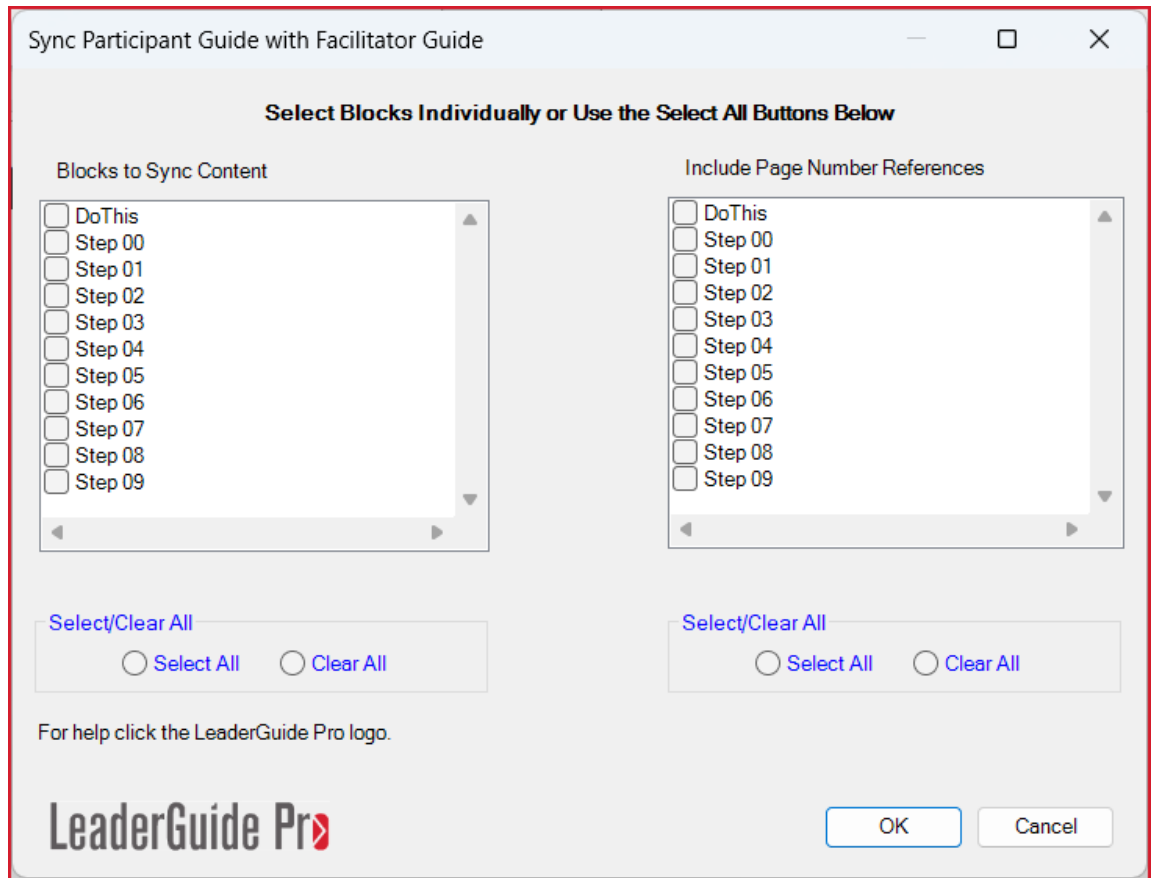
- A. Select your **Participant** Guide from the list in the white box, which will show all open Word documents
- B. Click the **Source** button
 - a. The name of your Participant Guide will populate the area to the right, and the Participant box will light up
- C. Select your **Facilitator** Guide from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

How to Sync a Participant Guide and a Facilitator Guide



Step Three

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

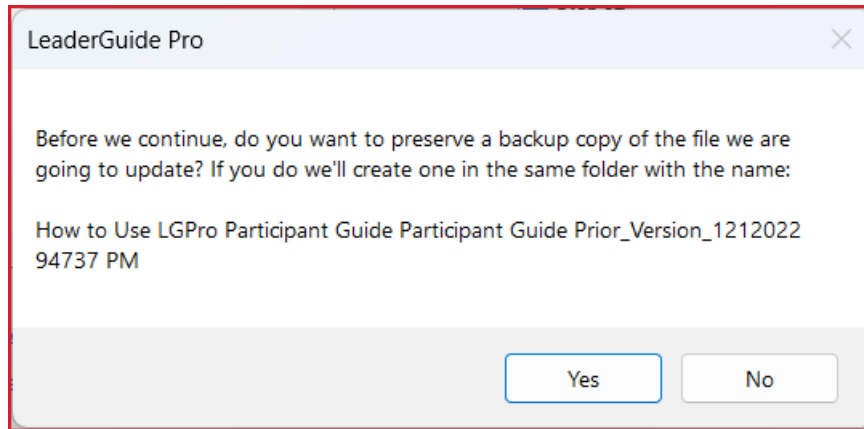


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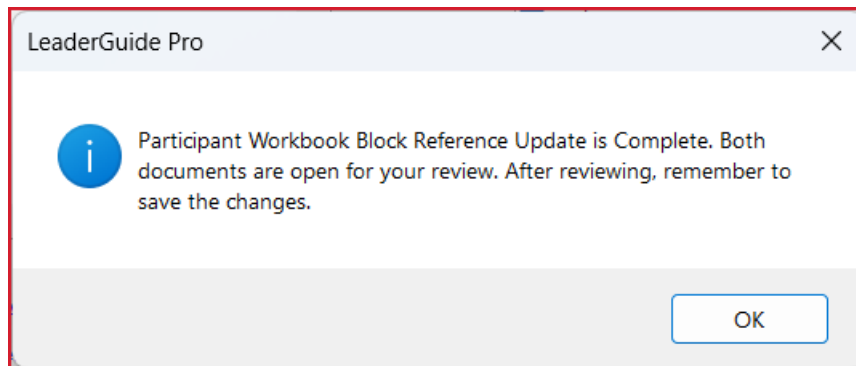
Step Four

- 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

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

Connect with Pat on LinkedIn:

www.linkedin.com/in/patrick-j-michaels
