Delivery guide: *SAGE Business Cases* training presentation

Our Trainers have put together this training delivery guide to accompany the ***SAGE Business Cases* training presentation**. If you plan on delivering the training presentation to educate users about the ***SAGE Business Cases*** platform, this document will help you prepare and deliver the session. The following pages contain a slide-by-slide representation of the presentation, with tips, suggestions and guidance from the SAGE Training team. We hope that this guide makes it simple and painless to deliver training to your users!

If you want to learn more about this database, **explore more of our training resources**, or **get in touch** with the SAGE Training team who will be happy to help you!

Getting started…

1. This guide and the accompanying presentation are available through the SAGE training pages and have been designed to provide guidance and inspiration so that you feel comfortable and confident to deliver your own sessions on our products. Any of these resources can be modified to best meet the needs of users at your institution, so please feel free to amend the presentation in any way before you begin.
2. ***SAGE Business Cases*** is comprised of different collections of content, and your institution may not have access to all content available. It is worth checking with the library what level of access you have before starting any training or information sessions.
3. Before you deliver this presentation to others, you might like to refresh your own knowledge of the platform using our **An introduction to *SAGE Business Cases*** presentation.
4. If you would like to add a more interactive component to your presentation, we have prepared some simple yet effective **training activities**, that you can use to get participants exploring the platform first-hand. If you decide to use one of these activities, we recommend setting this at the end of the full presentation, to help participants consolidate what they have learnt during your presentation and apply their learning in a hands-on way.

Setting up…

1. The training session works most effectively if delivered in a teaching or training room with a presentation screen, with each participant having access to their own computer or laptop; this allows participants to get hands-on with the platform and apply their learning under the guidance of the instructor.
2. Before promoting your session to potential participants, it is worth spending some time thinking about what you would like participants to have learnt, understood or achieved by the end of the session. Being clear on these aims will help guide the development of your session, i.e. how long the session needs to be, and how much detail you want to include in the session.
3. Prior to delivering your session, you should find out how many participants will be attending, and who they are, i.e. undergraduate students, researchers, faculty, or library staff, as each of these groups might have different motivations for attending.

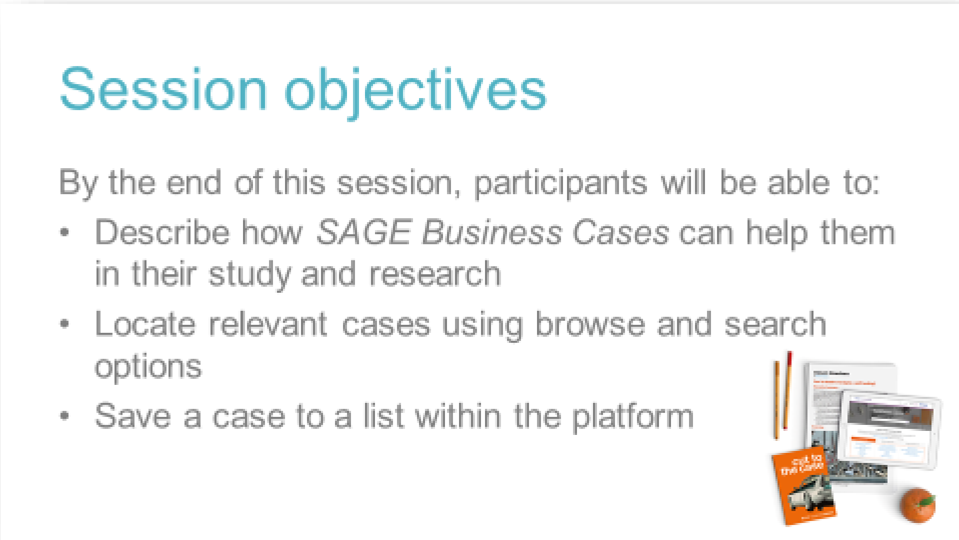
General training tips…

1. Aim to arrive in good time to the teaching or training room to set up your presentation screen, check the internet connection, and open the appropriate pages on the ***SAGE Business Cases*** platform so that you are able to demonstrate the content, tools and functionality to the session participants.
2. Give participants plenty of opportunity to ask questions and clarify information. The presentation is broken down into logical sections with heading slides, which provide nice, natural pauses where the presenter can open the floor for questions.

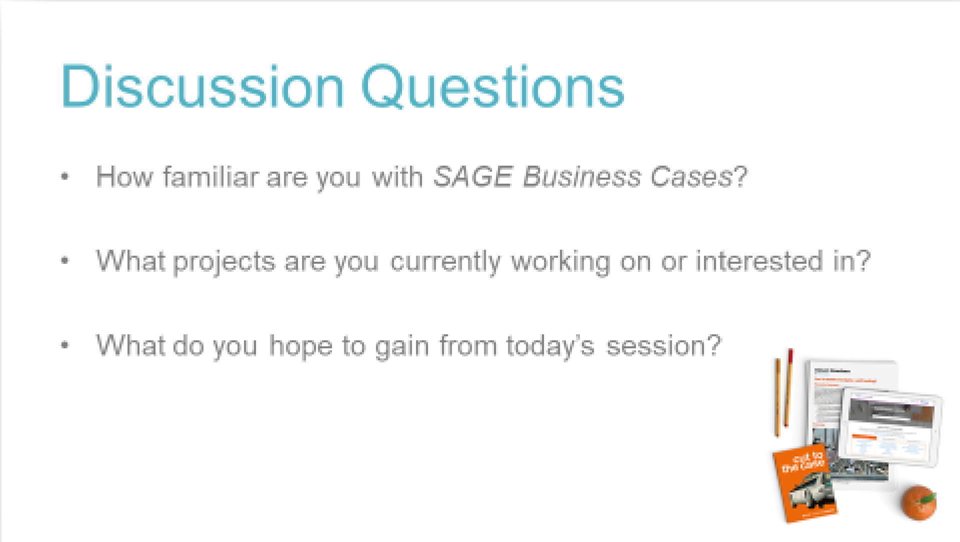
Beginning your session

Title slide
Add in your workshop title, who it is for, your name and contact details.

Session outline
This slide informs your participants of the session structure, so they know what to expect. You might like to amend this slide, especially if you decide to change the structure of this ready-made presentation, depending on your audience needs and session criteria (*e.g.* duration, location).



Session objectives
Objectives are a great way of helping participants engage with a session, as they can see what they should be able to do by the end of the session. These are the session objectives created specifically for this ready-made presentation. If you change anything within the presentation, you should double-check to ensure that the session will still deliver the objectives; if not, then you can amend the objectives on this slide.



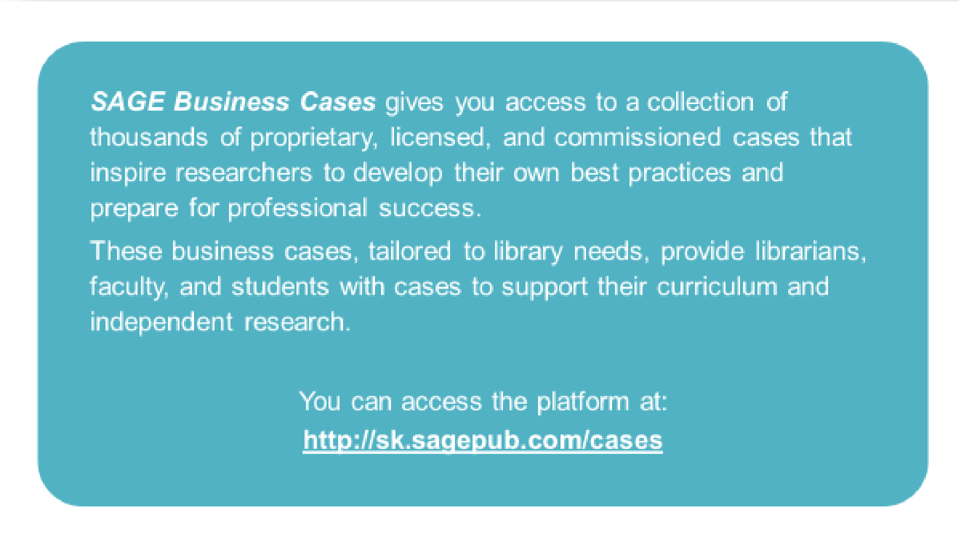
Discussion Questions

Discussion questions are a great way of opening a session, especially as an ice-breaker and to help the group feel comfortable with each other.

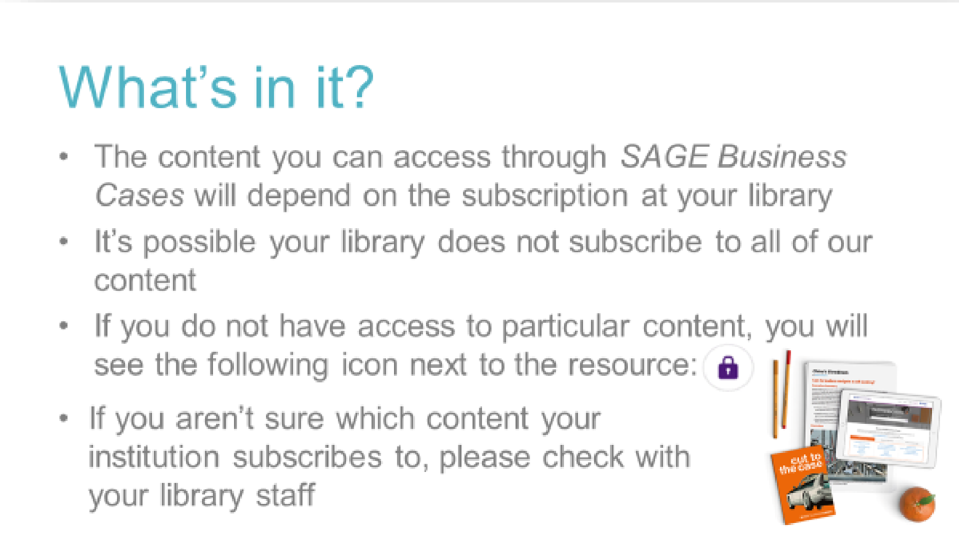
These are some questions which might be suitable for a *SAGE Business Cases* session, but you may like to change these to better suit your group.

Ask participants to discuss their answers to these questions in pairs or small groups. Allow 5 minutes or so for feedback, depending on the size of the group.

Introduction to the platform

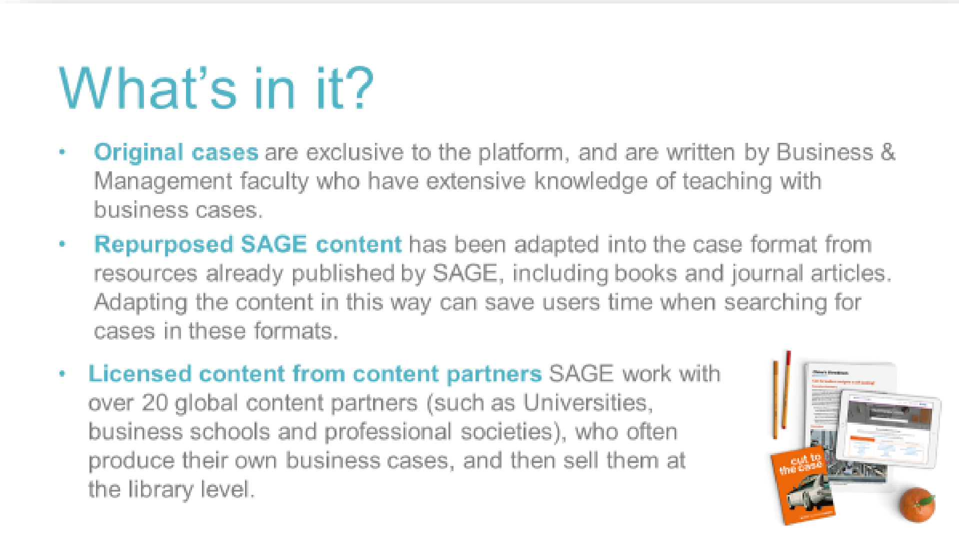


Overview slide
This slide provides a basic and concise introduction to *SAGE Business Cases*.
The URL of the platform is also shown at the bottom of the slide for easy reference.

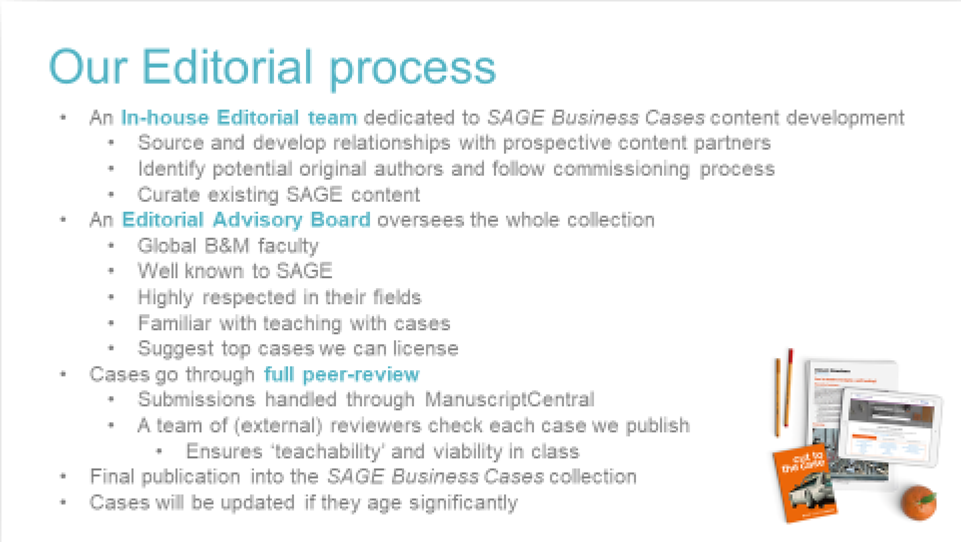


What's in it?
This slide offers a simple summary of what users can find on *SAGE Business Cases,* including how they can learn whether or not they have access to particular content.
We recommend editing this slide in the following ways:

- Edit the first bullet point to only indicate the content you have access to
- Edit the last bullet point to add in a key library contact



What's in it?
This slide gives a bit more information about each of the three channels.
You can explore all of the Original cases **here**.
Content partners – highlight here the global representation of cases, i.e. cases from Tsinghua University in China, and the Indian Institute of Management.
You can learn more about our different content partners **here**.

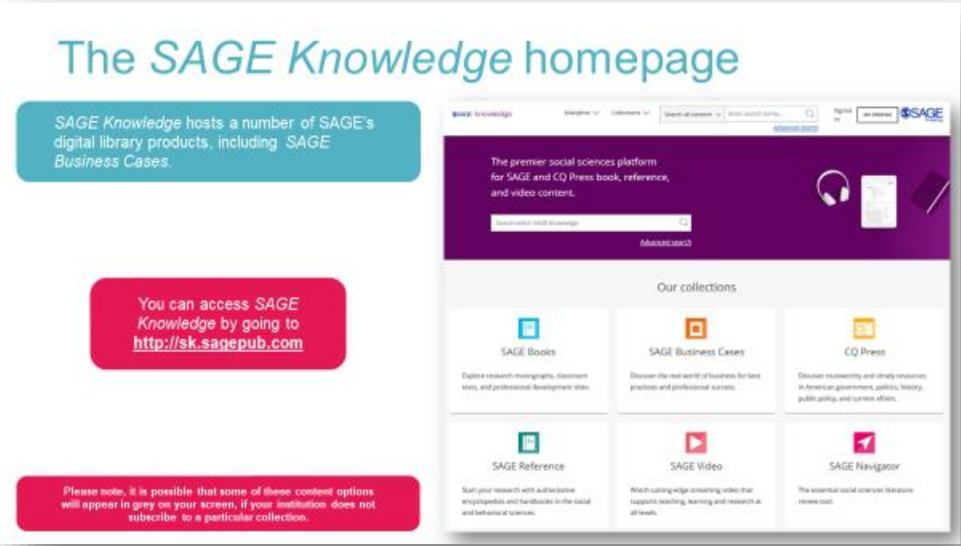


Our Editorial process
This slide gives information about how the cases make it onto the platform.
Our **in-house editorial team** source content for the platform in three ways.
An **Editorial Advisory Board** provide support on suggesting cases, and with developing subject taxonomies.
All cases go through a process of peer-review, with a separate team of **peer-reviewers**.

Who is it for?
Here you can show your participants what they can gain from using the *SAGE Business Cases* platform, depending on their role. You may like to edit this slide by showing only those user groups that your session is targeted at.

Getting started on the platform

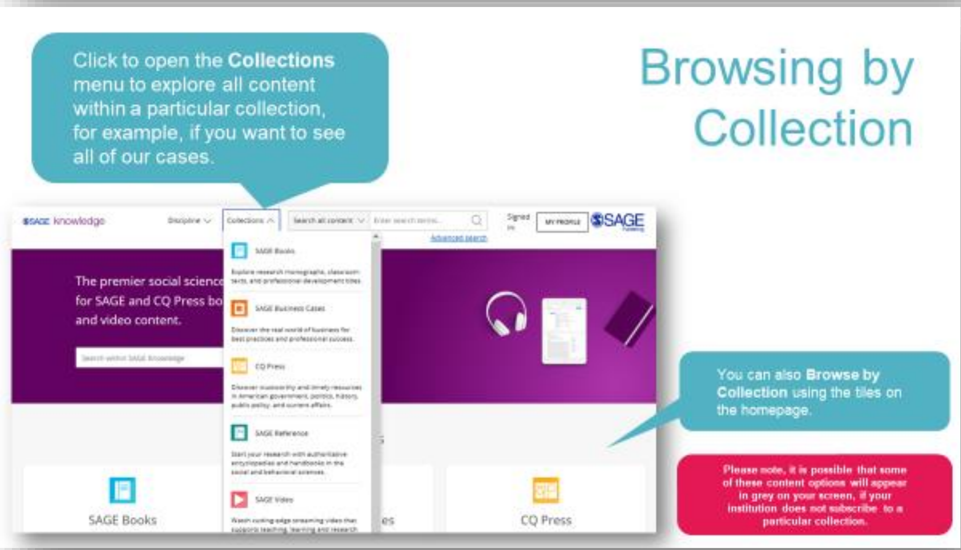
The slides that follow are all screenshots from the platform in slide format. However, we recommend that you use these slides as a guide for a live platform demonstration, instead of showing the slides themselves. It is benefical for participants to see how to access the platform from your institution's homepage or library page, and to see how to navigate the platform live. The screenshots provide a suitable back-up for participants to review after th e session, or in case you have internet problems during your session.



The *SAGE Knowledge* homepage

SAGE Business Cases is hosted on the *SAGE Knowledge* platform.

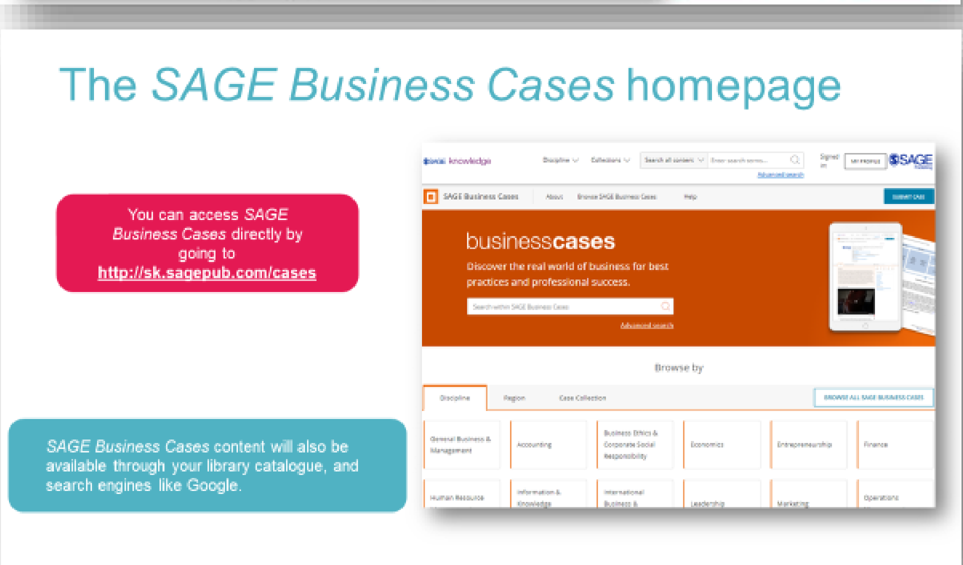
This screenshot shows the *SAGE Knowledge* homepage, as well as the direct URL and information about other methods users can use to access *SAGE Business Cases.* Depending on your institution's access level and settings, some options may be inactive and therefore the screenshot may look slightly different to your version.



Browsing by Collection

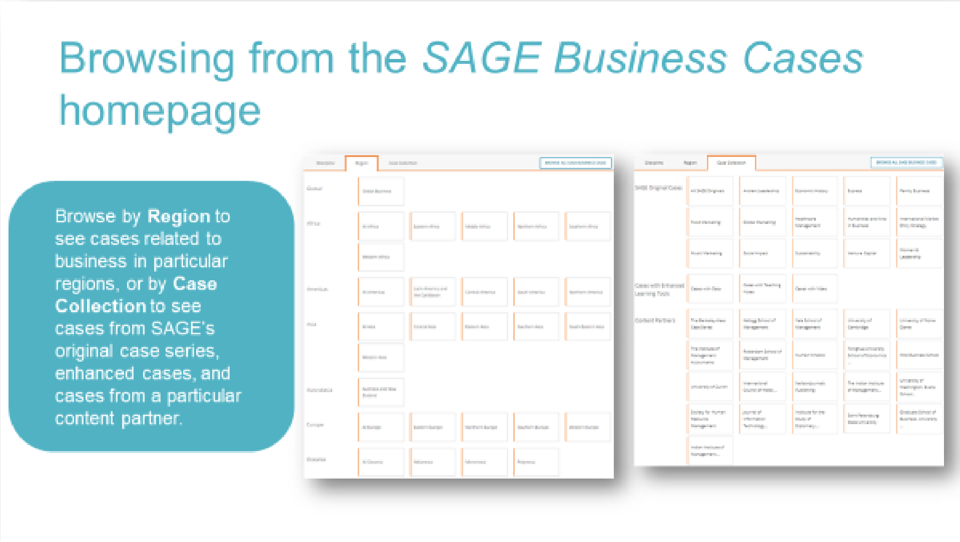
This screenshot shows the *SAGE Knowledge* homepage, and how to navigate to the *SAGE Business Cases* collection homepage through two methods.

Depending on your institution's access level and settings, some options may be inactive and therefore the screenshot may look slightly different to your version.

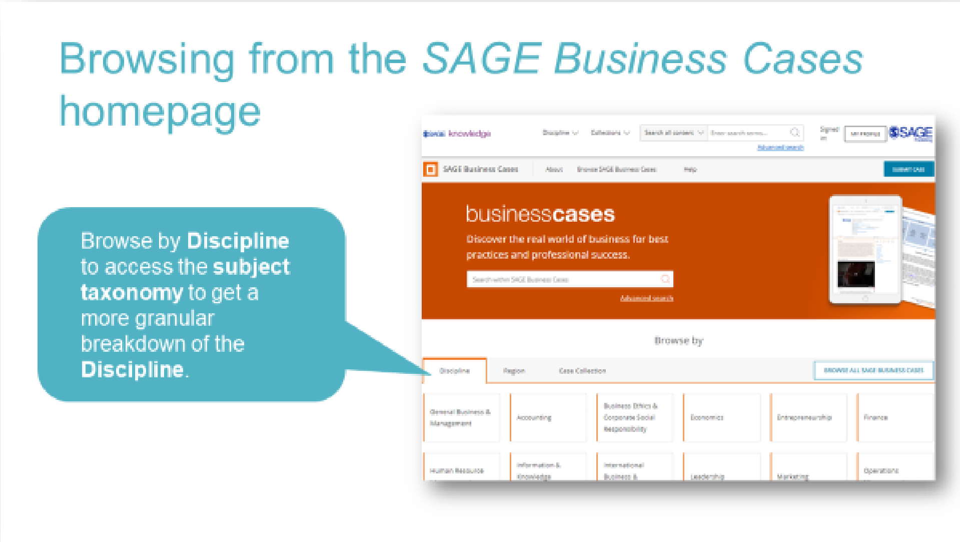


The *SAGE Business Cases* homepage

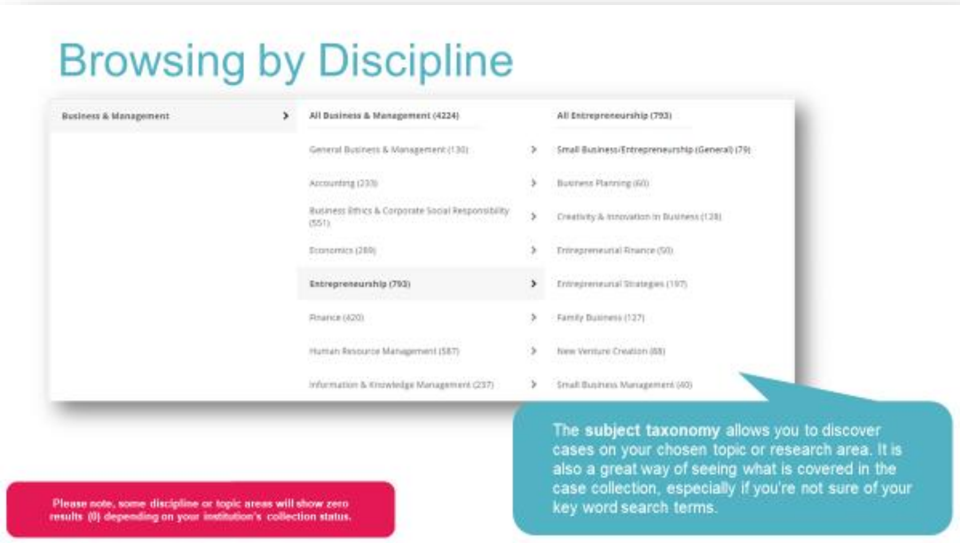
This screenshot shows the *SAGE Business Cases* homepage, and the direct URL. Content is also able to be accessed through the library catalogue and search engines. Students might want to bookmark this link, librarians might want to add this link to a subject guide, and faculty might want to add this link to a reading list or link to it from a learning management system (LMS) or virtual learning environment (VLE).



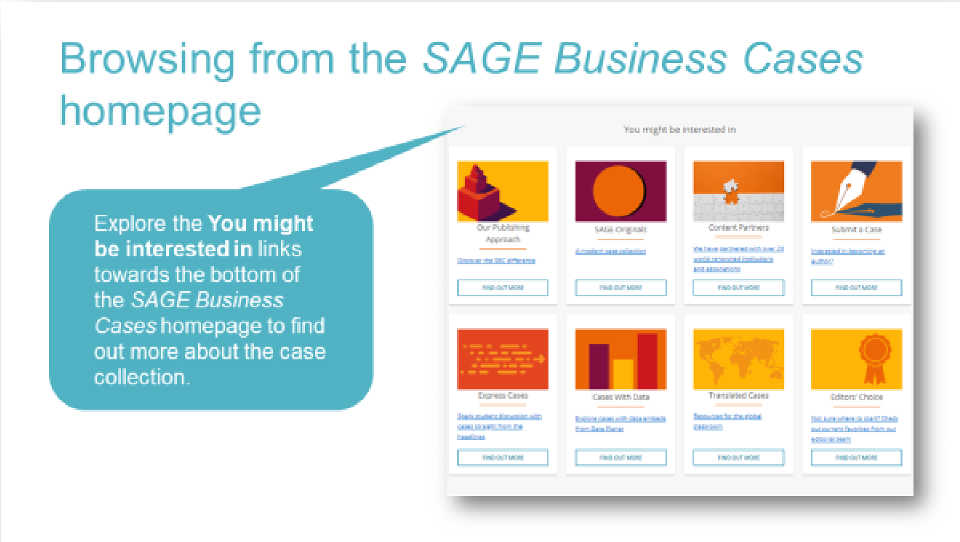
Browsing from the *SAGE Business Cases* homepage
This screenshot indicates how users can browse case content by **Region** and **Case Collection**.



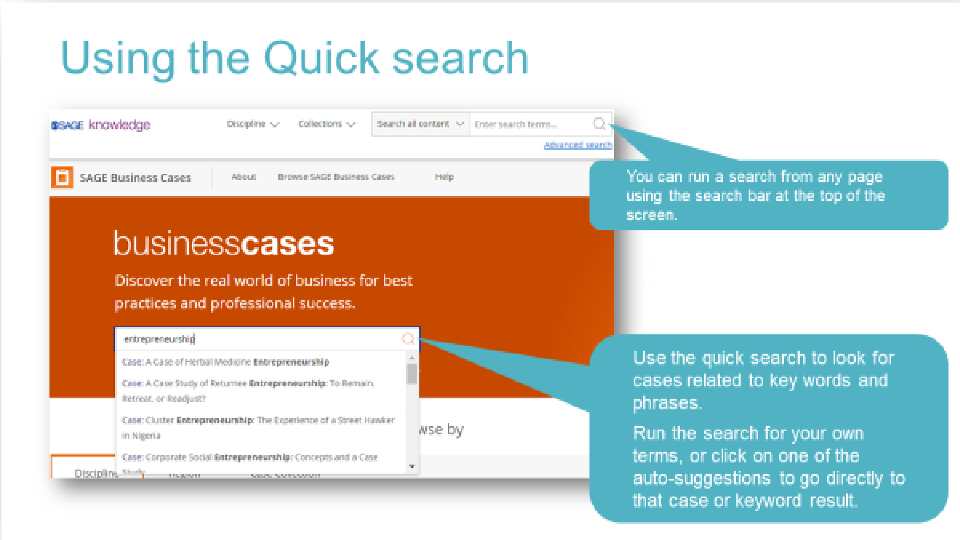
Browsing from the *SAGE Business Cases* homepage
This screenshot indicates how users can browse case content by **Discipline**.



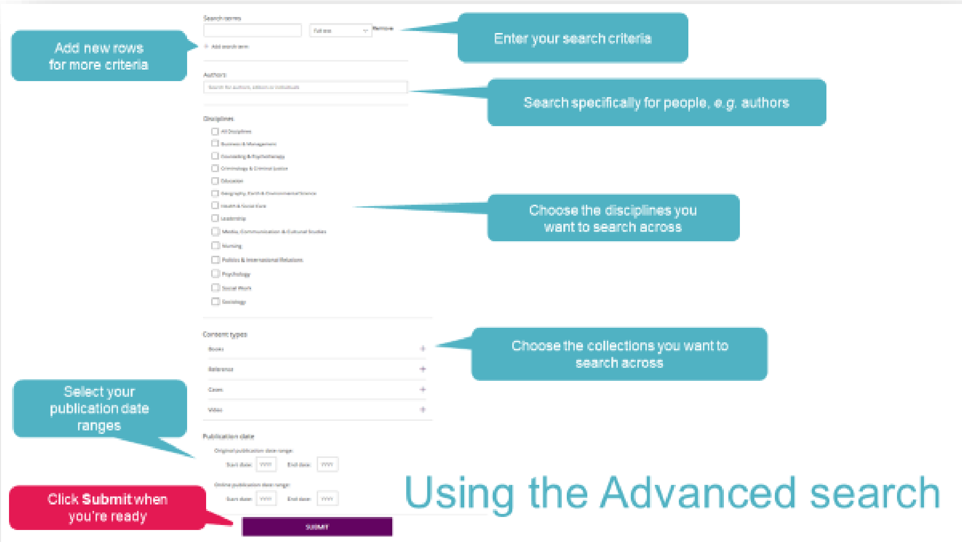
Browsing by Discipline
This screenshot displays the subject taxonomy page and indicates how users can browse case content by Discipline from the cases homepage and see a more granular breakdown of a selected Discipline.



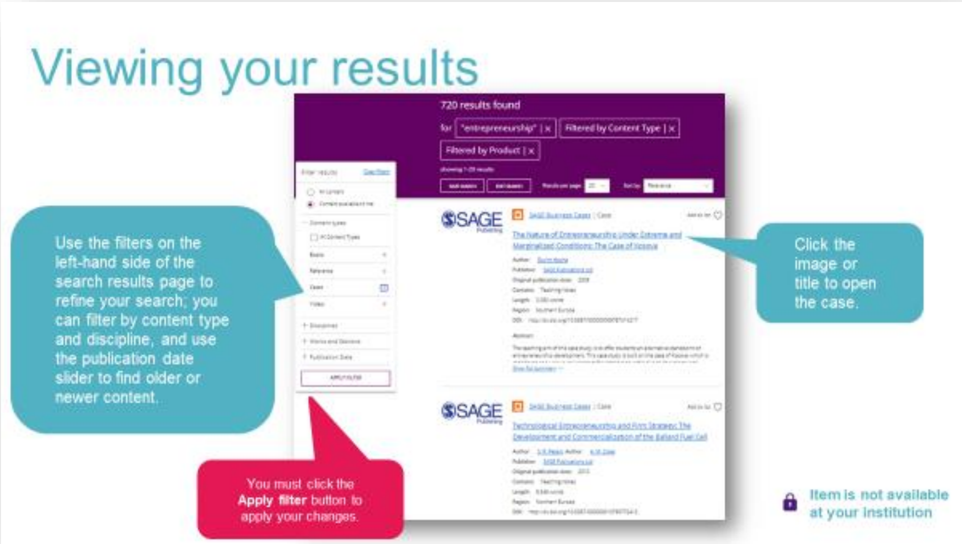
Browsing from the *SAGE Business Cases* homepage
This screenshot indicates how users can explore the 'You might be interested in' links towards the bottom of the *SAGE Business Cases* homepage.



Using the Quick search
This screenshot shows the quick search feature on the *SAGE Business Cases* homepage.



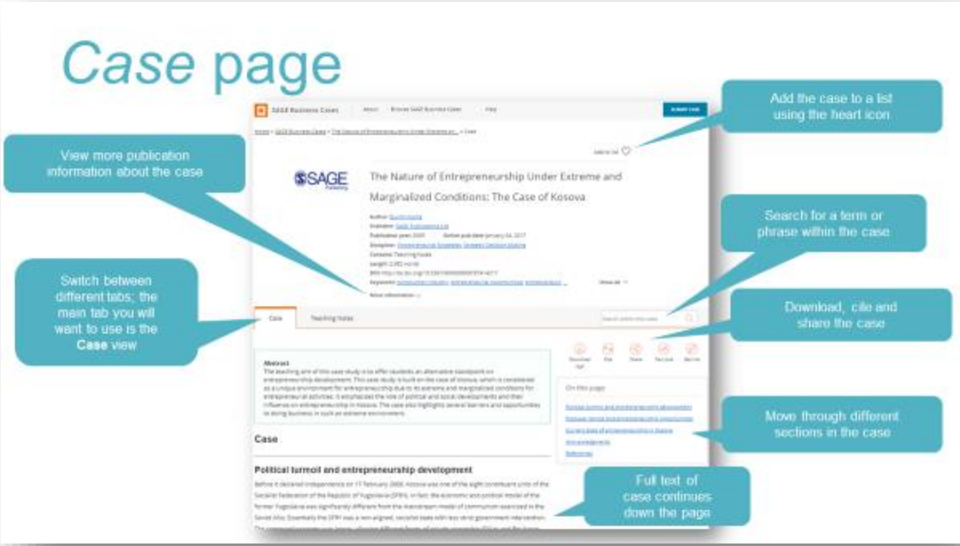
Using the Advanced search
This screenshot shows users the Advanced search, and some tips for running an effective advanced search using some of the main criteria fields.



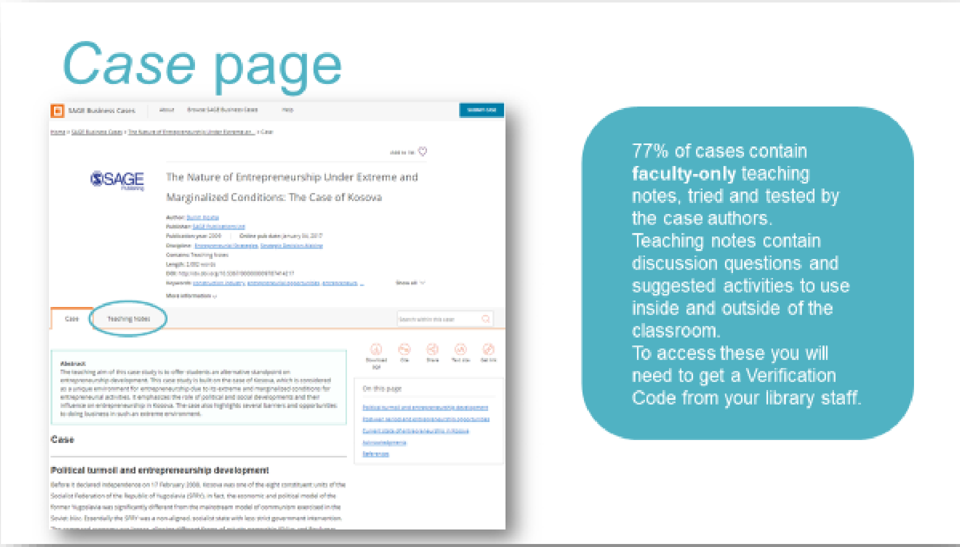
Viewing your results
This screenshot displays some search results so that users can see what the results page looks like. It highlights the filters that users will want to use to refine their search results, on the left-hand side of the screen.

It also indicates, at the bottom-right corner, how users can identify content that is not available to them due to their institution's access restrictions.

The Case page



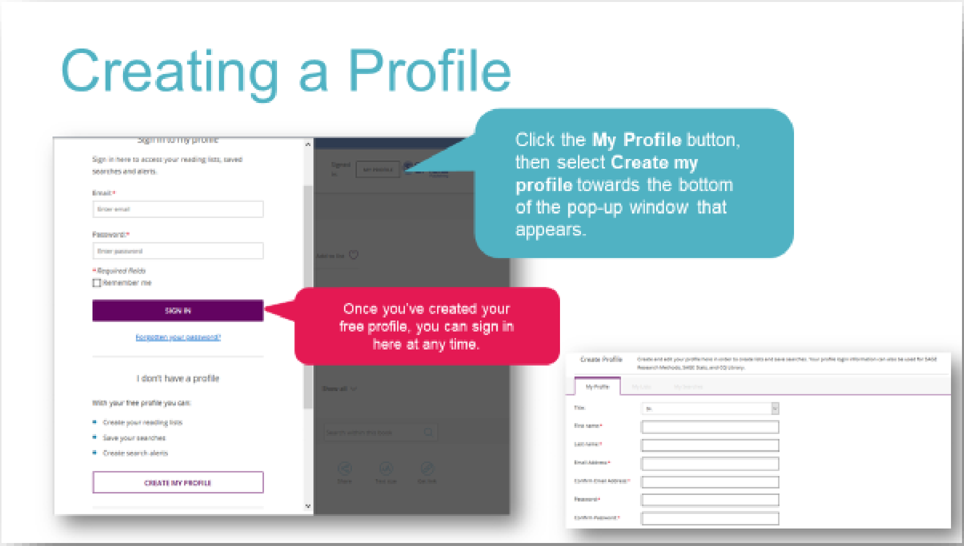
Case page
This screenshot shows a case page.
The call-out shapes highlight key functionality, for example downloading as PDF, downloading citations, and searching within the case for a specific word or phrase.



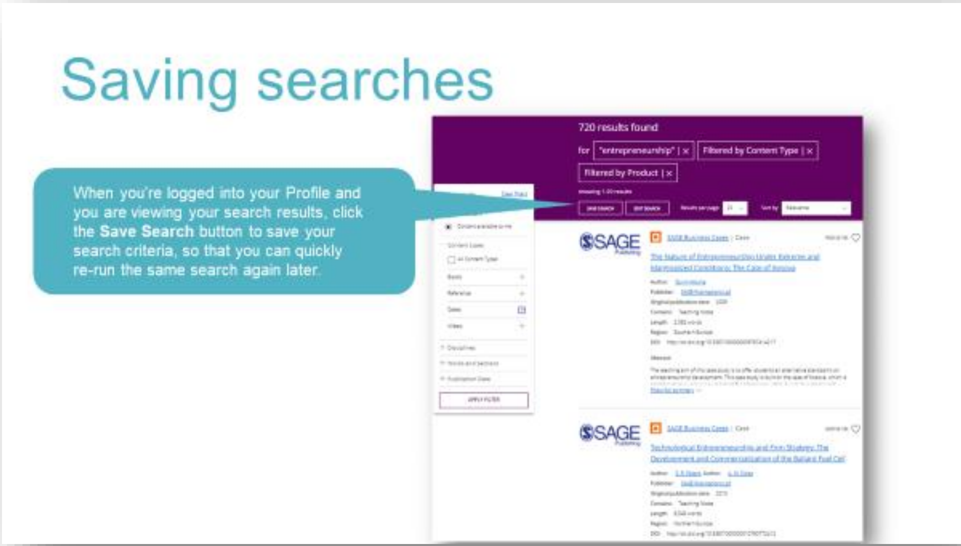
Case page, and teaching notes
This screenshot shows a case page, and how to navigate to the teaching notes tab (not all cases come with teaching notes).
Please note: If you don't have access to teaching notes, a padlock icon will display on the tab. To access teaching notes you will need to create a profile, and obtain a Verification Code from your library staff.

Creating a Profile

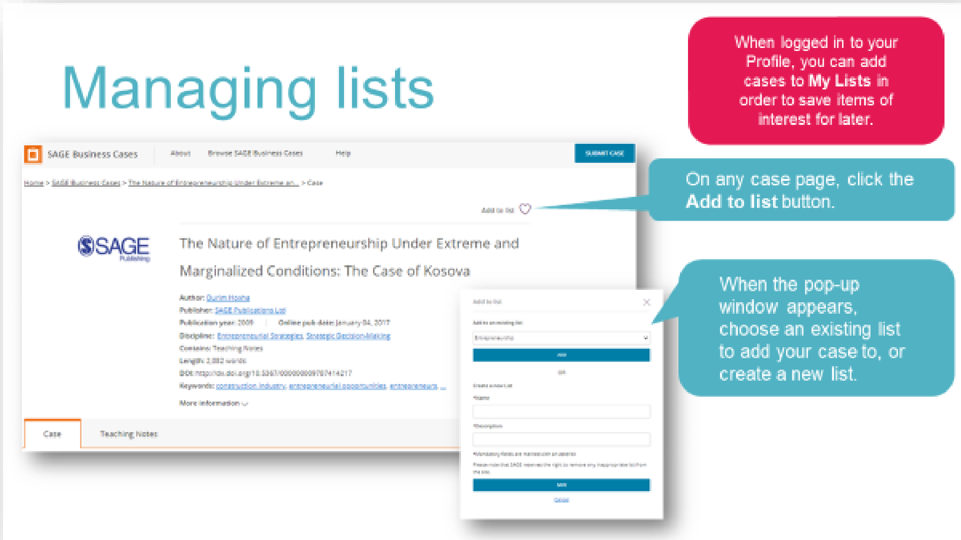
Encourage participants to create their own profile, and experiment with adding cases to a list. Allow 12-15 minutes to complete this, and then 3-5 minutes for feedback so participants can discuss some of the resources they discovered.



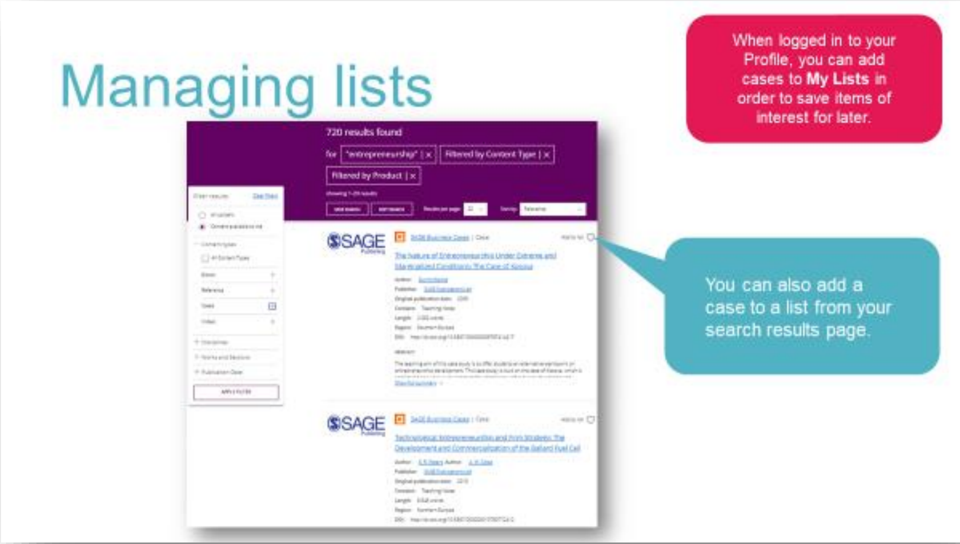
Creating a Profile
This screenshot shows users how they can create their own personal profile in *SAGE Knowledge*, and, for future reference, how they can log in once they have created their profile.



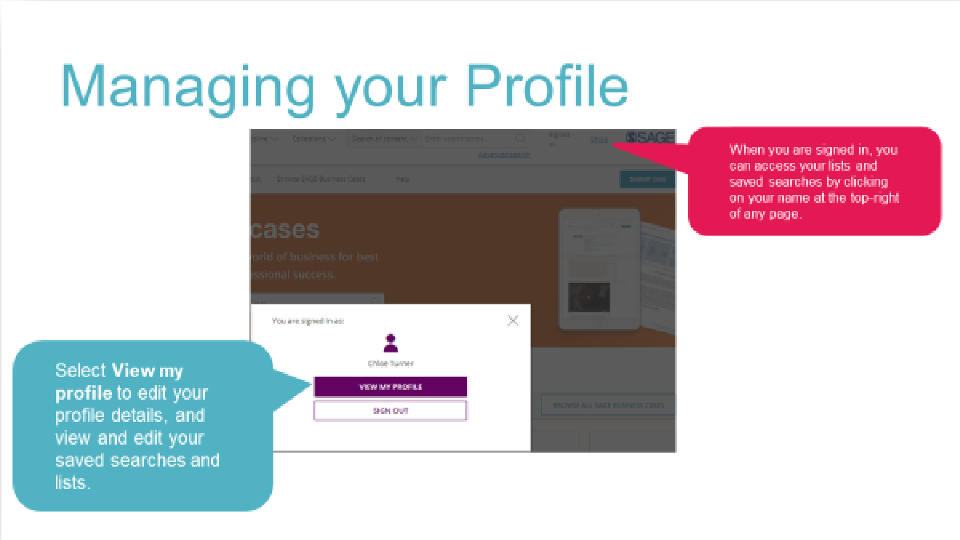
Saving searches
This screenshot shows users how they can save a search to their profile, once they are logged in.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.



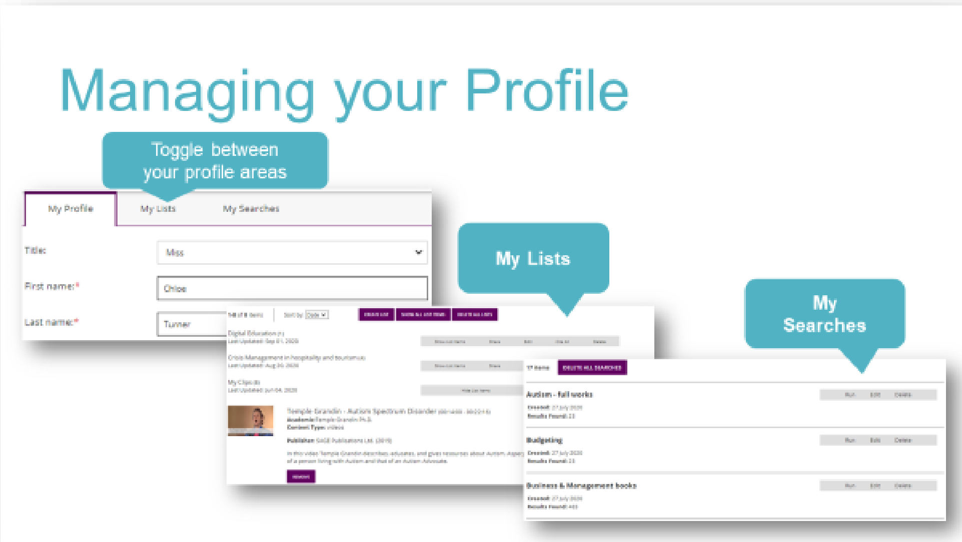
Managing lists
This screenshot shows users how they can add a case to a personal list, once they are logged in from the case page.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.



Managing lists
This screenshot shows users how they can add a case to a personal list, once they are logged in from the search results page.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.



Managing your Profile
This screenshot demonstrates how a user can access their profile and view and edit their details and saved searches and lists.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.



Managing your Profile
This screenshot highlights the different things a user can do within their profile once they are logged in, such as editing their profile information, accessing their saved searches, and viewing their lists.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.

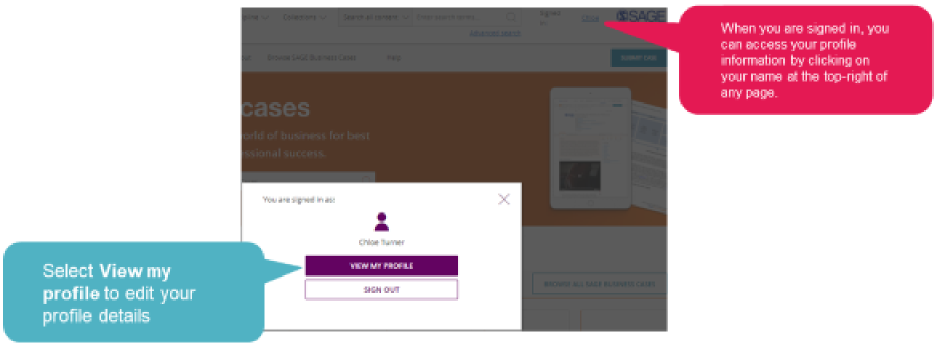
Accessing teaching notes

Accessing teaching notes

To access the teaching notes, teachers will need to create a profile, if they haven’t already, on the *SAGE Business Cases* platform.

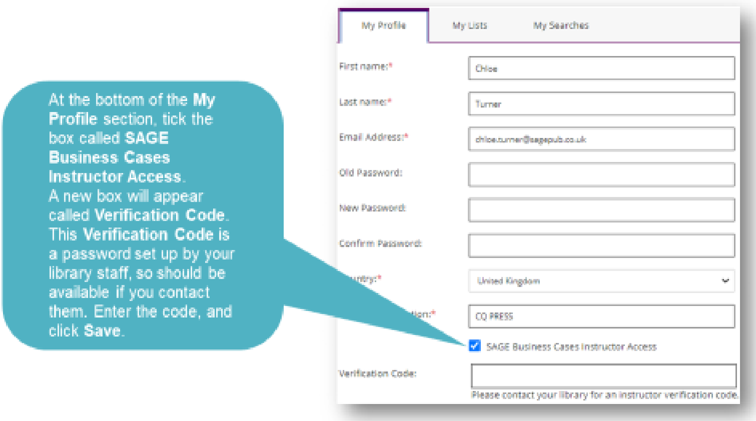
Accessing teaching notes
Please note: This section may not be relevant if any of your participants are students or researchers. If you do not want students and researchers to be able to access teaching notes, which would give them access to the answers to the discussion questions or activities in the case itself, then do not give out your institutional verification code in the session.
To access teaching notes, faculty and staff members at your institution will need to create a profile on the *SAGE Knowledge* platform.

Accessing teaching notes

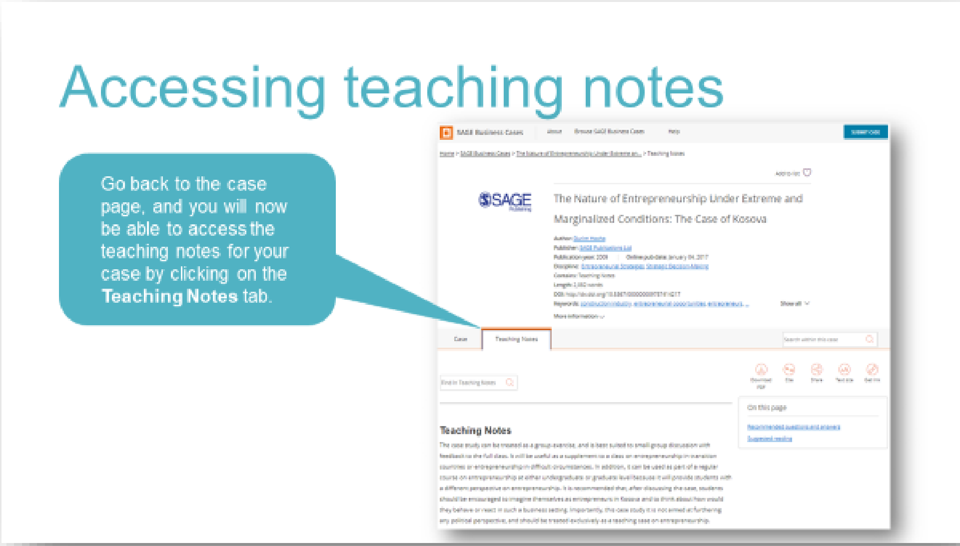


Accessing teaching notes
This screenshot shows how a user can navigate to the My Profile part of their profile.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.

Accessing teaching notes



Accessing teaching notes
This screenshot shows how a user can navigate to the My Profile part of their profile, and where to enter the Verification Code to be able to access teaching notes in cases.
Please note: you will need to be logged in to your own profile to demonstrate this functionality in full.



Accessing teaching notes
This screenshot shows where a user needs to go on the case page to be able to access the teaching notes.
Please note: Individuals who do not have the Verification Code saved to their profile will continue to see a padlock icon on this tab.