

# let your training journey begin



## 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

- Introduction to *SAGE Business Cases*
- Live platform demonstration
- Final questions and session round-up



## 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

By the end of this session, participants will be able to:

- Describe how *SAGE Business Cases* can help them in their study and research
- Locate relevant cases using browse and search options
- Save a case to a list within the platform



## 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

- How familiar are you with *SAGE Business Cases*?
- What projects are you currently working on or interested in?
- What do you hope to gain from today's session?



## 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

**SAGE Business Cases** gives you access to a collection of thousands of proprietary, licensed, and commissioned cases that inspire researchers to develop their own best practices and prepare for professional success.

These business cases, tailored to library needs, provide librarians, faculty, and students with cases to support their curriculum and independent research.


You can access the platform at:  
<http://sk.sagepub.com/cases>

## 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?

- The content you can access through *SAGE Business Cases* will depend on the subscription at your library
- It's possible your library does not subscribe to all of our content
- If you do not have access to particular content, you will see the following icon next to the resource: 
- If you aren't sure which content your institution subscribes to, please check with your library staff



## 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?

- **Original cases** are exclusive to the platform, and are written by Business & Management faculty who have extensive knowledge of teaching with business cases.
- **Repurposed SAGE content** has been adapted into the case format from resources already published by SAGE, including books and journal articles. Adapting the content in this way can save users time when searching for cases in these formats.
- **Licensed content from content partners** SAGE work with over 20 global content partners (such as Universities, business schools and professional societies), who often produce their own business cases, and then sell them at the library level.



## 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

- An **In-house Editorial team** dedicated to *SAGE Business Cases* content development
  - Source and develop relationships with prospective content partners
  - Identify potential original authors and follow commissioning process
  - Curate existing SAGE content
- An **Editorial Advisory Board** oversees the whole collection
  - Global B&M faculty
  - Well known to SAGE
  - Highly respected in their fields
  - Familiar with teaching with cases
  - Suggest top cases we can license
- Cases go through **full peer-review**
  - Submissions handled through ManuscriptCentral
  - A team of (external) reviewers check each case we publish
    - Ensures 'teachability' and viability in class
- Final publication into the *SAGE Business Cases* collection
- Cases will be updated if they age significantly



### 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?

- **Faculty**
  - Reduce costs by circumventing the pay-per-case model
  - Remove access barriers for students
  - Easily access wide variety of cases from a number of different sources
  - Publish cases with SAGE
- **Students**
  - Access cases whenever, wherever, for course prep, revision, and self-study
  - Become more self-sufficient by going beyond assigned cases
  - Find related study resources such as books, reference works and journal articles
- **Researchers**
  - Examine real-life business decisions and strategies for personal research
- **Librarians**
  - Enhance relationships with Business faculty
  - Save faculty money
  - Inform collection development, obtain data on usage and engagement of case content



### 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

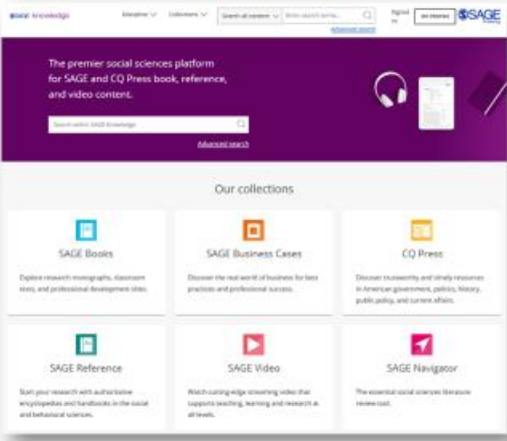
The slides that follow are all screenshots from the platform in slide format. However, we recommend that you use these slides as a guide for a live platform demonstration, instead of showing the slides themselves. It is beneficial for participants to see how to access the platform from your institution's 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 the session, or in case you have internet problems during your session.

## The SAGE Knowledge homepage

SAGE Knowledge hosts a number of SAGE's digital library products, including SAGE Business Cases.

You can access SAGE Knowledge by going to <http://sk.sagepub.com>

Please note, it is possible that some of these content options will appear in grey on your screen, if your institution does not subscribe to a particular collection.



### 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

Click to open the Collections menu to explore all content within a particular collection, for example, if you want to see all of our cases.

You can also Browse by Collection using the tiles on the homepage.

Please note, it is possible that some of these content options will appear in grey on your screen, if your institution does not subscribe to a particular collection.



### 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

You can access SAGE Business Cases directly by going to <http://sk.sagepub.com/cases>

SAGE Business Cases content will also be available through your library catalogue, and search engines like Google.

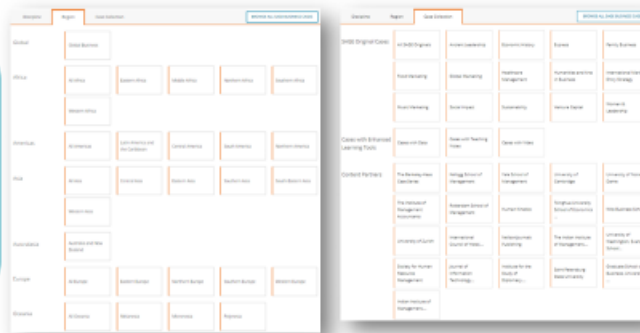


### The SAGE Business Cases homepage

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

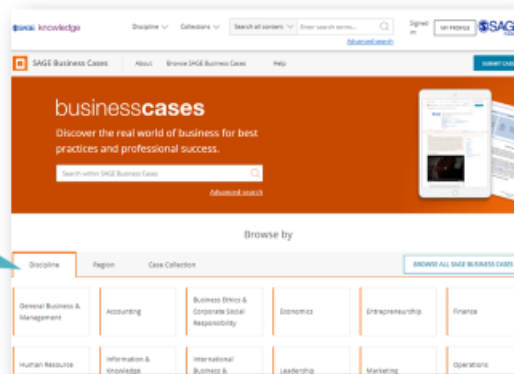
Browse by **Region** to see cases related to business in particular regions, or by **Case Collection** to see cases from SAGE's original case series, enhanced cases, and cases from a particular content partner.



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

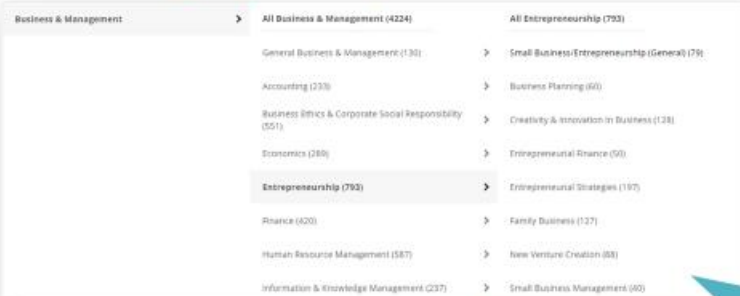
## Browsing from the *SAGE Business Cases* homepage

Browse by **Discipline** to access the **subject taxonomy** to get a more granular breakdown of the **Discipline**.



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

## Browsing by Discipline



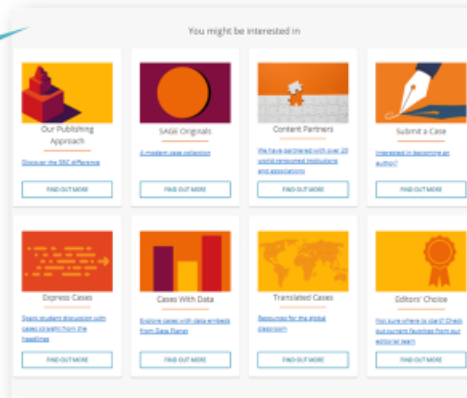
Please note, some discipline or topic areas will show zero results (0) depending on your institution's collection status.

The subject taxonomy allows you to discover cases on your chosen topic or research area. It is also a great way of seeing what is covered in the case collection, especially if you're not sure of your key word search terms.

**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.

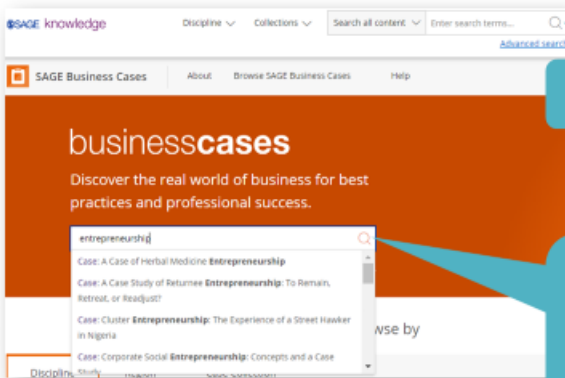
## Browsing from the SAGE Business Cases homepage

Explore the You might be interested in links towards the bottom of the SAGE Business Cases homepage to find out more about the case collection.



**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



You can run a search from any page using the search bar at the top of the screen.

Use the quick search to look for cases related to key words and phrases.  
Run the search for your own terms, or click on one of the auto-suggestions to go directly to that case or keyword result.

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



Add new rows for more criteria

Enter your search criteria

Search specifically for people, e.g. authors

Choose the disciplines you want to search across

Choose the collections you want to search across

Select your publication date ranges

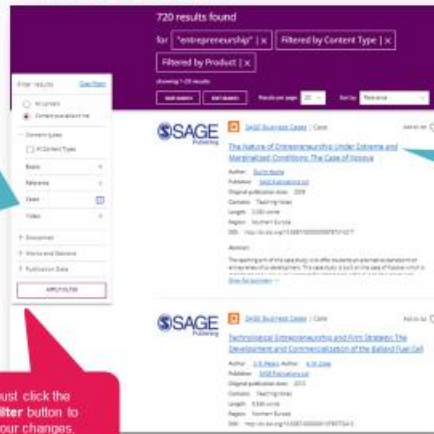
Click Submit when you're ready

## Using the Advanced search

**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



Use the filters on the left-hand side of the search results page to refine your search, you can filter by content type and discipline, and use the publication date slider to find older or newer content.

You must click the **Apply filter** button to apply your changes.

Click the image or title to open the case.

Item is not available at your institution

**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 SAGE Business Cases page for the article "The Nature of Entrepreneurship Under Extreme and Marginalized Conditions: The Case of Kosovo". The page includes a title, author information, publication year (2008), and a search bar. Callouts highlight the following features:

- View more publication information about the case
- Switch between different tabs: the main tab you will want to use is the Case view
- Add the case to a list using the heart icon
- Search for a term or phrase within the case
- Download, cite and share the case
- Move through different sections in the case
- Full text of case continues down the 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

This screenshot shows the same SAGE Business Cases page, but with a callout highlighting the "Teaching notes" tab. The callout contains the following text:

77% of cases contain **faculty-only** teaching notes, tried and tested by the case authors. Teaching notes contain discussion questions and suggested activities to use inside and outside of the classroom. To access these you will need to get a Verification Code from your library staff.

### 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

Click the My Profile button, then select Create my profile towards the bottom of the pop-up window that appears.

Once you've created your free profile, you can sign in here at any time.

**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

When you're logged into your Profile and you are viewing your search results, click the Save Search button to save your search criteria, so that you can quickly re-run the same search again later.

**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

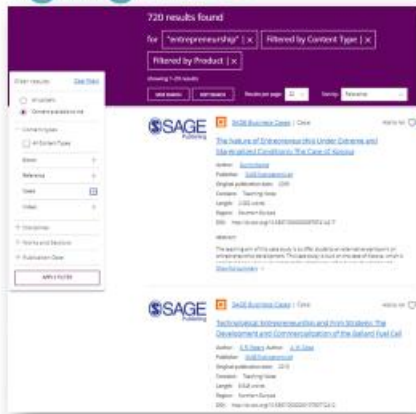
When logged in to your Profile, you can add cases to My Lists in order to save items of interest for later.

On any case page, click the Add to list button.

When the pop-up window appears, choose an existing list to add your case to, or create a new list.

**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

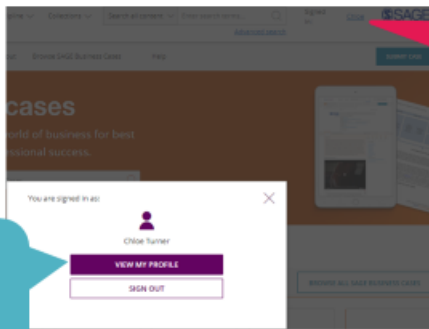


When logged in to your Profile, you can add cases to My Lists in order to save items of interest for later.

You can also add a case to a list from your search results page.

**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

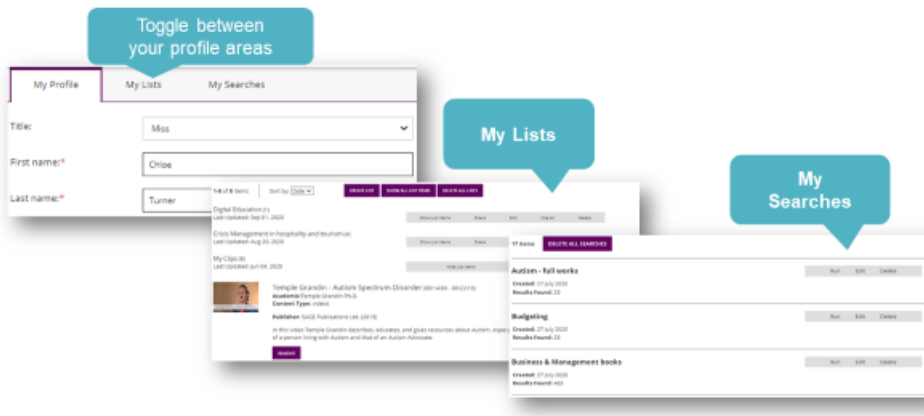


Select View my profile to edit your profile details, and view and edit your saved searches and lists.

When you are signed in, you can access your lists and saved searches by clicking on your name at the top-right of any page.

**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



**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

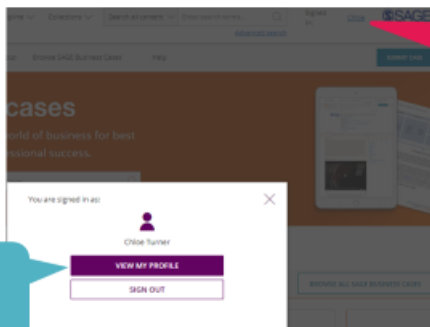
To access the teaching notes, teachers will need to [create a profile](#), if they haven't already, on the *SAGE Business Cases* platform.

### 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



When you are signed in, you can access your profile information by clicking on your name at the top-right of any page.

Select **View my profile** to edit your profile details

### 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

A screenshot of the 'My Profile' form in the SAGE Business Cases platform. The form includes fields for First name, Last name, Email Address, Old Password, New Password, Confirm Password, Country, and Institution. There is a checkbox for 'SAGE Business Cases Instructor Access' which is checked. A 'Verification Code' field is at the bottom with a note: 'Please contact your library for an instructor verification code.'

At the bottom of the My Profile section, tick the box called **SAGE Business Cases Instructor Access**. A new box will appear called **Verification Code**. This Verification Code is a password set up by your library staff, so should be available if you contact them. Enter the code, and click **Save**.

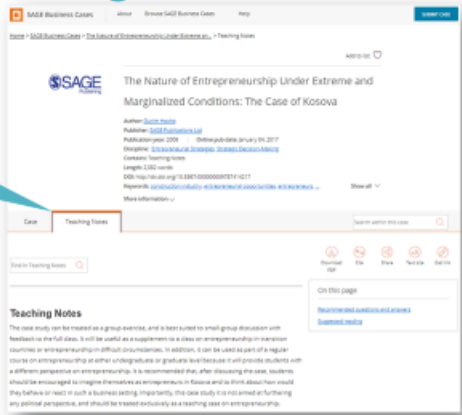
### Accessing teaching notes

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

Go back to the case page, and you will now be able to access the teaching notes for your case by clicking on the Teaching Notes tab.



**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.**