Discussion Streams

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Overview

top

A Discussion Stream is used to allow members of the business to collaborate; bringing users, Yellowfin Content, and external links together in one place to be viewed and discussed. Streams are tightly integrated with Timeline so that users keep up to date with posts made in a Discussion by viewing updates in their Timeline feed.

Creating a Stream

In order to start collaborating in a team space, you will need to create a Discussion Stream. Complete the following steps:

1. Access the Create menu using whichever Navigation method you have in your system.

2. Click on the Discussion option to begin setting up a Stream.

Create
Report
Dashboard Tab
View
Data Source
Storyboard
Discussion Jm
Task

3. You will now see the Stream creation window, that allows you to set up all the options related to your discussion.

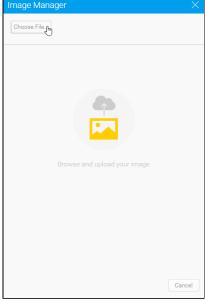
Details Members		
Name Description	Set Thu	mbnail
+ Add tags Default Layout The discussion stream will be displayed in timeline view by default.	Task View	List View
Discussion Stream Security All users have access to this discussion str members may post messages.		ublic 🔓 🔘 ivate 🖰 🕓
Save		

4. Set up an image to use for the Stream, helping users identify it when they open it from the browse page, by clicking on the thumbnail.

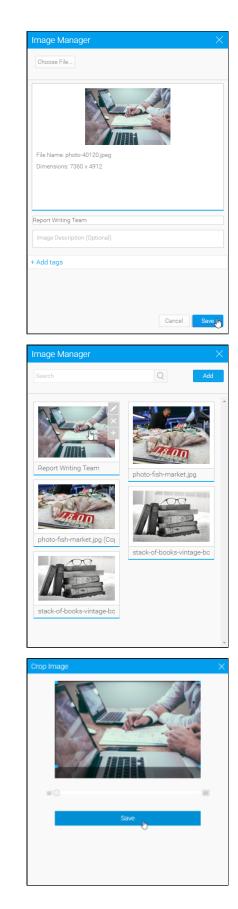
5. Click Add to load a new image to use. Alternatively, select an existing image (skip to step 10).



6. If loading a new image, click the **Cho ose File** button to locate your image file.



- 7. Provide a name, description, and tags for your image.
- 8. Click Save to load your file.



9. You will now be returned to the image manager to select your new image.

10. Crop your image so that it's the correct proportions for use with a Stream thumbnail.

11. Define the following for your stream:

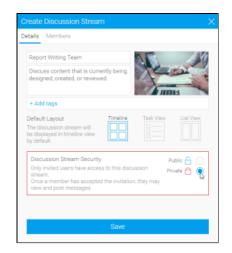
- Name
- Description
- Tags
- Default Layout this allows you to define which style of stream layout the user sees when they initially load the stream.
 - Tim
 - eline

Pub lic any one

- Task
- View
- List View

See Layout for more information.

 Security - this allows you to define who can access your stream.



who has acc ess to Stre ams thro ugh thei r role per mis sion s will be able to acc ess this stre am and join it. Priv ate only spe cifie d use rs will be invit ed to join this stre am.

12. Define the list of members to be attached to the stream. This will invite users to join the conversation.

13. Click **Save** to complete the stream.

Details	Member	в						
Or	Only invite a memb		accepte	access t ed the inv message	itation, t			
	Teresa P	vingle				Admi	nistrator	•
6	Violet Sc	uthga	te			In	vited	
9	Jessica	Flower	r			In	vited	
				Save		-		
				Save		ł		
= Search	Discussion	Q	All Posts	Save	Status) Layout	0
E Search	Concession) Layout	0 2
Search Report	Decusion Winting Tee	29	C A	Priority	Status	r to) Layout	0
Discuss o currently I	Concusion Writing Tee ontent that is being designer reviewed.	An an	C A	Priority dd Post	Status	r to) Layout	0

14. You will now see your new stream, you're ready to start posting.

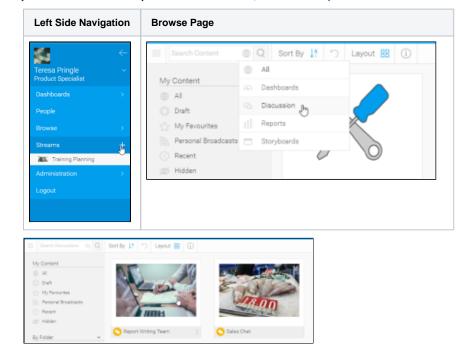
Locating a Stream

In order to contribute to a discussion stream you will need to locate and join it. To locate a stream, follow these steps:

1. Access a list of streams available to you via the left side navigation panel, or by searching for streams on the Browse page.

2. Double click on the stream you wish

to open from the Browse page.



Joining a Stream

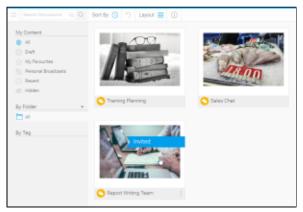
Once you have located a stream you will need to join it in order to contribute. If the stream is public, you can either join by locating the stream itself or by invitation from another user. If, however, the stream is private you will **require** an invitation in order to join it.

Follow these steps to join a stream:

1. If you have been invited to a stream, you will see it in your timeline or left side navigation area (if enabled).

Violet Southgate Team Lead	
Dashboards	
People	
Browse	>
Streams	+
Pending Invites	0
Training Planning	
Logout	

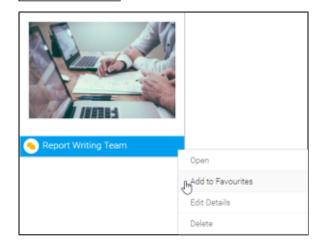
2. Locate the stream you wish you join.



3. You can either double click on the stream to open it, and then click the **Join** button, or...



... click on the stream options from the browse page and select the **Add to Favourites** option.



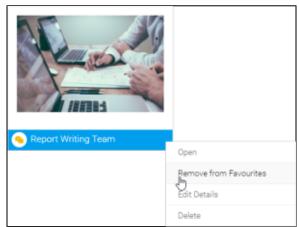
Leaving a Stream

When you no longer belong to a team involved in a stream, or a stream is not longer required, you can leave it. Follow these steps to leave a stream:

1. In order to leave a stream, you will need to either open the stream and click the **Leave** button, or...



... locate the stream in the browse page and select the Remove from Favourites option.



Using a Stream

Discussion Streams can contain posts (comments), tasks, and decision threads. Each of these types of communication are designed to aid in the collaborative efforts of users and teams, and are able to contain a range of different types of content and attachments.

See Comments and Tasks for more information.

Members

top The users that have joined a discussion stream are considered its members. This includes both administrators of the stream, and standard contributors.

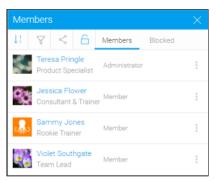
Viewing Members

To view the members of a discussion stream, follow these steps:

- 1. Locate the stream and view it.
- 2. Click on the Members icon.



3. You will now see a list of members displayed on the right of your screen.



Inviting Members

To invite members to join your discussion stream, follow these steps:

Г

1. Click on the **Share** button on the stream's members list.

Mem	bers				X
11	7 5	6	Members	Blocked	
	Teresa Prin Product Spe	-	Administrator		÷
	Jessica Flo Consultant		Member		:
Jus	Sammy Jo Rookie Trair		Member		÷
	Violet Sout Team Lead	hgate	Member		÷
Membe	ers List				
Member	8				

All users have access to this discussion stream. Only members may post messages.

No people are blocked from this discussion stream.

Administrator 🔷 👻

•

+

÷

Member

Member

Member

Teresa Pringle

🥸 Jessica Flower

🚕 Sammy Jones 6

Violet Southgate

2. You will now see a Members List popup.

3. Locate users in the Members List popup that appears. You can select individual users or groups.

M	embe	rs List		×
Me	mbers			
	All use	ers have access to this discussion stream. I messages.	Only members may post	
	\$1	Teresa Pringle	Administrator 🚽	
	93	Jessica Flower	Member 🔷 👻	
	يلي،	Sammy Jones	Member 🔷 👻	
	٠.	Violet Southgate	Member 🚽 👻	
	\heartsuit	Administrators ×		
		Bill David	n stream.	
	7	Captain SysAdmin 🕒		
	٨.	Jacinta Doze		
	w	Jack Nimble		
	95	Jessica Flower		
	AL	A 1	-	
	People Group	e Only s Only		

4.	When you have finished adding	
us	ers/groups click Save .	

Member	8				
All us	iers have ac		iscussion stream. Or messages.	nly members m	ay post
	Teresa Pr	ingle	1	Administrator	•
90	Jessica F	lower		Member	•
4	Sammy J	lones		Member	•
6	Violet So	uthgate		Member	•
7	Captain S)ysAdmin		Invited	
	No pe	onie are block	ed from this discuss	ion stream	
		opre are proon		addr birean c	
			Save		
			Save	b	
			Save	b	
Merr	bers		Save	b	×
Merr ↓1		< 6		Blocked	×
	▼ • Teresa	-	Members		×
	Teresa Product Jessica	Pringle	Members Administrator		
	Teresa Product Jessica	Pringle Specialist Flower ant & Train	Members Administrator		
	✓ ° Teresa Product Jessica Consult Sammy Rookie	Pringle Specialist Flower ant & Train Jones Trainer	Members Administrator er Member		:

У System Administra...

5. You will now see the users as **invited** in the main members list.

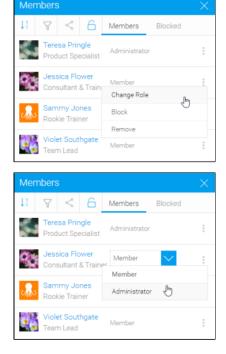
Member Permissions

Users can either be a member or administrator of a discussion stream. Members are users that contribute content and posts to the stream, where administrators can also manage users and security permissions.

Invited

To change the role of a user, follow these steps:

1. While viewing the Members list on a stream, click on the option button next to a user and select the **Change Role** option.



2. Select their new role.

Removing Members

If users no longer need to belong to a discussion stream they can remove themselves, but an administrator can also remove them by following these steps:

1. While viewing the Members list on a stream, click on the option button next to a user and select the **Remove** option.

Members		\times
1:	Members Blocked	
Teresa Pringle Product Specialist	Administrator	:
Jessica Flower Consultant & Trainer	Administrator	:
Sammy Jones Rookie Trainer	Member Change Role	:
Violet Southgate Team Lead	Block	
Captain SysAdmin System Administra	Remove Unvited	÷

2. Confirm you would like to remove the user by clicking the **Ok** button on this prompt.

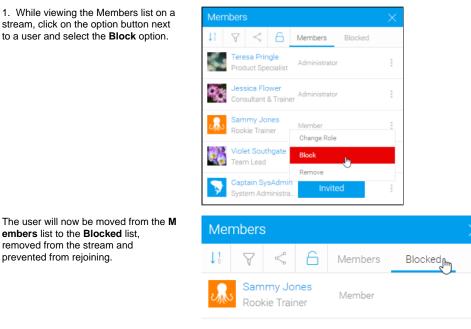


Do you want to remove this person from the discussion stream?



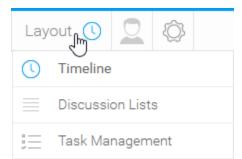
Blocking Members

Sometimes users may need to be removed from a discussion thread, and prevented from returning. An administrator can block a user by following these steps:



Layout

top A Discussion Stream can have three layouts, each designed to allow users to interact with the stream in different ways.



Layout	Description
Timeline	The timeline feed displays a list of activity that has taken place within the Discussion Stream. This can include new threads, responses to posts, and task activity. This behaves the same way as a user's timeline feed. See Timeline for more information.
Discussio n Lists	The lists layout allows you to group all content within a stream into user-defined lists. This allows you to organise content by your own groupings rather than sorting by date. See Discussion Lists for more information.
Task Managem ent	The task management layout allows you to do just that; manage the tasks associated with the discussion stream. See Task Management for more information.

Filtering Threads

top When exploring a Discussion Stream it's important to be able to quickly locate specific posts or pieces of content when needed. The filters located at the top of the stream feed allow you to do this.

Sea	arch Discussion	Q	All Posts	Priority	Status		5	Layout	0	2	Ô
Option	Description										
Search	This search allows the u	ser to na	rrow down the eve	ents they see in	the feed, in or	der to loca	ate spec	cific posts or pi	eces of c	ontent.	
Post Type	This option allows the us • Tasks • Discussion Str • Proposals • Decisions		ecify which type c	of posts they see	e in the feed, fr	om;					
Priority	This option allows the us	ser to spe	ecify the items the	y see based on	the priority ass	signed to t	hem:				

Status	This option allows the user to specify the items they see based on their current status: All Assigned In Progress / Discussion Stream Review / Proposal Complete Rejected
Favourite Flag	This option allows the user to restrict the items they are seeing just to ones they have marked as favourite or "flagged".
Reset	This option allows the user to clear all the above items, resetting their timeline feed to show everything.
Layout	This option allows the user to specify which layout they look at on the page. Timeline Discussion Lists Task Management
Members	This option opens the Members panel on the right of the screen, allowing the user to explore people that are involved in the Discussion Stream.