Discussion Streams

Overview

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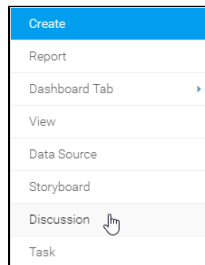
2. Click on the **Discussion** option to begin setting up a Stream.

3. You will now see the Stream creation window, that allows you to set up all the options related to your discussion.
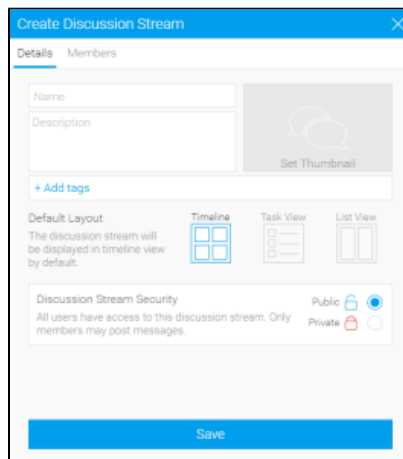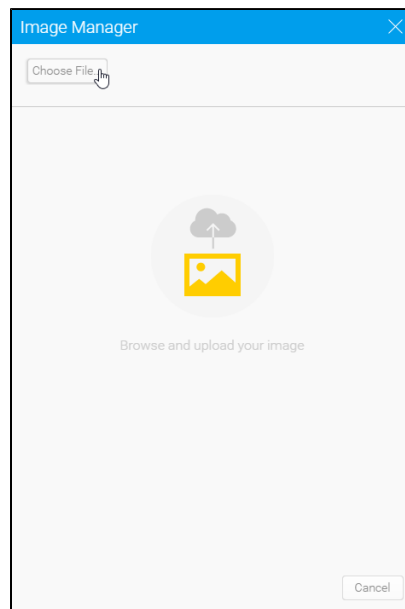
4. Set up an image to use for the Stream, helping users identify it when they open it from the browse page, by clicking on the thumbnail.

5. Click **Add** to load a new image to use. Alternatively, select an existing image (skip to step 10).
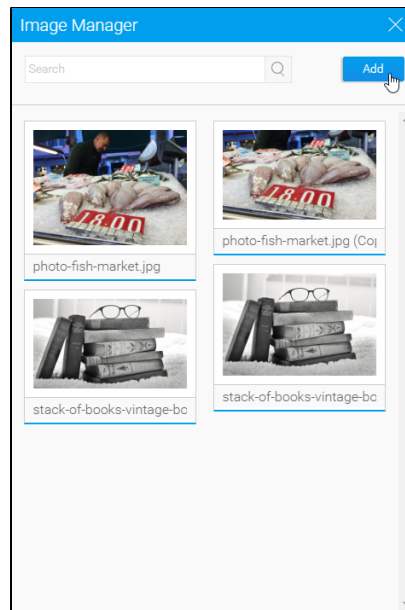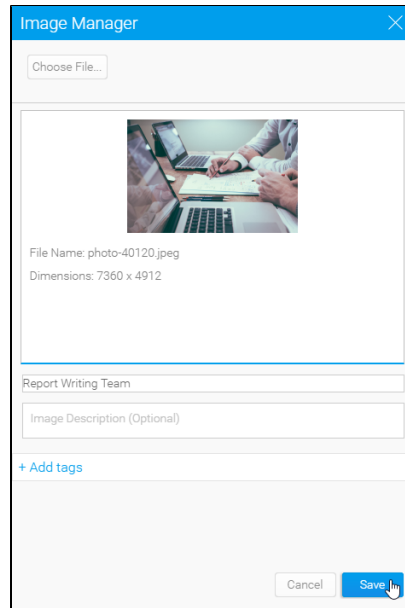
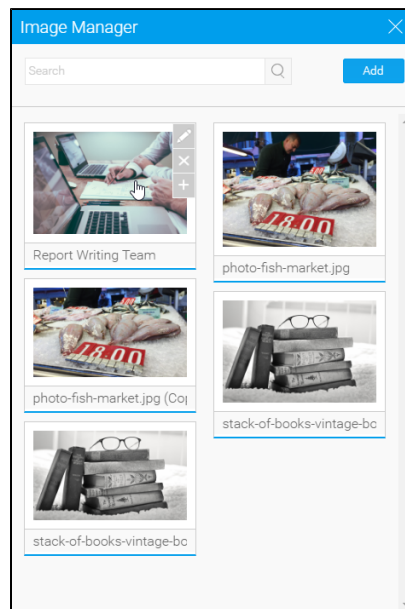6. If loading a new image, click the **Cho ose File** button to locate your image file.
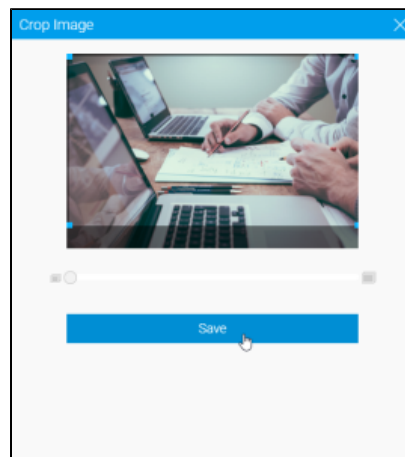

7. Provide a name, description, and tags for your image.

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.
    - **Timeline**
    - **Task View**
    - **List View**
  See Layout for more information.
- **Security** - this allows you to define who can access your stream.
    - **Public** - anyone who has access to Streams through their role permissions will be able to access this stream and join it.
    - **Private** - only specified users will be invited to join this stream.

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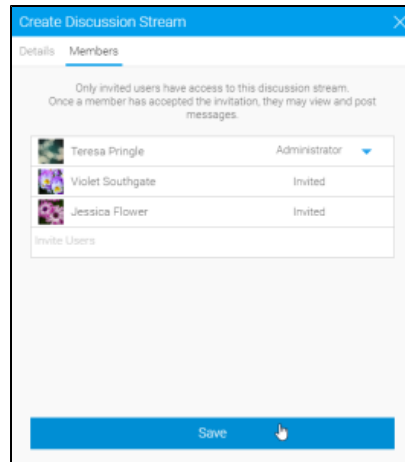
14. You will now see your new stream, you're ready to start posting.
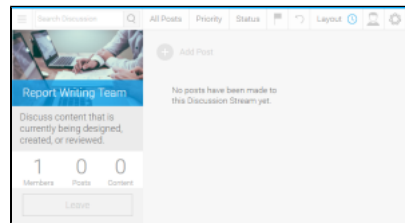
Locating a Stream

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.

Left Side Navigation	Browse Page
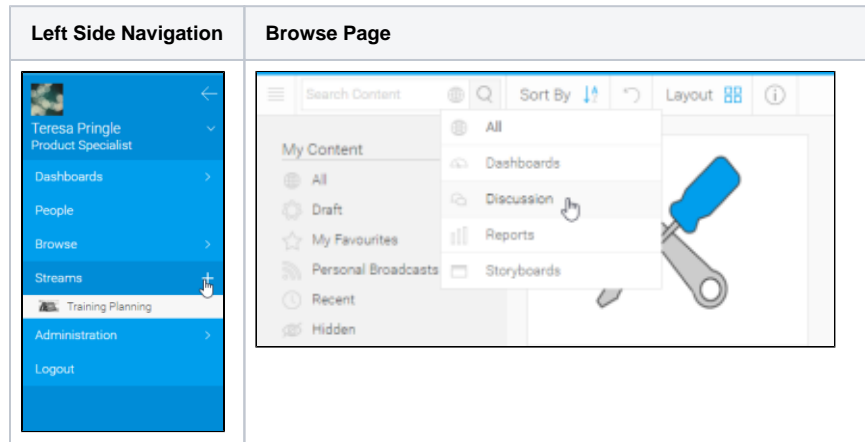
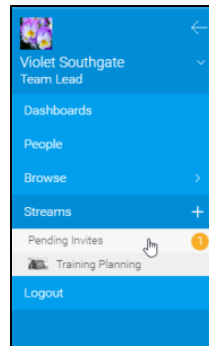2. Double click on the stream you wish to open from the Browse page.
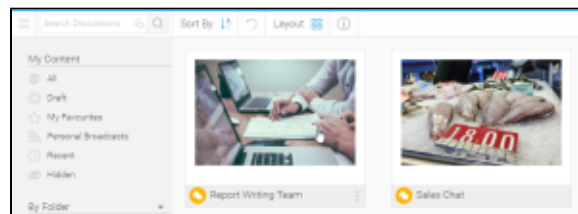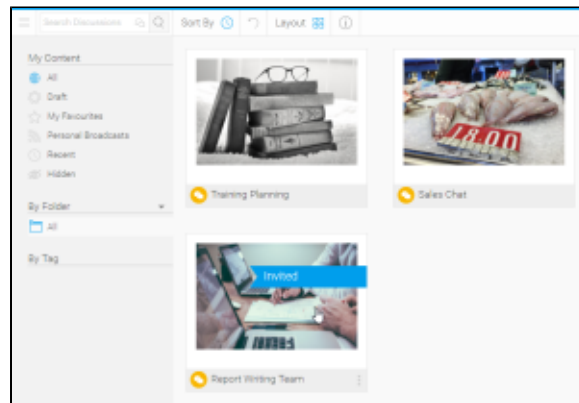

Joining a Stream

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.
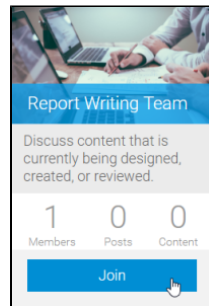
Follow these steps to join a stream:

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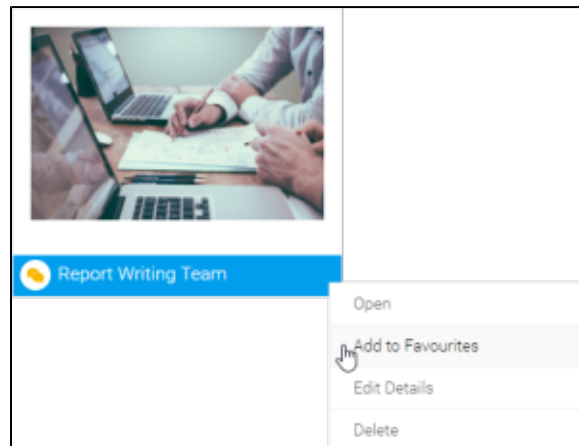
2. Locate the stream you wish you join.

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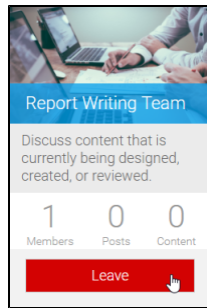

... click on the stream options from the browse page and select the **Add to Favourites** option.
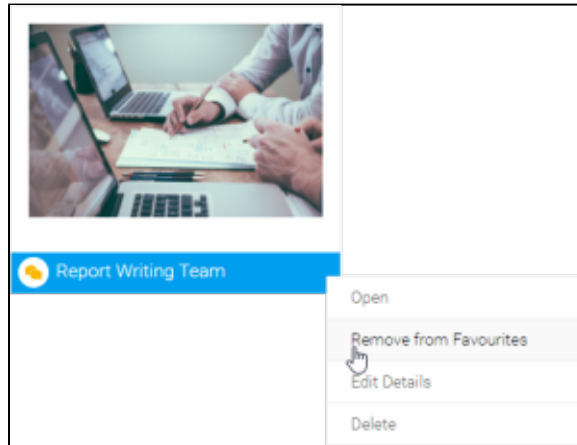

Leaving a Stream

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
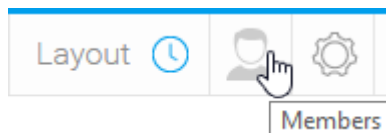
top

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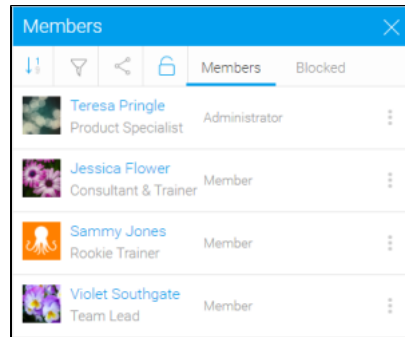
Viewing Members

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

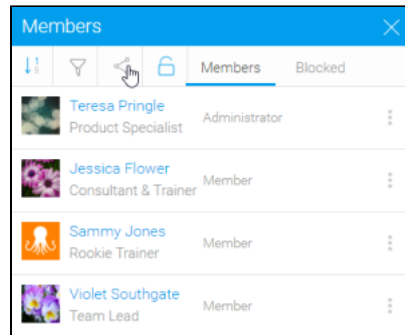1. Locate the stream and view it.

2. Click on the **Members** icon.

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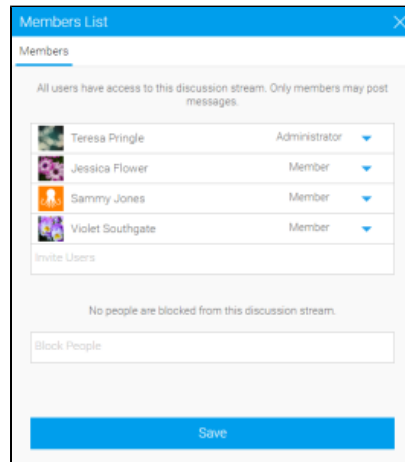
Inviting Members

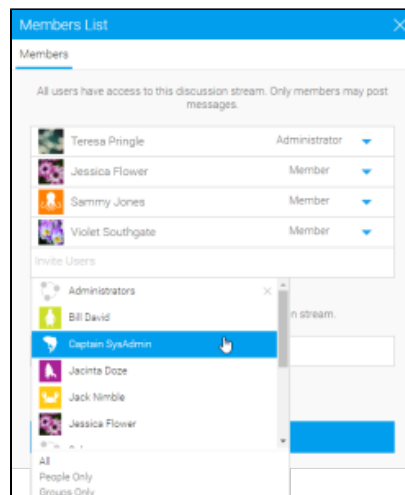To invite members to join your discussion stream, follow these steps:

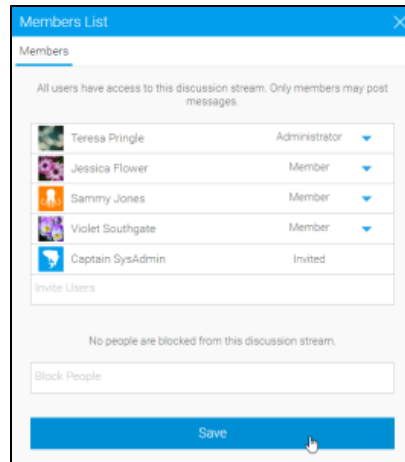1. Click on the **Share** button on the stream's members list.

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.

4. When you have finished adding users/groups click **Save**.
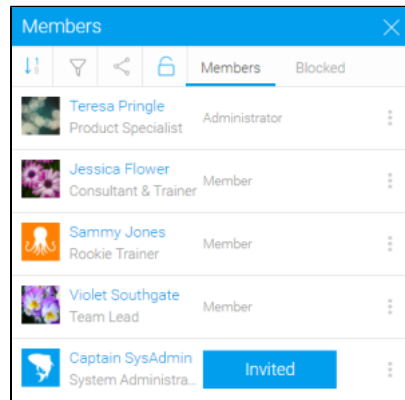
5. You will now see the users as **invited** in the main members list.
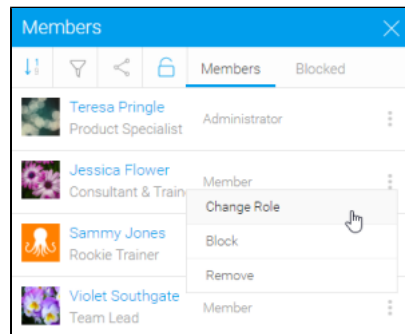
Member Permissions

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.

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

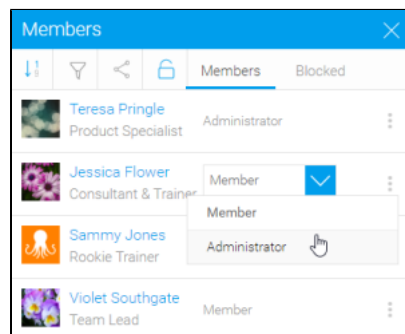If users no longer need to belong to a discussion stream they can remove themselves, but an administrator can also remove them by following these steps:

1. While viewing the Members list on a stream, click on the option button next to a user and select the **Remove** option.
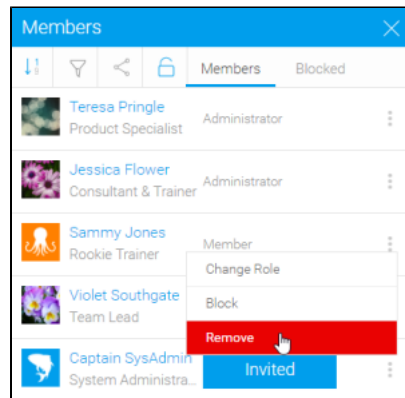
2. Confirm you would like to remove the user by clicking the **Ok** button on this prompt.
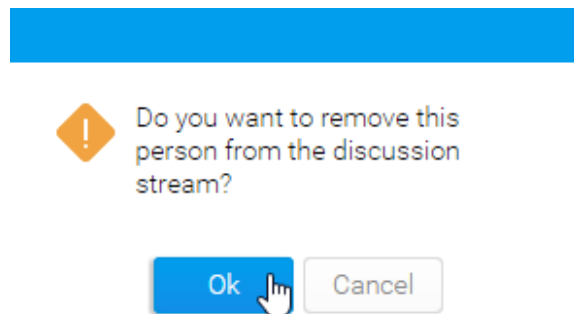
Blocking Members

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:

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

The user will now be moved from the **Members** list to the **Blocked** list, removed from the stream and prevented from rejoining.
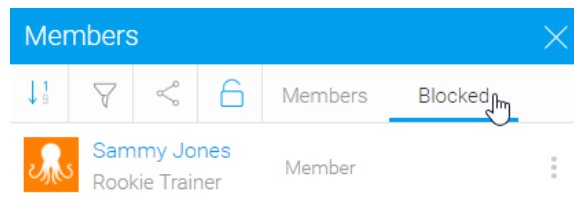
Layout

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

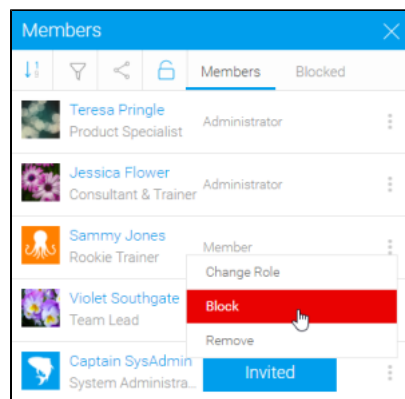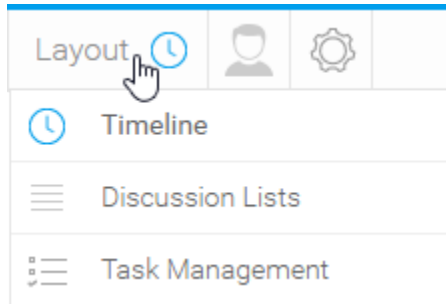| Layout	Description
Timeline	The timeline feed displays a list of activity that has taken place within the Discussion Stream. This can include new threads, responses to posts, and task activity. This behaves the same way as a user's timeline feed. See *Timeline* for more information.
Discussion Lists	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 Management	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

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.

Option	Description
Search	This search allows the user to narrow down the events they see in the feed, in order to locate specific posts or pieces of content.
Post Type	This option allows the users to specify which type of posts they see in the feed, from; ○ Tasks ○ Discussion Streams ○ Proposals ○ Decisions
Priority	This option allows the user to specify the items they see based on the priority assigned to them: ○ All ○ Low ○ Medium ○ High

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.