

Discussion Lists

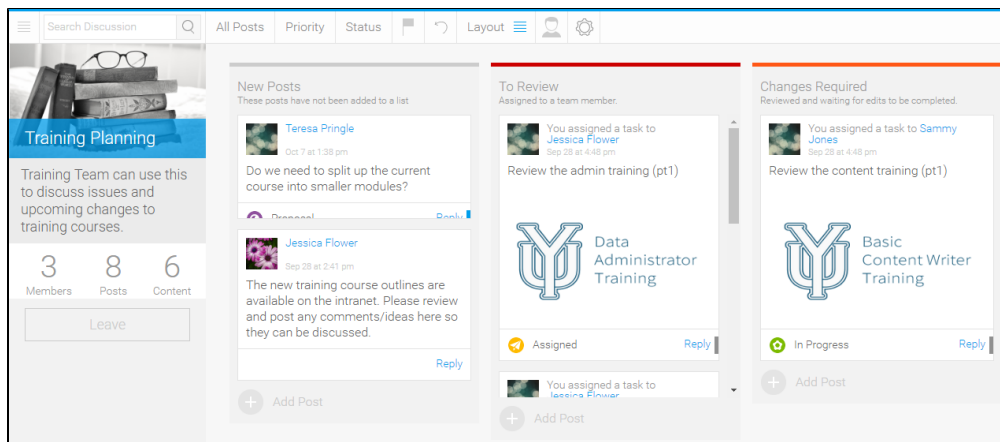
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Overview

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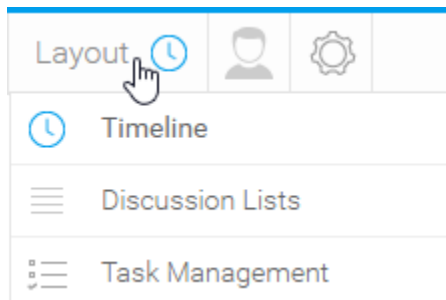
Discussion lists allow you to group all the posts, tasks, and content from a discussion stream into lists defined by you and your team. Lists can be used for a variety of reasons - common uses include grouping items into;

- **Categories** - this can be useful when a stream is often used to capture ideas and brainstorming. All ideas/posts can be grouped into different topics or categories so they can be explored with similar or supporting items. This saves searching through a large stream for posts and potentially missing them.
- **Statuses** - this can be useful when a stream is often used to keep track of current tasks, issues, or projects. Lists can be created to hold items for each phase or step in a process and items can be progressed through the lists in order to manage them.
- **Sub Teams** - this can be useful when a stream is used by a large team that is broken down into smaller teams or partnerships during mini projects. This way all the posts are still maintained within one stream, but each sub team has their own list.



Discussion Lists Layout

Discussion streams have a default layout defined during their setup. If your stream is not set to display as lists by default, you can change to list view by selecting the **Discussion Lists** option from the **Layouts** menu.



List Setup

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Creating Lists

In order to start grouping your stream's content, you will need to create some lists. To create a list, follow these steps:

1. Click on the **Add Lists** button while viewing your stream in **Discussion Lists Layout**.



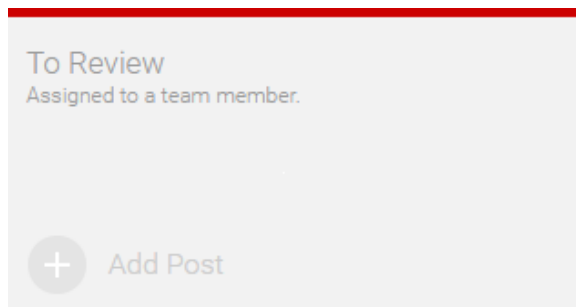
2. Provide some details for your list:

- **Title:** this is the heading for your list, used to identify it.
- **Description:** this is the description displayed under the title of your list. It's used to describe what the list is used for. *Optional.*
- **Colour:** this is the colour band displayed above the title of your list. It's used to help quickly identify it. *Optional.*

A blue-titled dialog box titled 'Add list' with a close button. It contains three input fields: 'To Review' (Title), 'Assigned to a team member.' (Description), and 'Colour' (with a red color picker). A blue 'Submit' button is at the bottom, with a hand cursor pointing at it.

3. Click **Submit**

4. Your list will now be displayed, empty and ready for posts/content to be added.

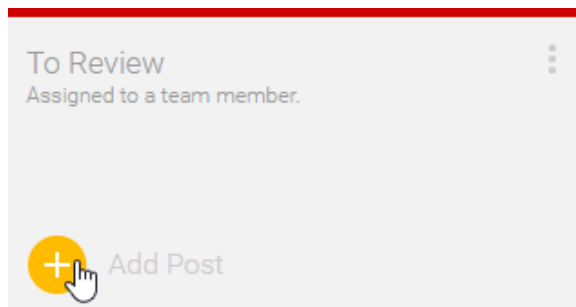


Using Lists

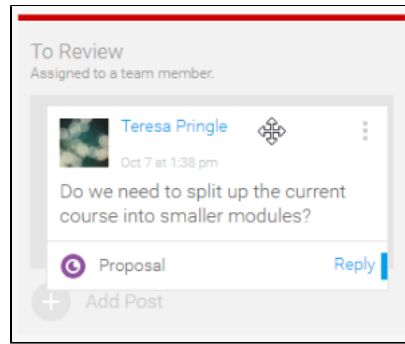
Once you have a list created you will need to know how to populate it. Follow these steps to add content to your list:

A: You can click on the **Add Post** button on your list in order to create a new comment or task and add it to this list.

OR



B: You can drag existing posts/content /tasks from the **New Posts** default list on the left of your stream, to your new list.



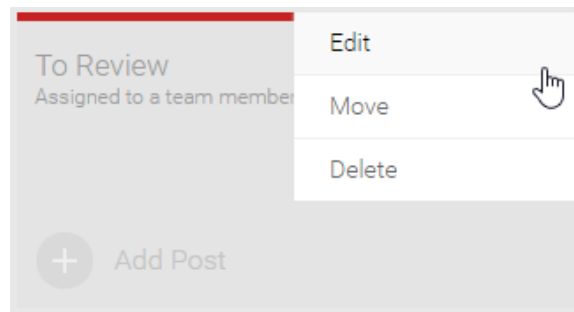
List Management

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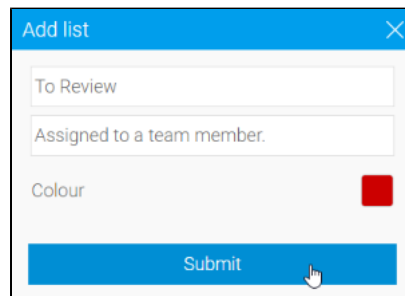
Editing Lists

Once you have created your lists, you may find that you need to make adjustments to them. To edit the details of your list, follow these steps:

1. Open the list options menu and select **Edit**.



2. Adjust the title, description, or colour and click **Submit** to save your changes.

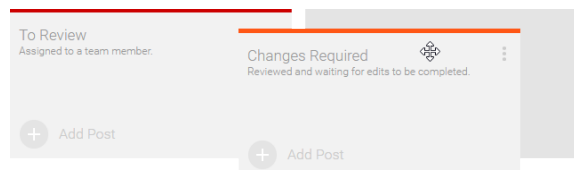


Moving Lists

Sometimes you may need to reorder your lists, or potentially move them to another discussion stream. Follow these steps to move a list:

- A: If you want to reorder your lists within a stream, click and drag the list across the stream's page to move it.

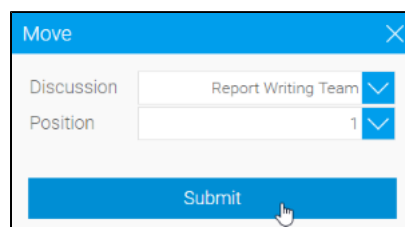
OR



- B: If you want to move your list to a different stream, open the list options menu and select **Move**.

From here you will be able to select the discussion stream and the list position number.

Click **Submit** to move the list.

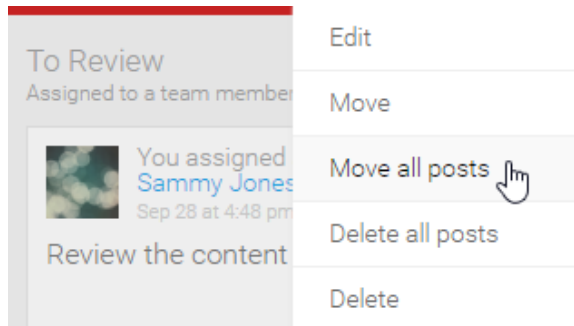


Note: this will move all items contained within the list to the new stream.

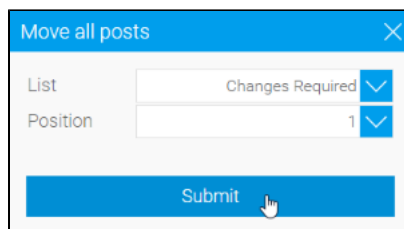
Moving Posts

Sometimes you may want to merge lists. To do this you will need to move all the items from one list to another in the same stream. Follow these steps to move all posts in a list:

1. Open the list options menu and select **Move all posts**



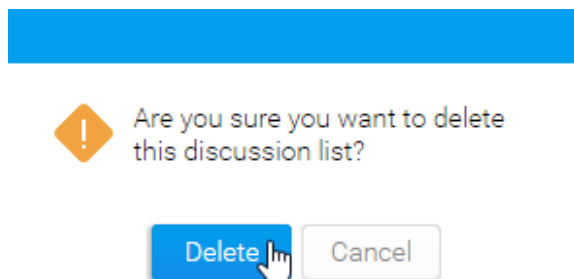
2. Select the list you wish to move the posts to, and where in the list order you want them to appear. Click **Submit** to move the posts.



Deleting Lists

If you are no longer using a list, you can follow these steps to delete it:

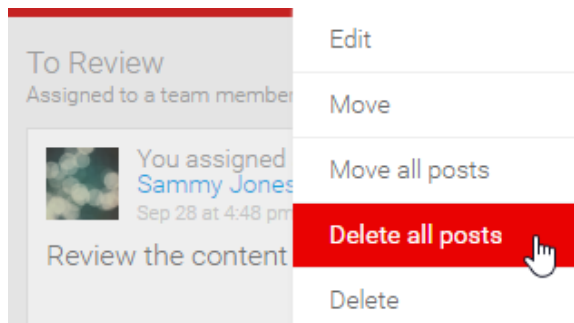
1. Open the list options menu and select **Delete**.



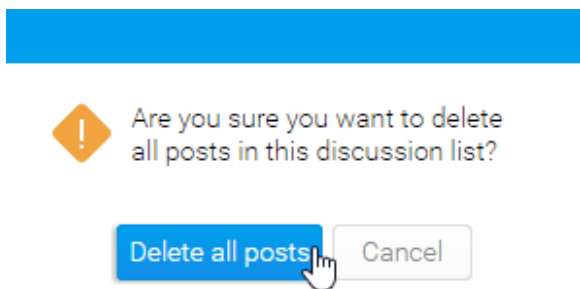
Deleting Posts

Sometimes you may wish to clear out a list, deleting all the posts contained within it. This might be if you are using a list to monitor completed tasks or ideas and have come to the end of a cycle and want to clear out old items. To delete all the posts in a list follow these steps:

1. Open the list options menu and select **Delete all posts**.



2. Confirm you want to go ahead by clicking the **Delete all posts** button in the prompt.



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