Table of Contents

Introduction to Discourse	1
Background	1
Migration Notes	. 1
Discourse Administration for Listowners	. 1
Finding list content:	1
Finding list administrative controls, such as user maintenance:	2
To remove list members:	2
To add an existing BCLC Discourse user:	3
To invite new members:	. 3
End-User Discourse Help	4
Logging In	4
To see the messages in a list:	4

Introduction to Discourse

Background

As of January 2025 the Co-op has had to move off of its old mailing list software on to Discourse. Discourse is primarily a web-focused discussion forum application, but can be configured to act like a traditional mailing list with users receiving and replying to discussions primarily through email. As such, the architecture of the application is significantly different than Sympa, which was already quite nuanced and complex.Below are some instructions for list-owners and for list-members to get you started.

In addition to these initial help docs the software itself provides extensive documentation at https://meta.discourse.org/c/documentation/10

Migration Notes

We have migrated the archives of the old sympa list into the new system, so all old discussions are preserved. Users will be able to view these archives (as well as future discussions) by going to https://discourse.libraries.coop/ and logging in.

We have also migrated all existing subscribers to the new list.

Discourse Administration for Listowners

As a list administrator, you'll need to log into the web interface for some administrative purposes. You can log in at:

https://discourse.libraries.coop/

You can log in using your username and password, or have Discourse email you a login link to your registered email address.

Finding list content:

🔿 👌 🕶 https://discourse.libraries.	соор				☆
Discourse				,	Q 🂕
Topics	categories Itags Latest Hot Categories		+ New Topic		
My Posts Groups	Торіс		Replies	Views	Activity
: More	■ Welcome to BC Libraries Co-operative Discourse! 8				
CATEGORIESGeneralSite Feedback	General We are so glad you joined us. BC Libraries Co-operative Discourse Lists hosted by the BC Libraries Co-operative Here are some things you can do to get started: Introduce yourself by adding your pictu read more	0	0	3	Nov 2024
All categories MESSAGES	A test post for visibility ■ a testing2	K	0	1	Nov 2024
Inbox	Welcome to BCLC Co-op staff testers General	ß	2	5	Nov 2024
∨ DMS	There are no more latest topics.				

The list messages can be found by clicking "All categories" in the left navigation column, then the name of the list in question.

Finding list administrative controls, such as user maintenance:

O A ≈ https://discourse.libraries.	coop/g			ដ
Discourse			🗩 Q (ß
Topics	All Groups Filter by group typ	0e ▼		
My Posts				
🚨 Groups	BCI C Staff 2	€ 2	moderators	. 2
: More	DOLO SIAN 2	-	Responsible for responding to flags, moderating discussions, and helping members with their accounts	
General	✓ Member		Automatic	
Site Feedback				
i≡ All categories				
✓ MESSAGES				
Inbox				
✓ DMS				

- click Groups in the left navigation column
- select the desired list

To remove list members:

- select the wrench icon to the right of the member information for the member to remove
- select Remove member

To add an existing BCLC Discourse user:

○ A == https://discourse.libraries.coc	op/g/cooperators					
	j started				🗩 Q K	
 Topics My Posts Review 	BCLC Co-op staff cooperators				≛ * Leave <u> </u>	
≁ Admin Groups	Test group for figuring out mailing list ops.					
 ✓ Invite : More ✓ CATEGORIES 	cooperators Members (6) Activity Manage	Permissions				
GeneralSite Feedback	username or email				+ Add Users + Invite	2
Staff I All categories	Username JaneW		Added	Posted	Seen	
 MESSAGES Inbox 	Kev	• Owner	1000 19, 2024	1000 19, 2024	Dec 16, 2024	
 CHANNELS General Staff 	Kevin	v Owner	Dec 15, 2024	NOV 25, 2024	just now	
✓ DMS	scott.leslie	♥ Owner	Nov 12, 2024	Nov 21, 2024	Dec 16, 2024 🏓	

- click Add Users on the right side of the page
- click Select, and type the first few characters of the username/email address
- click the Add button

To invite new members:

0	合 ☞ https://discourse.libraries.	.coop/g/cooperators						☆
=								
() •(Topics • My Posts Review	BCLC (coopera	Co-op staff tors		-	-	* Leave 💼 Dele	te
¥	Admin	Test grou	Invite members		×			
-	Groups		Destrict to (optional)					
1	Invite		name@example.com.or.example.com	n	_			
:	More	cooperator	name@example.com of example.com		_			
~	CATEGORIES		Max uses					
	General				_			Invito
	Site Feedback	:= use	Expire after		_		T Add Osers T	mvite
	Staff	Username	30 days	~	_	Posted		
IE	All categories	Ja	Arrive at topic (optional)					
~	MESSAGES			-	24	Nov 19, 2024	Dec 16, 2024	F
	Inbox	K	Add to groups (optional)		_			
~	CHANNELS	K	cooperators	+	24	Nov 25, 2024	7 mins	¥
,	General				_			
•	Staff	K	Create link Cancel		24	Nov 21, 2024	Dec 16, 2024	۶

- click Invite on the right side of the page (requires trust level 2)
- click Edit link options
- Restrict to" is optional, but helps keep invite links from being misused; consider putting the email address or domain of the user there to reduce the risk
- for "Max uses", keep it low, but probably not lower than 3, even for a single user if they have to retry the onboarding process for some reason, it may consume a "use"
- for "Expire after", the default is 30 days, but we recommend keeping this to a reasonable period for your uses; 7 to 15 days probably makes more sense than the default for most uses
- for "Arrive at topic", leave it blank this is functionality for public groups, and our groups are private
- for "Add to group", select the group that corresponds to your list; you may have to type a few characters of its name; if you do not do this, the user will not be added to your list and you will have to do the "add an existing BCLC Discourse member" step listed above
- click Create link, and provide that link to your intended list member

The invites automatically ensure the new user has all of the settings for receiving all list posts via email. Note that it is possible for the user to log into Discourse and change these settings, though we do not recommend it unless the user in question is quite familiar with Discourse in specific and will not have trouble getting their list messages.

End-User Discourse Help

Logging In

If you do not currently have an account:

- click on the provided link
- provide your email address, username, and a password
- click Accept Invitation

If you have an existing account on the Co-op's Discourse server:

- click on the provided link
- click "Log in" at the bottom of the page
- provide your existing username and password
- click Log In

You will be sent a confirmation, to ensure you are not unintentionally subscribed to a list. Please click on the link in the confirmation message and then the Activate button to complete your sign-up to the list.

To see the messages in a list:

2025/03/14 14:09

5/5

Ĵ ြ 려 Https://discourse.librar	ies.coop/g		ង
Discourse			🗩 Q 💕
Topics	All Groups Filter by gro	up type 👻	
My Posts Groups			
: More	BCLC Staff 2	2 moderators	2
✓ CATEGORIES		Responsible for responding to flags, moderating helping members with their accounts	discussions, and
General	✓ Member	Automatic	
Site Feedback			
I≡ All categories			
V MESSAGES			
Inbox			
V DMS			

• click "All categories" in the left navigation

From the message view or list view there are various actions that can be taken on messages – editing, deleting, and the like. Please note that these operations cannot be undone, and may have consequences you don't intend. Please consult with us if you are unsure of how to achieve a given goal and we'll be happy to help.

From: https://wiki.libraries.coop/ - BC Libraries Coop wiki Permanent link: https://wiki.libraries.coop/public/discourse-how-to?rev=1736551047

Last update: 2025/01/10 15:17

