How to use Chat in Microsoft Teams

Contents

Glossary

Chat: the space attached to every Teams meeting where those invited can have a conversation during the meeting and access attached files. A chat can also take place between two or more people as instant messaging (without a meeting).

Application: the different programmes within O365 are called applications, e.g. Outlook, Word, Teams. Often these are called 'Apps' for short.

Icon: the 'logos' of the different applications (e.g. Word is a blue W, Excel is a green E, OneDrive is a blue cloud) or web browsers (e.g. Chrome is a coloured circle).

Window: in computer terms, a window is an area on the screen that displays information about a programme. You can have multiple windows open, displaying different websites, documents and applications.

Ellipsis: the 3 dots you will find next to various lists and commands. An ellipsis is used when there is not enough room to display all options and is sometimes called the More Options area.

Microsoft 365 and Office 365: this is essentially the same thing and both names are used for the applications such as OneDrive, Outlook, Teams, Word, Excel.

Channel: in Teams, communication and tasks happen in channels. A channel is a single place for a team to share messages, tools, and files. They can be organised by group, project or whatever else is relevant. For now, channels are not enabled for most of Barnardo's.

Internal and External: for Teams purposes, an internal person is one with a Barnardo's email address; an external is someone attending a meeting who has no Barnardo's email but was invited.

Notifications: the means by which Teams lets you know you have a call, a message, a voicemail, etc. They will either appear in bottom left of your screen or will appear in the Activity app within Teams.

OneDrive: this is Microsoft's own storage in the Cloud. It works in the background of Office 365 and is your personal storage space. It is secure and cannot be accessed by others.

What is a chat?

Chats are a way of communicating with individuals or smaller groups within the Microsoft Teams app.

There are two ways you can use the chat function:

- Attached to a specific meeting (automatically done)
- For instant messaging with one or more people with no meeting involved

Chat icons

 A chat attached to a meeting has this 'calendar' blue icon.

 A chat with another person has either their initials or their picture.

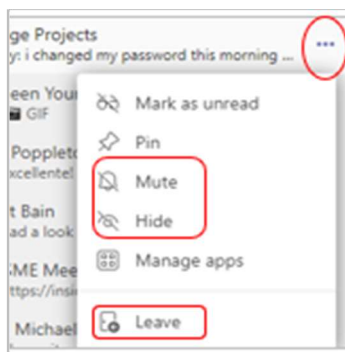 A group chat has pictures or initials of the group participants.

 The icon with a bell crossed through indicates that you have put this chat onto mute.

Can I delete a whole chat?

No, nobody can delete a chat once it has started. You can do one of three things, all of which can be found by clicking onto the ellipsis of a chat.

- Mute the chat
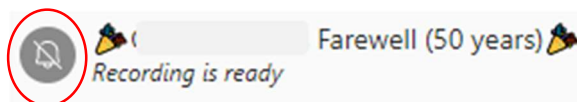- Hide the chat
- Leave the chat

Mute

Mute will keep you in the chat but means you won't get notifications whenever someone adds to the conversation. You can still look at the chat and see the new messages but Teams will not notify you of them.

This is a good option for any busy chats that you find distracting so you want to see the new messages in one 'catch up' when you choose to.

You can tell if you have a chat muted as it has an icon which is a bell with a line through.

Hide

This keeps you in the chat but puts it 'away' so it is not displaying in your chat list. If you decide later that you want to see it again, just use the Search field to find it, then 'Unhide' it by clicking again.

Leave

This removes you from a chat but is only available for chats between more than two people.

Can I delete individual messages within a chat?

Regardless of whether a chat is attached to a meeting or not, you can edit or delete your own messages. **However, you cannot do this with other people's messages.**

This is the ellipsis area in each of your own messages, showing options for Edit and Delete.
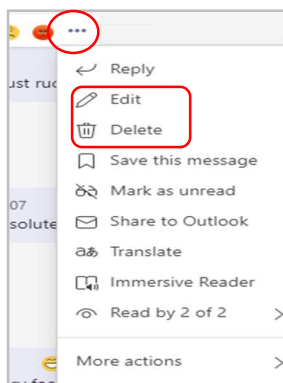
This is the ellipsis area in other people's messages – as you can see, there is no Delete or Edit option.
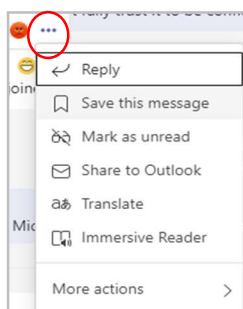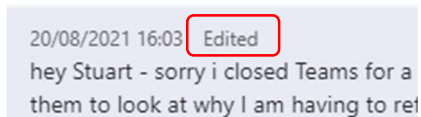
Edit

Click onto Edit and your message will appear for you to make amendments. Once done, click onto the 'tick' in the right corner of your message to save your edits.
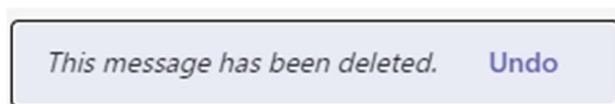

Your message will appear with your changes made and will have 'Edited' next to the date and time.


Delete

Once you have clicked onto Delete, you will see this message, but you can undo your deletion at a later time if you change your mind.

Sharing files in a Chat

Any files or documents you share in a chat must be stored in the OneDrive of the person posting the files. If you move documents from their place in OneDrive, people will no longer have access to them in any chat where you posted them.

When sharing files in a chat, you can still set permissions for access if you want to. A link settings box will appear in the same way as sharing from any Office 365 app, but the default here will be 'People currently in this chat'.
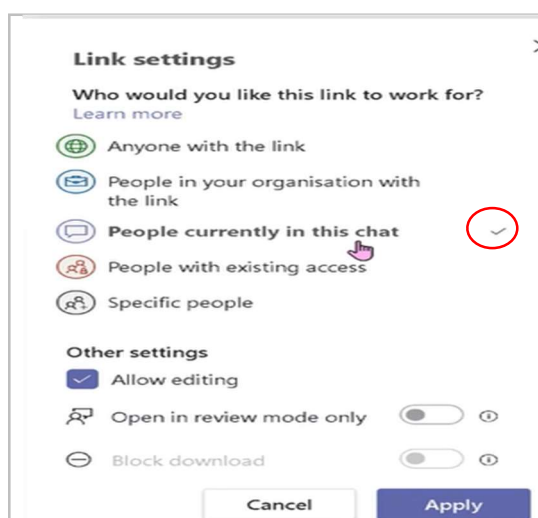
Chat tabs

Within a chat, you will have tabs across the top of the page. These will differ depending on if your chat is attached to a meeting or not.
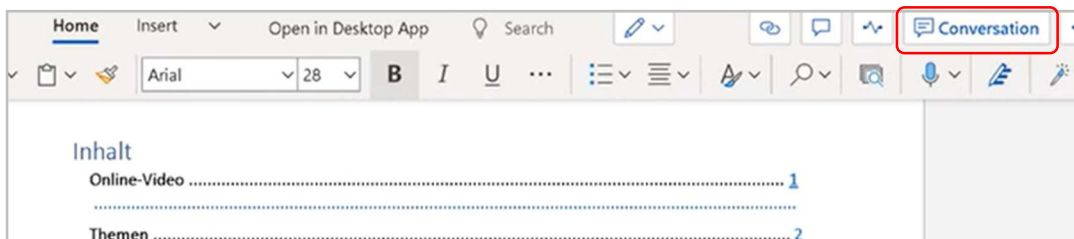
Instant messaging chat with a person(s) – defaults are Chat, Files, Organisation and Activity but you can add more if you need to by clicking onto the 'plus' sign.
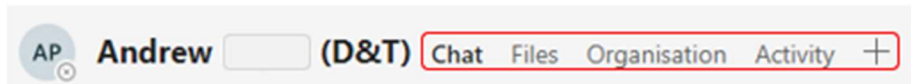

A meeting chat – defaults are Chat, Files, Meeting Notes and Whiteboard., but again you can add more by clicking on the Plus sign.
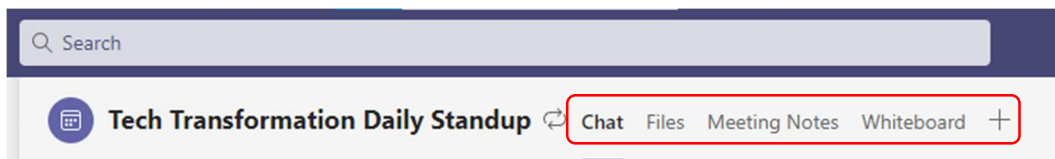
When you are in the Files tab, you can open and continue the conversation to the right.


You can add other tabs such as Forms, Excel, Word by clicking onto the 'plus' sign. For example, adding a Word tab will make it easy to find any Word documents shared within your chats. Or you can even rename the 'Word' tab as a specific document name.
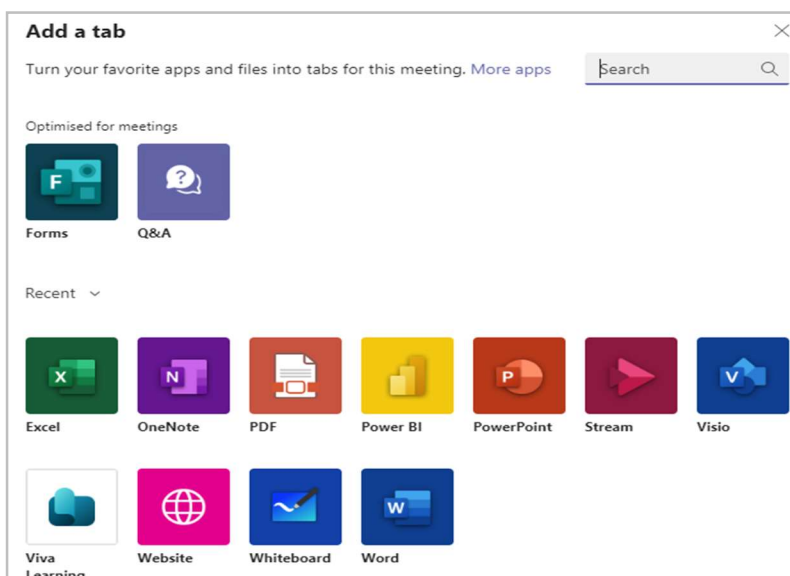
A chat attached to a meeting

Each meeting you attend will have its own chat that can be seen by **only the invited people**.

If it is a recurring meeting, the chat will continue as one single chat, marking the time and date that each separate meeting starts and ends.
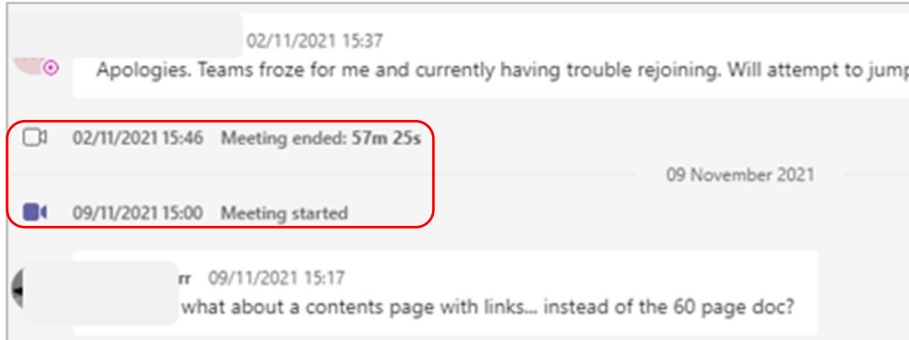

For internal attendees, the chat is available even after the meeting has ended but remember that others might not monitor the chat afterwards if you post a comment.

Currently, external guests without Barnardo's email cannot access the chat before or after a meeting but can do so during a meeting.

New chats

New chats will arrive in the Chat column of the Teams main screen. You can type into any chat before, during or after the meeting; this way, you will have access to any document or link shared in the chat.
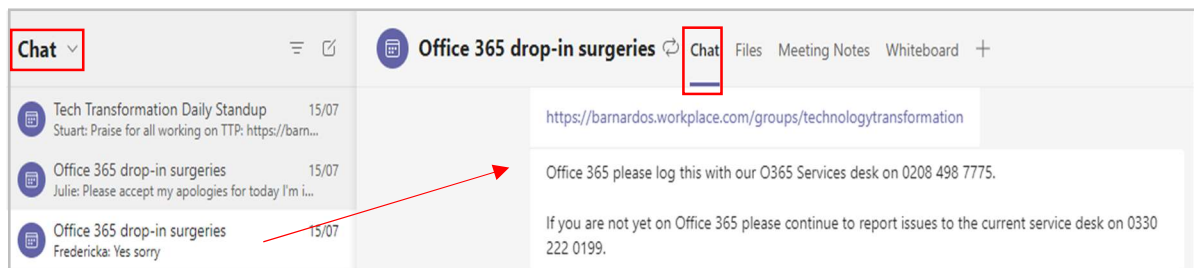
Chat pre-meeting

If you wish to start a chat for a meeting before it starts, find the meeting in your Teams calendar (not Outlook) and right click.

Choose 'chat with participants' and start your chat.
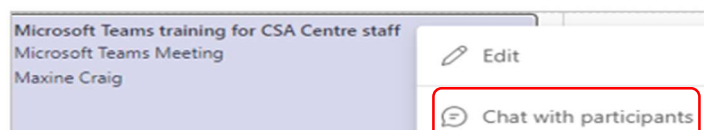
Chat during a meeting

This chat space is where you can add links for others to access, ask questions, attach files, etc whilst the meeting is taking place. In a large meeting, it is good practice to use the chat space rather than have lots of raised hands, although it is up to the organiser to make sure the chat is monitored.

To access the chat during the meeting, click onto the 'Show conversation' icon on your control panel - the current conversation will appear to the right.
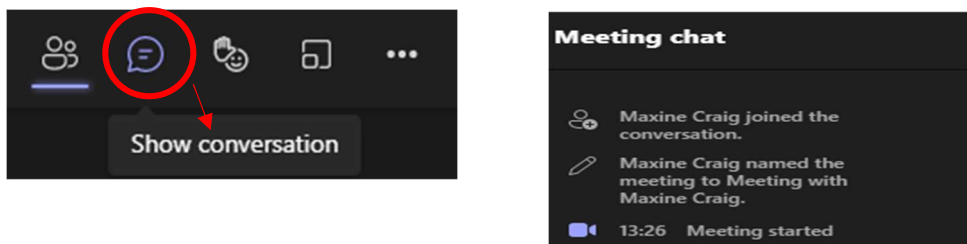
Type your comment or question into the 'type' box, use the paperclip icon to add any files you want attendees to see, use the '!' to set the message importance, or add an emoji, GIF or sticker. You can also paste hyperlinks into this space rather than attach files.
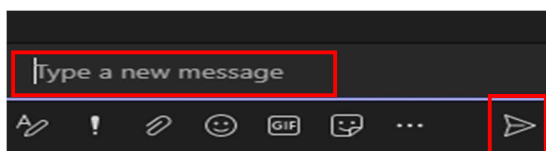
You can also access the chat as you would before or after the meeting – via the main Teams screen. This is particularly useful if you have a dual screen set-up so you can have the live meeting window on one screen, and the chat on another screen.

Chat controls

When you are in a chat attached to a meeting, there are a couple of icons in top right of your Teams screen.


Add participants

You can add people into a current chat using the People icon.

If the icon has a number next to it, that is how many people have been invited to the meeting, but not necessarily how many are attending.

When you click onto the People icon, the 'Add' box appears for you to choose what access the new participants will have to any previous conversation in that chat. You can choose that they see none of the previous conversation, that they see all of the conversation history, or you can choose to go back a set number of days to share.
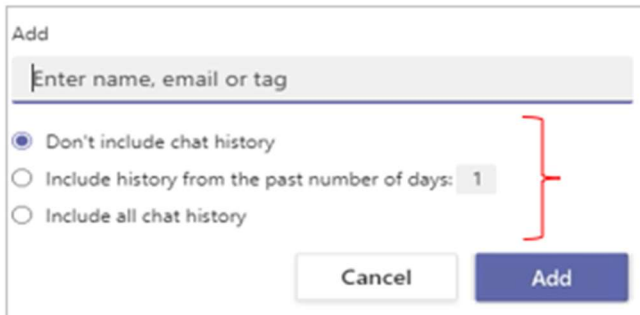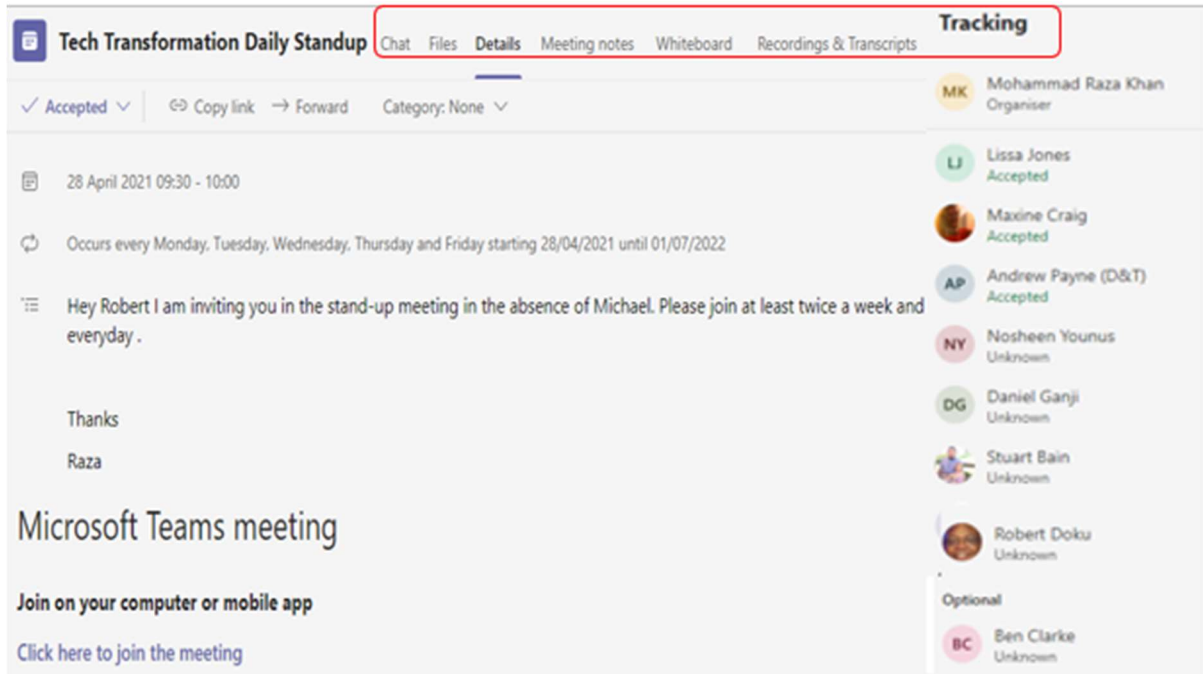

View meeting details

The other icon in top right is 'View meeting details'.

If you click onto this, a page will open showing all meeting details, including time/date, meeting link, the appointment email and who it went to, the meeting tabs, and a tracking column.


You can see who has accepted the meeting from the Tracking area and you can see who is the meeting Organiser (who created it)

Recordings and transcripts

Also available in the chat space is any recording or transcription that has been made in your meeting.

A recording and a transcription will automatically be available to the internal invitees of your meeting. Even if Barnardo's colleagues were invited but did not attend, they can view the recording or read the transcription because they have access to the chat.

Both can be accessed via the Chat space.
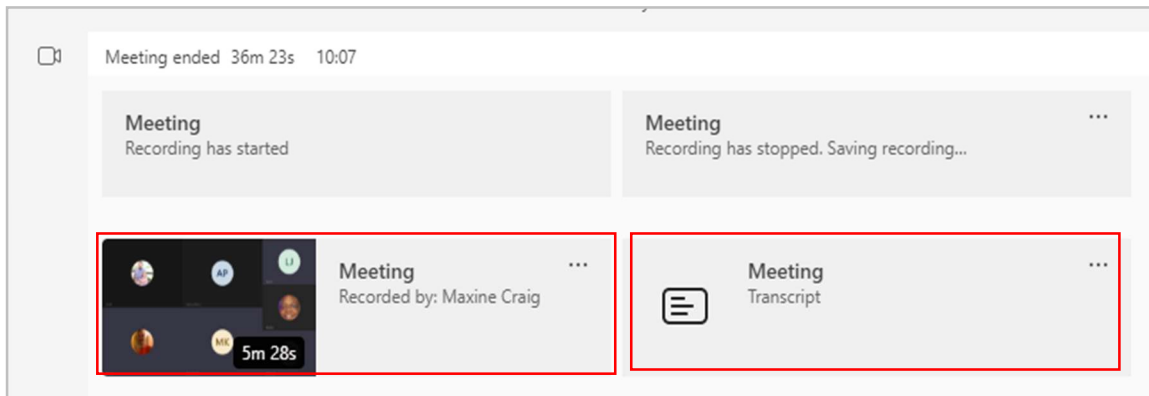
For full guidance on recording and transcription, please see the relevant guide on the Inside Barnardo's Teams training page.

https://inside.barnardos.org.uk/teams-training-and-guidance
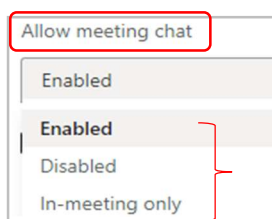
Changing the availability of a meeting chat

You can disable a chat or make it available only during the actual meeting; however, only the Organiser can do this.

Go to Meeting Options via the Settings button of your meeting invite.
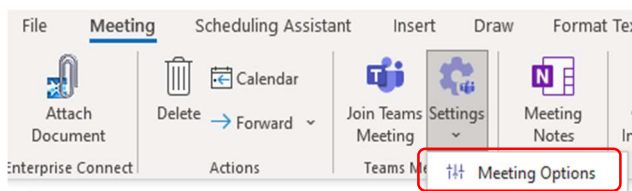
Find the 'Allow meeting chat' drop-down area and choose which setting you want.

- The default is that chat is **Enabled** and is available before, during and after the meeting.
- **Disabled** means nothing can be added to the chat from that point – the Organiser can disable a chat any time, even after a meeting ends.
- **In-meeting only** is the option if you just want participants to converse during the meeting and for the chat to close when the meeting ends. The chat is still available to read but nobody can add to it.
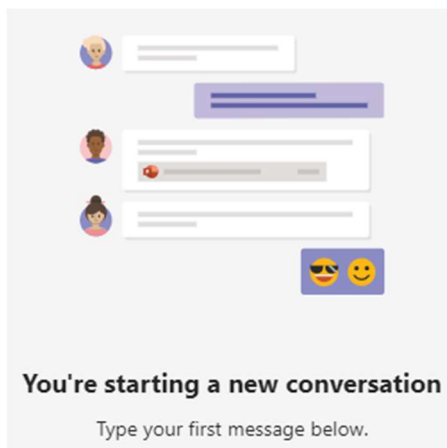
A chat not attached to a meeting

You can use chat even without a meeting as long as your recipient is logged on to Teams.
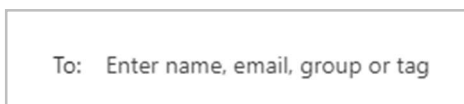
Just click onto the 'New chat' icon in your chat column.
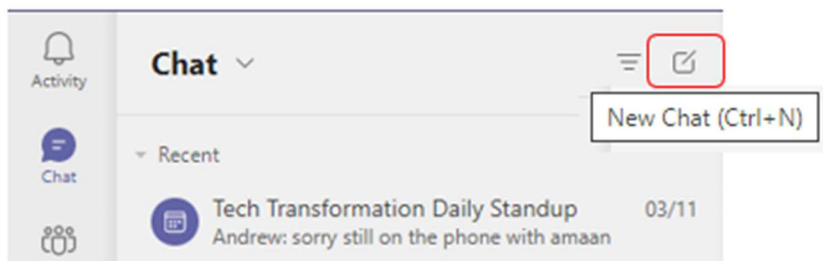
A blank chat screen will appear to the right, telling you that you are starting a new conversation.

At the top is the 'enter name' field.

When you start typing names, the system will suggest some for you.

Note: If you type in the name of a person or group of people you have chatted with before, Teams will find the previous chat chain and continue from that one. This way, all of your conversations with the same person/group are kept together like an email trail.

Use the 'type new message' field along the bottom of the screen to write your message.
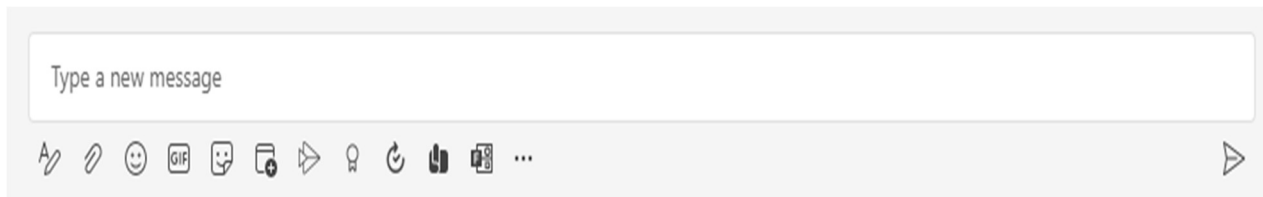

Under the 'type' field, you can adapt your text –

- Click on the A icon for normal Office 365 formatting such as bold, italics and underline, strikethrough, font size, bullet points, insert link or insert table.
- Click on the paperclip icon to attach a file from either OneDrive or your computer.
- Add emojis, GIFs, stickers.
- Create a Microsoft Form using the icon with the F.

When writing a chat message, you can use the return key to get to a new line in the message.

Chat controls

Within the chat screen, you have some controls in top right of the screen.
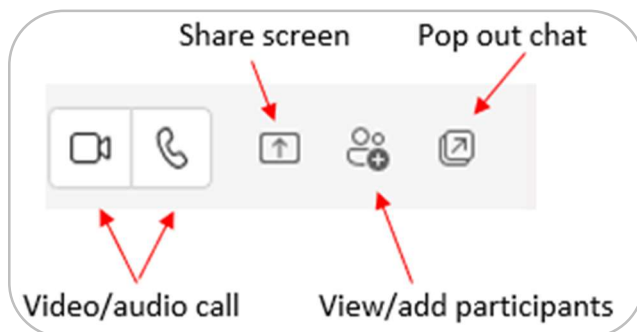
Pop-out

In any chat, you have the ability to 'pop out' the chat to open it in a new window if it makes it easier to follow and interact.

You can share your screen if needed.

Video/Audio call

If using Chat outside of a meeting, sometimes you may decide a call is quicker after you have started a chat with someone. Any chat conversation can be converted to a video or audio call by using the camera or phone icons in top right of the screen.
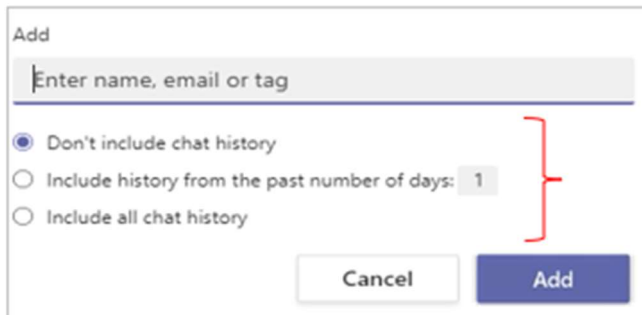
Add participants

You can add people into a current chat using the People icon

The 'Add' box appears for you to choose what access they have to any previous conversation in that chat. You can choose that they see none of the previous conversation, that they see all of the conversation history, or you can choose to go back a set number of days to share.

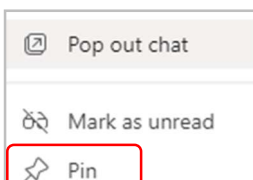You can name a chat by using the pen icon next to the names

Everything you do will be documented in the chat –
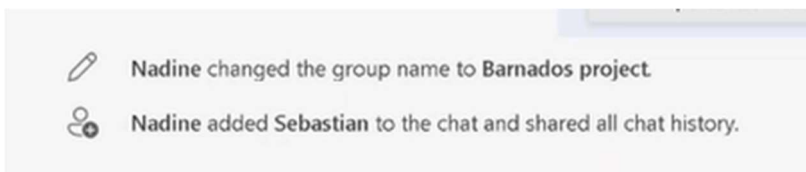
Keep important chats handy

You can pin chats to keep them at top of list if you have any that you access regularly. Click onto the ellipsis (…) next to the chat in the chat space and choose Pin.

Search Bar

The chat search bar is a useful tool. You can type in a subject and it will bring up results divided into Messages, People or Files. You can press ' enter' to see all results.
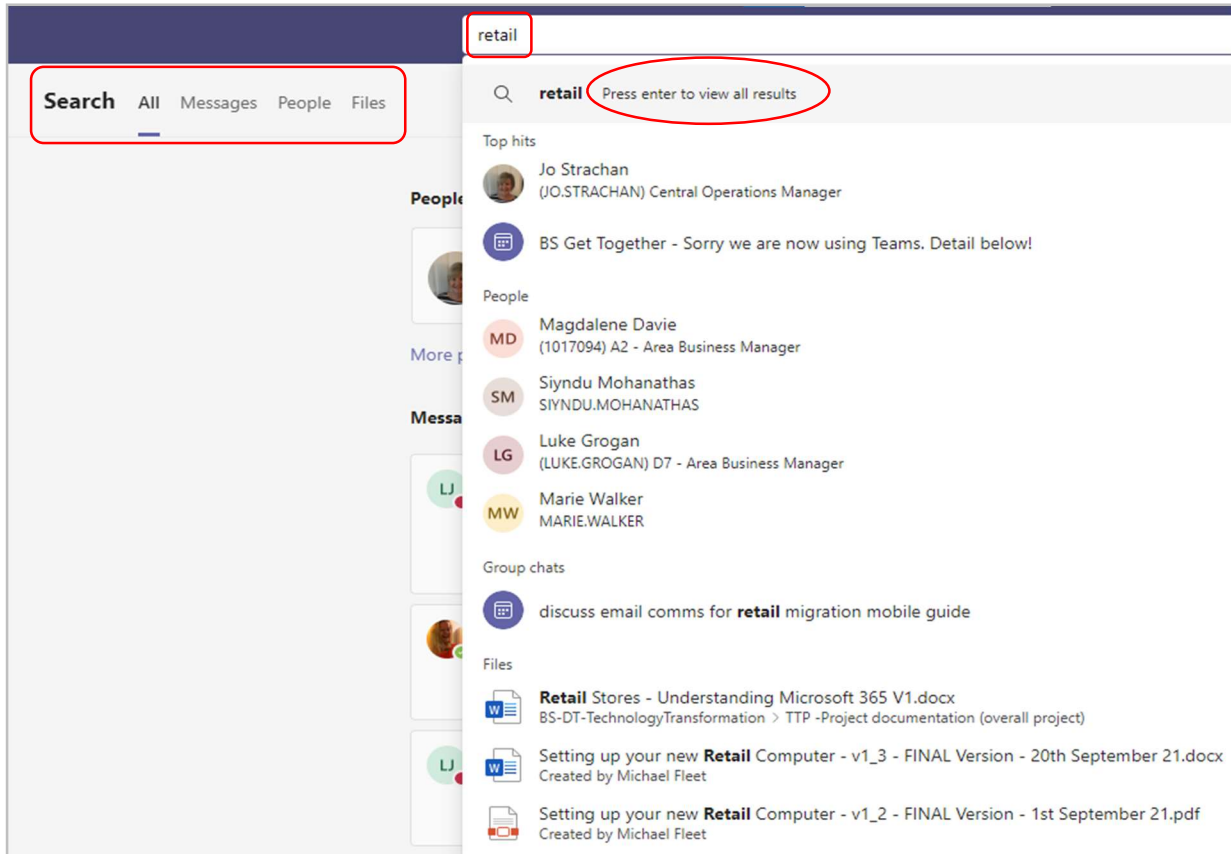
Chat using Search bar

You can actually use the Search bar to have a conversation if you prefer.

Input **/chat** into the search bar and you can choose a person it suggests or start typing a name in the Person field.

Then type your message. **Note** that it will not check spelling errors this way.

Then press the blue arrow to the right and your message will send.