Chat Handbook

Lightweight in-app messaging for your staff — named channels and one-to-one direct messages, strictly scoped to the entity a person belongs to.

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Reference

Chat is IXL CORE's built-in staff messaging. It gives the people in an entity a place to talk — a shared **#general** channel everyone lands in, purpose-built **channels** you create, and **direct messages** one-to-one — without leaving the platform or reaching for a separate tool. It is deliberately focused: this is internal staff communication, not a customer-facing inbox. Messages carry text, **@mentions** and **file or image attachments**, and everything is scoped so a person only ever sees and messages colleagues within their own entity.

This guide is a reference for what the module does and how the pieces fit together. It describes IXL CORE **version 1.0**.

Overview

At a glance, Chat covers these connected areas:

- **Channels** — named, entity-bound rooms for a team or topic, plus an automatic **#general** every entity gets.
- **Direct messages** — one-to-one conversations between two colleagues who share an entity.
- **Messages** — text posts (up to 8,000 characters) with **@mentions** and attachments, which you can **edit** or **delete**.
- **Attachments** — files and images uploaded to a conversation and downloaded by its members.
- **Directory** — the eligible staff in your current entity, from which you start channels and DMs.
- **Delivery** — real-time push where a provider is configured, with a polling fallback so messages always arrive.

Every conversation is bound to your organisation and entity, and access is governed by the `chat.participate` permission (see Access & permissions).

Channels

A **channel** is a named room within a single entity. Each entity automatically has a default **#general** channel — it is created on first access and every eligible member of the entity is joined to it, so nobody has to be invited to the room everyone shares.

Beyond #general you can **create your own channels**, giving each a name and an optional topic. When you create one you pick who joins from the entity's eligible staff; you are always added yourself. Members are restricted to that entity — you cannot add someone who does not belong to it. Channels are ordered by their most recent activity, and each shows an **unread count** based on when you last read it.

Typical steps

1. Open **Chat** — you arrive in your entity's **#general**.
2. Create a channel, give it a name and topic, and pick colleagues from the directory.
3. Post messages; the channel rises to the top of your list as people reply.

Direct messages

A **direct message** is a private one-to-one conversation. You start one by choosing a colleague from the directory; the conversation can only be opened with someone who **shares an entity** with you. Direct messages are created once and reused — messaging the same person again reopens the existing thread rather than making a new one. Unlike channels, direct messages are not tied to a single entity view: once created, membership alone governs access.

Messages

A **message** carries text, attachments, or both — an empty message with neither is rejected. Text is limited to 8,000 characters. Within a channel, **@mentions** are resolved against that channel's members only (never the wider directory), and each mentioned person receives an in-app notification, so a mention can never notify or reveal someone who is not in the conversation.

You can **edit** or **delete your own** messages — only your own. An edited message is marked as edited; a deleted message is soft-deleted, keeping its place in the thread but clearing its text so it renders as removed. Sending is **idempotent**: a retry or double-click of the same compose returns the message already posted rather than a duplicate.

Attachments

You can attach **files and images** to a conversation. A file is uploaded to the channel first and then bound to a message when you send it, so a message may carry text, attachments or both. Uploads go through the platform's shared, governed document storage and use the same allowlist as the rest of IXL CORE — active-markup types that could carry scripts (such as SVG, HTML and JavaScript) are deliberately excluded. Downloading an attachment is membership-gated: only members of the owning conversation can retrieve it, and an attachment can never be carried from one channel onto a message in another.

Delivery

New messages, edits and deletes are **broadcast** to a conversation's members for real-time delivery. Where a real-time provider is configured for the platform, updates push instantly; where none is, the

client falls back to **polling** — it periodically asks for anything posted or changed since it last checked (using forward and updated-since cursors), so messages always arrive even without a live connection. A **read marker** records where you last caught up, driving each conversation's unread count.

Access & permissions {#access-and-permissions}

Access to staff chat is governed by a single capability, `chat.participate`. It can be granted at organisation scope — which gives leadership reach across every entity — or at an entity scope, which keeps an ordinary staff member strictly within their own entity. Your **entity set** is derived from your role assignments in the organisation: a user with only organisation-level (leadership) assignments reaches every entity, while everyone else is confined to the entities they are assigned to.

Every endpoint is **membership-gated**: you can only read, post to, edit or download within a conversation you belong to. The rules **fail closed** — a platform operator with no in-entity role assignment resolves to an empty set and sees no chat at all. This is intentional: staff chat is private to staff, and operators are kept out by design.

How Chat connects

Chat sits on the same shared platform foundation as the rest of IXL CORE:

- **Access control** enforces `chat.participate` and the entity scoping that decides who can see whom.
- **The document store** holds every attachment on the platform's governed storage, under one upload allowlist.
- **Notifications** deliver the in-app alerts raised by @mentions.
- **Real-time delivery** rides the platform's broadcast provider when one is configured, with polling as the always-on fallback.

The result is a focused, private place for your people to talk — scoped correctly by default, and connected to the storage, notifications and access rules the rest of the platform already uses.

How-to guides

Create a channel and message your team

Create a named channel within your entity, add colleagues, and post messages with mentions and attachments.

Channels are named rooms within a single entity where your team can talk in one place. This guide walks you through creating a channel, adding members from your entity, and posting your first message.

Before you start

- You need the `chat.participate` capability. Without it, Chat shows *You don't have access to staff chat.*
- You can only add colleagues who belong to the same entity — the member list is drawn from that entity's eligible staff.
- Your **#general** channel already exists for every entity and everyone in it is joined automatically, so create a new channel only when you want a focused, separate room.

Steps

1. Open **Chat**. You arrive in your entity's **#general** channel by default.
2. If you belong to more than one entity, choose the right one from the **Entity** selector at the top of the conversation list.
3. Under **Channels** in the left-hand list, select the **+** button (*New channel*). [screenshot: New channel button in the Channels list]
4. In the **New channel** panel, type a **Channel name** (for example, *sales*).
5. Under **Add members**, tick each colleague you want to include. You are always added yourself. [screenshot: New channel panel with name field and member checkboxes]
6. Select **Create channel**. The new channel opens ready to use. (Choose **Cancel** to discard.)
7. In the composer, type your message. To mention someone, type @ and pick a name from the suggestions — mentions resolve to channel members only, and each mentioned person receives an in-app notification.
8. To attach a file or image, select the Attach) button and choose a file, then **Send**. A message can carry text, attachments, or both. [screenshot: message composer with @mention suggestions and attach button]

Result

Your channel appears under **Channels** and rises to the top of the list as people reply. Messages you send show your name and time; you can **Edit** or **Delete** your own messages (only your own) — an edited message is marked **(edited)** and a deleted one renders as *message deleted*. Text is limited to 8,000 characters, and unread messages show a count beside the channel name.

Related

- Chat reference
- Send a direct message

Send a direct message

Start a one-to-one conversation with a colleague who shares an entity with you.

A direct message is a private one-to-one conversation with a colleague. This guide shows you how to start one, and explains how existing conversations are reused.

Before you start

- You need the `chat.participate` capability to use staff chat.
- You can only message someone who **shares an entity** with you. If you pick a colleague who does not, the message is rejected.
- Every direct conversation is created once and reused — messaging the same person again reopens the existing thread rather than making a new one.

Steps

1. Open **Chat**.
2. In the left-hand conversation list, find the **Direct messages** section and select its **+** button (*New direct message*). [screenshot: New direct message button under Direct messages]
3. In the **New direct message** panel, under **Choose a person**, select the colleague you want to message. Only staff from your current entity appear here.
[screenshot: New direct message panel listing eligible colleagues]
4. The conversation opens immediately. If you have messaged this person before, the existing thread reopens with its history intact.
5. Type your message in the composer and select **Send**. You can also attach a file or image with the **Ø=ÜÎ** (Attach) button — a message may carry text, attachments, or both.
[screenshot: direct message conversation with composer]

Result

The conversation appears under **Direct messages** and moves to the top of the list on new activity. Unread messages show a count beside the person's name until you open the conversation, which marks it as read. As with channels, you can **Edit** or **Delete** your own messages (only your own): an edit is marked **(edited)** and a deletion renders as *message deleted*. Message text is limited to 8,000 characters.

Related

- Chat reference

- Create a channel and message your team