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# Optimizely Opal in Microsoft Copilot

Updated 4 hours ago

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### Note

If you use Opti ID, administrators can turn off generative AI in the Opti ID Admin Center. See [Turn generative AI off across Optimizely applications](#).

Optimizely Opal for [Microsoft Copilot](#) lets you use Opal directly in your Copilot workspace. You can do everything you can do in [Opal Chat](#), including creating and managing campaigns, generating and editing images, analyzing experiment results, and executing AI agents.

## Prerequisites

- You must use [Opti ID](#) to access Opal.
- You must have generative AI enabled in Optimizely.
- You must request access to Optimizely Opal in Microsoft Copilot, contact your Customer Success Manager.

## Install Opal in Copilot

In Microsoft Copilot,

1. Go to the [Agent Store](#).

Click the **Search agents** field and enter **Opal**.

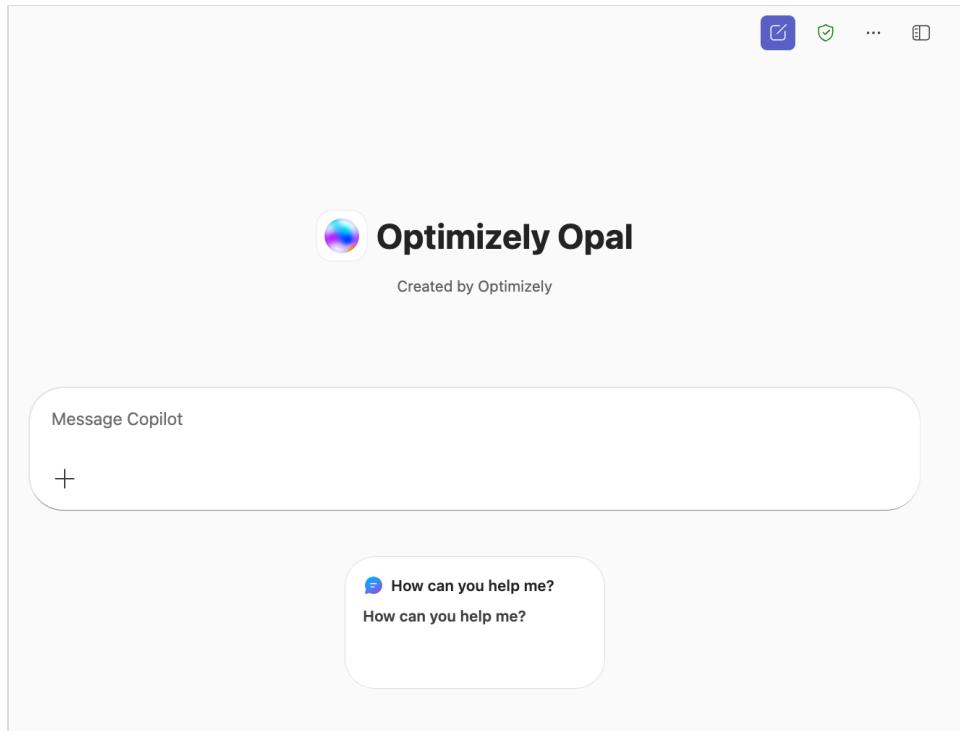
The screenshot shows the Microsoft Copilot Agent Store. At the top, there's a search bar with the text "Opal". Below it, a card for "Optimizely Opal" is displayed, featuring a purple circular icon, the text "Optimizely Opal", and the subtext "Use the same Opal you know and love — without leaving Copilot.". Below this card, there are tabs for "RESEARCHER", "ANALYST", "3rd Cloud", and "Commerce Cloud". Under the "Built by Microsoft" heading, there are six cards: "Researcher", "Analyst", "Prompt Coach", "Writing Coach", "Idea Coach", and "Career Coach".

3. Select **Optimizely Opal**.

4. Review the privacy policy, terms of use, and permissions, and click **Add**.

This screenshot shows the detailed view of the Optimizely Opal agent. It features a large circular icon, the name "Optimizely Opal", the brand "Optimizely", and a prominent blue "Add" button which is highlighted with a red rectangle. Below the button, the text "Works across" is followed by icons for Microsoft Copilot and Microsoft 365. A descriptive paragraph explains that users can interact with Optimizely Opal from within Copilot, mentioning its use in creating campaigns, optimizing tests, and analyzing experiments. Another paragraph discusses how Opal integrates with Copilot's AI capabilities for tasks like summarizing test results or creating new campaigns. At the bottom, a note states: "By using Optimizely Opal, you agree to the [privacy policy](#), [terms of use](#), and [permissions](#)".

5. Opal is added to your Copilot.

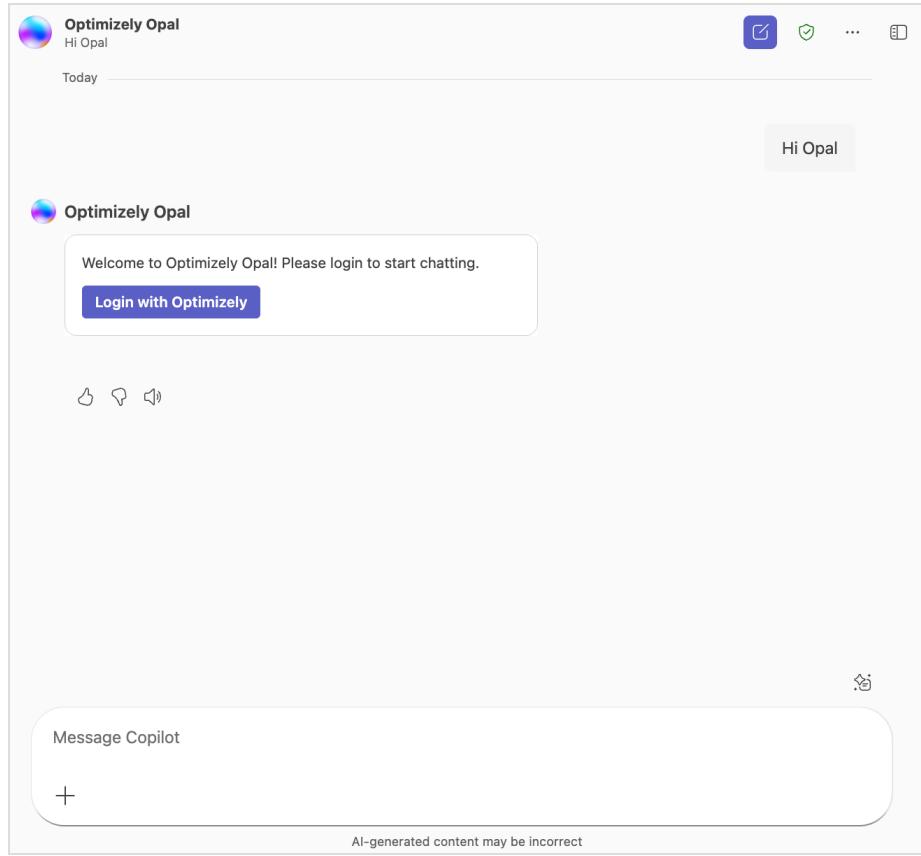


See [Agent installation in Microsoft 365 Copilot](#) for information.

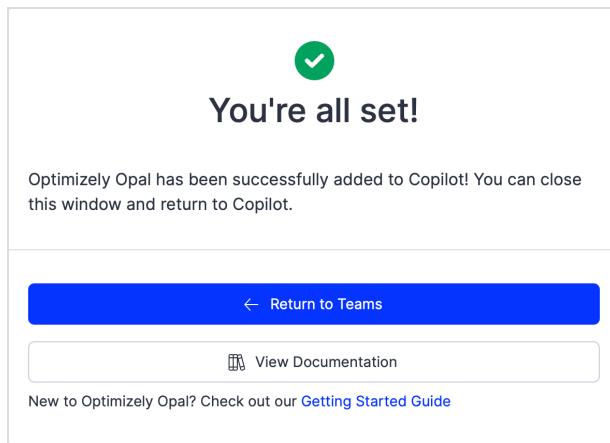
## Use Optimizely Opal in Copilot

With Opal in Copilot, you can chat with Opal to research, summarize, and ideate, create and refine content, manage tasks and campaigns, and analyze experiment results directly in Copilot.

1. Go to Copilot.
2. Enter a prompt.
  1. On your first visit, Opal prompts you to log in.



2. Click **Login with Optimizely**.
3. Enter your Opti ID credentials.



3. Optimizely Opal automatically responds in Copilot.

The screenshot shows a conversation in the Optimizely Copilot interface. At the top right are icons for refresh, save, and more. The message from 'Optimizely Opal' reads: "Hi there! I'm Opal, Optimizely's AI. Great to meet you! I can help you create content, come up with campaign ideas, generate hypotheses for experiments, and much more. I can also conduct web research, analyze data, summarize documents, and answer your questions about Optimizely products. I have access to a lot of tools to help you get work done, so just try me for anything that comes to mind. Also, if you need help with using Opal, just ask me! What are you working on today?" Below this is a section titled 'Available Commands' with three items: '/switch-instance', '/preview-instance', and '/logout'. At the bottom of the message area are five interaction icons: a document, a thumbs up, a thumbs down, a reply arrow, and a speaker. A small 'Copilot' icon is in the top right corner of the message area. A large input field at the bottom left is labeled 'Message Copilot' with a plus sign and a placeholder 'AI-generated content may be incorrect'.

Copilot does not display inline images. Instead, when Opal's message includes an image, Copilot shows a descriptive text link to the image's URL. Click on the URL to see the image.

The screenshot shows a conversation in the Optimizely Copilot interface. The message from 'Optimizely Opal' asks: "Can you create me an image of a dinosaur wearing a suit?" Below this, the AI responds: "Here is an image of a dinosaur wearing a suit:" followed by a link: "[a\\_dinosaur\\_wearing\\_a\\_suit\\_39cc813c-851b-4662-9b9d-d8bef8620615.png](#)". At the bottom of the message area are five interaction icons: a document, a thumbs up, a thumbs down, a reply arrow, and a speaker. A small 'Copilot' icon is in the top right corner of the message area.

## History

Your conversations with Opal are saved in Copilot and the Opal Chat app, so you can refer back to past chats and continue them across platforms.

## In Copilot

### Note

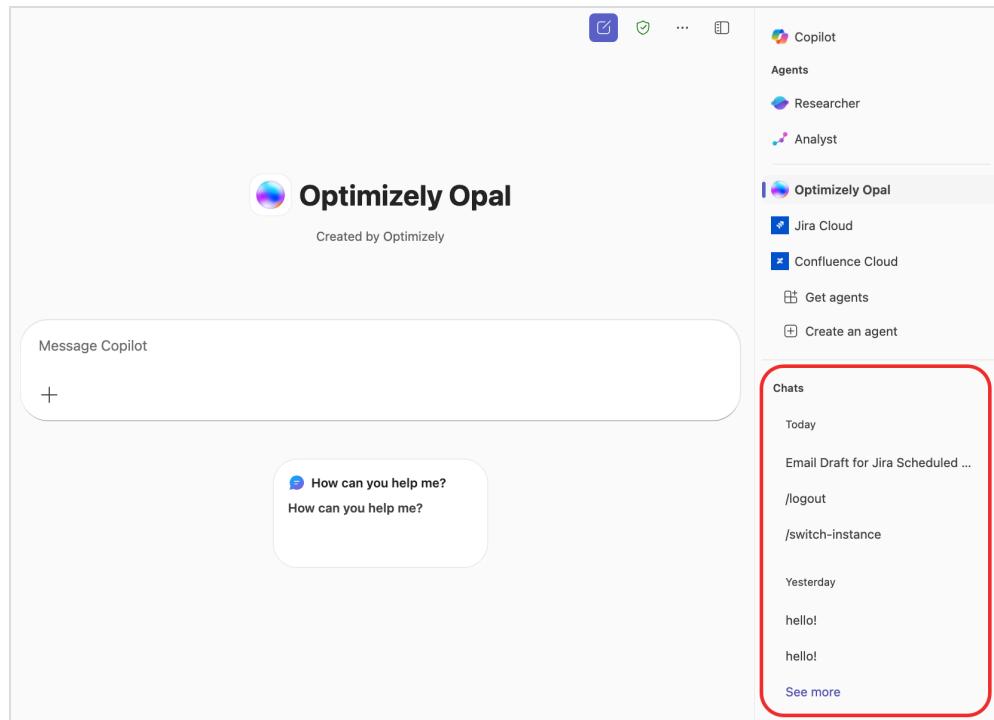
Chat history listed in Copilot includes chats from *all* your agents installed in Copilot, not just Opal.

Copilot keeps a list of your recent conversations so you can return to past work. In the section labeled **Chats**, review your recent conversations. Entries are grouped by day (for example, **Today** and **Yesterday**) and display the first line or command from each conversation.

### Note

Chats started in Copilot and continued in Opal Chat do not sync back to Copilot.

See [Conversation History in Microsoft Copilot](#) in the Microsoft documentation for information.



## In the Optimizely Opal UI

### Note

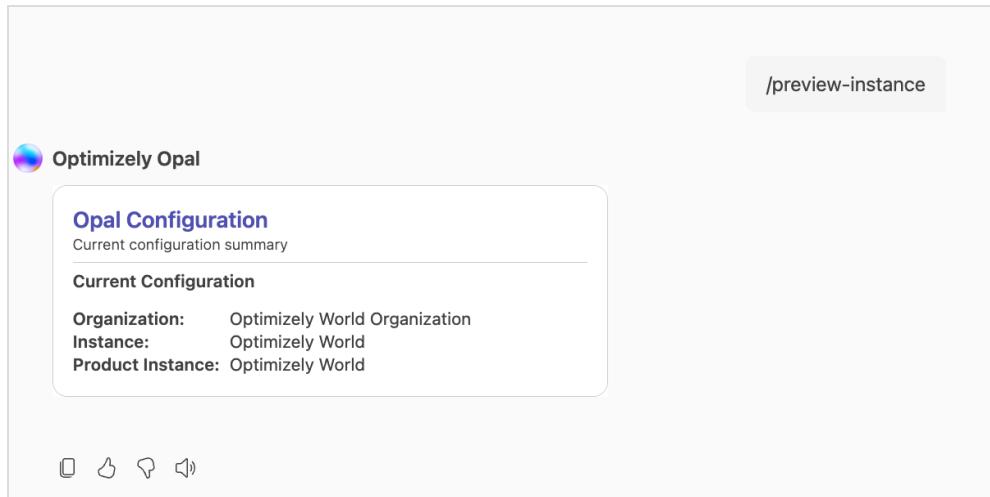
Chat and thread names may not match between Copilot and Opal.

1. Go to [home.optimizely.com](https://home.optimizely.com) and select the Optimizely organization that Copilot is connected to.
2. Click **Opal > Chat**.

Your recent chats display in the chat history panel. See the [Opal Chat user interface](#) documentation for information.

## View your Optimizely Opal instance

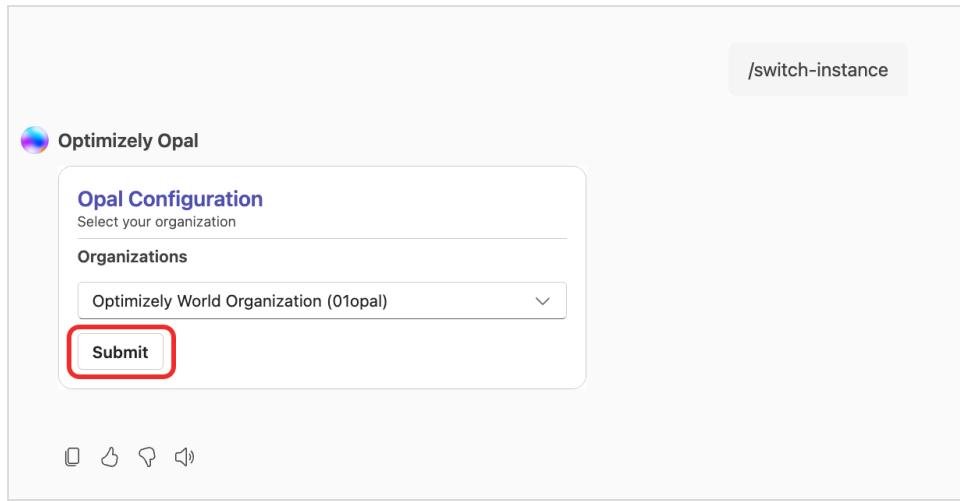
To view your current Opal instance, enter `/preview-instance`. Opal responds with your current Optimizely organization, Opal Instance, and Optimizely product instance.



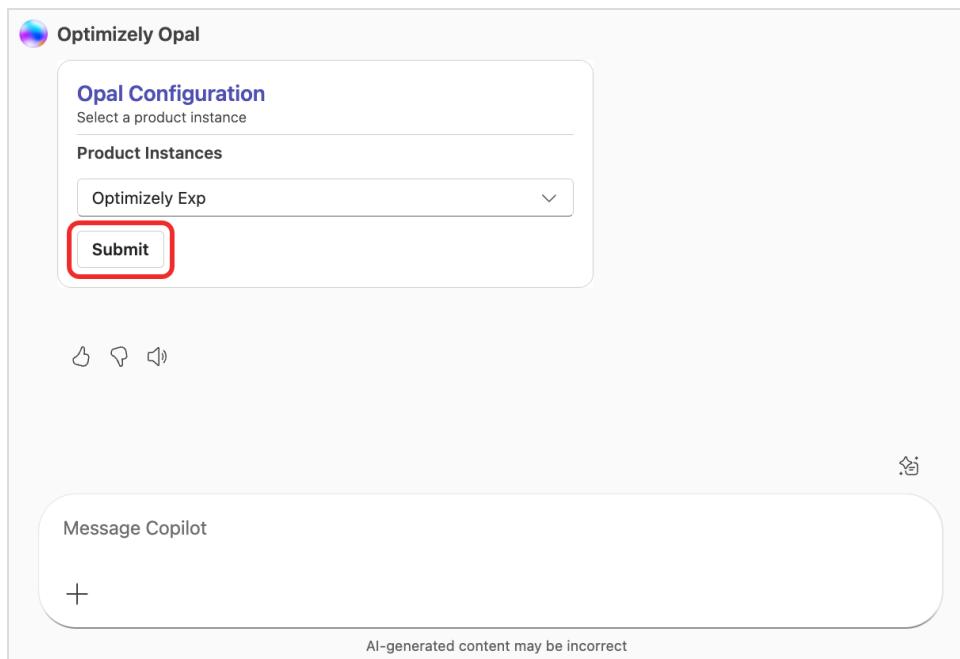
## Change your Optimizely Opal instance

To update your Opal instance, complete the following steps:

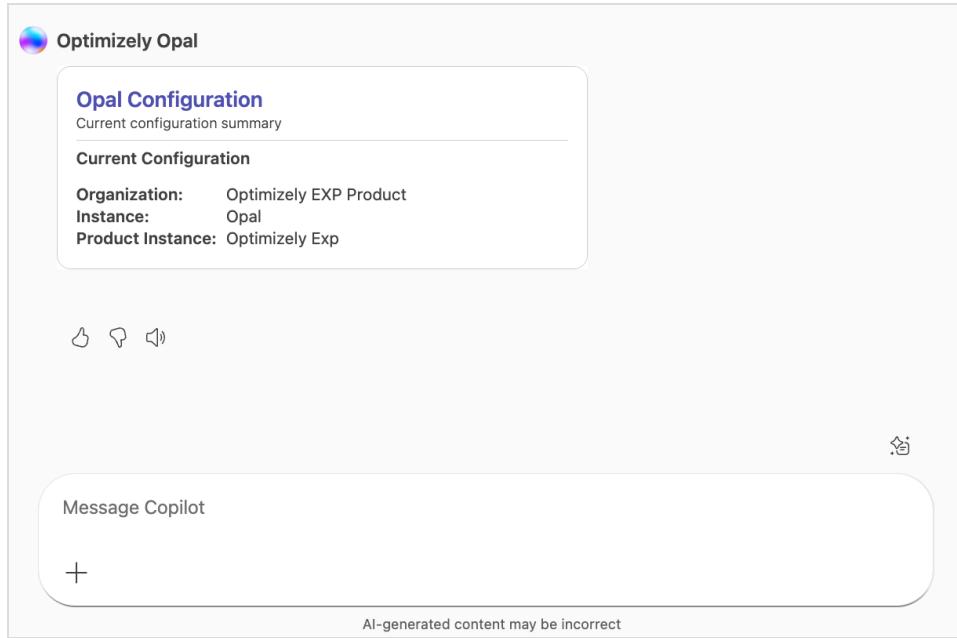
1. Enter `/switch-instance`.
2. Select your Optimizely organization from the **Organizations** drop-down menu.
3. Click **Submit**.



4. Select your Optimizely instance from the **Product Instances** drop-down list.
5. Click **Submit**.



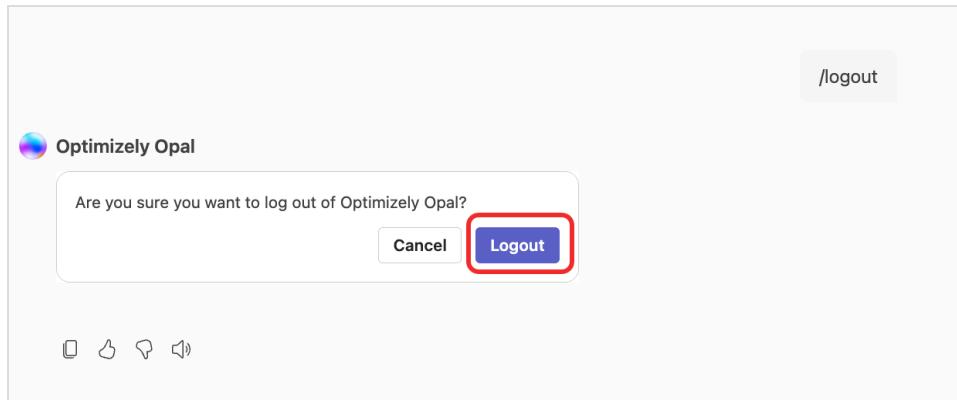
6. Opal displays your current configuration. Verify that your Opal instance was updated correctly.



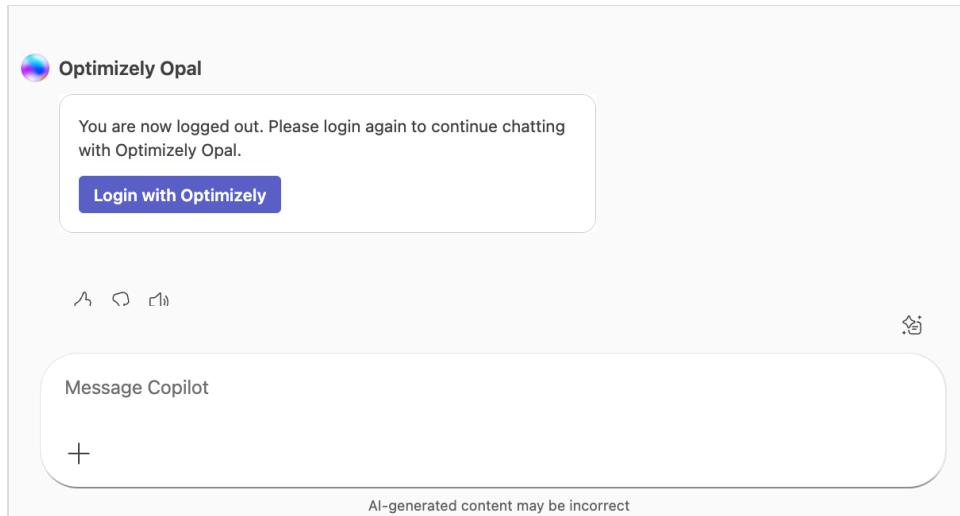
## Log out of Optimizely Opal in Copilot

To log out of your Opal instance, complete the following steps:

1. Enter `/logout`.
2. Click **Logout**.



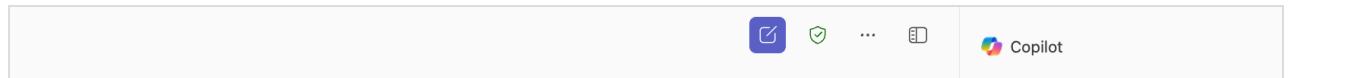
3. Opal displays a confirmation. To log in, see step two in the [Use Optimizely Opal in Copilot](#) section.



## Uninstall Optimizely Opal from Copilot

To remove Opal from Copilot, complete the following steps:

1. On the **Optimizely Opal** agent listing, click **more options (...)**.
2. Click **Uninstall**.



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