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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.

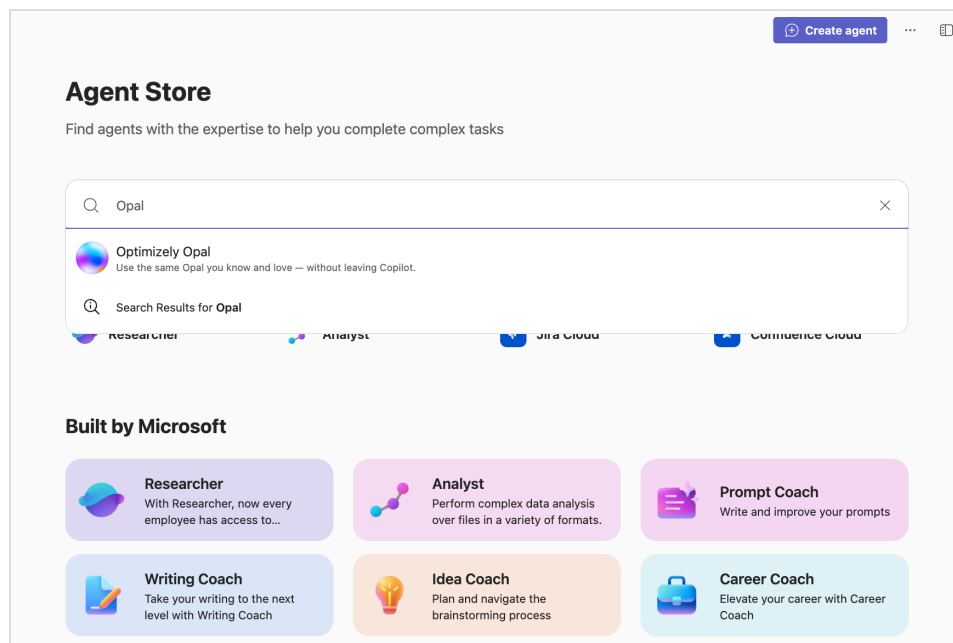
Install Opal in Copilot

In Microsoft Copilot,

1. Go to the **Agent Store**.

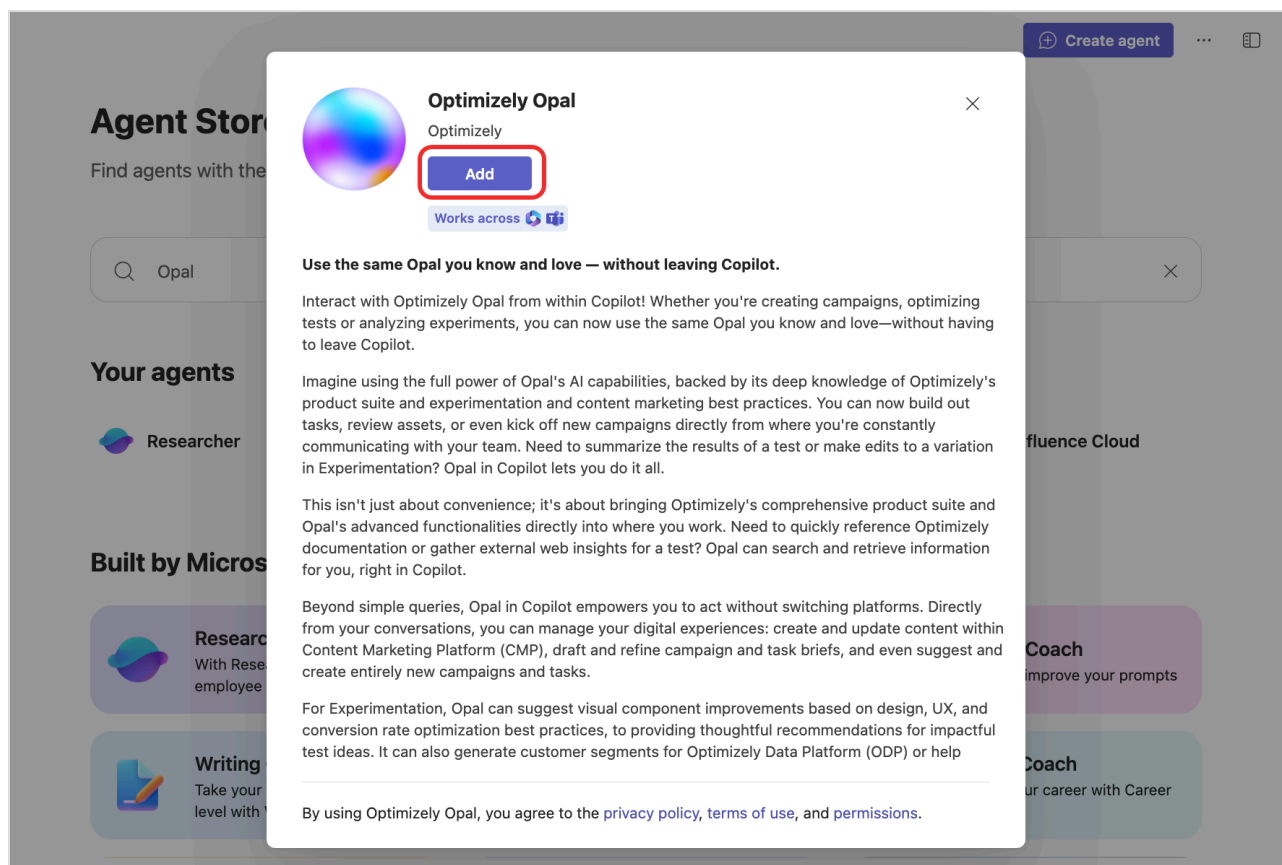


Click the **Search agents** field and enter *Opal*.

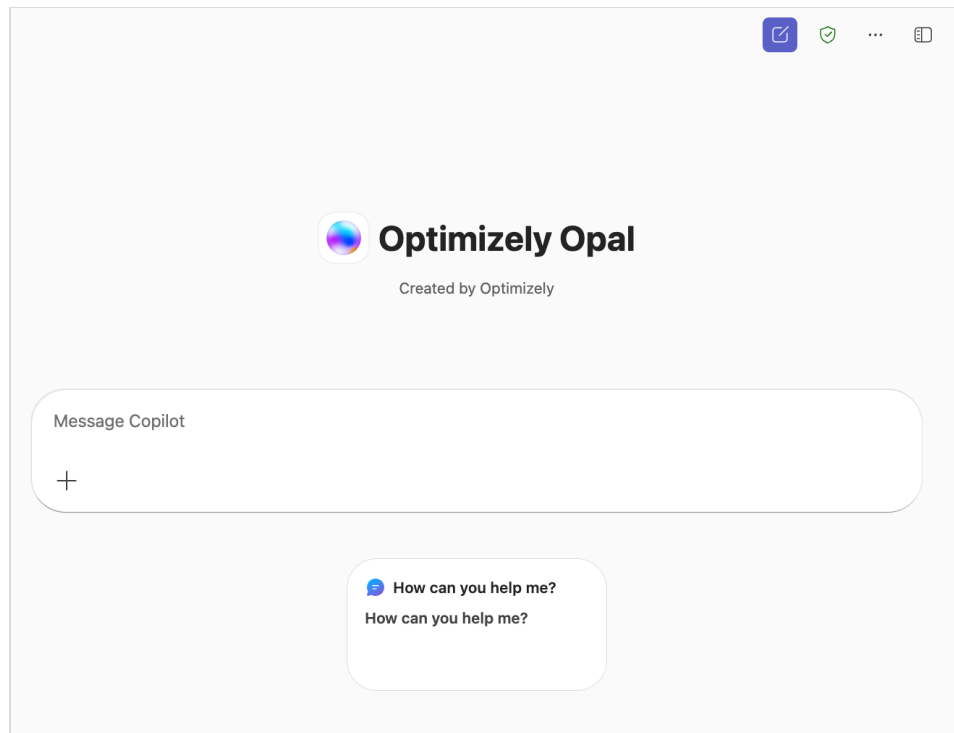


3. Select **Optimizely Opal**.

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



5. Opal is added to your Copilot.

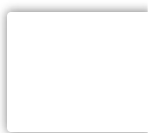


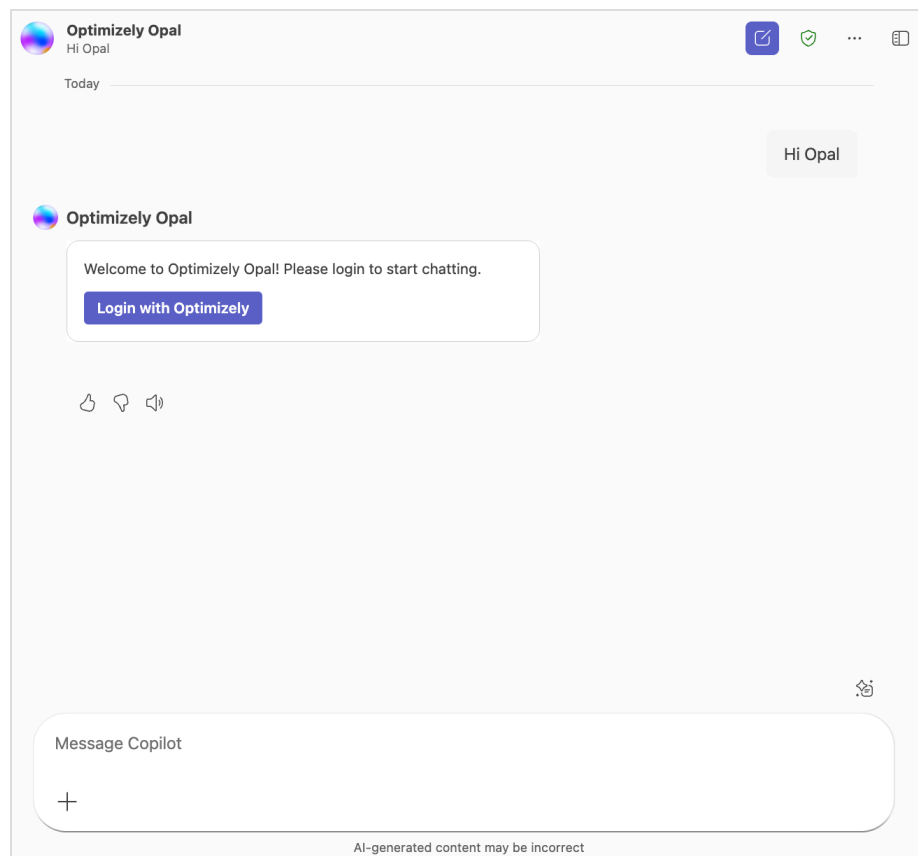
See [Agent installation in Microsoft 365 Copilot](#) for information.

Use Optimizely Opal in Copilot

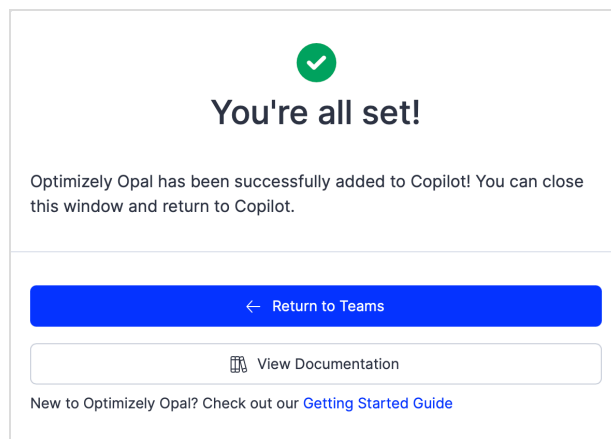
With Opal in Copilot, you can chat with Opal to research, summarize, and ideate, create and refine content, manage tasks and campaigns, and analyze experiment results directly in Copilot.

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



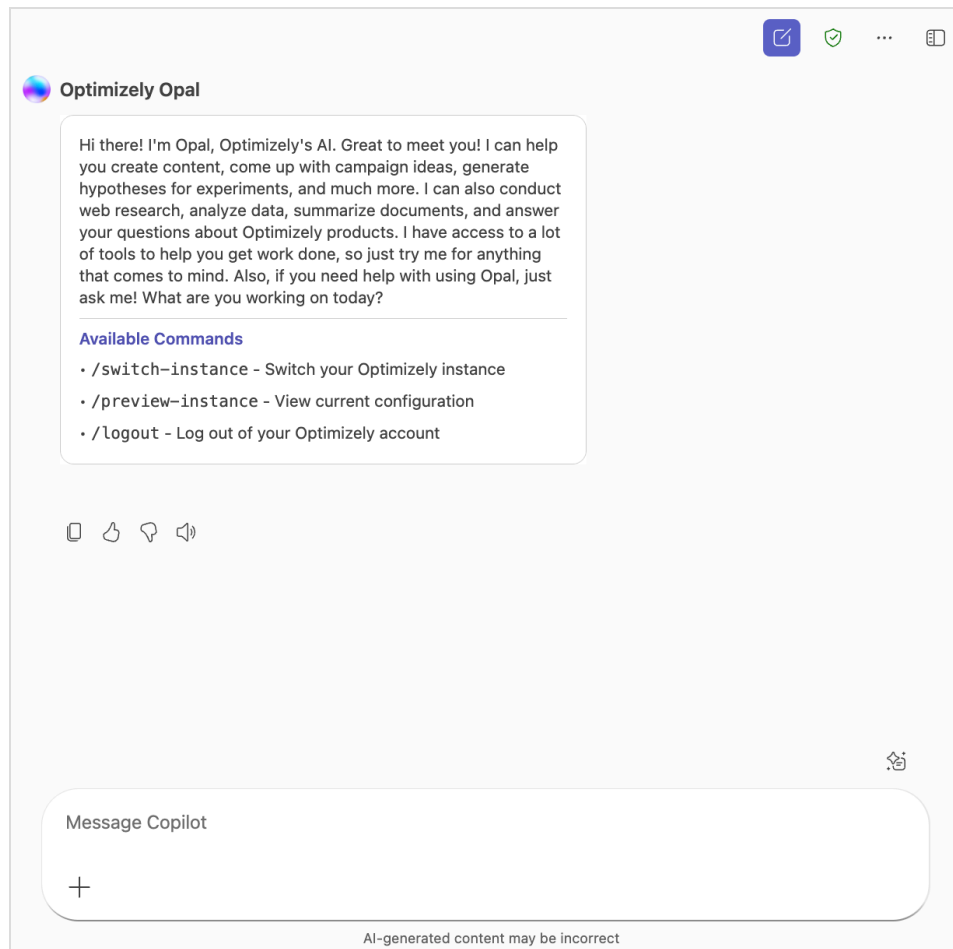


2. Click **Login with Optimizely**.
3. Enter your Opti ID credentials.

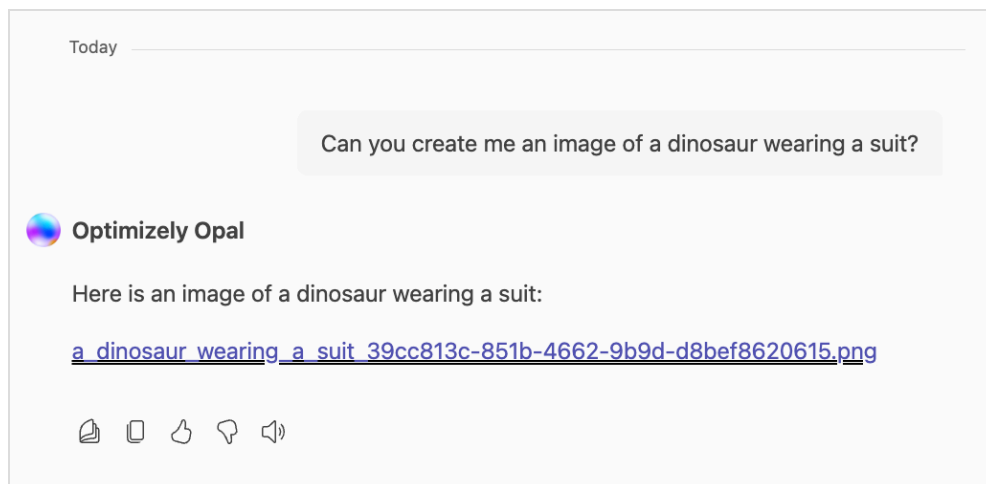


3. Optimizely Opal automatically responds in Copilot.





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.



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

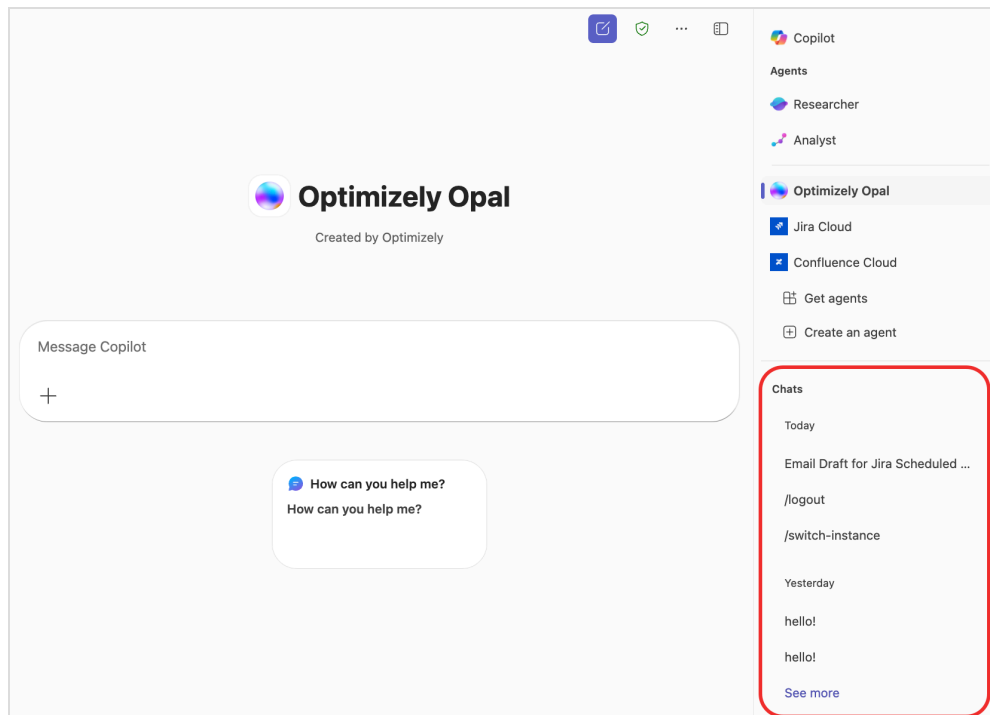
Chat history listed in Copilot includes chats from *all* your agents installed in Copilot, not just Opal.

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

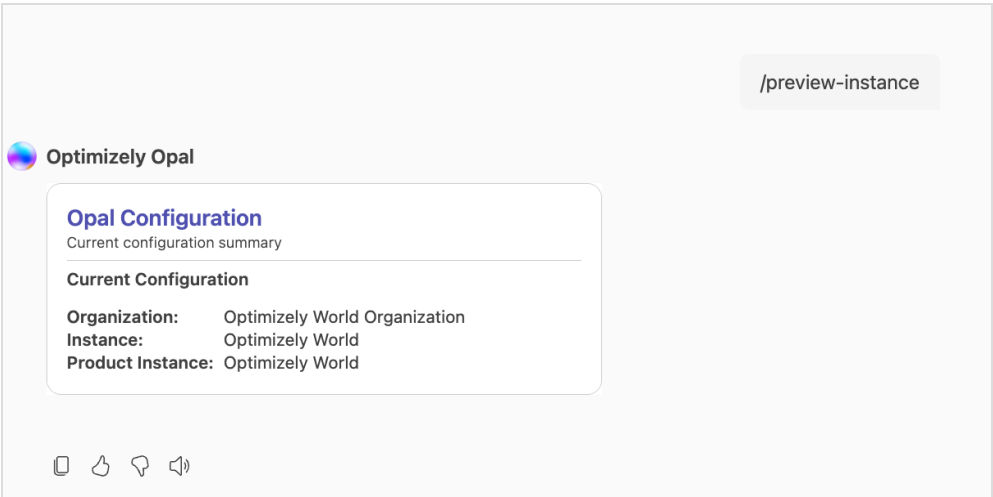
Chat and thread names may not match between Copilot and Opal.

- 1. Go to home.optimizely.com 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

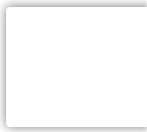
To view your current Opal instance, enter `/preview-instance`. Opal responds with your current Optimizely organization, Opal Instance, and Optimizely product instance.




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**.



/switch-instance





 **Optimizely Opal**

Opal Configuration
Select your organization


Organizations

Optimizely World Organization (01opal) ▼

Submit

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




 **Optimizely Opal**


Opal Configuration
Select a product instance

Product Instances

Optimizely Exp ▼

Submit



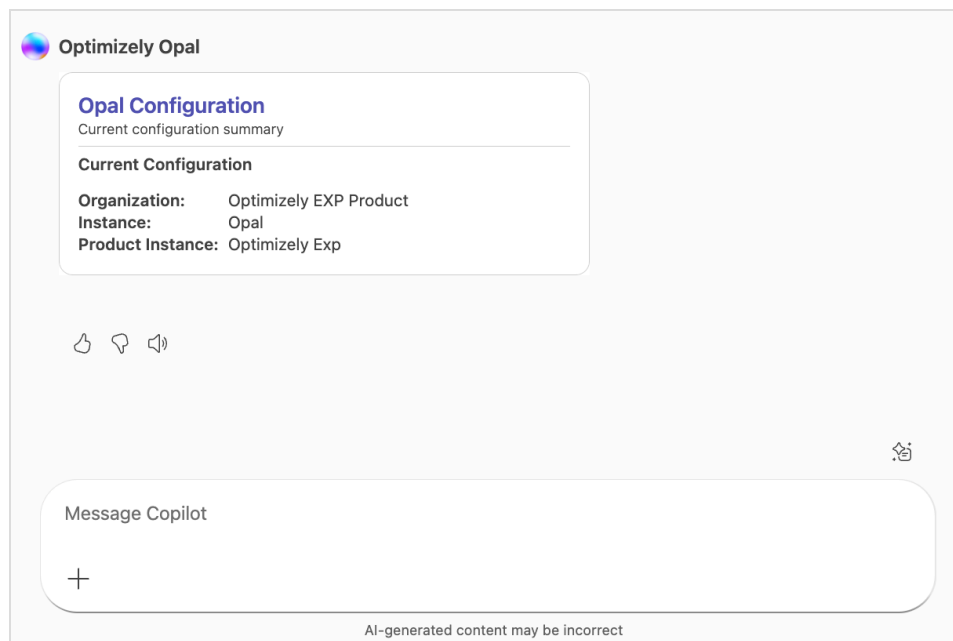
Message Copilot

+

AI-generated content may be incorrect

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

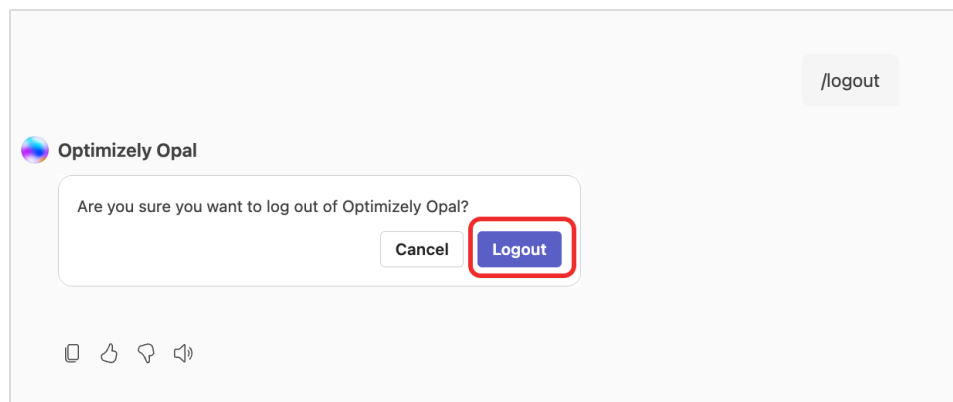




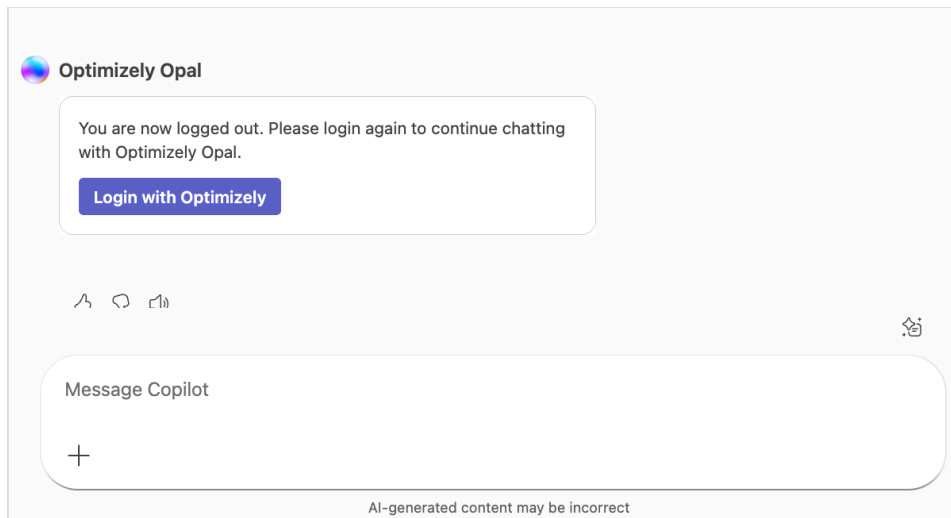
Log out of Optimizely Opal in Copilot

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

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



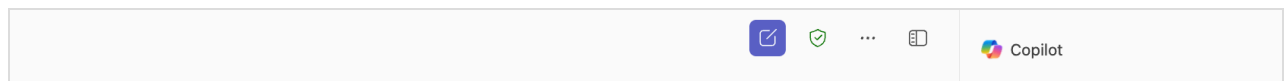
3. Opal displays a confirmation. To log in, see step two in the [Use Optimizely Opal in Copilot](#) section.



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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