

Using Optimality in Claude and ChatGPT

A guide for Optimality users

Production environment · **September 2026**

What you get

Connect Optimality to Claude or ChatGPT and you can ask about your work in plain language, without opening Optimality. Your projects, the activities, milestones and deliverables inside them, your tasks, decisions and documents - all readable by the assistant, on your behalf.

The assistant sees exactly what you see. It signs in as you, so your own permissions apply: if a project is not yours, it is invisible to the assistant too. And the connection is read-only - nothing you connect can create, change or complete anything in Optimality.

A flavour of it

"What am I behind on?"

"What is due this week on North Plant?"

"What should I be worried about on the Chevron estimate?"

"Why is the estimate review slipping?"

"What does the basis of estimate say about escalation?"

"Who is on this project, and what is Sarah working on?"

The last one matters: the assistant combines Optimality with everything else it can reach. Ask it to draft an email about what is late, and it will.

What to enter

A note on names: Claude calls this a **connector**, ChatGPT calls it a **plugin**. Same thing - this guide uses whichever word the app in front of you uses.

These are the values to type in. Copy them exactly.

Field	Value
Server address (both apps)	<code>https://mcp.optimalitypro.com/mcp</code>
Client ID in Claude	<code>optimality-mcp-claude</code>
Client ID in ChatGPT	<code>optimality-mcp-chatgpt</code>
Client secret	Leave it empty. Neither app needs one - both sign you in through your browser instead

The client IDs are not secret; they travel in the address bar while you sign in.

And the right kind of account:

	Claude	ChatGPT
Plan	Any plan that allows custom connectors	Plus, Pro, Business, Enterprise or Edu. Custom connectors are not available on the Free plan
Where to set it up	claude.ai, the desktop app, or Claude Code - under Connectors	chatgpt.com in a browser, under Plugins - the desktop app cannot add them
Optimality account	Your normal Optimality login	Your normal Optimality login

Connecting Claude

Takes about two minutes.

- 1 Open **Settings**, then **Connectors**, and choose **Add custom connector**.
- 2 Paste the server address: <https://mcp.optimalitypro.com/mcp>
- 3 Open **Advanced settings**. Put **optimality-mcp-claude** in the **OAuth Client ID** field and leave **OAuth Client Secret** empty - Claude does not use one.
- 4 Choose **Add**, then **Connect**. Optimality opens and asks you to sign in.
- 5 You are shown what the assistant is asking for - reading your projects, searching, and asking questions. Choose **Yes** to grant it.
- 6 Back in Claude, the connector should show **16 tools**. You are done.

In a conversation, Claude uses Optimality when your question needs it. You can also mention it - "check Optimality" - if you want to be sure.

Connecting ChatGPT

In ChatGPT this is a plugin. One field decides whether it works, and it is called out in step 6.

- 1 Open the **Plugins** tab and start a **New Plugin**. If that tab is not there, plugin support is not enabled for your account - ask your administrator.
- 2 Name it **Optimality**. Icon and description are optional.
- 3 Leave **Connection** on **Server URL** (not Tunnel) and paste <https://mcp.optimalitypro.com/mcp>
- 4 Set **Authentication** to **OAuth**, then expand **Advanced OAuth settings** on the right.
- 5 Under **Client registration**, leave **Registration method** as **User-Defined OAuth Client**. In the field under the callback URL put **optimality-mcp-chatgpt**, and leave **OAuth Client Secret** empty.
- 6 Set **Token endpoint auth method** to **none**. This is the one that matters: any of the client_secret options will demand a secret you do not have, and refuse to create the plugin.
- 7 Under **Scopes**, leave the four **Default** scopes ticked. Base scopes can stay empty.
- 8 Tick **I understand and want to continue**, then choose **Create**.
- 9 Sign in to Optimality and grant access. The plugin should then show **16 tools**.

Note. If ChatGPT answers "Client secret is required", the token endpoint auth method is still set to one of the client_secret options. Set it to **none** and create the plugin again.

Two messages you can ignore: CIMD is reported unavailable, and the panel warns that custom MCP servers carry risk. Both are expected.

Check it works

Four questions, in this order.

Ask	You should see
"Who am I in Optimality?"	Your email and the organizations you belong to, each with a count of the projects you can reach
"List my projects"	Your projects, most recently worked-on first
"What is due this week on (one of them)?"	Dated items, and the assistant able to tell you which days it covered
Wait six minutes, then ask anything again	A normal answer. Sign-ins are refreshed quietly in the background, and this confirms it is happening

If the first question already fails, the connection did not complete - see the last page.

Getting good answers

The assistant is reading a real system, not guessing. A few habits make a large difference.

Name the project

Most questions are answered one project at a time. If you do not name one and you work across several, the assistant will ask which - answer with a name or say "all of them" and it will tell you if it cannot.

"What is late on the Chevron Class 3 estimate?"

Say when, in words

You do not need dates. Say **this week, next week, overdue, in the next 30 days, last month** - Optimality works out the actual days and the assistant can tell you which ones it used. That matters when you are about to act on the answer.

Ask for a list, or ask for judgement

Both work, and they are different. A question with a filter in it - what is late, what is due, what is assigned to whom - is looked up and comes back exact. A question that needs weighing up is passed to Optimality's own assistant, which reasons over the project and answers in prose.

Looked up - exact and fast	Reasoned - slower, more thoughtful
"What is overdue on North Plant?"	"What is holding up the estimate?"
"What milestones are due next month?"	"Are we going to make the gate?"
"What is Sarah working on?"	"Who is overloaded, and why?"

Follow up rather than restating

Keep going in the same conversation - "which of those should I do first?", "who owns the second one?". The assistant keeps the context, and when it is talking to Optimality's assistant, that conversation is kept too.

Use people's names

"What has John got due this week?" works. If two people share a name you will be asked which - deliberately, because guessing would put someone else's work under John's name.

Reading the answers well

Four things worth knowing, because each can be misread.

- **"Nothing found" means nothing you can see.** An empty answer is about your access and your filter, never proof that the project is empty. If it surprises you, ask the assistant which project and dates it used.
- **"Late" is about the date, not about the work.** If something shows as five days late, that is the arithmetic on its due date. Optimality does not record which statuses count as finished, so the assistant will not tell you whether it is done - it will tell you the status, and you judge.
- **Being asked to choose is the system working.** Two projects or two people matching one name produces a question, not a guess.
- **Ask when it was read.** Every answer carries a timestamp. Before you forward a date or a status to someone else, ask - and prefer checking Optimality itself for anything you are committing to.

What it cannot do

- **Change anything.** No completing tasks, moving dates or creating items. That is coming; today it reads only.
- **Tell you what changed last week.** There is no change history it can read yet.
- **Summarise a meeting** unless the notes or transcript were put into Optimality - then it can find and read them like any document.
- **Run an optimizer**, or show you past optimizer runs.
- **See anything you cannot.** Worth repeating, because it is the point.

If it does not work

Most problems are one of these. Where it says to ask your administrator, send them the symptom - it tells them exactly which setting to look at.

What you see	What to do
It shows no tools, or the assistant says it has none	In ChatGPT, check the four Default scopes are ticked, then delete the plugin and create it again. In Claude, disconnect and reconnect
ChatGPT will not create the plugin: "Client secret is required"	Token endpoint auth method must be none . There is no secret to enter
The permission screen mentions only Offline Access	The wrong permissions are being requested. Choose No , check the four Default scopes are ticked, and create it again
Sign-in works, then every question fails	Disconnect and reconnect. If it persists, tell your administrator the sign-in succeeds but every call is rejected
It works for a few minutes, then says the connection was invalidated	Reconnect once. If it happens again, tell your administrator - there is a known setting behind this exact symptom
"Invalid parameter: redirect_uri" on the Optimality sign-in page	Your administrator needs to allow the callback address for your assistant. Send them a screenshot
ChatGPT asks you to approve every single lookup	Report it. Reading is meant to need no confirmation
An answer names a project you do not recognise	Ask the assistant which project it used, and tell your administrator if it is not yours

Your data

- The assistant reads Optimality **as you**, with your permissions. There is no shared account.
- You can withdraw access at any time - remove the connector in Claude or delete the plugin in ChatGPT, or ask your administrator to revoke it in Optimality.
- Every request is recorded: who asked, what was read, and which assistant it came through.
- **What you ask it to read leaves Optimality.** When the assistant reads a document, that text goes to Claude or ChatGPT to answer you. Treat it as you would forwarding the same file - and follow whatever your organization's policy says about that.

Questions about any of this belong with your Optimality administrator.