Introduction to Conversational Agents

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This article is designated for all users.

About

Conversational Agents help users quickly find answers using only your organization's verified content.

Unlike traditional AI tools that search the internet, Conversational Agents work exclusively within your Kaltura environment, helping ensure accuracy and relevance.

Depending on your configuration, you can interact using:

- **Text-based experience** (formerly known as Genie), by typing questions in the 'Ask me anything' field
- An **Agentic Avatar**, by starting a live conversation through a visual avatar interface (if enabled)

To enable **Agentic Avatars**, contact your Kaltura representative.

Where you can use Conversational Agents

How you access Conversational Agents depends on how your administrator has configured your site.

Conversational Agents across the site

If enabled by your administrator, you can open Conversational Agents from the Ask Anything button available throughout your site.

You can also open the dedicated Ask Anything page using a site-level URL (for example, {siteURL}/genie). Administrators can add this page to the site's navigation bar. For details, see the Navigation module.

Conversational Agents in specific locations

If Conversational Agents aren't enabled across the site, they can still be available in specific locations, such as:

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- **Channels, galleries,** and **media galleries** - Conversational Agents can be available on these specific pages so users can ask questions about their content. For configuration details, see the Genieai module.
- **Individual videos** - Conversational Agents can appear next to a video so users can ask questions about that specific video while watching. Conversational Agents also work in secure embeds when the embedded player includes the Genie plugin. For details, see Ask Conversational Agents questions about your video and Single-video Genie set up guide.

What agents use to build answers

Agents build responses using your organization's verified content, including:

- **Captioned videos** - Used to understand the spoken content in each video.
- **Documents** (PDF, DOCX, PPTX) - Used to extract text and relevant information. See Document entries for details.
- **On-screen text (OCR)** - Used to capture text from slides or whiteboards when OCR is enabled for your account.
- **Metadata** - Used to identify and organize content based on creator, date, speakers, categories, tags, and more.

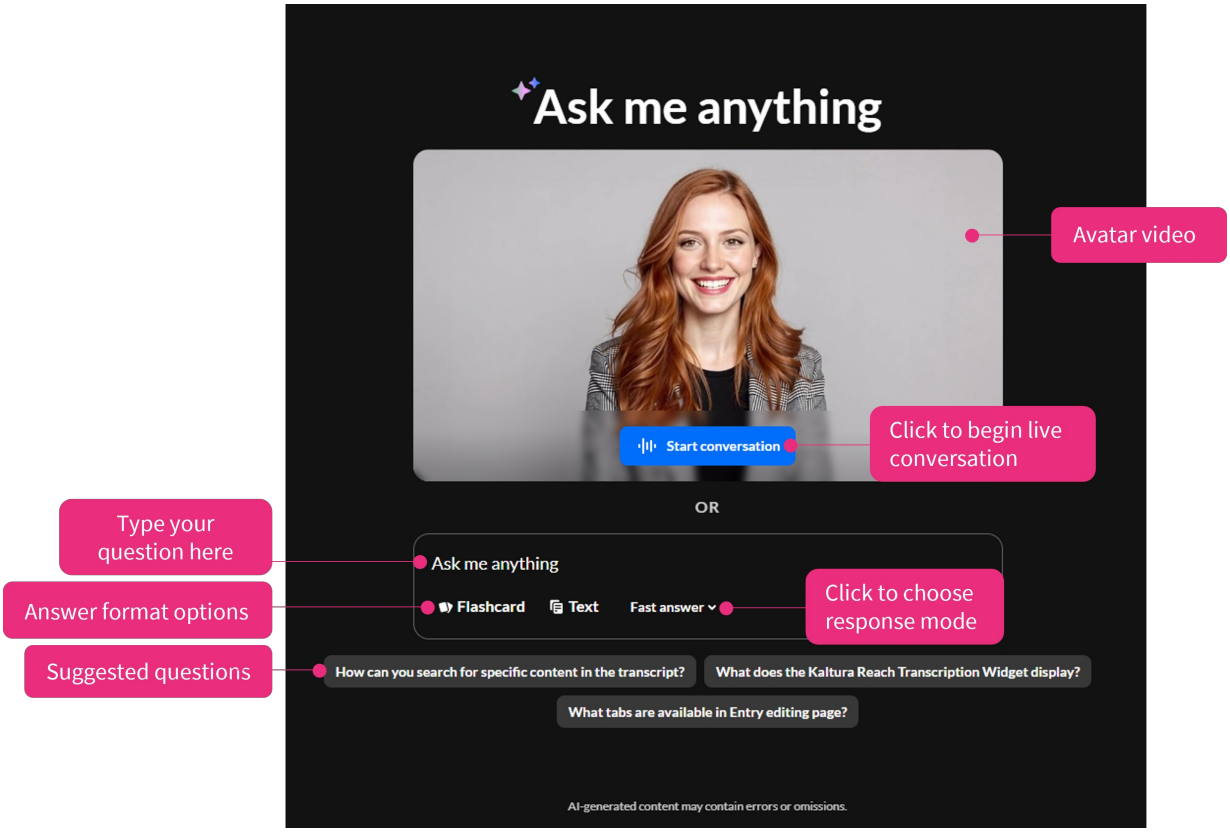
Learn more in our articles Ask an Agentic Avatar questions about your content and Understand Conversational Agent responses.

Why use Conversational Agents?

- **Instant access to knowledge** – Get quick, structured responses without manually searching through content
- **Trusted content** – Agents use only your published Kaltura content, not external data
- **Flexible interaction modes** – Use a text-based agent or speak naturally with an Agentic Avatar (if enabled)
- **Context-aware conversations** – Ask follow-up questions, continue conversations in the same thread, and return to previous interactions later.
- **Interactive results** – Click to view videos, documents, and sources
- **Enterprise-grade privacy** – Fully compliant with security and data privacy standards

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Core capabilities



- **Live avatar interaction** - Start a real-time conversation with an Agentic Avatar (if enabled). Interact using voice or text, view a live conversation transcript, and switch between speaking and typing at any time. The avatar uses the same underlying knowledge sources as text-based agent interactions.
- **Screen sharing with Agentic Avatars** - When enabled, you can share your screen during an Agentic Avatar conversation so the avatar can better understand the content being discussed and provide more relevant guidance.
- **Text and flashcard responses** - Type a question in the Ask me anything field to receive answers as flashcards or structured text, depending on your selection or question type.
- **Flexible response modes** - Choose between **Fast answer** for quick insights or **Detailed answer** for deeper, more comprehensive responses.
- **Unified conversation experience** - Conversational Agents maintain context during your interaction, allowing you to ask follow-up questions in the same thread. Conversations are saved automatically, so you can return to them later from your **History**.
- **Flexible context** – When the page context feature is available, you can remove it at any time to ask questions across all your organization's approved content, then add it back when you want to focus on the current page again.

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- **Conversation panel during avatar conversations** - During an Agentic Avatar conversation, users can open a conversation panel to view the live transcript, review responses, and send text messages without leaving the conversation.
- **Conversation summaries** - After an Agentic Avatar conversation ends, a summary is added to the thread. Expand the summary to view the full conversation transcript.
- **Interactive and shareable results** - Open videos and documents directly from responses, view sources, share individual answers, and provide feedback.
- **Secure, role-based access** - Conversational Agents follow your existing permissions and only returns content users are authorized to access.

User access & permissions

Conversational Agents strictly follow your existing user access controls - they only show entries the user has permission to see.

You can enable Conversational Agents for everyone in a specific user role, limit it to a specific user group, or allow access for unauthenticated visitors on public platforms.

For more information on user entitlements, see User roles and permissions in Content Hubs.

Personalized responses

When you're signed in, Conversational Agents can use basic information from your profile, such as your name, title, company, or bio, to return more relevant results. This information is used only within your organization and is never shared externally.

Agents speak your language

Conversational Agents detect the language of your question and reply in the same language when possible. The agent pulls from multilingual content, prioritizing your organization's default language while returning the most accurate results available.

Security and data privacy

Agents operate within your secure Kaltura environment:

- **No external AI training** – Agents never learn from or shares your organization's data externally.
- **Role-based permissions** – Users only receive results from content they have

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access to.

- **Enterprise-grade security** – Agents comply with strict security standards, including ISO 27001, SOC 2 Type II, and GDPR.
- **Data encryption** – All interactions are protected through industry-leading encryption protocols.

Kaltura does not use customer data to train its AI models. To learn more, see Kaltura's Artificial Intelligence Principles.

How Kaltura agents are set up

Conversational Agents are configured at the organizational level and are set up by your Kaltura representative. Admins control content access, permissions, and integrations with systems like LMS platforms.

For configuration steps, see the GenieAI module.

OCR support

If OCR is enabled for your account, agents can use on-screen text (such as slides) to improve searchability and enrich answers. For details on ordering OCR, see our articles Order captions, Order captions via Rich Media CMS, and Order OCR.

For best results, use high-quality captions. If you rely on machine-generated captions, consider adding a dictionary for names and domain-specific terms. You can also work with your Kaltura representative to add a glossary or custom prompts for organization-specific terminology.

Analytics

Admins can request a usage report through their Kaltura representative. This report includes:

- All questions asked by users
- The answers they received
- Any feedback provided (thumbs up/down and explanations)

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