

# Manage the agent playbook

Last Modified on 06/22/2026 10:47 pm IDT

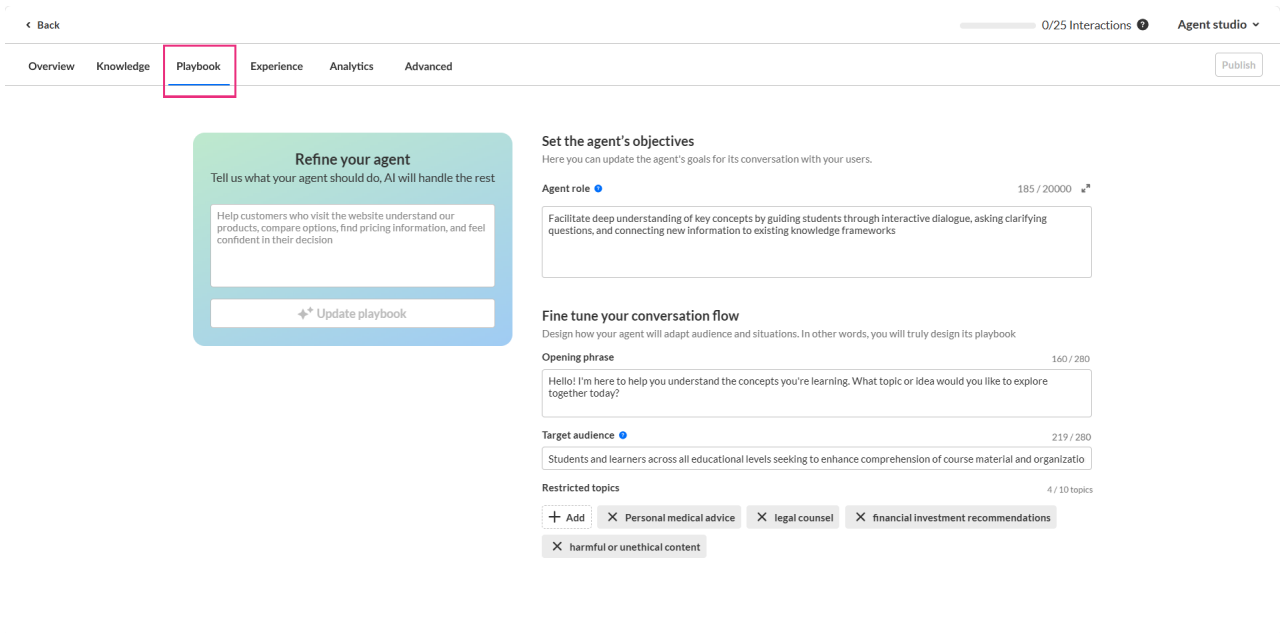
 This article is designated for administrators.

## About

Configuring an agent starts with defining who it is and how it should interact with users. This guide walks you through the process of setting up your agent's core profile via the Playbook tab - from describing its role and purpose, to crafting its opening message, identifying its intended audience, and establishing topic boundaries. Each section is designed to help you shape a focused, consistent conversational experience, ensuring your agent stays on-topic and delivers relevant responses.

## Navigate to the Playbook tab

Click on the Playbook tab.



The screenshot shows the 'Playbook' tab in the Kaltura Agent Studio interface. The navigation bar includes 'Overview', 'Knowledge', 'Playbook' (highlighted with a red box), 'Experience', 'Analytics', and 'Advanced'. A 'Publish' button is visible in the top right. The main content area is divided into two columns. The left column, titled 'Refine your agent', contains a text area with the instruction 'Tell us what your agent should do, AI will handle the rest' and a sample description: 'Help customers who visit the website understand our products, compare options, find pricing information, and feel confident in their decision'. Below this is an 'Update playbook' button. The right column, titled 'Set the agent's objectives', contains a text area with the instruction 'Here you can update the agent's goals for its conversation with your users.' and a sample objective: 'Facilitate deep understanding of key concepts by guiding students through interactive dialogue, asking clarifying questions, and connecting new information to existing knowledge frameworks'. Below this are sections for 'Fine tune your conversation flow', 'Opening phrase', 'Target audience', and 'Restricted topics'.

## Refine your agent

This is where you describe what job(s) your agent should do. What will your agent's purpose(s) be?

1. In the **Refine your agent** free text area on the left of your screen, type your description.

**Refine your agent**

Tell us what your agent should do, AI will handle the rest

Help customers who visit the website understand our products, compare options, find pricing information, and feel confident in their decision

+\* Update playbook

#### Set the agent's objectives

Here you can update the agent's goals for its conversation with your users.

**Agent role** ● 185 / 20000 \*

Facilitate deep understanding of key concepts by guiding students through interactive dialogue, asking clarifying questions, and connecting new information to existing knowledge frameworks

#### Fine tune your conversation flow

Design how your agent will adapt audience and situations. In other words, you will truly design its playbook

**Opening phrase** 160 / 280

Hello! I'm here to help you understand the concepts you're learning. What topic or idea would you like to explore together today?

**Target audience** ● 219 / 280

Students and learners across all educational levels seeking to enhance comprehension of course material and organization

**Restricted topics** 4 / 10 topics

+ Add
X Personal medical advice
X legal counsel
X financial investment recommendations
  
X harmful or unethical content

## 2. Click **Update playbook**.

The playbook is updated automatically based on the description you provided.

You can now review and fine-tune the playbook using the fields on the right of your screen.

## Set the agent's objectives

Update the agent's goals for its conversation with your users.

### Agent role

In the **Agent role** free text area, type information about your agent's purpose, what it should help with and how it should behave. This can be up to 20,000 char.

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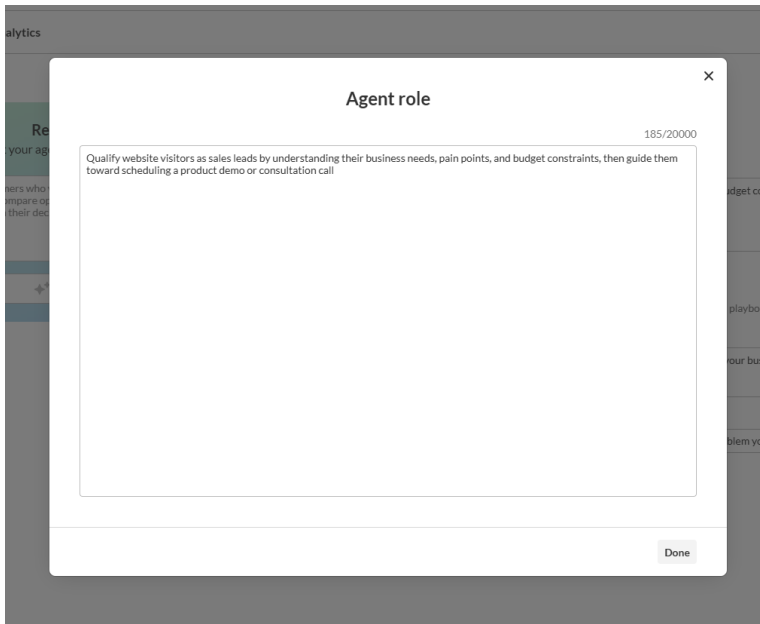
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You can click the 'extend screen view' icon just above the upper right corner of the text area to open a large popup. This makes it easier to manage your text. Simply click **Done** once you're finished typing to save your text and close the popup.

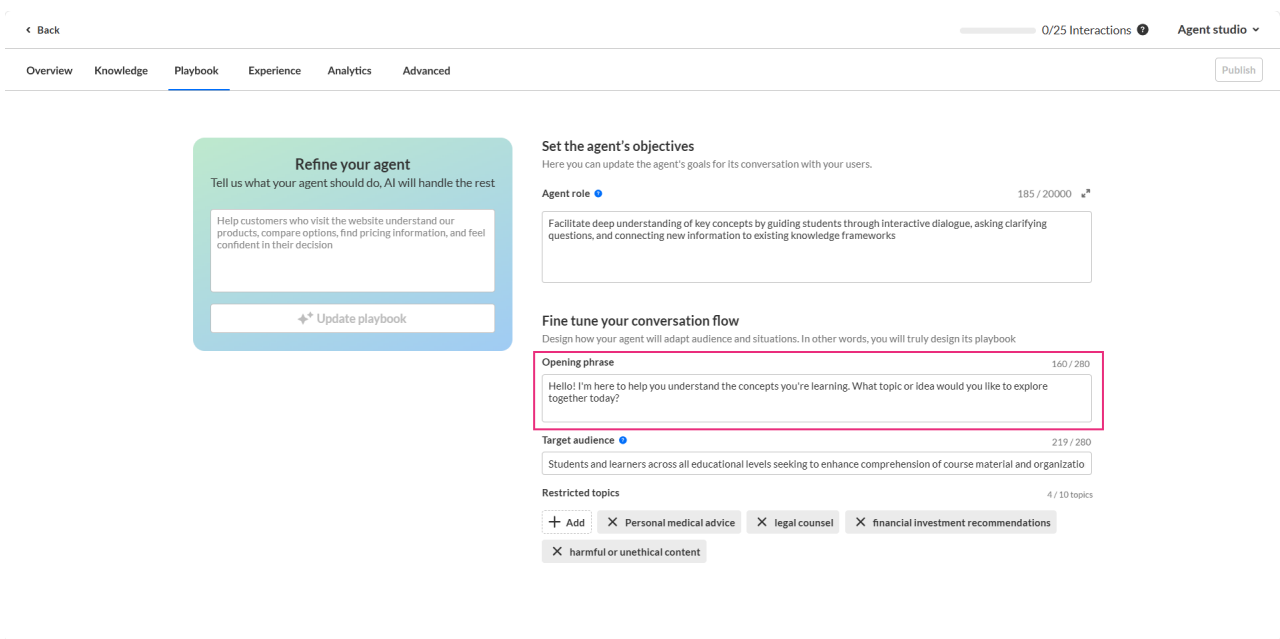


## Fine tune your conversation flow

Define how your agent will adapt to its audience and situations.

### Opening phrase

In the **Opening phrase** free text area, type what you would like your agent to say when "meeting" your users for the first time. This can be up to 280 char.



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Overview Knowledge **Playbook** Experience Analytics Advanced Publish

**Refine your agent**

Tell us what your agent should do, AI will handle the rest

Help customers who visit the website understand our products, compare options, find pricing information, and feel confident in their decision

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**Set the agent's objectives**

Here you can update the agent's goals for its conversation with your users.

**Agent role** 185 / 20000 ✎

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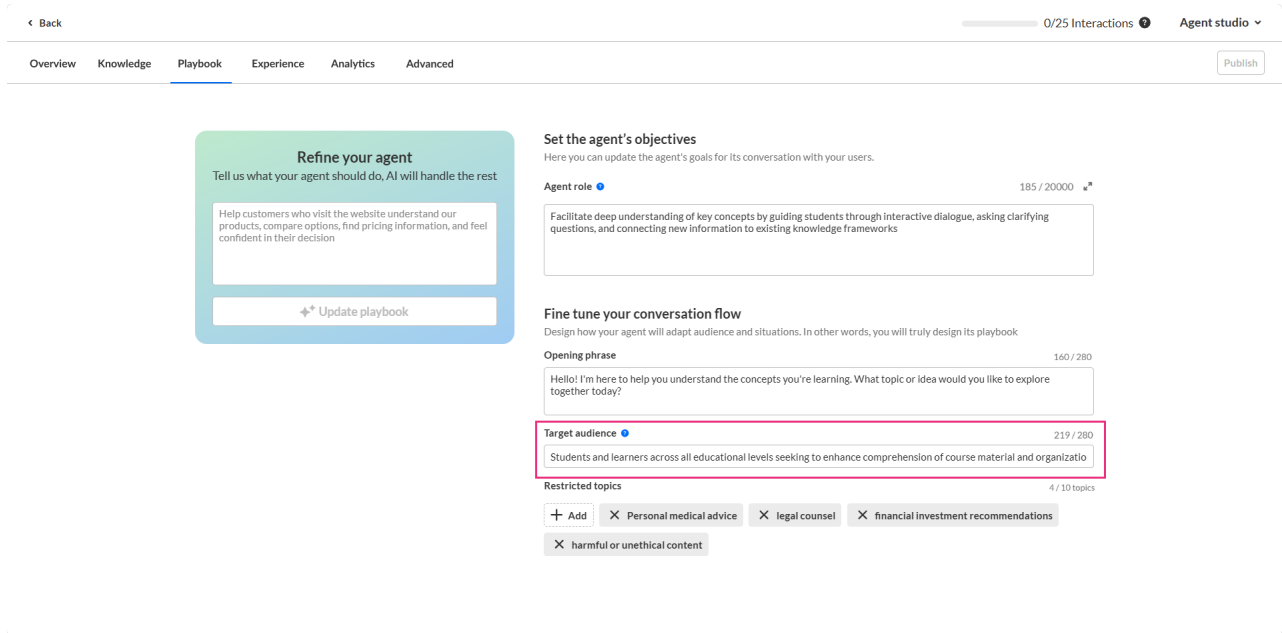
**Restricted topics** 4 / 10 topics

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✕ harmful or unethical content

## Target audience

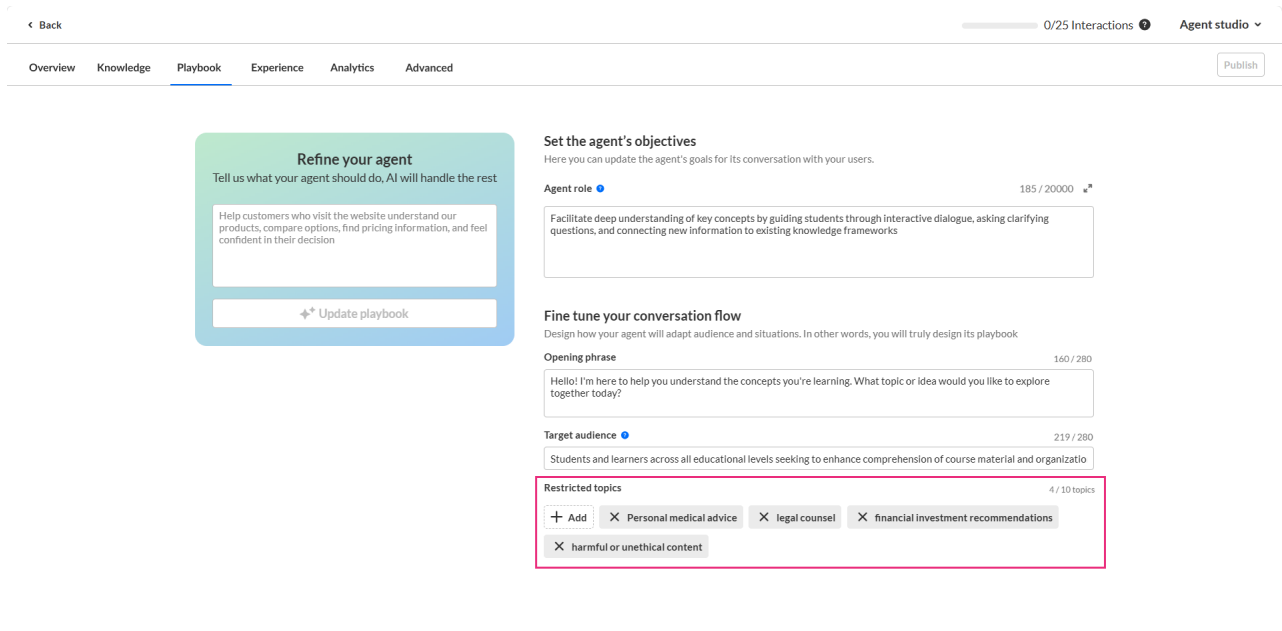
In the **Target audience** free text area, specify your primary audience. For example, website visitors, future students, or existing customers. This can be up to 280 char.



The screenshot shows the 'Playbook' configuration page in Agent Studio. The 'Target audience' field is highlighted with a pink border. The field contains the text: 'Students and learners across all educational levels seeking to enhance comprehension of course material and organization'. Other visible fields include 'Agent role' (185 / 20000), 'Opening phrase' (160 / 280), and 'Restricted topics' (4 / 10 topics) with tags for 'Personal medical advice', 'legal counsel', 'financial investment recommendations', and 'harmful or unethical content'.

## Restricted topics

In the **Restricted topics** area, define which topics are off-limits for your agent.

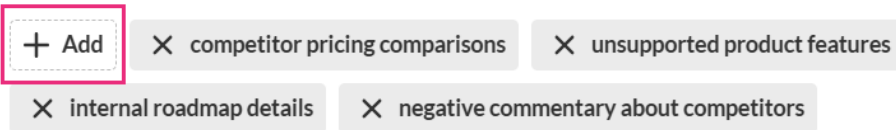


This screenshot is identical to the one above, but the 'Restricted topics' area is highlighted with a pink border. It shows the same configuration for 'Agent role', 'Opening phrase', and 'Target audience', with the 'Restricted topics' list containing: '+ Add', 'Personal medical advice', 'legal counsel', 'financial investment recommendations', and 'harmful or unethical content'.

### 1. Click + **Add**.

Restricted topics

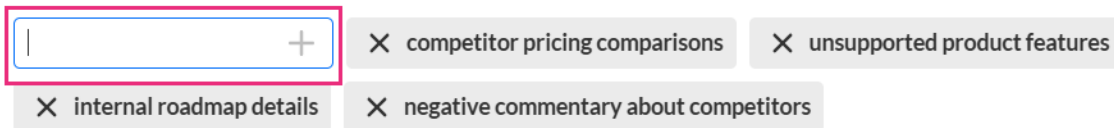
4 / 10 topics



A free text box displays.

Restricted topics

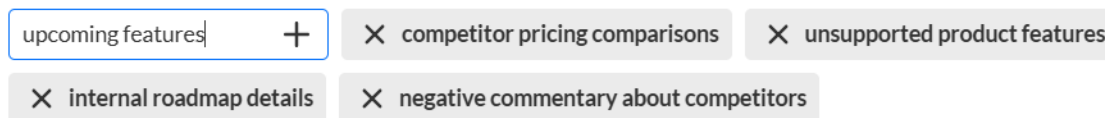
4 / 10 topics



2. Type the restricted topic. This can be up to 30 char.

Restricted topics

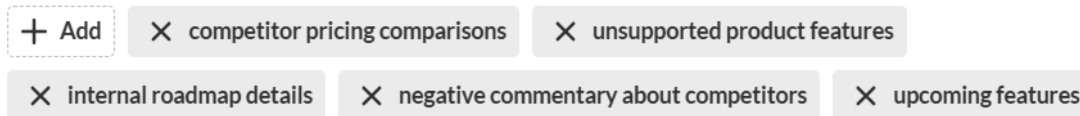
4 / 10 topics



3. Click the + button. The restricted topic tag is created.

Restricted topics

5 / 10 topics

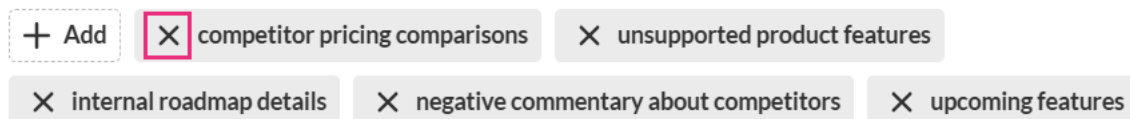


You can add up to 10 topics.

You can always remove tags by clicking the X button.

Restricted topics

5 / 10 topics



Remember to click the **Publish** button on the Playbook tab to publish any changes you've made.





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

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