

Manage the agent playbook

Last Modified on 04/30/2026 5:46 pm IDT

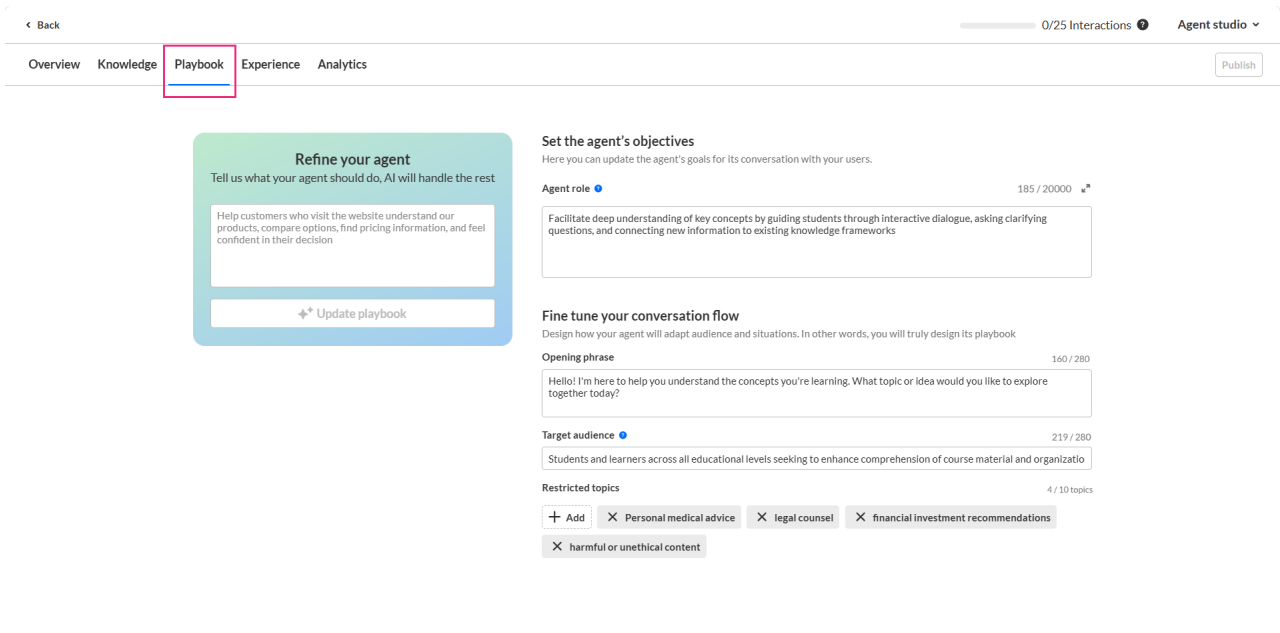
 This article is designated for administrators.

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' configuration page in the Kaltura Agent Studio. The navigation bar at the top includes 'Overview', 'Knowledge', 'Playbook' (highlighted with a red box), 'Experience', and 'Analytics'. On the right, it shows '0/25 Interactions' and 'Agent studio'. 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 is an 'Agent role' dropdown set to '185 / 20000'. Further down, the 'Fine tune your conversation flow' section includes an 'Opening phrase' text area with a sample message: 'Hello! I'm here to help you understand the concepts you're learning. What topic or idea would you like to explore together today?'. Below that is a 'Target audience' dropdown set to '219 / 280' and a 'Restricted topics' section with a list of topics: 'Personal medical advice', 'legal counsel', 'financial investment recommendations', and 'harmful or unethical content'. There is an 'Add' button and an 'X' icon next to each topic.

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

- Personal medical advice
 legal counsel
 financial investment recommendations
 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.

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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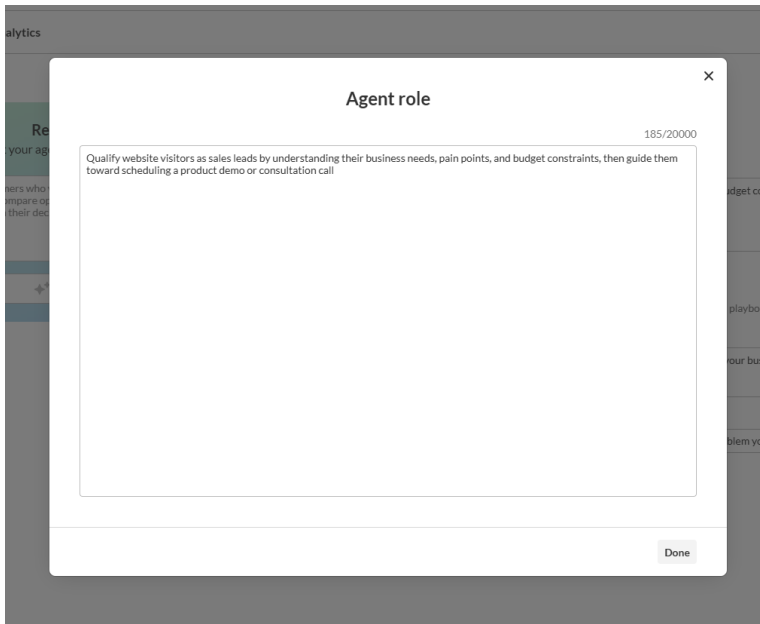
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Restricted topics 4 / 10 topics

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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.

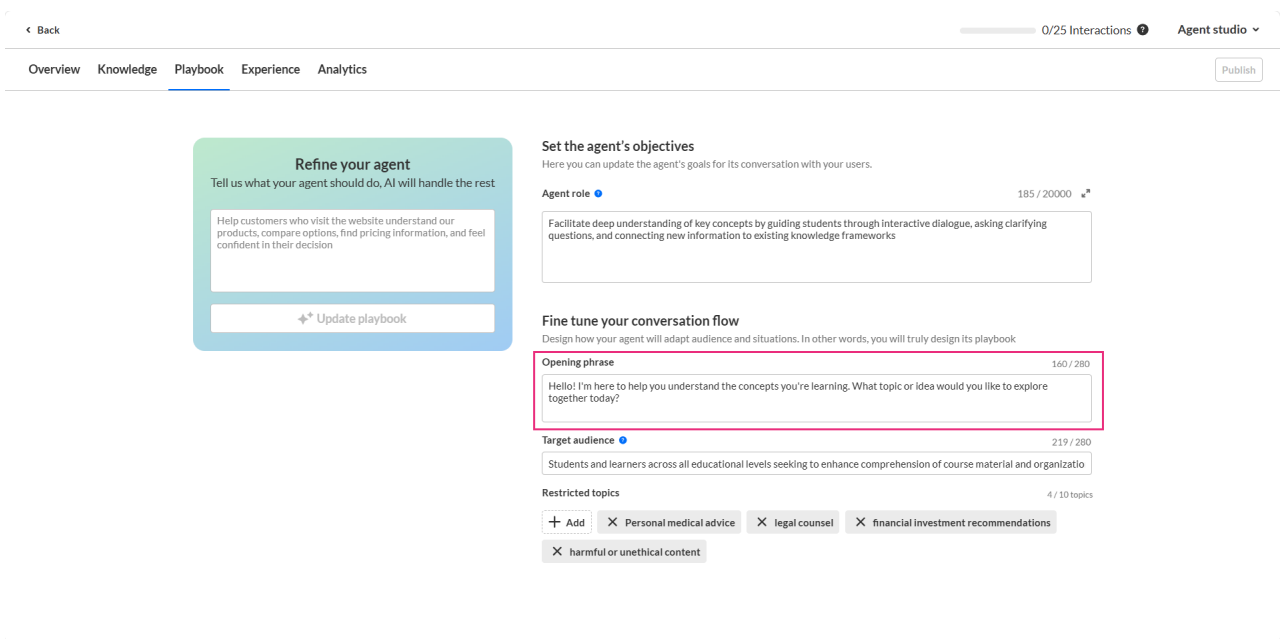


Fine tune your conversation flow

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.



← Back 0/25 Interactions ⓘ Agent studio ▾

Overview Knowledge **Playbook** Experience Analytics 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

+* 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 ✎

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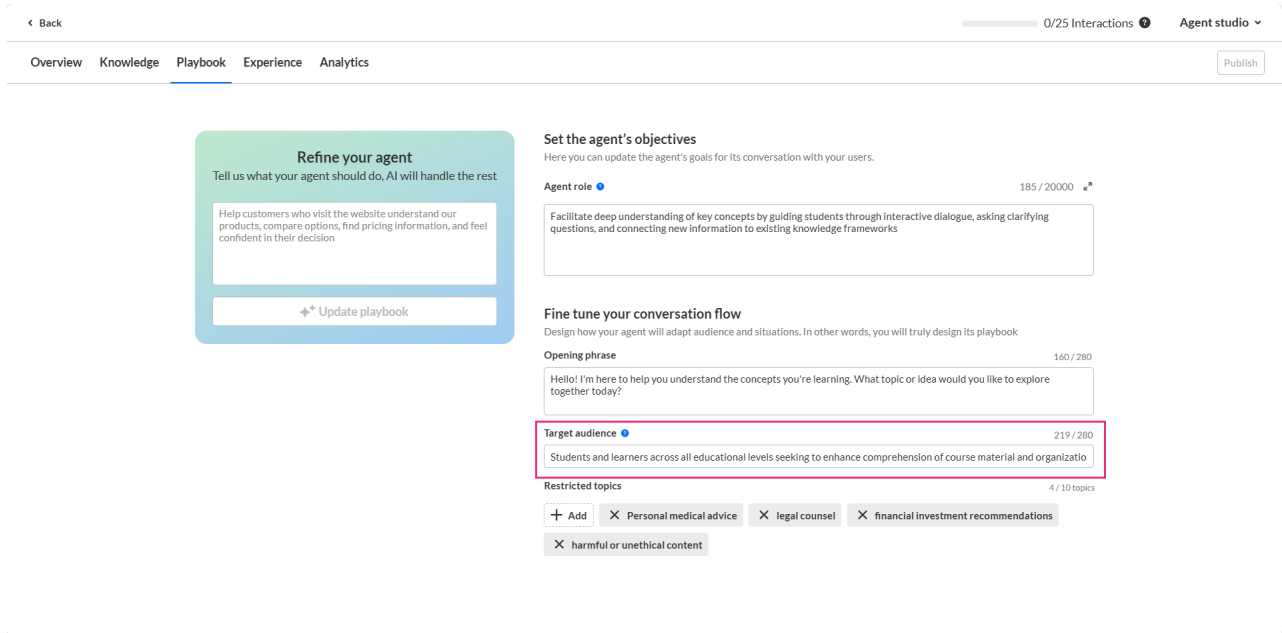
Restricted topics 4 / 10 topics

+ Add ✗ Personal medical advice ✗ legal counsel ✗ financial investment recommendations

✗ harmful or unethical content

Target audience

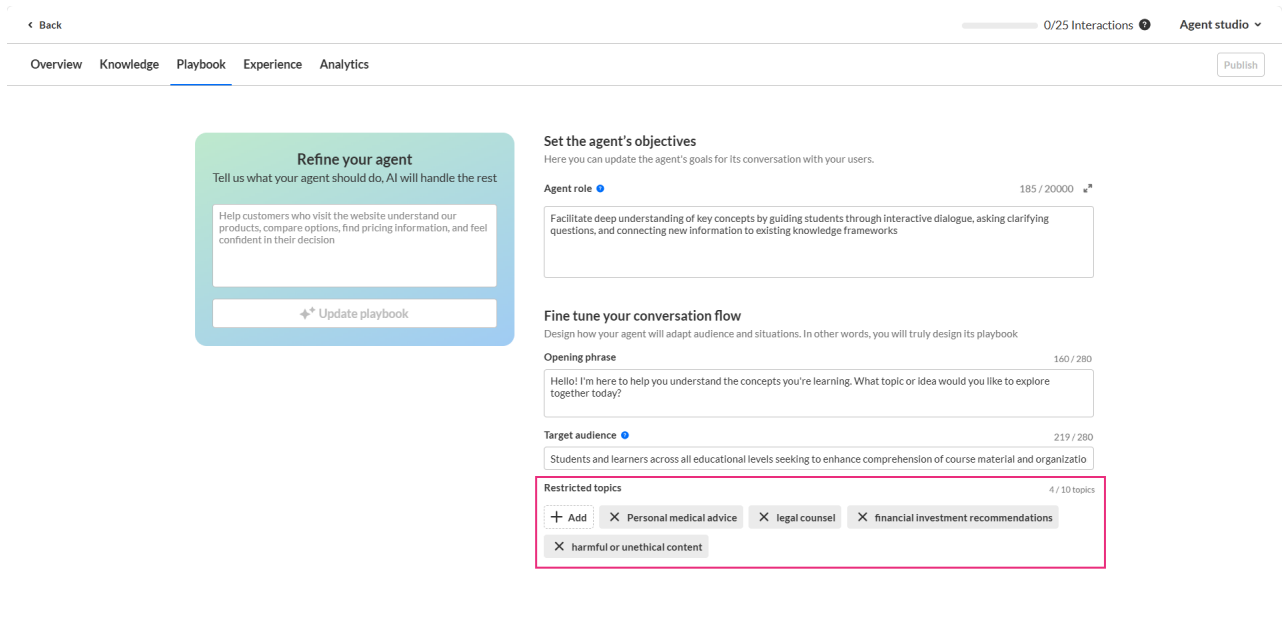
In the **Target audience** free text area, specify your primary audience. For example, website visitors, future students, or existing customers. This can be up to 280 char.



The screenshot shows the 'Agent studio' interface with the 'Playbook' tab selected. On the left is a 'Refine your agent' panel. The main area is divided into sections: 'Set the agent's objectives', 'Agent role' (185 / 20000), 'Fine tune your conversation flow', 'Opening phrase' (160 / 280), 'Target audience' (219 / 280), and 'Restricted topics' (4 / 10 topics). The 'Target audience' field is highlighted with a pink border and contains the text: 'Students and learners across all educational levels seeking to enhance comprehension of course material and organization'. The 'Restricted topics' section includes a '+ Add' button and several topics with 'X' icons: '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, showing the 'Agent studio' interface. The 'Restricted topics' section is highlighted with a pink border. It shows the '+ Add' button and the list of restricted topics: '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 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](#).
