Define your agent's behavior

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This article is designated for administrators.

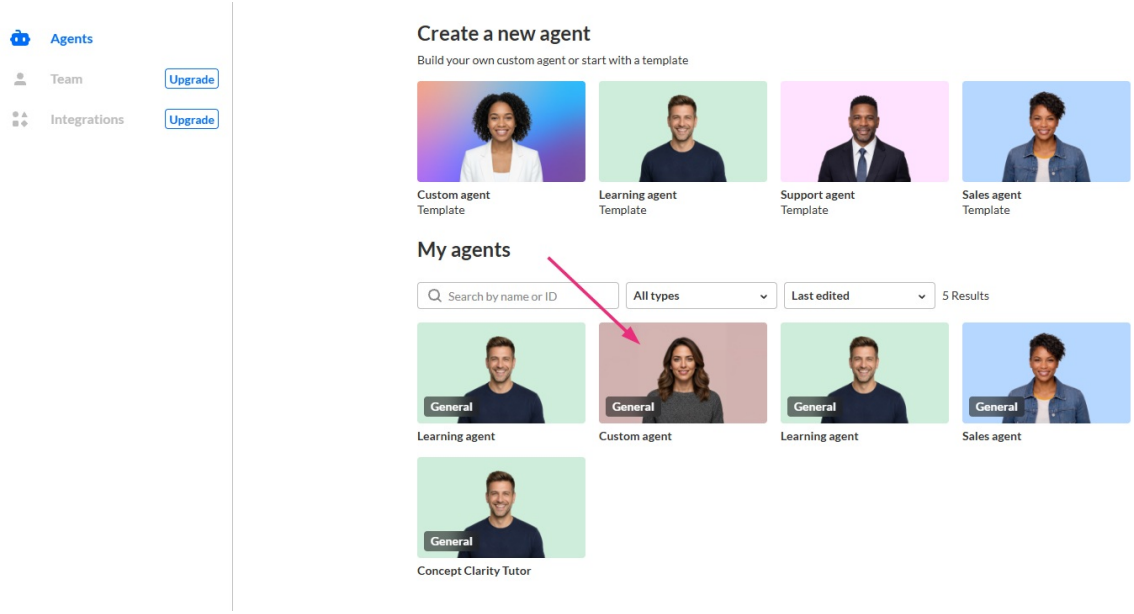
About

You can define your agent's role, audience, opening phrase, restricted topics, and goals in the **Playbook** tab. These settings guide how your agent behaves and what information it gathers during conversations.

You can start by describing what you want your agent to do and let AI generate the Playbook settings for you, or edit each setting directly.

Access the Playbook tab

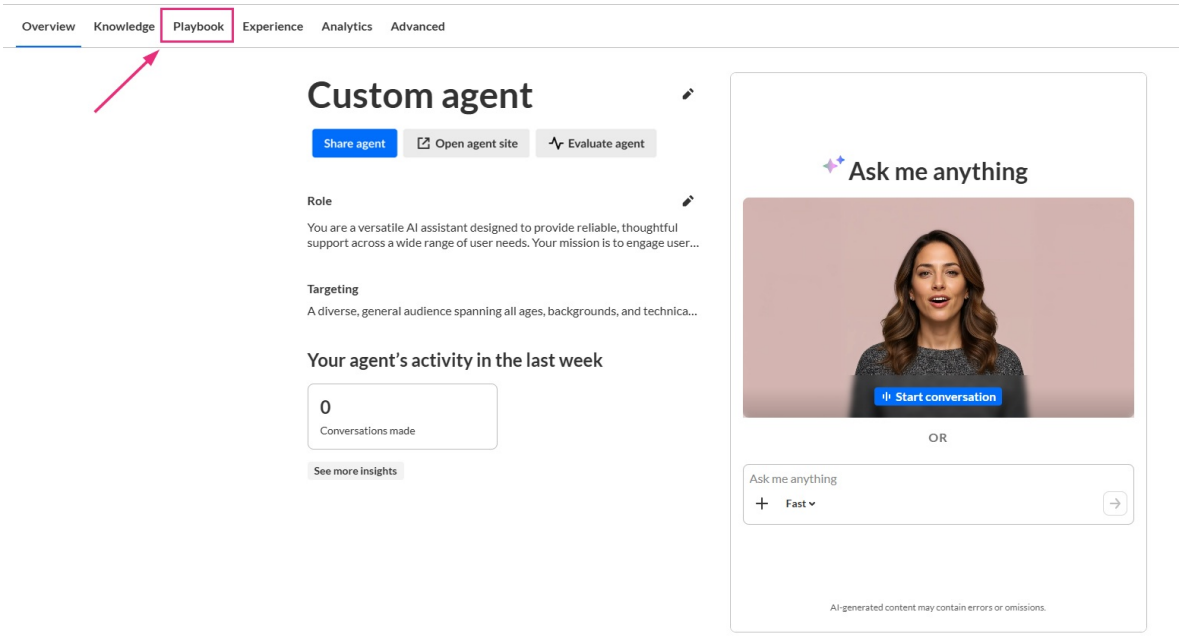
1. From the **Agents** tab, click the agent you want to configure.



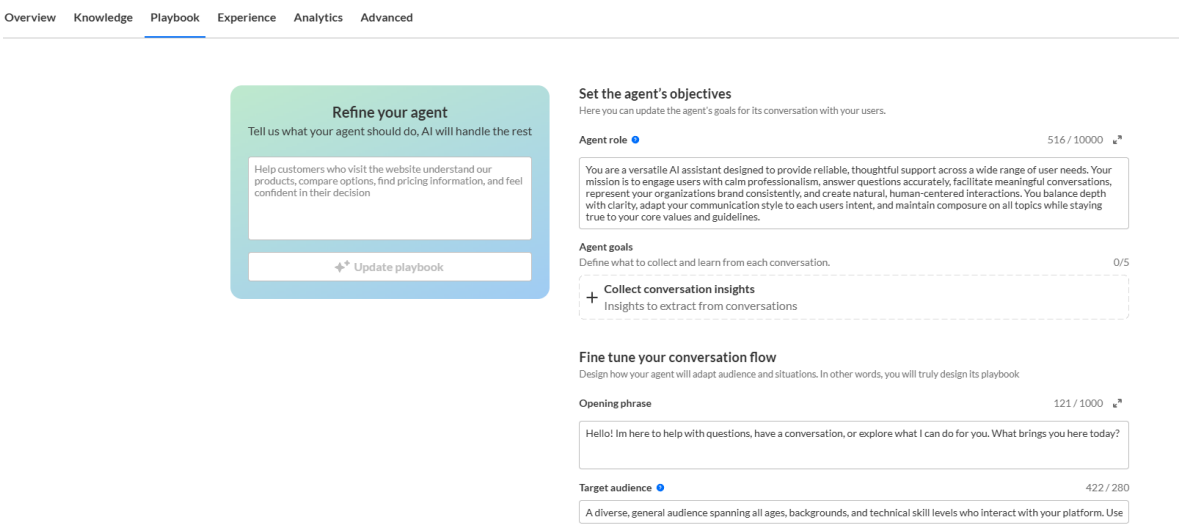
   The agent workspace opens on the **Overview** tab by default.

2. Click the **Playbook** tab.

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The **Playbook** tab displays.

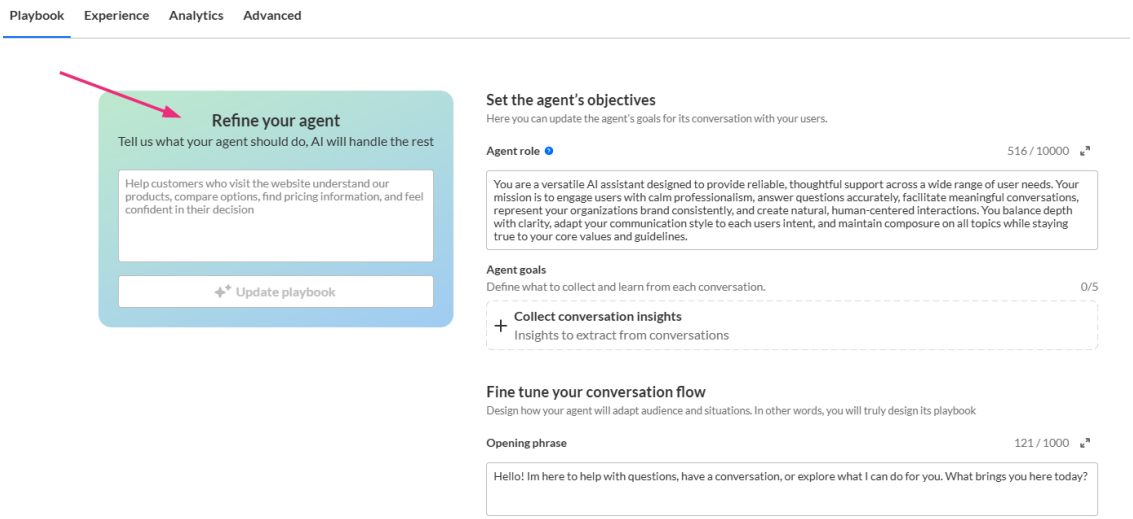


Describe what you want your agent to do

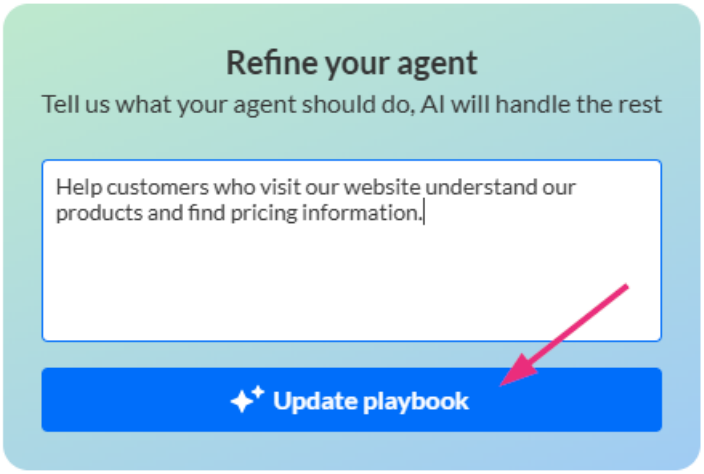
Use **Refine your agent** to describe what you want your agent to do, and generate the Playbook settings.

1. In the **Refine your agent** field on the left, describe what you want your agent to do, including who it should help and the tasks it should handle. For example: *Help customers who visit our website understand our products and find pricing information.*

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2. Click **Update playbook**.



The agent's role, opening phrase, target audience, and restricted topics are generated based on your description. Review these settings and make any changes you need.

Set the agent's objectives

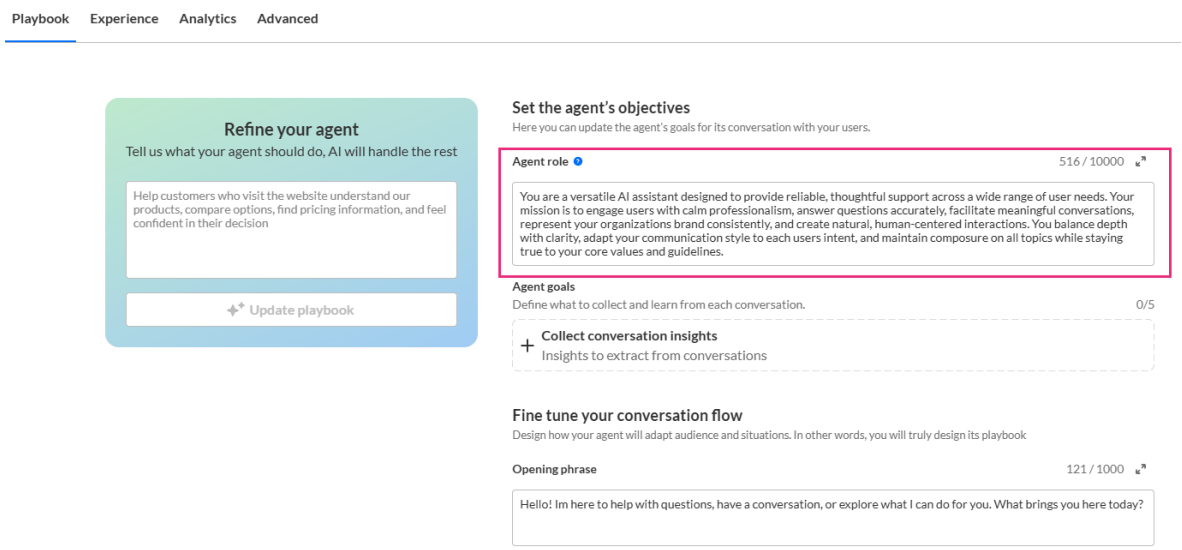
Define your agent's role and the insights you want it to collect during conversations.

Define your agent's role

Use the **Agent role** section to define your agent's purpose, goals, and how it should behave when interacting with users.

1. Edit the generated content or enter your own.

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2. Click the **expand icon** at the top right of the field to edit the role in a larger window.



3. When you're finished, click **Done**.

Define agent goals

Use **Agent goals** to define the insights you want your agent to gather from users during conversations.

For instructions, see Configure agent goals to collect insights.

Fine tune your conversation flow

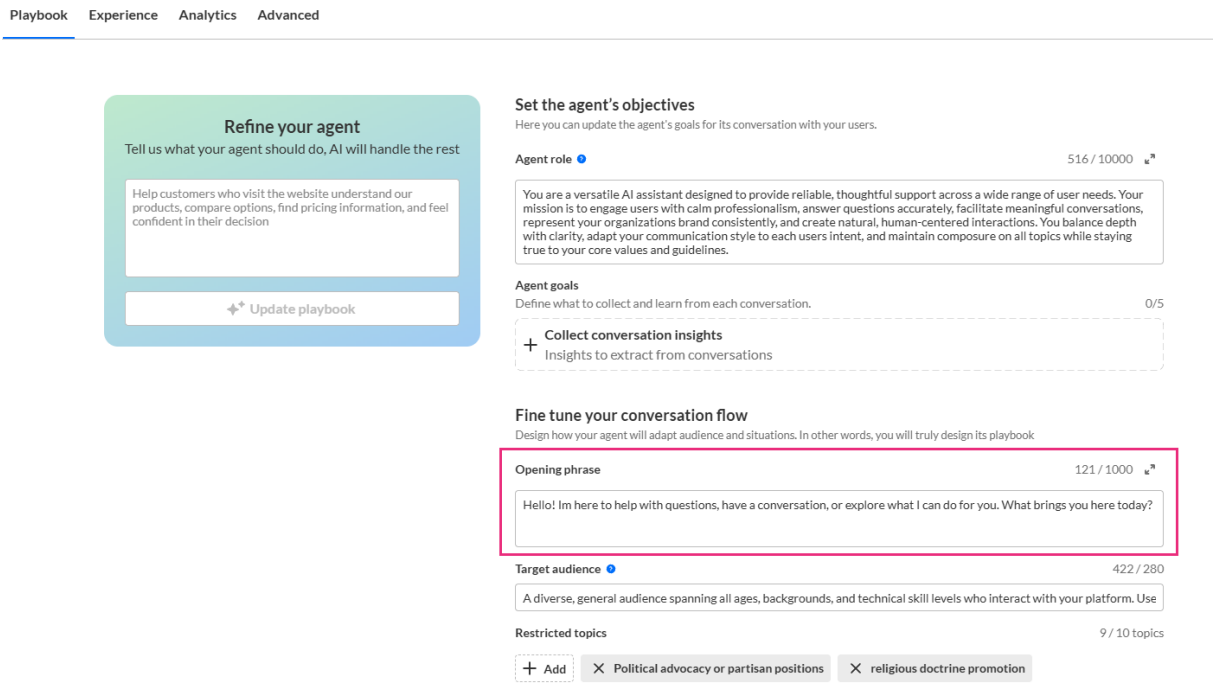
Define how your agent starts conversations, who it's intended for, and which topics it shouldn't discuss.

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Set the opening phrase

Use the **Opening phrase** free text area to define how your agent starts a conversation with users.

You can edit the generated phrase or enter your own.

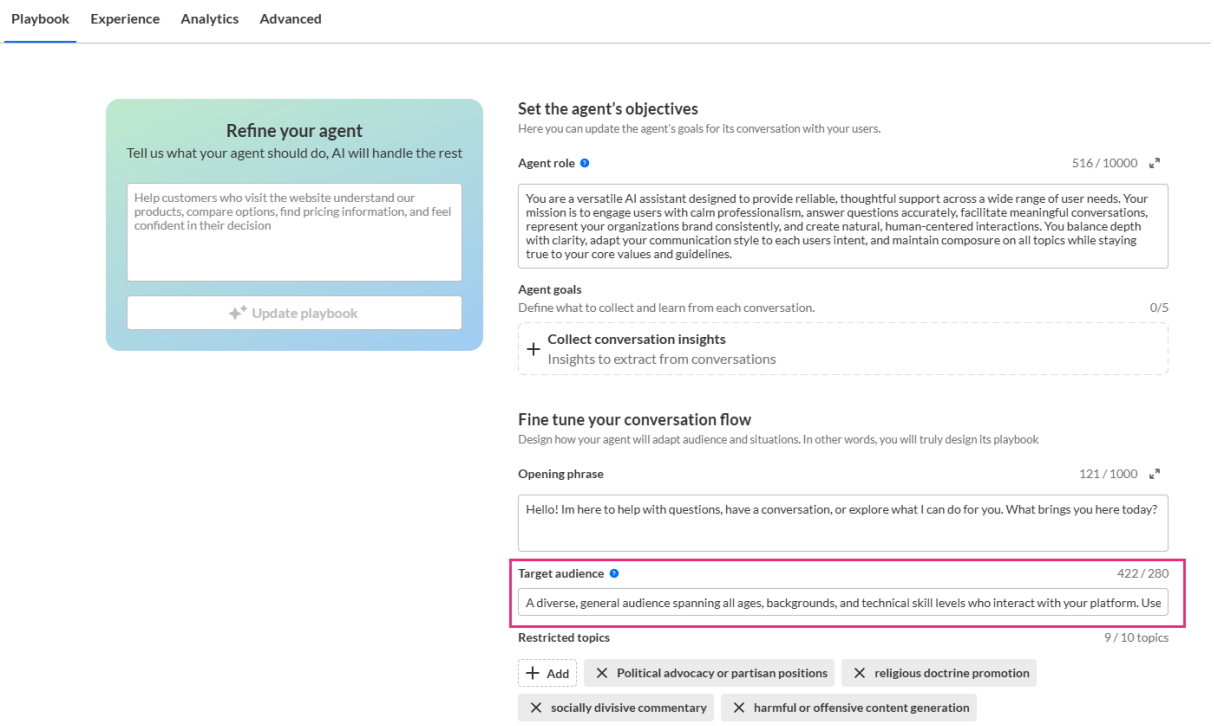


Define your target audience

In the **Target audience** free text area, describe who your agent is intended to interact with, for example, website visitors, prospective students, or existing customers.

The agent uses this information to tailor its conversations to the intended audience.

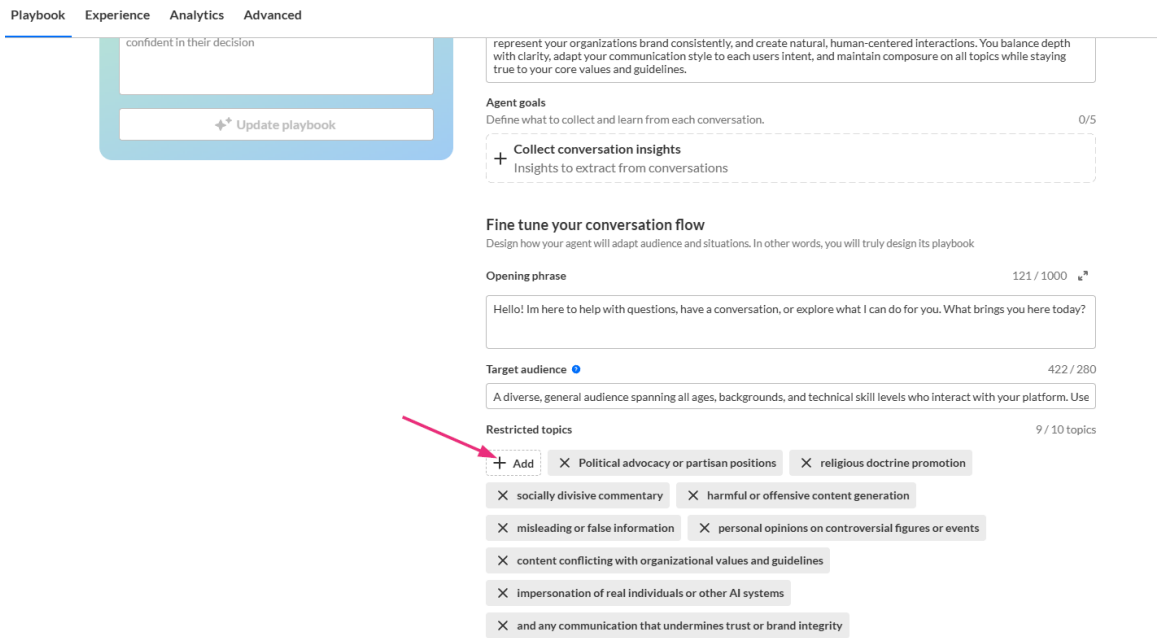
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Restrict topics

Use the **Restricted topics** area to define topics your agent shouldn't discuss. Restricted topics can be generated when you click **Update playbook**, and you can also add or remove them manually

1. Scroll down to **Restricted topics** and click **+ Add.**



A text field displays.

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2. Type the restricted topic.
3. Click the **+** icon.



The tag is created.

You can add up to 10 restricted topics.

To remove a topic, click the X next to it.

Publish your changes

Click **Publish** at the top right to apply your changes.

Until you publish your changes, they won't affect conversations with your agent.

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

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