

Overview page for your agent

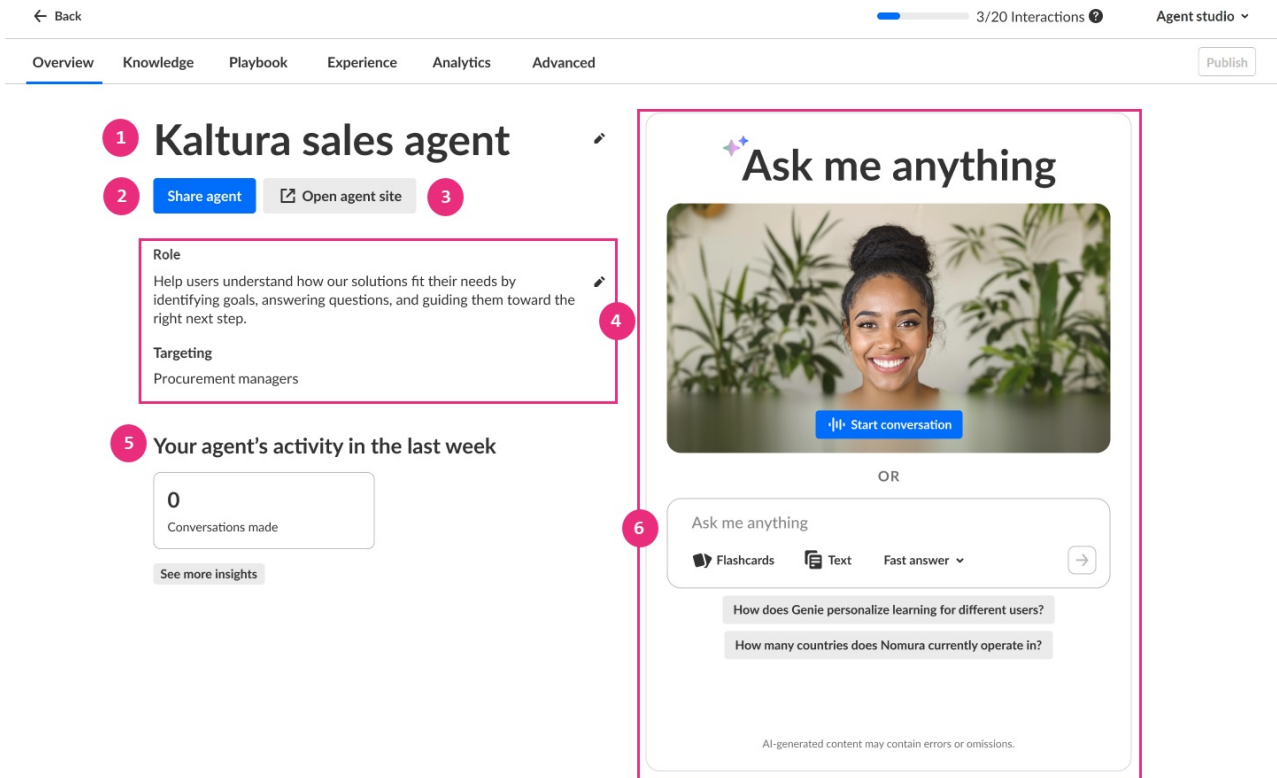
Last Modified on 06/22/2026 10:46 pm IDT

 This article is designated for administrators.

About

The Overview page displays the vital details of the agent. It offers a centralized place to manage and customize agent information, as well as the ability to interact with your agent in real-time.

Get to know the Overview page



The screenshot shows the 'Overview' page for an agent named 'Kaltura sales agent'. The page includes a navigation bar with tabs for Overview, Knowledge, Playbook, Experience, Analytics, and Advanced. A 'Publish' button is visible in the top right. The main content area is divided into several sections:

- 1** **Kaltura sales agent**: The agent name, with an edit icon.
- 2** **Share agent**: A blue button to share the agent.
- 3** **Open agent site**: A button with an external link icon to open the agent's site.
- 4** **Role**: A text field containing 'Help users understand how our solutions fit their needs by identifying goals, answering questions, and guiding them toward the right next step.' Below it is the **Targeting** field with 'Procurement managers'.
- 5** **Your agent's activity in the last week**: A card showing '0 Conversations made' and a 'See more insights' button.
- 6** **Ask me anything**: A chat interface with a 'Start conversation' button, a text input field, and example questions: 'How does Genie personalize learning for different users?' and 'How many countries does Nomura currently operate in?'.

The page includes the following:

- (1) Agent name** - Rename your agent. Select the edit icon next to the agent name to open the editor. Type a name for your new agent, then click **Save**. Max is 50 char.
- (2) Share agent** - Click **Share agent** to copy a direct link of your agent to share with others. See [Share an agent](#) for complete information.
- (3) Open agent site** - Click **Open agent site** to open a stand-alone media page for

your agent and preview your agent as it will appear to users. See [Open agent site](#) for complete information.

(4) Agent Role and Targeting - Customize your agent's playbook. Select the edit icon next to Role to open the Playbook tab. See [Manage the agent playbook](#) for complete information.

(5) Agent activity - See number of conversations your agent has had and its success rate in the last week. Click **See more insights** to open the Analytics tab. See [Agentic Avatar Studio analytics](#) for complete information.

(6) Real time avatar/chat - Preview and interact with your agent in real-time. See [Real time agent interaction](#) for complete information.



Remember to click the **Publish** button on the Overview page 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](#).