Best practices for adding knowledge to your agent

Content updated: 10/06/2026

This article is designated for administrators.

About

Great answers start with great knowledge. These best practices help your agent retrieve the right content, and help you test and fine-tune its answers.

To add or delete knowledge, see Add knowledge to your agent. To understand how your agent finds answers, see How agents build answers from their knowledge.

Help your agent retrieve the right content

When a visitor asks a question, the agent searches its knowledge and picks the sections that best match. Clear, focused content helps it pick the right ones.

- Add fewer, better sources. If two sources cover the same topic, the agent might pick either one.
- Remove outdated or conflicting content, instead of adding a correction elsewhere.
- Give each file a specific, descriptive title, so the agent can tell what it's about.
- Keep each file to 1 GB or smaller. Split very long documents into shorter ones by topic.
- If your content covers very different subjects, such as travel and insurance, consider a separate agent for each, with its own knowledge.

Make your videos and audio searchable

- Add captions to every video and audio file. Without captions, the agent can't use them.
- Check that captions are accurate, especially names and product terms. To improve accuracy, add these terms to a REACH caption dictionary.
- If important information is shown on screen but not spoken, order OCR (on-screen text recognition) through REACH.

Write clear instructions

- Use **Agent role** on the **Playbook** tab to describe how your agent should behave,

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such as its purpose and tone. Add facts, such as product details or policies, on the **Knowledge** tab instead.
- Use as few restrictions as you need. Too many restricted topics, or very strict wording, can stop the agent from answering questions it has the content for.

Test your agent

- Ask the questions your visitors are most likely to ask, worded in different ways, and check each answer against your content.
- Ask a question your knowledge doesn't cover, to check that the agent responds the way you instructed.
- To see your agent the way visitors see it, go to the **Overview** tab and click **Open agent site**. Conversations started inside the studio can address the account owner by name.
- After adding media, wait for processing to finish (up to 3 hours) before you test it.

Troubleshooting

Problem	What to do
The agent doesn't use new content.	Check that you clicked **Publish** on the **Knowledge** tab, and wait up to 3 hours for processing. Check that videos and audio files have captions, and that OCR is set up if the information is on screen only.
The answer is wrong or out of date.	Look for conflicting or outdated sources and remove them. Check the captions for errors. For a key fact, add it to **Free text**.
The agent answers something that isn't in its knowledge.	In **Agent role** on the **Playbook** tab, add an instruction telling the agent to say it doesn't know when the information isn't in its knowledge.
The agent won't answer a question it has content for.	Review the **Agent role** and restricted topics on the **Playbook** tab. Remove wording or restrictions that are stricter than you need.

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