

# Categories CSV - Usage and Schema Description

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The Categories CSV may be used for creating, updating or deletion of, a large amount of categories.

## Purpose and Usage

The categories CSV for bulk operation may be useful for:

- Creating multiple categories for any applicative use. For example:
- Creating multiple categories for the initial setup of Media Space's galleries and channels
- Creating multiple categories for a Kaltura based website integration
- An on-going scheduled process for the syncing categories managed in Kaltura with a respective external structure. For example:
  - A scheduled daily sync process for syncing MediaSpace group channels with groups managed in the organization.
  - An automatic sync of Kaltura's categories with the taxonomy of an external CMS

**NOTE:** For an efficient on-going CSV based sync processes, only new categories and categories that require updating or deletion should be included within the CSV

**NOTE:** Content entitlement related attributes can be populated via the CSV only in accounts that are set to support entitlements and for categories under a category tree branch that is set to have entitlement settings.

## General Guidelines

- Lines that begin with a # character will not be processed.
- The first line for processing (fields' definition line) should start with an \* sign and should include the field names to be populated via the CSV, according to the defined schema of each CSV format. Mandatory fields must be present. The field order may be set as needed.
- Each line for processing within the CSV should include a comma separated list of values ordered by the field ordering set in the fields' definition line.
- Each line for processing within the CSV will apply an action on a single Kaltura object. For example: each line in the categories CSV will apply the action to a single category.
- The CSV may be submitted from the KMC (through the Upload menu) or via a script, by utilizing Kaltura's API.
- Prior to processing the CSV file, its format is validated. When a mandatory field is missing, the bulk job will fail and processing will not start.
- Bulk job tracking as well as downloading bulk job related files (the original CSV and log files) are done through the KMC using the **Bulk Upload Log** feature under the **Upload Control** page.
- Email notifications on the completion of bulk upload processing - including completion status and a direct link to the log file, can be configured by Kaltura per request.
- There is no limitation on the supported number of lines within each CSV. The overall processing time of each CSV file is affected by the number of lines included in it.
- The following special characters can be populated within text fields via the CSV file :

- \_ % ? . : ; & > @ ! \$ ^ ~ = [ ] { } | <

See special exceptions within each schema description.

The CSV examples included in this guide are displayed in screens from MS Excel for better clarity.

## Schema Description for Categories CSV

Parameter Name	Mandatory/ Optional	Description	Default	Type and Restrictions
action	Optional	<p>Kaltura's numeric value for the action to apply on a specific category.</p> <p>CSV lines with different actions can be combined into a single CSV file. Only fields that are relevant to the CSV action will be used.</p> <p>The supported action types and their numeric values are:</p> <p>1=Add - to add a category</p> <p>2=Update – to update an existing category</p> <p>3=Delete – to delete an existing category</p> <p>6=Add or Update – to add or update a category when the given categoryId or referenceld are already available in Kaltura.</p>	1= Add	<a href="#">KalturaBulkUploadAction</a>
name	Mandatory in <b>add</b> actions	The name of the category. When the category name includes the > character it will automatically be replaced with _ (underscore character).		Text Field. Maximum length: 60 Characters

Parameter Name	Mandatory/ Optional	Description	Default	Type and Restrictions
relativePath	Optional	The category-tree path in which the category is located or should be created. Each category level within the path should be separated by the '>' character.  <b>Note:</b> The provided path must exist prior to processing the CSV line, or created in a higher CSV line.		Text Field. Unlimited length
categoryId	Optional	The Kaltura internal and unique identifier of the category. The categoryId field is used in the CSV for identifying a category that requires updating or needs to be deleted.  In an 'update' or a 'delete' action, either the categoryId or the referenceId field must be provided for identifying the category to which the action should apply.  In 'add' actions the categoryId field will be ignored.		Integer
referenceId	Optional	A possible identifier of the category based on an identifier from an external system that can relate the category to an external entity it represents or related to.  In an 'update' or a		Text Field. Maximum length: 512 Characters

Parameter Name	Mandatory/ Optional	Description	Default	Type and Restrictions
		<p>'delete' action, either the category or the referenceld field must be provided for identifying the category to which the action should apply.</p> <p>In 'add' actions the referenceld will be populated into the new category.</p> <p>Note: The uniqueness of the referenceld field is not verified nor managed in Kaltura. It is recommended to use logic that maintains this uniqueness for being able to reference bulk actions and API calls to a specific category.</p> <p>In case multiple categories with the same referenceld exist in the account, any update/delete action will be committed only to a single category.</p>		
tags	Optional	<p>The tags to be added to the category. Multiple tags can be separated by commas, while the entire field should be wrapped with double quotation marks (e.g. "tag1, tag2). When the CSV is created in a simple text editor or by a script - the wrapping quotation marks should be added explicitly. When CSV is created with a spread sheet editor (e.g. MS Excel) this wrapping is automatically generated</p>		Text Field. Unlimited length

Parameter Name	Mandatory/ Optional	Description	Default	Type and Restrictions
		<p>when saving to a CSV no need for manual editing.</p> <p>Tag values cannot include commas.</p>		
description	Optional	<p>A description of the category and its applicative/administrative purpose.</p> <p>When the CSV is created in a simple text editor or by a script – adding wrapping quotation marks is recommended for cases in which the description includes commas</p>		Text Field. Unlimited length
Custom Data		<p>Custom data fields that are set to extend the Kaltura Category object can be populated into a category by defining the fields in the following formats:</p> <p>metadata::the-schema-system-name::the-schema-field-name</p> <p>With this format multiple custom data schemas and fields can be populated via the CSV.</p> <p>Custom data schema and fields system names are available in the custom data setting page in the KMC.</p> <p>Values of custom data fields that have multiple values should be</p>		

Parameter Name	Mandatory/ Optional	Description  Note: When updating custom data fields to an	Default	Type and Restrictions
		separated with a the following delimiter:  ,   existing category, a new metadata XML is automatically created. For preventing overriding existing values, all custom data fields that are set for the user should be provided in the CSV as part of the update action.		
<b>Entitlements Settings</b>				
privacy	Optional	The numeric value of the Content Privacy option to set for the category as part of its entitlements settings.  This option is enabled only in accounts that are configured to support end-user entitlements to content and for categories that were set to have entitlement settings.  The supported action types and their numeric values are:  1= No Restriction  2 =Requires Authentication  3= Private	1 = No Restriction	<a href="#">KalturaPrivacyType</a>
appearInList	Optional	The numeric value of the Category Listing option	1 = No Restriction	<a href="#">KalturaAppearInListType</a>

Parameter Name	Mandatory/ Optional	Description to set for the category as part of its entitlements settings.	Default	Type and Restrictions
		<p>The setting of this option is enabled only in accounts that were configured to support Content Entitlements and in categories that have entitlement settings.</p> <p>The supported action types and their numeric values are:</p> <p>1= No Restriction</p> <p>3= Private</p>		
contributionPolicy	Optional	<p>The numeric value of the ContributionPolicy option (who can add content to the category) to set for the category as part of its entitlements settings.</p> <p>The setting of this option is enabled only in accounts that were configured to support Content Entitlements and in categories that have entitlement settings.</p> <p>The supported action types and their numeric values are:</p> <p>1= No Restriction</p> <p>2= Private</p>	1 = No Restriction	<a href="#">KalturaContributionPolicyType</a>
inheritanceType	Optional	The numeric value of user permissions inheritance option	2=No	<a href="#">KalturaInheritanceType</a>

Parameter Name	Mandatory/ Optional	Description (Inherit End-User Specific Permissions from Parent Category) to set for the category as part of its entitlements	Default	Type and Restrictions
		<p>settings.</p> <p>The setting of this option is enabled only in accounts that were configured to support Content Entitlements and in categories that have entitlement settings.</p> <p>The supported action types and their numeric values are:</p> <p>1= Yes. inherit specific end-user permissions from parent category</p> <p>3= No.</p>		
owner	Optional	The userId of the category's owner.		<p>Text Field.</p> <p>Minimum length: 3 characters Maximum length: 100 Characters</p> <p>Only the following special characters are supported as part of the userId:</p> <p>. _ @ -</p>
defaultPermissionLevel	Optional	<p>The numeric value of the default permission Level the end-users should be granted for the specific category (unless other permission level was specified explicitly via CSV or API). The supported values are:</p> <p>0=Manager</p>	3=Member	<a href="#">KalturaCategoryUserPermissionLevel</a>



Parameter Name	Mandatory/ Optional	Description 1=Moderator 2=Contributor 3=Member	Default	Type and Restrictions
moderation	Optional	Indicates whether content should be moderated in the application before it is added to the category.	0=moderation is not required	Boolean

## Examples of the Categories CSV

### Bulk Creation of Categories – Basic Metadata Only

	A	B	C	D	E	F
1	*action	relativePath	name	Description	tags	referenceId
2	1	MediaSpaceRootCategory	Education	This category includes videos related to educational topics.	university, campus	EDU
3	1	MediaSpaceRootCategory	Entertainment	This category includes entertaining videos.	Comedy, funny, movies	ENT
4	1	MediaSpaceRootCategory	Business	This category includes videos related to business.	Marketing, sales	BUS
5	1	MediaSpaceRootCategory>Education	Biology	This category includes videos related to biology.	Life Sciences	BIO
6	1	MediaSpaceRootCategory>Education>Biology	Genetics	This category includes videos related to Genetics.		GEN

### Updating Existing Categories with a Few Entitlement Settings

This example uses the referenceId as the category identifier.

	A	B	C	D	E	F	G	H
1	*action	referenceId	Description	privacy	appearInList	contributionPolicy	inheritanceType	owner
2	2	EDU	This category will now be open only to people in the education department.	3	3	2	2	Johns123
3	2	ENT	This category will now be open to all employees, but only few people can add content to it.	2	1	2	2	Dabas123
4	1	BUS	This category will be open to everyone on the web, but only few people can add content to it	1	1	2	2	Dans123
5	1	BIO	This category will now be open only to people in the education department (inherited permissions)	3	3	2	1	
6	1	GEN	This category will now be open only to people in the education department (inherited permissions)	3	3	3	1	