Create role-based rules for captioning and enrichment in channels in Video Portal

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👥 **This article is designated for all users.**

About

This article explains how to create role-based rules for captioning and enrichment services in channels.
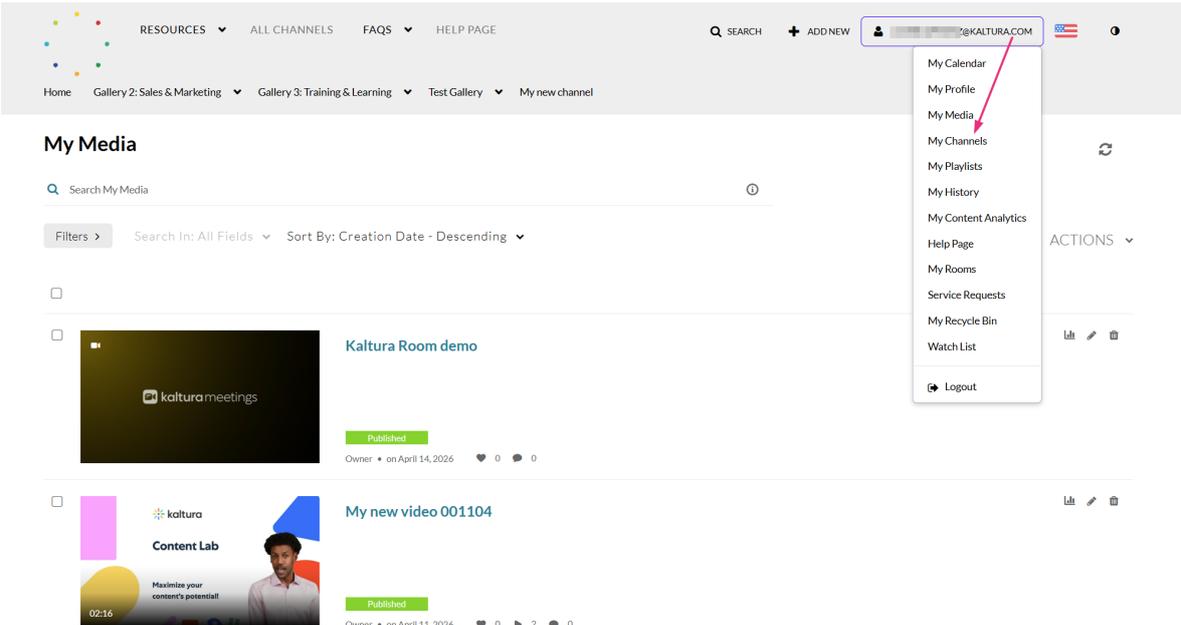
These rules automatically trigger service requests (such as captions, translations, audio descriptions, or chaptering) for entries that meet the defined criteria.

ℹ️ Please note the **categoryRuleOrderRole** field must be configured by your administrator in the REACH module.

These instructions apply to the **legacy Video Portal**. If you're using the new Video Portal with Theming, see the Content Hubs category.

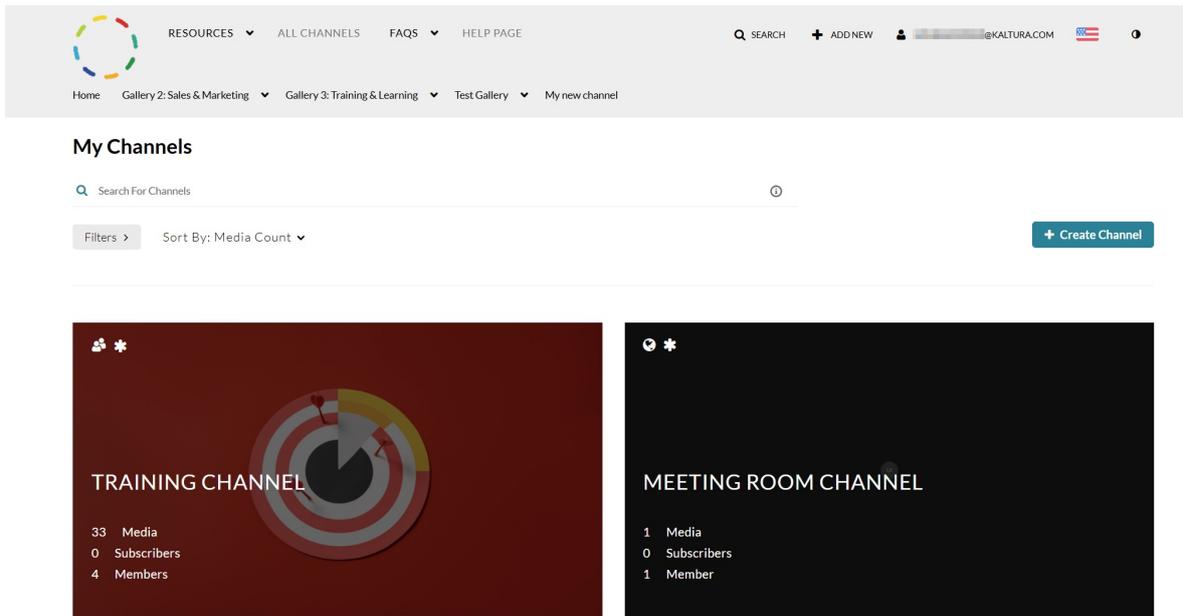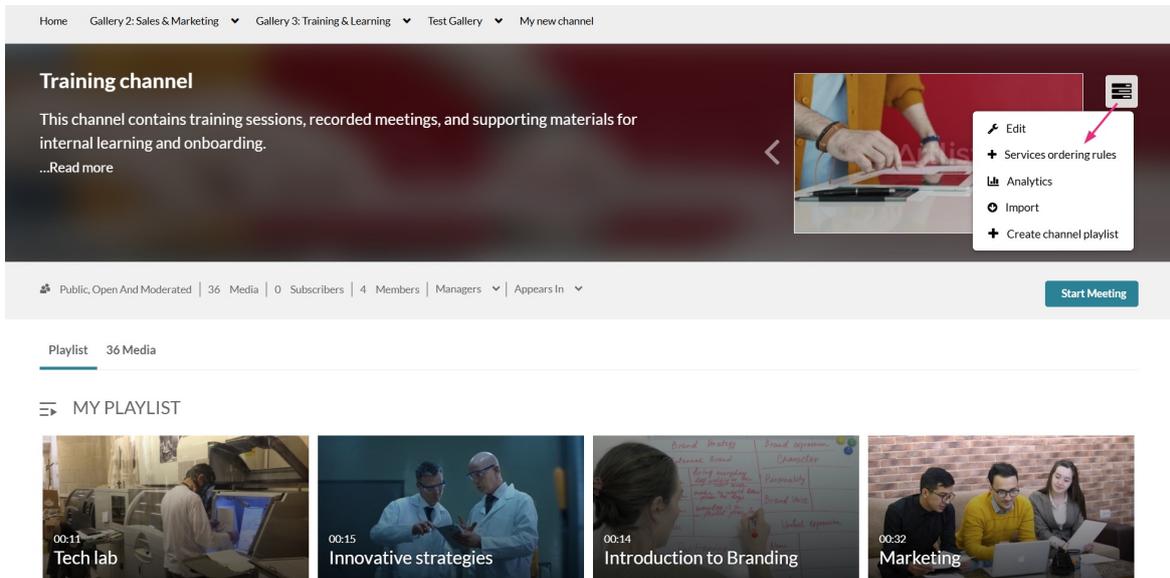## Access the channel

1. From the user menu, choose **My Channels**.

![Kaltura logo]

2. The **My Channels** page displays.

3. Click the channel thumbnail to select it. You can select more than one channel.

4. Choose **+Services ordering rules** from the **actions menu** (three lines).

5. The **Captions and Enrichment Services** page displays.

Captions and Enrichment Services

Back to **Action Channel**

View Ordering Rules

No rules were found	✕

Create Rule for Ordering ⓘ

Order Captions

Apply to content published by the following role:

| manager | ▼ |

Service:	Source Media Language:
Machine ▼	English ▼

Feature:

| Captions | ▼ |

6. If there are no existing rules, the following message is displayed:

Captions and Enrichment Services

Back to **Action Channel**

View Ordering Rules

No rules were found	✕

If there are existing rules the **View Ordering Rules** table is displayed with the configured rules.

View Ordering Rules   **+ Create Rule**

CREATOR	CREATION DATE ▼	SERVICE	FEATURE	TAT	LANGUAGE	PUBLISHED BY	
Ellalidich@Gmail.Com	04/06/19	Professional	Captions	2 Hours	English	N/A	🗑
Ellalidich@Gmail.Com	13/12/18	Machine	Captions	12 Hours	English (British)	N/A	🗑

The service rules table contains the following:

- Creator
- Creation Date – use the arrow to sort this column
- Service
- Feature
- TAT
- Language

  - Published By

A trash icon is displayed for rules that are pending. You can delete service rules by clicking on the trash icon.

Create a rule

1. Choose a role from the drop-down menu.

> ✓ To learn more about roles and permissions, visit our article Video Portal and KAF roles and permissions.

2. Choose one of the following **Service** options: Machine or Professional.

Machine

1. After choosing **Machine**, select the **Source Media Language** from the drop-down menu.

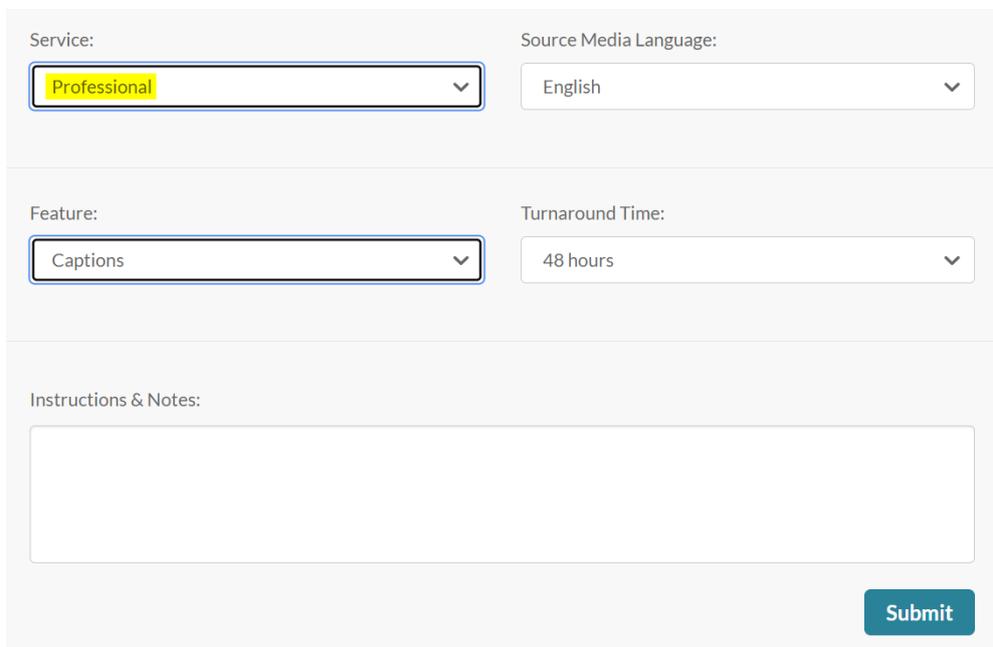2. Select the **Feature** from the drop-down menu.

3. Click **Submit**.

> ✅ The service you select will be applied to each media published to this channel in the future. Orders for this service will apply to all content created by the rule you set for the channel.

Professional

1. If you choose **Professional**, the screen expands. Select the **Source Media Language** from the drop-down menu.
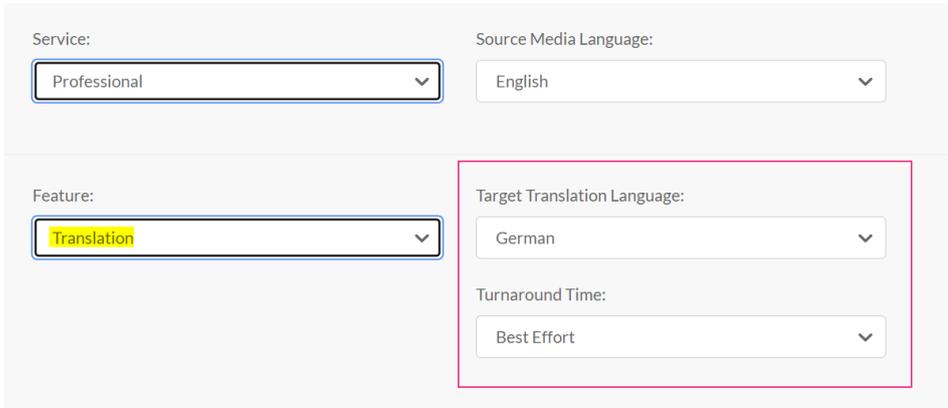

2. Select the **Feature** from the drop-down menu.
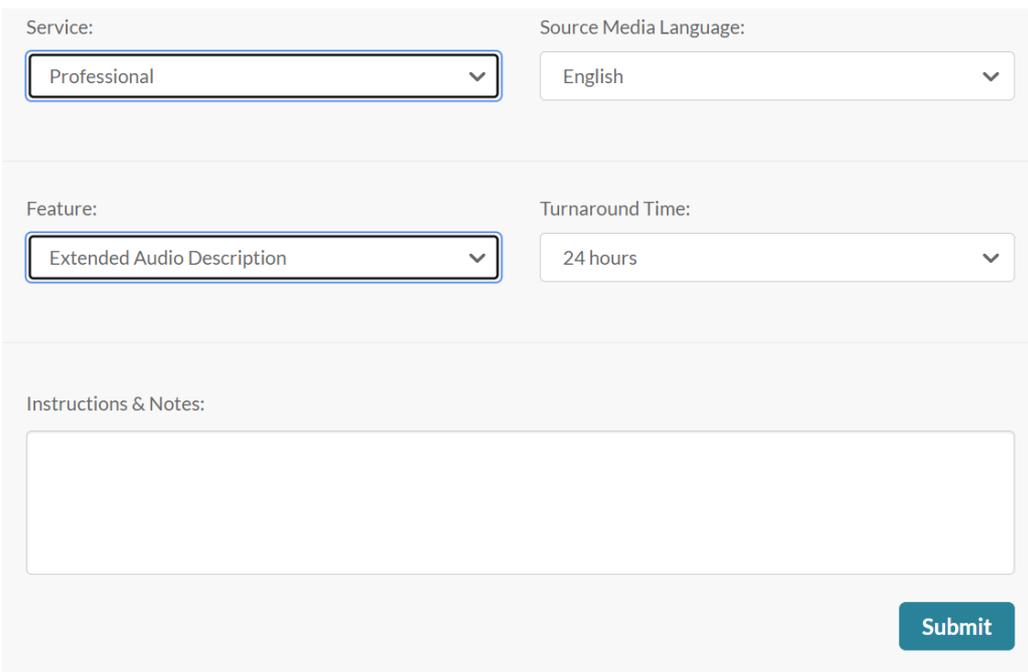3. If you select **Translation**:
   - Select the **Target Translation Language**.

- Select the **Turnaround time** (TAT) from the drop-down menu (the TAT options are set by your administrator).

4. If you select **captions, audio description** or **chaptering**:
   - Select the **Turnaround time** (TAT) from the drop-down menu (the TAT options are set by your administrator).

5. **Instructions & Notes** (Optional) - Use this box to add notes for the attention of human editors and reviewers.

6. Click **Submit**.

   A confirmation message displays: *Your order has been received.*

View Ordering Rules

+ Create Rule

Your order has been received. Order requests will be generated and automatically approved for each video published to this channel in the future. ×

CREATOR	CREATION DATE	∨	SERVICE	TAT	LANGUAGE	PUBLISHED BY	
Ella @Kaltura.Com	22/07/18		Professional	30 Minutes	Arabic	Manager	🗑

Order requests will be generated and automatically approved for each video published to this channel in the future. The requested order will be uploaded when completed.

To create another role-based rule for the same channel, click **+Create Rule** at the top right of the page and repeat the process.

ℹ️

Canceling human or professional captions is not possible if they have been requested already and are in the status Processing.