

# Introduction to Kaltura's Automation Manager

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 This article is designated for administrators.

## About

The **Automation Manager** helps you automatically manage and process your media based on rules you define. You can use it to organize media, apply updates at scale, trigger agents for complex workflows, and monitor activity over time.

Automation Manager runs on a schedule, scans your media against defined criteria, and applies actions based on your rule settings.

This article provides a quick guide to the Automation Manager workflow. For step-by-step instructions, see the detailed articles linked in each section.

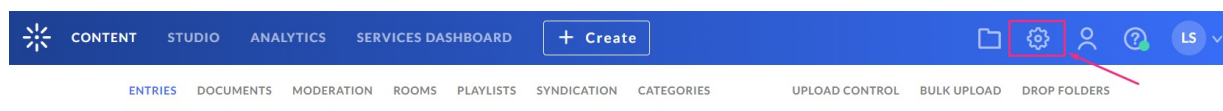
## How Automation Manager works at a glance

Here is what you do:

1. Create a rule.
2. Define criteria to select media.
3. Configure actions to apply.
4. Review selected media (if required).
5. Track activity using notifications and reports.

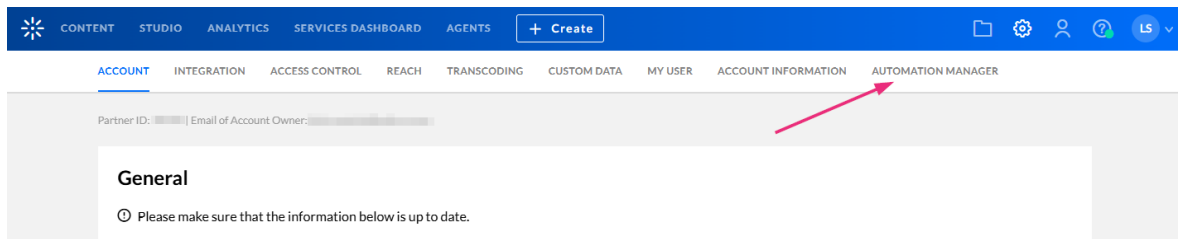
## Access the Automation Manager

1. Log into your Kaltura Management Console.
2. In the top navigation menu, click the **settings** (gear) icon at the far right.



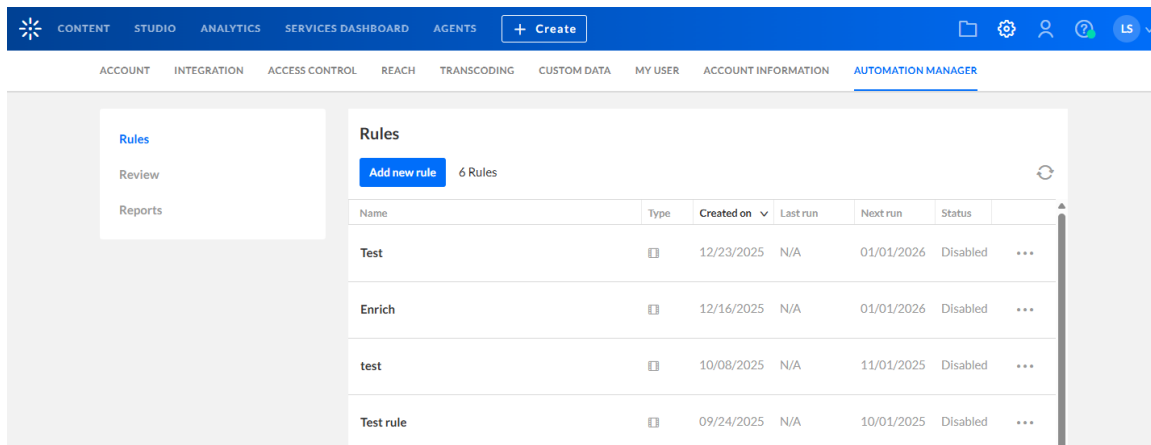
The Account settings page opens.

3. Click the **Automation Manager** tab at the far right.



If you don't see the automation manager tab in your KMC, you need to enable it on your account. In addition, only users with certain roles can access the automation manager.

The **Rules** page displays. Here you can view any rules that have already been set up on your account.



## Create and manage rules

Rules control when Automation Manager runs and how your media is handled. From the **Rules** page, you can create new rules or manage existing ones.

When creating or editing a rule, you configure:

- **General settings** – Rule name, owner, schedule, and review options
- **Criteria** – Which media the rule applies to
- **Actions** – What happens to selected media
- **Notifications** – When email notifications are sent

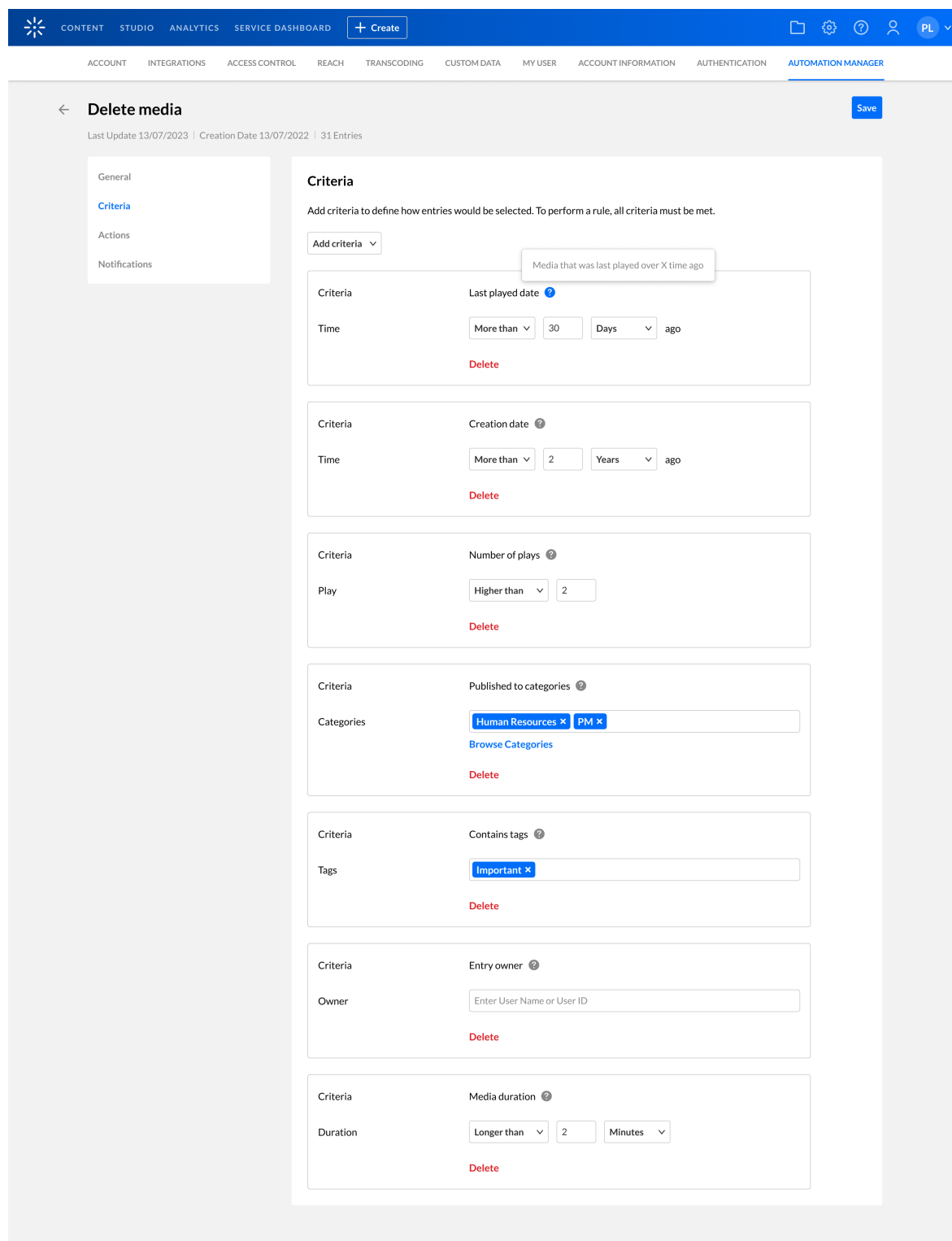
For the full guide, see [Create and manage rules in Automation Manager](#).

## Define criteria

In the **Criteria tab**, you select the conditions media must meet to be included in the

rule. You can add multiple criteria. All criteria must be met.

For the full guide, see [Define rule criteria for Automation Manager](#).



**Delete media** Save

Last Update 13/07/2023 | Creation Date 13/07/2022 | 31 Entries

General  
**Criteria**  
Actions  
Notifications

**Criteria**

Add criteria to define how entries would be selected. To perform a rule, all criteria must be met.

Add criteria

Media that was last played over X time ago

Criteria: Last played date ⓘ

Time: More than 30 Days ago

Delete

Criteria: Creation date ⓘ

Time: More than 2 Years ago

Delete

Criteria: Number of plays ⓘ

Play: Higher than 2

Delete

Criteria: Published to categories ⓘ

Categories: Human Resources X PM X

[Browse Categories](#)

Delete

Criteria: Contains tags ⓘ

Tags: Important X

Delete

Criteria: Entry owner ⓘ

Owner: Enter User Name or User ID

Delete

Criteria: Media duration ⓘ

Duration: Longer than 2 Minutes

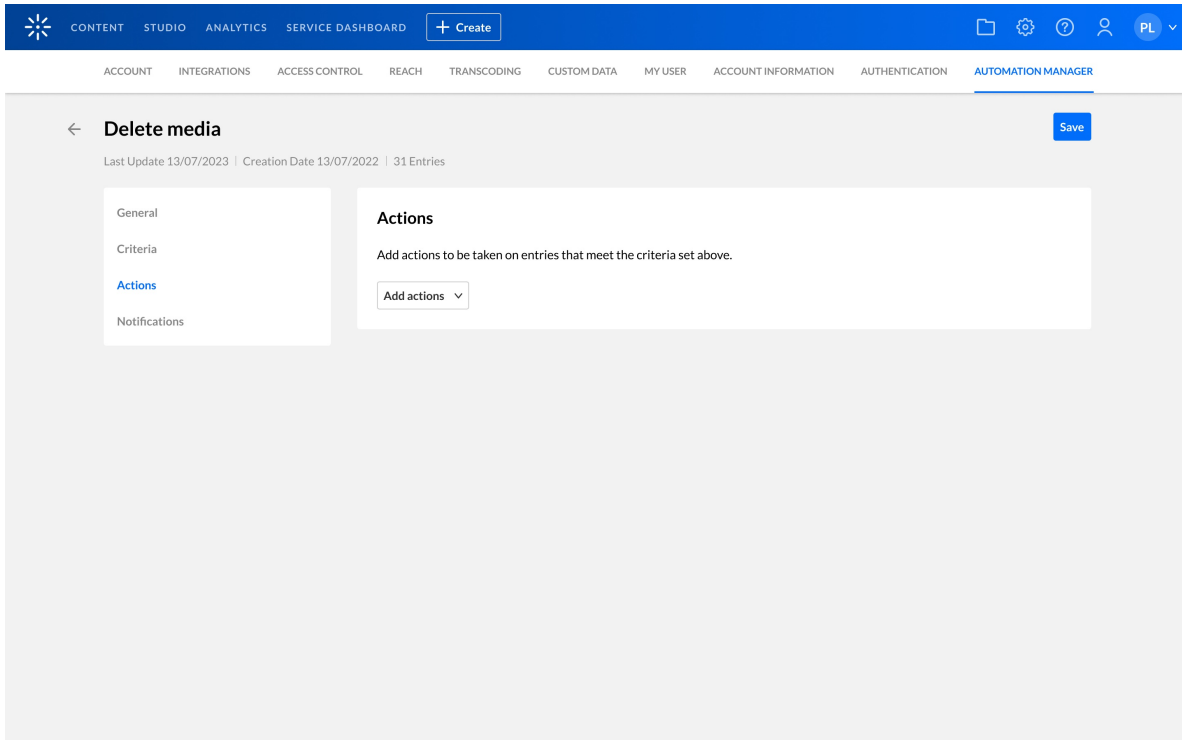
Delete

## Configure actions

In the **Actions tab**, you define what happens to the selected media. Actions can

include standard Automation Manager operations or triggering a preconfigured agent to run on the selected media.

For the full guide, see [Configure rule actions for Automation Manager](#).



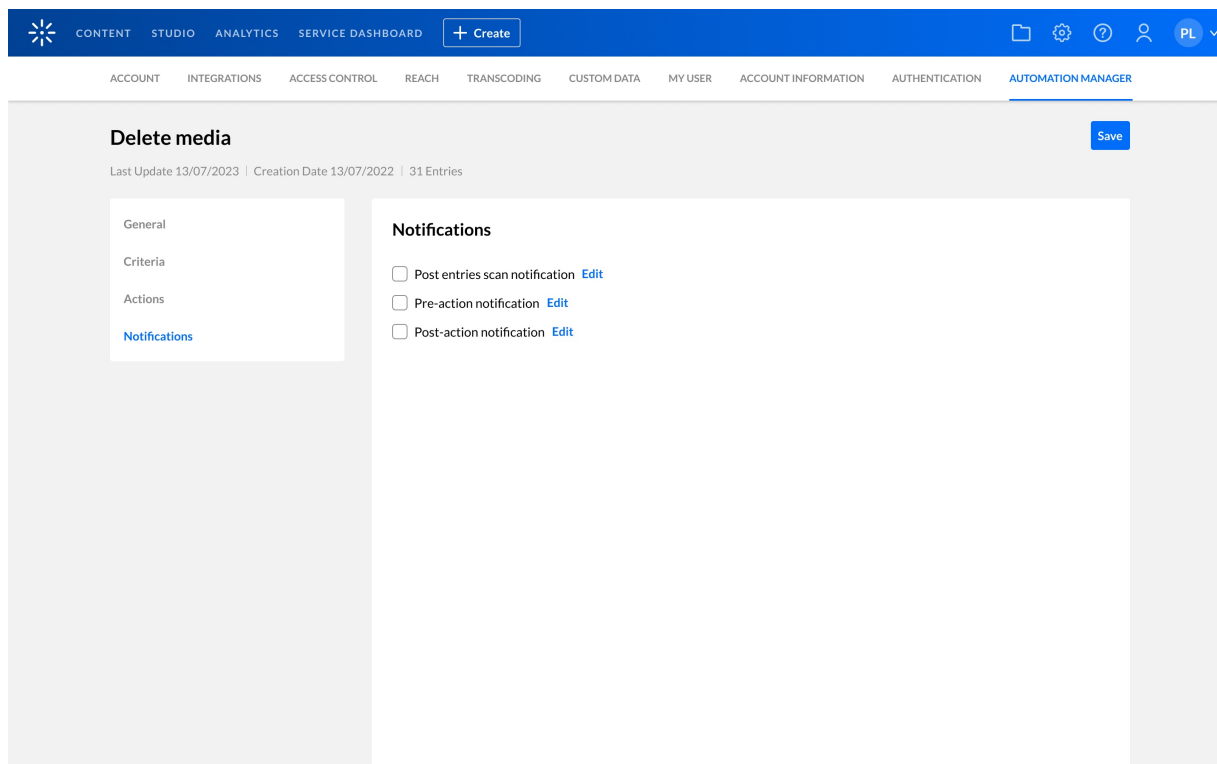
The screenshot shows the Kaltura Automation Manager interface. At the top is a blue navigation bar with the Kaltura logo, menu items (CONTENT, STUDIO, ANALYTICS, SERVICE DASHBOARD), a '+ Create' button, and user profile icons. Below this is a secondary navigation bar with various categories, with 'AUTOMATION MANAGER' selected. The main content area is titled 'Delete media' and includes a 'Save' button. It displays metadata: 'Last Update 13/07/2023 | Creation Date 13/07/2022 | 31 Entries'. On the left is a sidebar with tabs: 'General', 'Criteria', 'Actions' (selected), and 'Notifications'. The 'Actions' tab shows a section titled 'Actions' with the instruction 'Add actions to be taken on entries that meet the criteria set above.' and a button labeled 'Add actions' with a dropdown arrow.

## Set notifications

In the **Notifications tab**, you can configure email notifications for:

- After media is scanned
- Before actions run
- After actions are completed

For the full guide, see [Automation Manager reports and notifications](#).



## Manage rules

The Rules page is the main workspace in Automation Manager. It lists all rules on your account and lets you monitor their status and manage their settings.

Each rule appears as a row in a table with the following information:

- **Name** - name of rule
- **Description** - description of rule
- **Created on** - the date that the rule was created on
- **Last run** - the last time MR ran this rule
- **Next run** - the next scheduled date that MR will run this rule
- **Status** (enabled / disabled)

The columns are sortable by *Name*, *Creation on*, *Last run*, *Next run* and *Status*.

Each rule has a **three-dot menu** at the end of the row with the following options:

- **Enable / Disable** - Click to enable / disable the rule state.



If you try to enable a rule that has no criteria, an error message displays: *No criteria found for this rule. To enable, please define at least one criteria.*

- **Edit** - This directs you to the edit page of the rule profile.
- **Delete** - Click to delete an existing rule.

Rules

[Add new rule](#) 1 Rules ↻

Name	Description	Created on	Last run	Next run	Status	
New rule		09/11/2024	N/A	10/01/2024	Disabled	...

Enable  
 Edit  
 Delete


## Review selected media

When a rule runs, selected media appears in the Review tab if approval is required.

From here, you can:

- Approve or reject actions
- Run actions immediately
- Search and filter selected media

For the full guide, see [Review and manage media selected by Automation Manager](#).


 CONTENT STUDIO ANALYTICS SERVICE DASHBOARD [+ Create](#)
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ACCOUNT INTEGRATIONS ACCESS CONTROL REACH TRANSCODING CUSTOM DATA MY USER ACCOUNT INFORMATION AUTHENTICATION **AUTOMATION MANAGER**

Rules

[Review](#)

Reports

**Review**

4 Entries 🔍 Search 🔼 Refine 📄 Export

<input type="checkbox"/>	Name	ID	Type	Duration	Triggering rule	Execution date	Status	
<input type="checkbox"/>	New Employee On-B...	1_j36gx57v	📹	10:32	Move to archive	13/09/23	Auto	...
<input type="checkbox"/>	HR Information Syst...	1_87n1bphv	📹	18:12	Lecturer content sto...	24/09/23	Pending	...
<input type="checkbox"/>	Inclusion and Divers...	1_j21gx4r4	📹	09:35	Student upload clea...	15/08/23	Approved	...
<input type="checkbox"/>	Equality in Workplace	23j16gx57g	📹	06:14	Move to archive	17/08/23	Denied	...

Approved by: Olívia Brown  
 Approve  
 Deny  
 Perform now

⏪ ⏩ 1 > >>
Show Rows 25 ▼

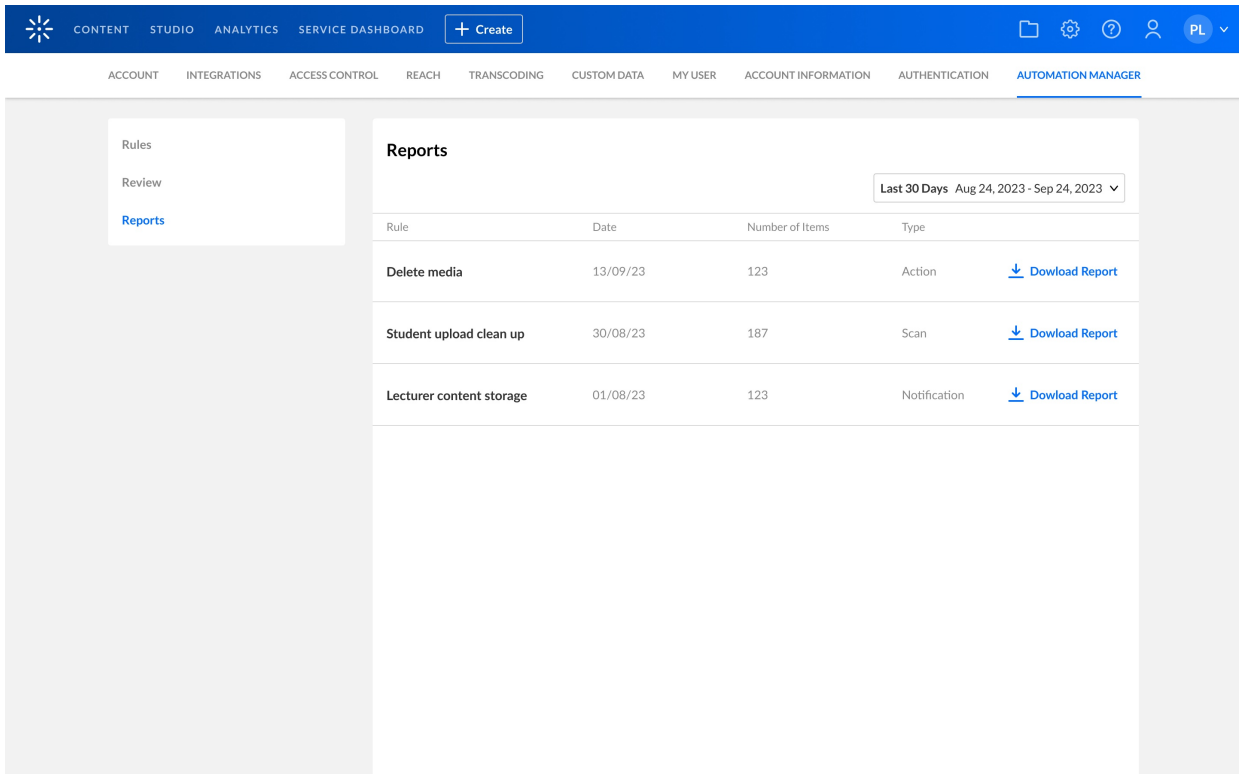
## Monitor activity with reports

Automation Manager generates reports each time it scans media or performs actions.

Reports help you:

- Track rule activity
- Review outcomes
- Export data for auditing or reporting

For the full guide, see [Automation Manager reports and notifications](#).



The screenshot shows the Kaltura Automation Manager interface. The top navigation bar is blue with the Kaltura logo and a '+ Create' button. Below it, a secondary navigation bar lists various sections: ACCOUNT, INTEGRATIONS, ACCESS CONTROL, REACH, TRANSCODING, CUSTOM DATA, MY USER, ACCOUNT INFORMATION, AUTHENTICATION, and AUTOMATION MANAGER (which is highlighted). On the left side of the main content area, there is a sidebar with three options: Rules, Review, and Reports (which is selected and highlighted in blue). The main content area is titled 'Reports' and features a table with columns: Rule, Date, Number of Items, and Type. A dropdown menu at the top right of the table allows selecting a time range, currently set to 'Last 30 Days' (Aug 24, 2023 - Sep 24, 2023). The table contains three rows of data, each with a 'Download Report' link.

Rule	Date	Number of Items	Type
Delete media	13/09/23	123	Action
Student upload clean up	30/08/23	187	Scan
Lecturer content storage	01/08/23	123	Notification