

Create role-based rules for captioning and enrichment in channels

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 This article is designated for all users.

About

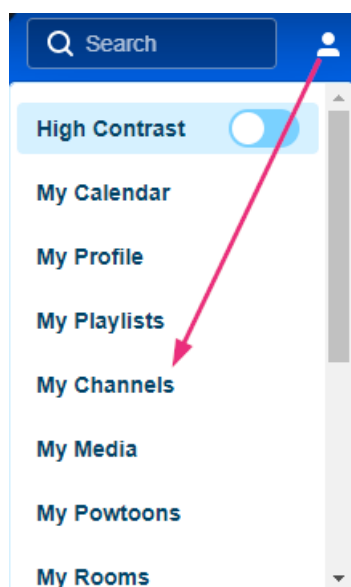
With REACH services, your videos can have quality captioning and transcriptions, featuring machine or professional human captions. To order services (captions, translations, audio descriptions, or chaptering) for a channel, simply create a role-based rule for the desired service. These rules will automatically trigger caption requests for entries meeting specific criteria.



Please note the **categoryRuleOrderRole** field must be configured by your administrator in the [REACH module](#).

Access the channel

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



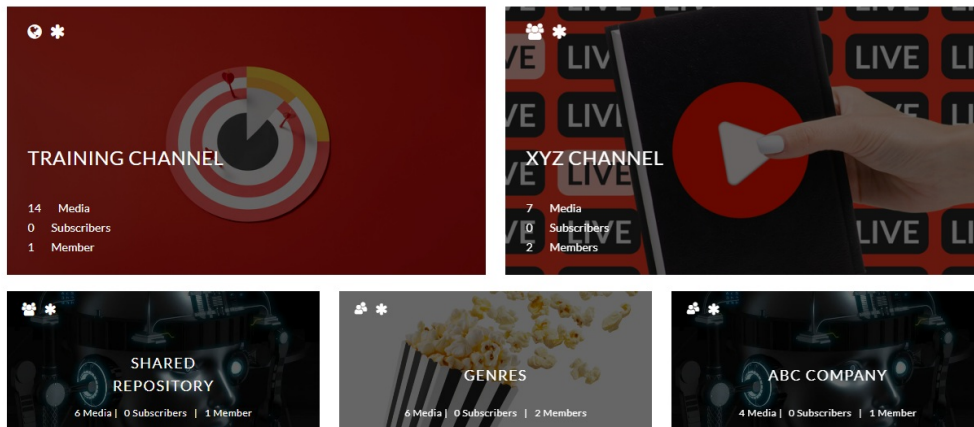
2. The **My Channels** page displays.

My Channels

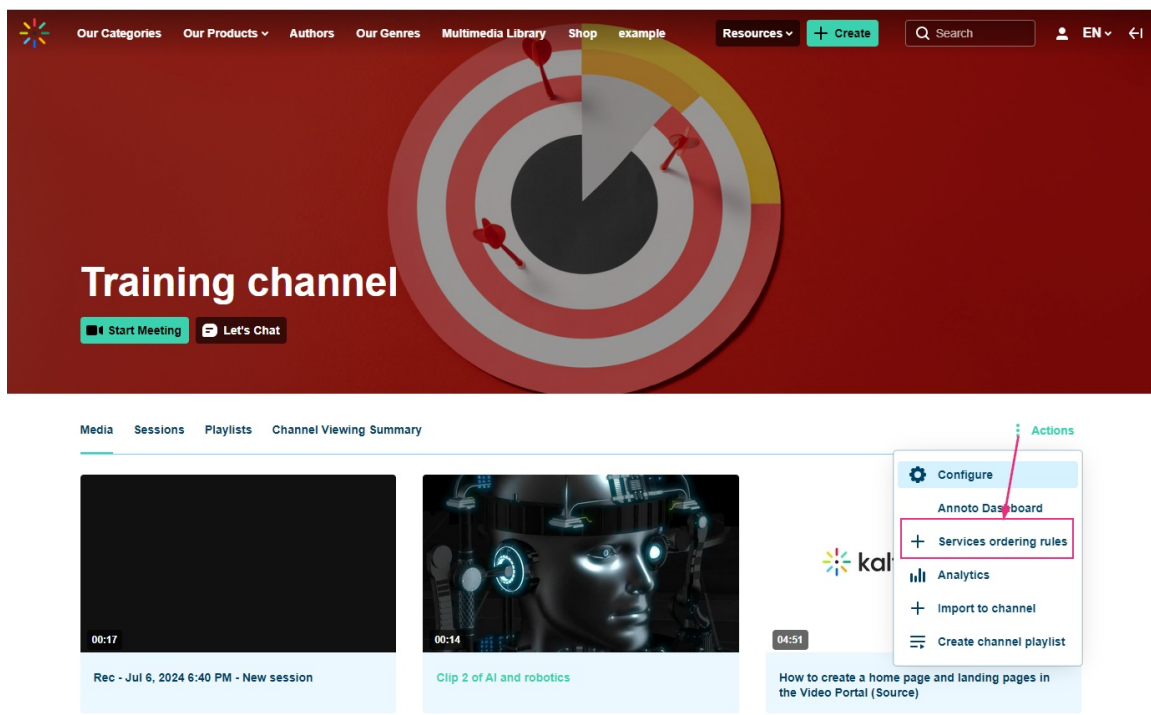
Search For Channels

Filters Sort By: Media Count

+ Create Channel



3. Click the channel thumbnail to select it. You can select more than one channel.
4. Choose **+Services ordering rules** from the **Actions** menu.



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:

Machine

Source Media Language:

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	
Elalidich@gmail.Com	04/06/19	Professional	Captions	2 Hours	English	N/A	
Elalidich@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](#).

Apply to content published by the following role:

manager

manager ✓

moderator (and higher)

contributor (and higher)

member (and higher)

anyone

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.

Apply to content published by the following role:

member (and higher)

Service:

Machine

Feature:

Captions

Source Media Language:

English

English ✓

German

Spanish

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

Feature:

Captions

Captions

Chaptering

Dubbing

Live Captions

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.

Service:

Professional

Source Media Language:

English

Feature:

Captions

Turnaround Time:

48 hours

Instructions & Notes:

Submit

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).

Service: Professional	Source Media Language: English
Feature: Translation	Target Translation Language: German Turnaround Time: Best Effort

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).

Service: Professional	Source Media Language: English
Feature: Extended Audio Description	Turnaround Time: 24 hours
Instructions & Notes: 	
Submit	

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.



Canceling Human/Professional captions is not possible if they have been requested already and are in the status Processing.

Learn more

- You can easily manage and monitor your caption requests and budget via the REACH dashboard. Read about it in our article [Moderating Services Requests and General Statistics](#).
- REACH also features a handy transcript plugin which you can read about in our article [Transcript](#).
- You can also edit the captions. See our article [Editing Captions](#) for more information.