Create an agentic workflow

Content updated: 09/02/2025

This article is designated for all users.

About

Streamline repetitive tasks and automate content processing with Agentic workflows. This article explains how to create a workflow by selecting a trigger, adding actions, applying optional filters, and saving the workflow.

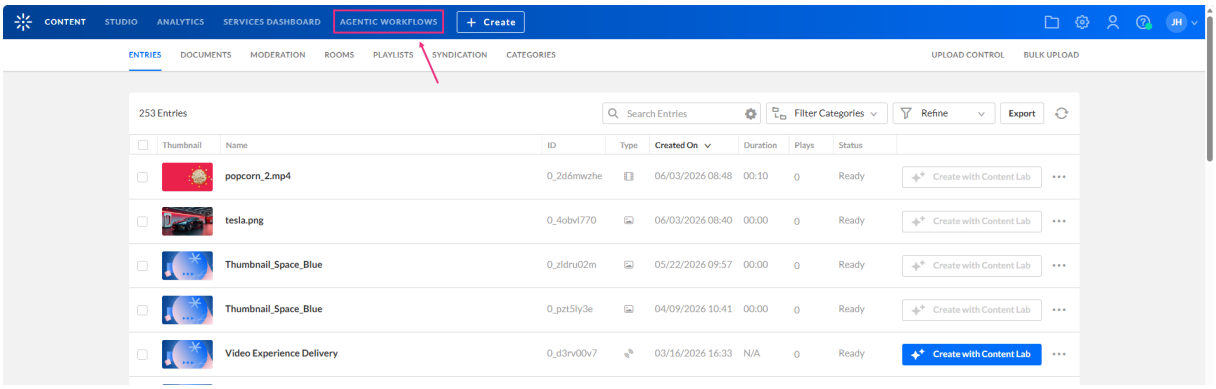
Looking for more information about this feature? Feel free to contact your Kaltura representative.

Before you start

- Your account must have Agentic Workflows enabled.
- If you want to use REACH-based actions (such as captions, translation, dubbing, moderation, audio description, chaptering and metadata enrichment), your account must have an active REACH profile and relevant catalog item(s) configured.

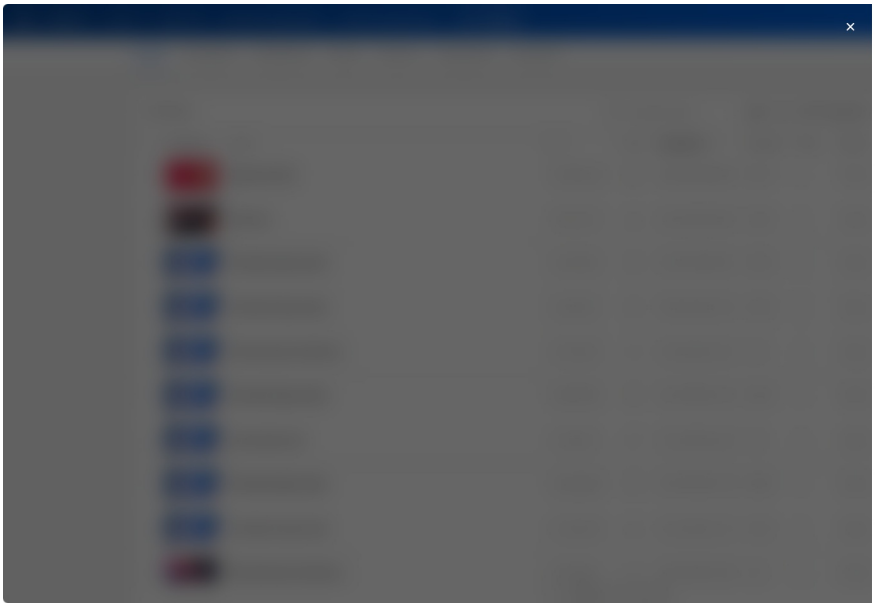
Access Agentic Workflows

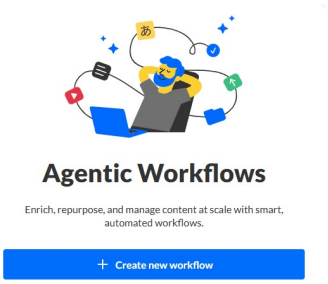
In the Rich Media CMS, click the **Agentic Workflows** button on the top navigation bar.



The Agentic Workflows screen displays. If you've already created workflows, they're listed below the **Create new workflow** button.

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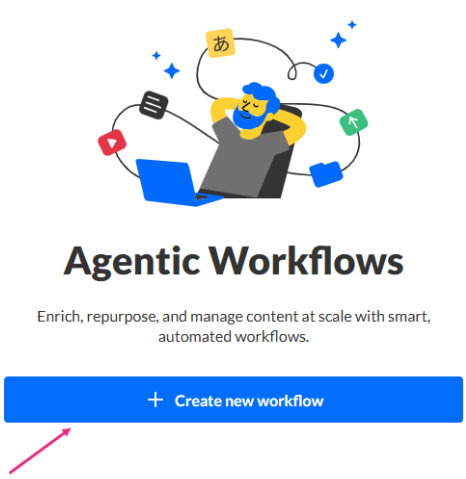




Set a trigger

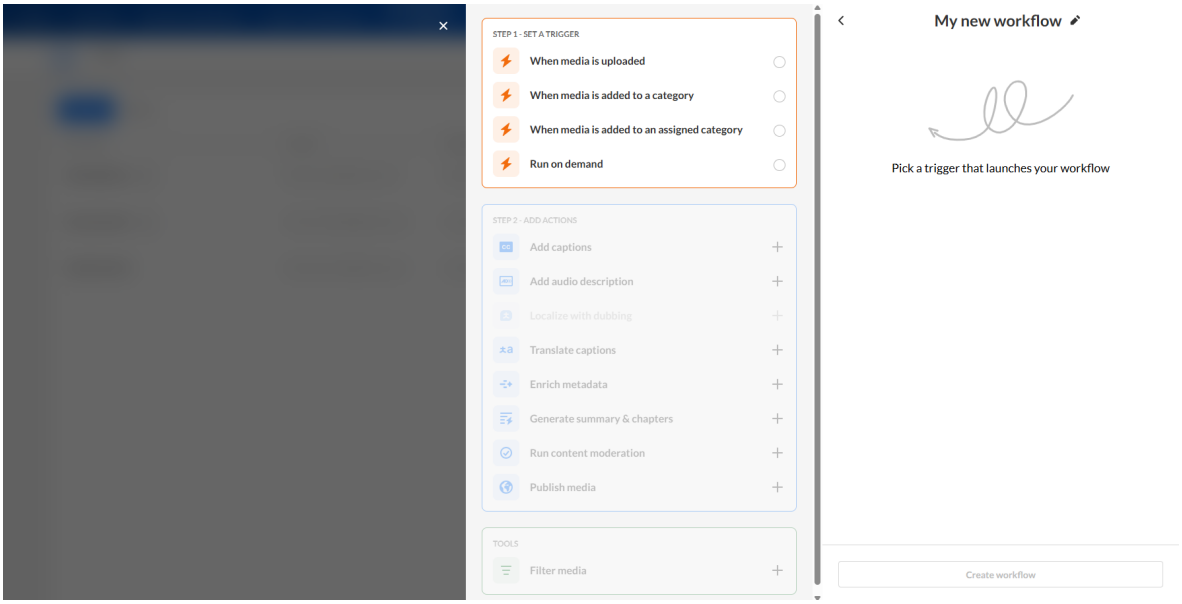
A trigger defines when the workflow runs.

1. Click the **Create new workflow** button.

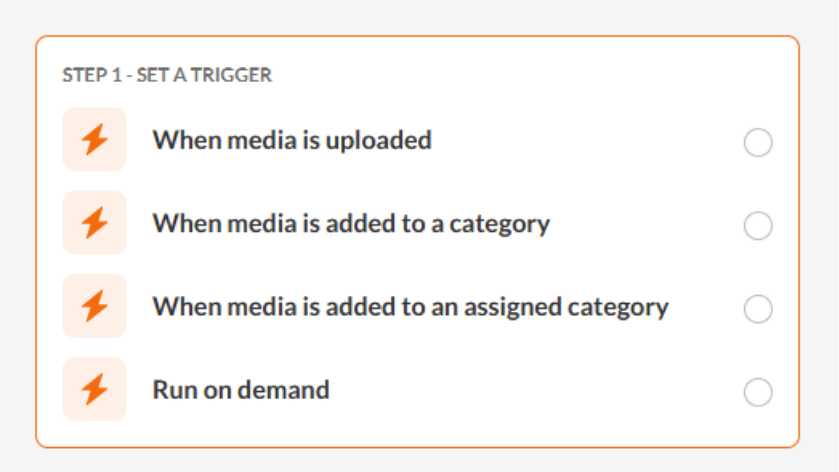


2. The 'My new workflow' screen displays.

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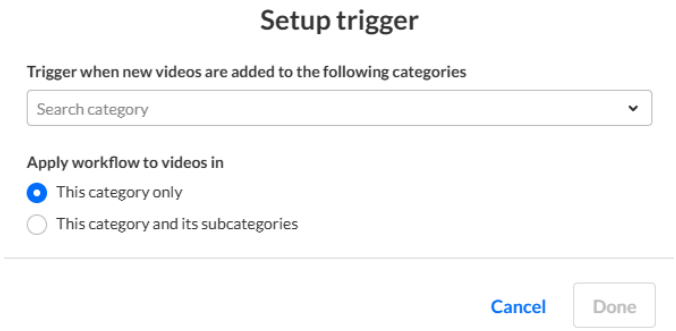


3. In the **STEP 1 - SET A TRIGGER** section of the 'My new workflow' screen, choose a trigger to define when your workflow will run.



- **When media is uploaded** – Runs automatically when uploaded media finishes processing and reaches 'Ready' status.
- **When media is added to a category** – Runs automatically when media is added to the selected category.
    - When you select this trigger, the 'Setup trigger' window opens.

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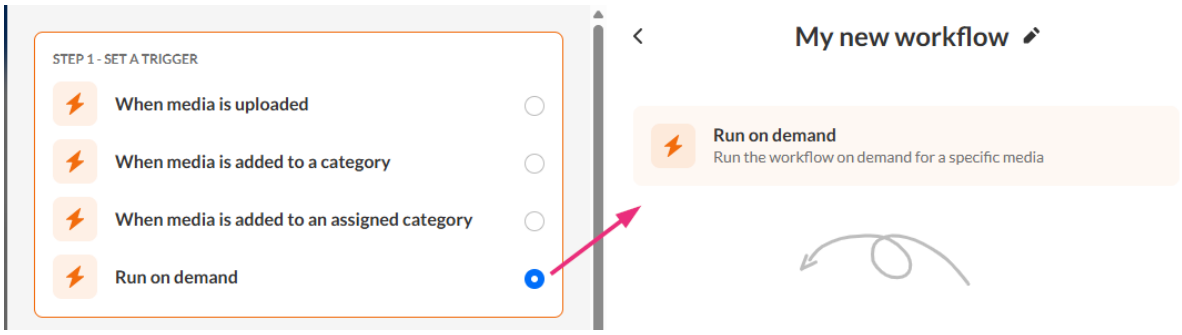


  - In the **Search category** field, start typing a category name and select it from the dropdown.
  - Under **Apply workflow to videos in**, select one of the following:
    - **This category only** – The workflow runs only when media is added to the selected category.
    - **This category and its subcategories** – The workflow runs when media is added to the selected category or any of its subcategories.
  - Click **Done**.
- **When media is added to an assigned category** – Makes the workflow available for assignment to Content Hubs channels or LMS media galleries. After a channel owner or manager assigns the workflow, it runs automatically whenever media is added to that channel or media gallery.

  Unlike the **When media is added to a category** trigger, this trigger isn't linked to a specific category when you create the workflow.

- **Run on demand** – Runs only when you manually select one or more media items.

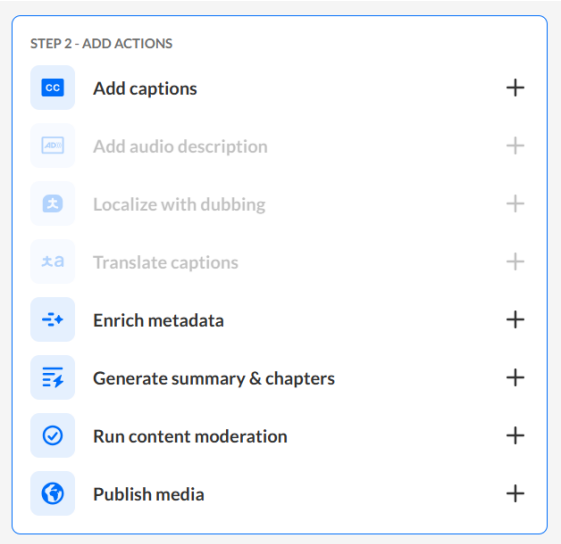
The configured trigger appears in the right panel. As you continue building the workflow, your configured filters and actions are also added to the panel.



Add actions

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In the **STEP 2 - ADD ACTIONS** section of the 'My new workflow' screen, add one or more actions to the workflow.



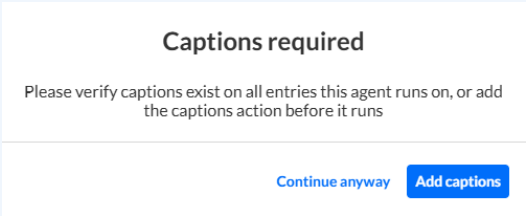
Not all actions are always available to run. Here's what you might see:

Greyed-out actions – These appear when the required REACH service (for example, audio description, translation or dubbing) isn't configured in your account, or when you don't have the right permissions.

Actions that require captions – These actions are available, but they can only run if the entry already has captions. Actions that require captions are:

- **Enrich metadata**
- **Generate summary & chapters**
- **Run content moderation**
- **Translate captions**

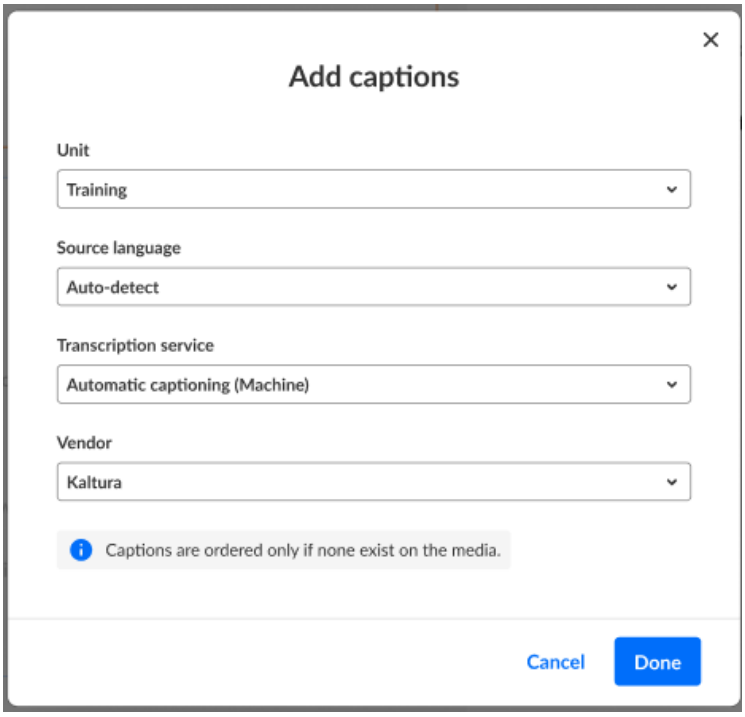
If captions are missing, a pop-up displays. Click **Add captions** to order captions or click **Continue anyway** to continue setting up the action and add captions later.



Add captions

Set a workflow to add captions to your videos.

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1. Configure the following:

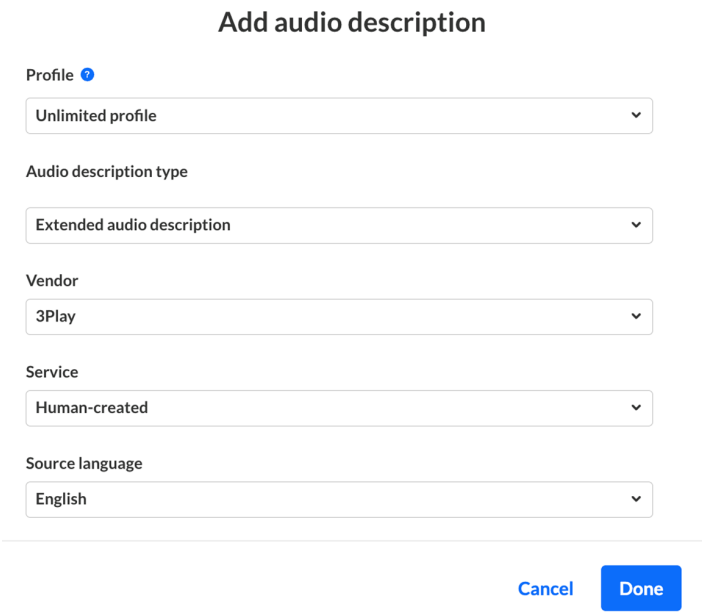
- **Unit** – Choose from the list of available units. If there's only one option, this field won't display.
- **Source language** – Select the language spoken in the media.
- **Transcription service** – Choose between Automatic (machine) or Professional transcription.
- **Vendor** – If multiple vendors are available, select one. If only one is available, this field won't display.

- 2. Click **Done**.

Add audio description

Available if your account has audio description enabled in REACH.

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1. Configure the following:

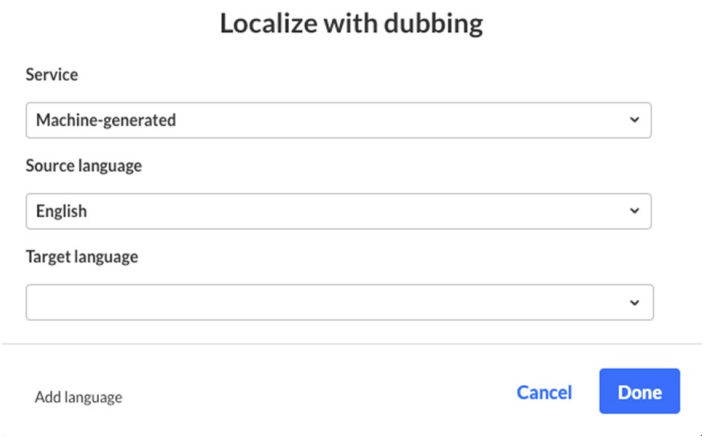
- **Profile** – Choose the REACH profile (organizational unit) to use. If there's only one available, this field won't display.
- **Audio description type** – Select the format of the audio description, such as Standard or Extended audio description.
- **Vendor** – Choose the provider offering the audio description service. If only one is available, this field won't display.
- **Service** - Select the service type, for example Human-created or Machine-generated.
- **Source language** - Choose the language spoken in the video.

- 2. Click **Done**.

Localize with dubbing

Generate dubbed audio tracks in additional languages. Available if your account has dubbing enabled in REACH.

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1. Configure the following:

- **Service** – Select the service type (for example, Machine-generated).
- **Source language** – Select the spoken language in the video.
- **Target language** – Select one or more languages for the dubbed audio tracks.

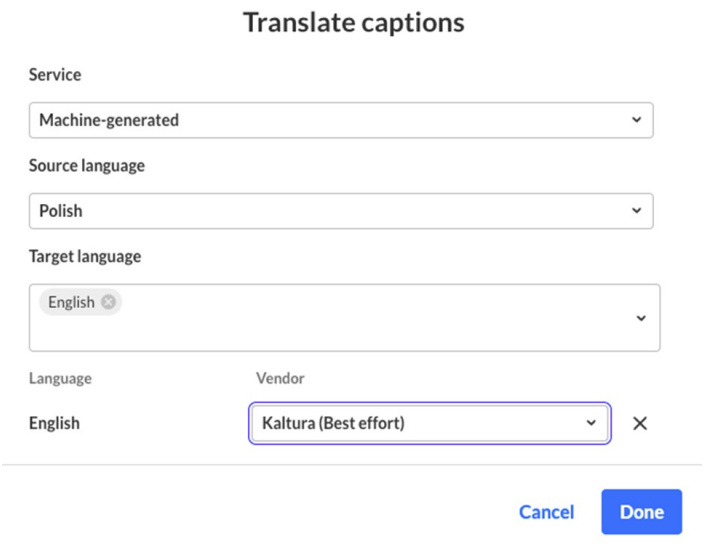
- 2. Click **Done**.

- Dubbing does not require captions.
- You can select multiple target languages for the same source language.
- If an audio track already exists in a selected target language, the workflow skips that language and processes only the remaining ones.

Translate captions

Translate captions into one or more target languages. Available if your account has translation enabled in REACH.

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1. Configure the following:

- **Service** – Select the service type (for example, Machine-generated).
- **Source language** – Select the language of the existing captions.
- **Target languages** – Select one or more languages to translate the captions into.
- **Vendor** – If multiple vendors are available, select one. If only one is available, this field won't display.

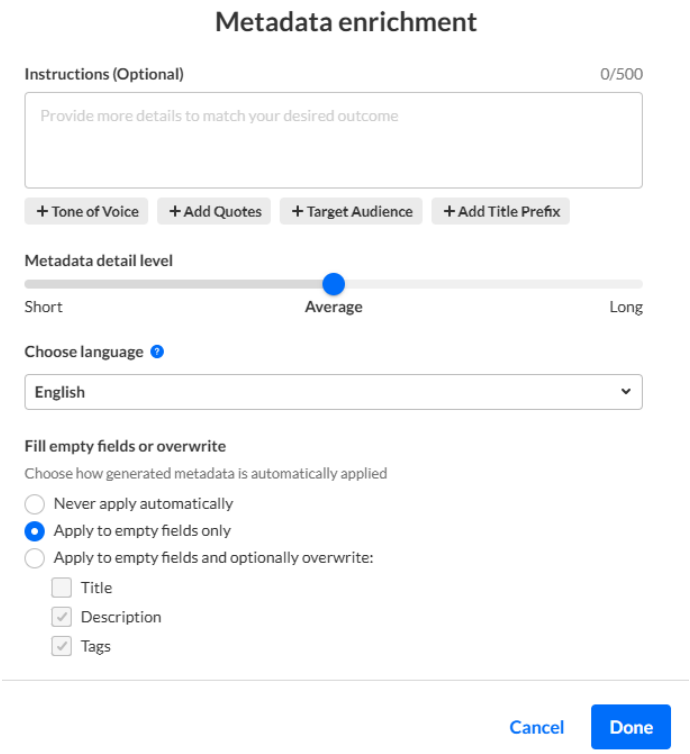
- 2. Click **Done**.

- Translation requires existing captions in the source language.
- You can select multiple target languages with the same source language.
- If captions already exist in a selected target language, the workflow skips that language and processes only the remaining ones.

Enrich metadata

Enhance video metadata with AI-generated content.

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1. Enter your own instructions or select from preset tags (e.g., tone of voice, target audience, add prefix).
2. Adjust metadata length and select output language. For detailed configuration options, see our article Enrich metadata with AI.
3. Decide how the generated metadata will be applied. In **Fill empty fields or overwrite**, click one of the following options:

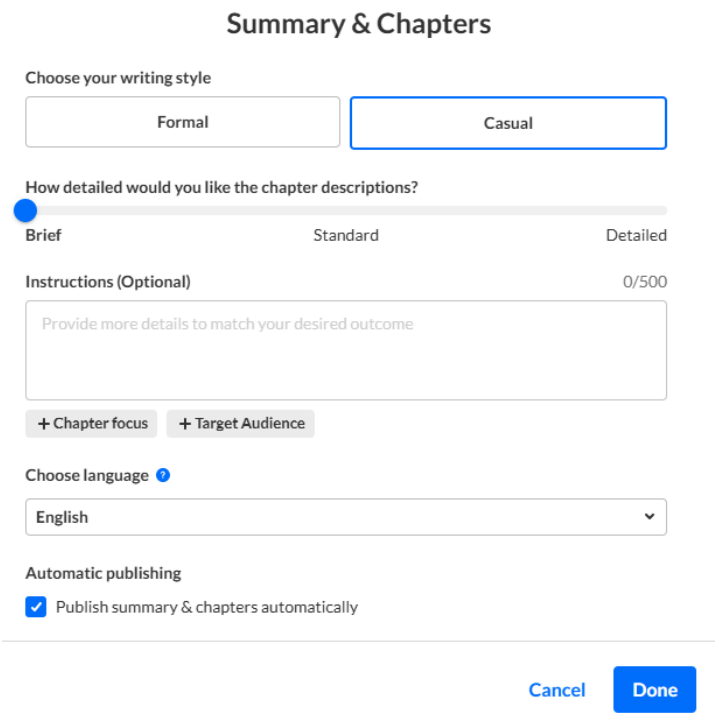
- **Never apply automatically** – Don't automatically publish generated metadata.
- **Apply to empty fields only** – Add metadata only to blank fields.
- **Apply to empty fields and optionally overwrite** – Fill blank fields and optionally overwrite existing fields. Use the checkboxes to select which fields to overwrite (Title, Description, Tags).

4. Click **Done**.

Generate summary & chapters

Create a summary and structured chapters.

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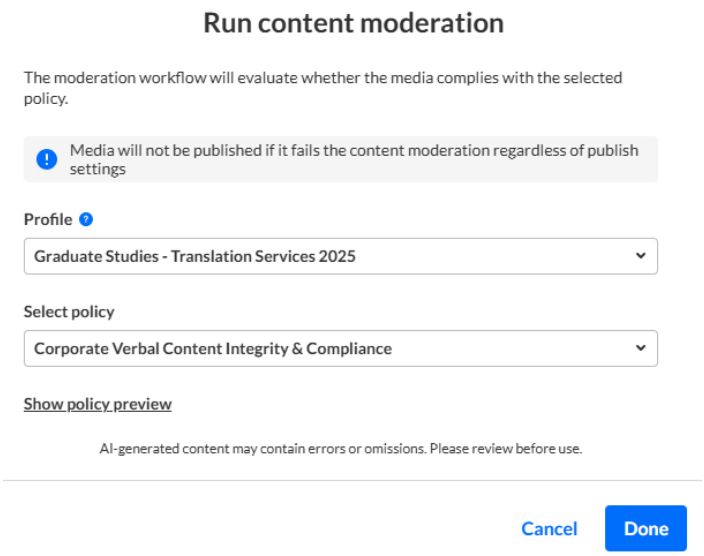
1. Choose style (formal or casual), level of detail (brief, standard, or detailed), output language. For detailed configuration options, see our article Create a summary and chapters with AI.
2. If you want the summary and chapters to be automatically published, click the option **Automatic publishing**.
3. Click **Done**.

Run content moderation

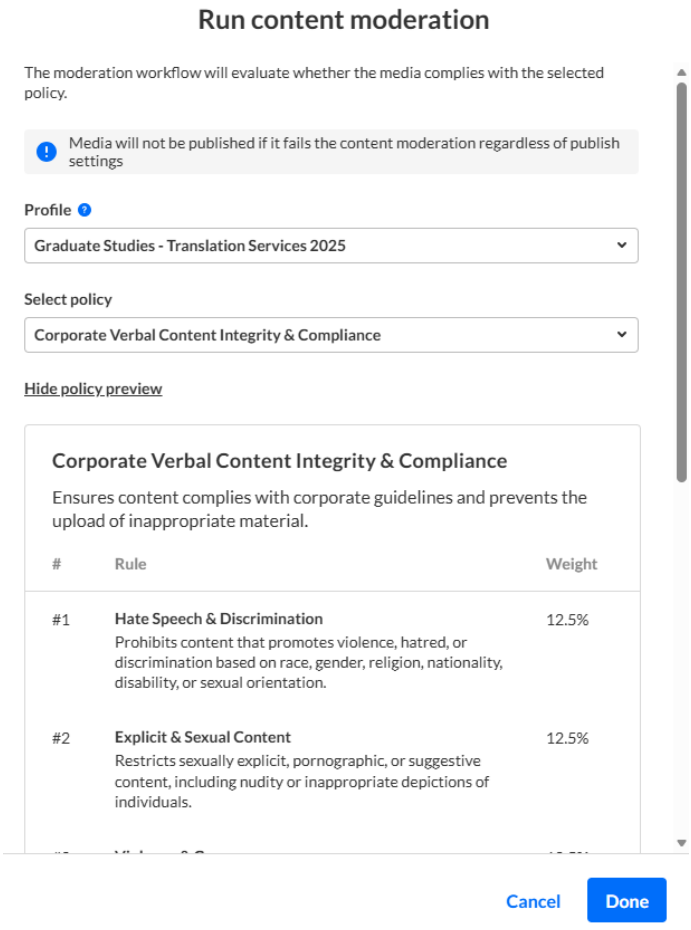
Review compliance based on policies in your account.

1. Select desired Reach profile from the pull-down list.
2. Select desired policy from the pull-down list.

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3. Click **Show policy preview** to check policy details before applying.



4. Click **Done**.

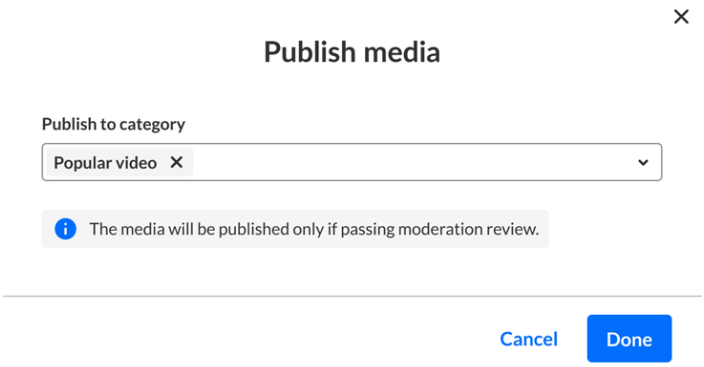
For an overview of how the moderation service works, including policies and reports, see Kaltura's AI-powered moderation service.

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Publish media

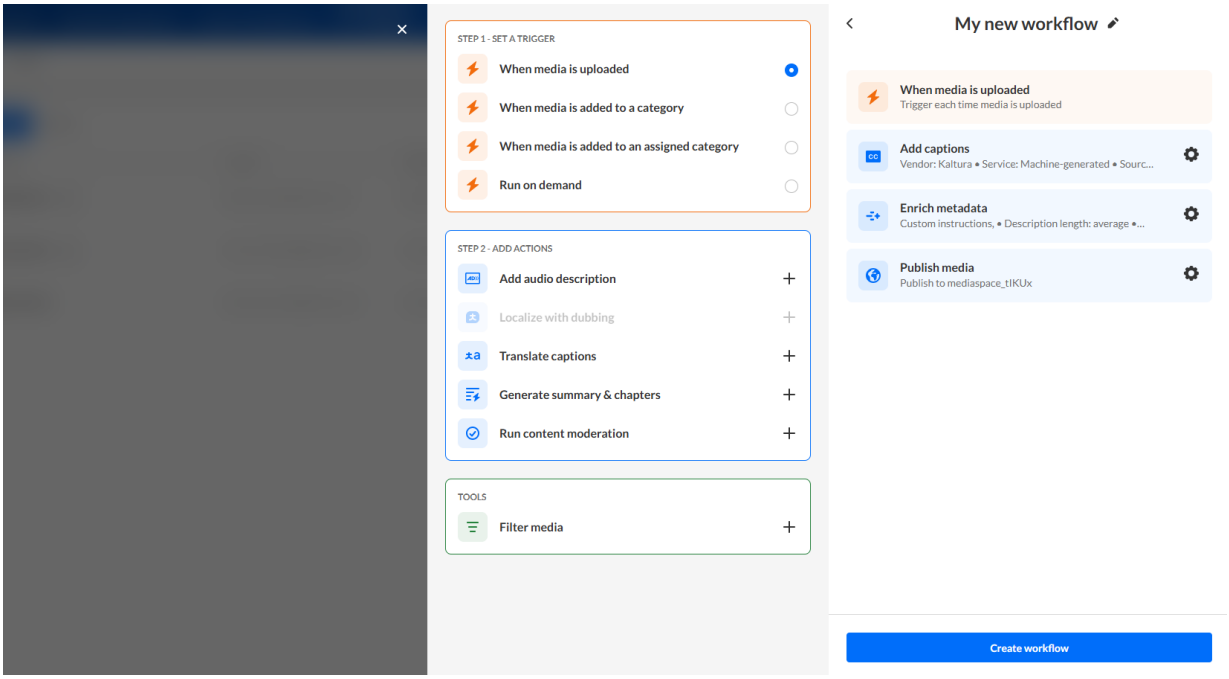
Publish to a channel or category.

1. Start typing a category name and select from the dropdown.



2. Click **Done**.

The configured actions are shown in the right panel.

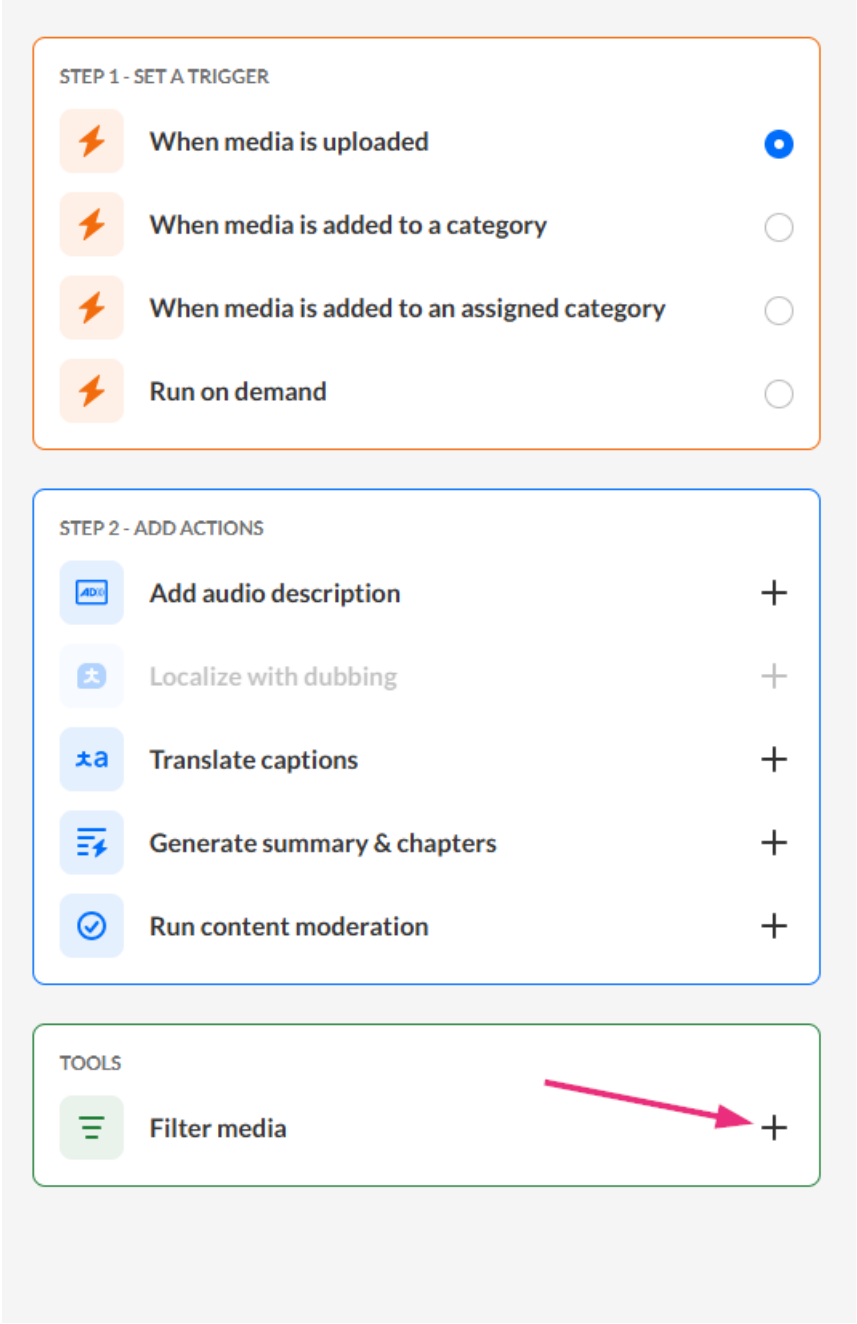


Filter media

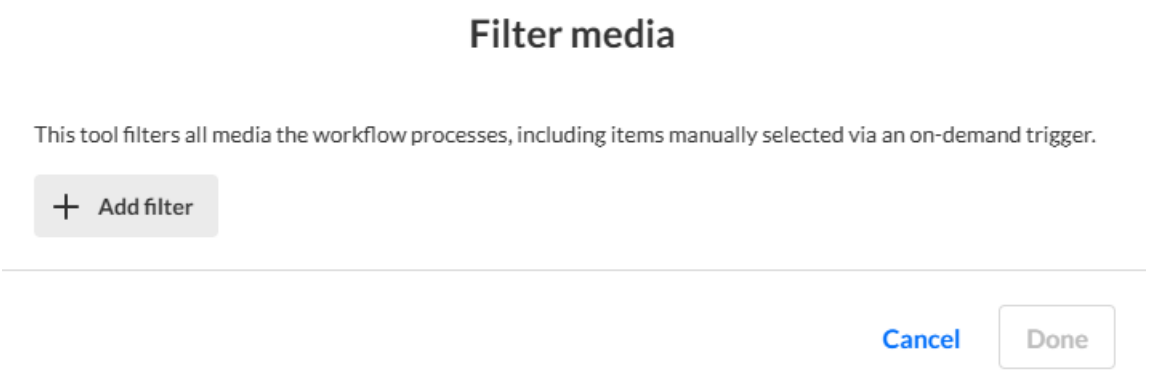
In the **TOOLS** section of the 'My new workflow' screen, add filters to fine tune which entries your workflow processes.

1. Click on **Filter media**.

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The Filter media window opens.

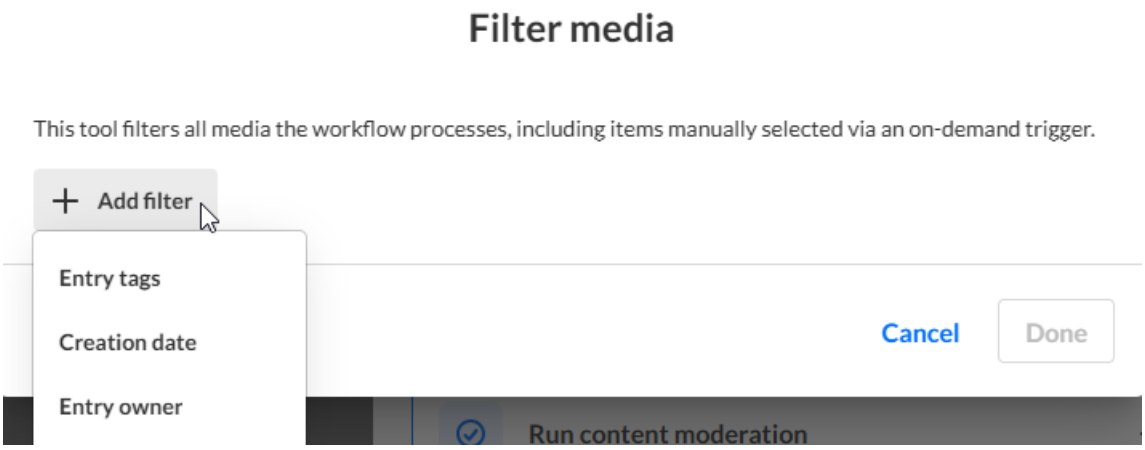


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2. Click **+ Add filter**.

Three filter types are available:

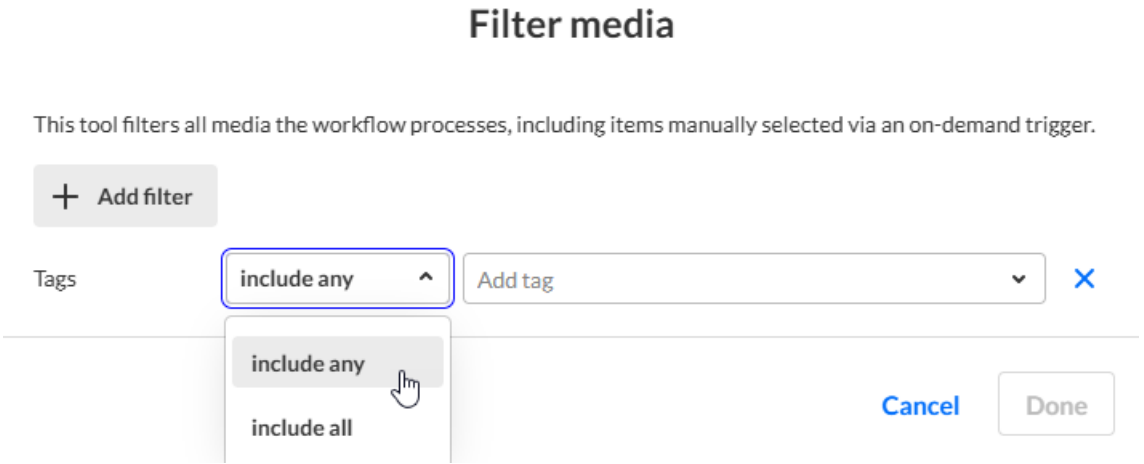
- **Entry tags**
- **Creation date**
- **Entry owner**



3. Choose your desired filter, and configure as follows:

Entry tags

Add this filter to process only media with specific tags.



1. Choose whether you want to include **any** or **all** of the tags you select.

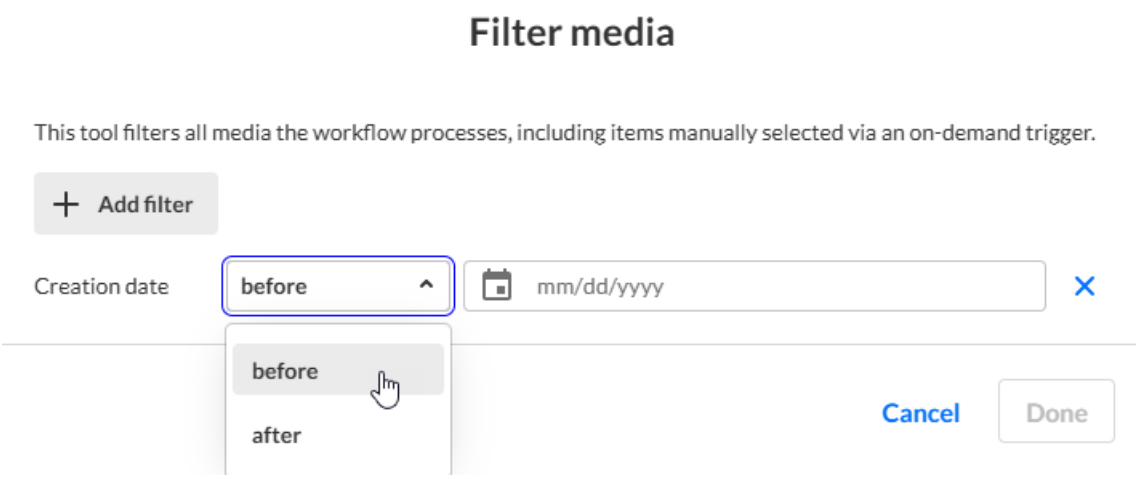
2. Click in the Add tag field. Start typing the first few letters of a tag and a list of matching tags will populate for you. Click to select the checkbox next to the desired tag.

3. Click **Done** or move on to adding another filter.

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Creation date

Add this filter to process only media created before or after a certain date.



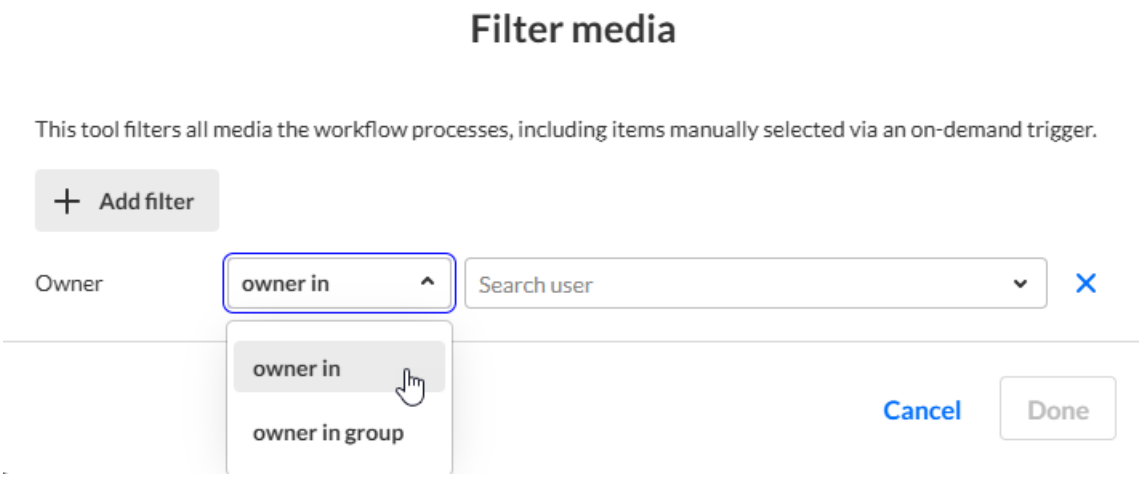
1. Choose whether you want to filter for media **before** or **after** the date entered.

2. Choose a date.

3. Click **Done** or move on to adding another filter.

Entry owner

Add this filter to process only media owned by certain users or groups.



1. Choose whether you want to filter for media with a **specific owner** or **group of owners**.

2. Depending on which option you chose, click in the Search user or Search groups field. Start typing the first few letters of a user or group and a list of matching users or groups will populate for you. Click to select the checkbox next to the desired user or

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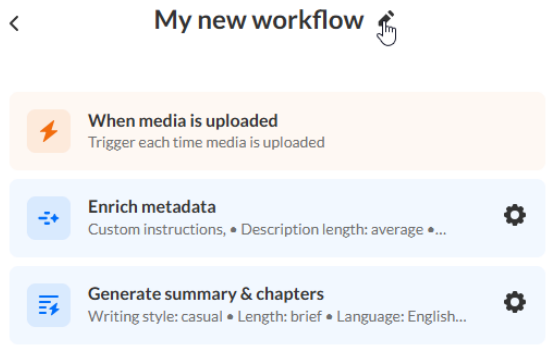
group.

3. Click **Done** or move on to adding another filter.

Once you've added all your filters, they are displayed in the right-side panel.

Name your workflow

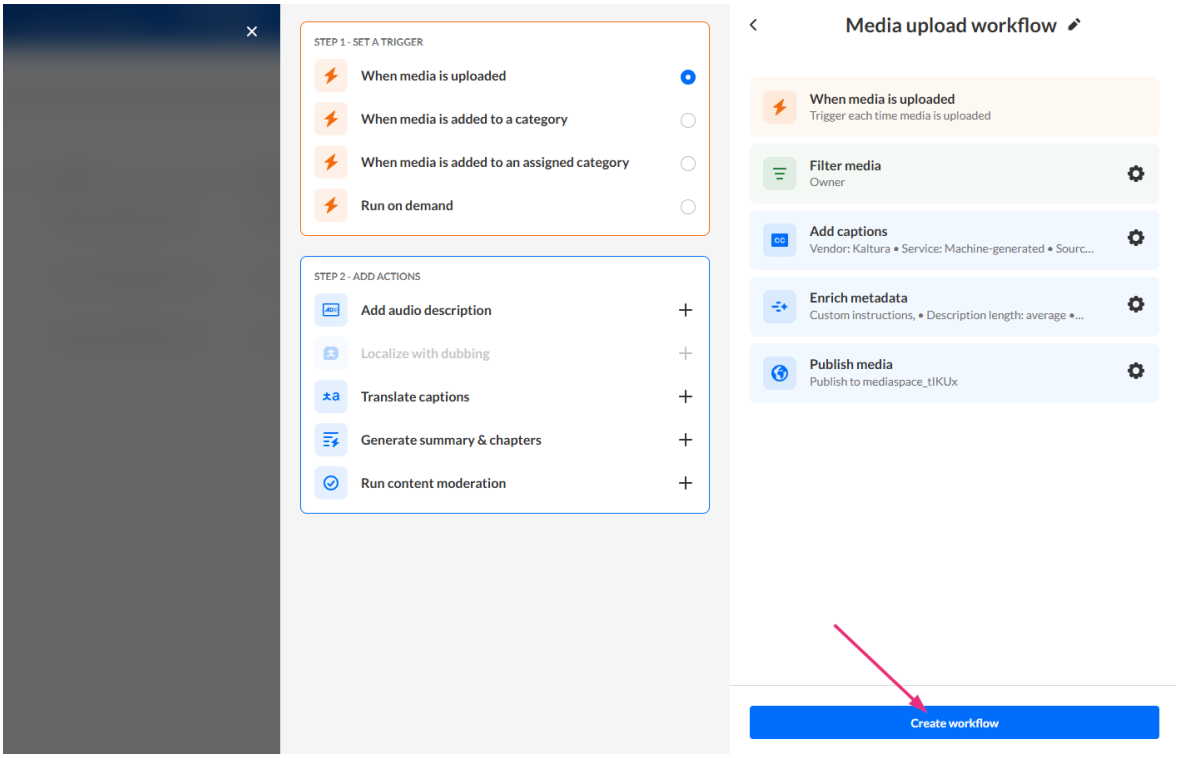
Click the **pencil icon** to the right of your workflow name, and replace 'My new workflow' with a meaningful name, then press enter.



Complete the process

After you've set a trigger, added actions and filters, and named your workflow, you're ready to create it.

Click the **Create workflow** button.



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A confirmation message displays.

To learn how channel owners and managers assign workflows to Content Hubs channels or LMS media galleries, see Assign agentic workflows to a channel.

Kaltura does not use customer data to train its AI models. To learn more, see Kaltura's Artificial Intelligence Principles.

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