Create a workflow

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This article is designated for all users.

About

Streamline repetitive tasks and facilitate scalable content management with Kaltura Publishing Workflow. This article will guide you through the process of building and defining workflows tailored to your own specific needs.

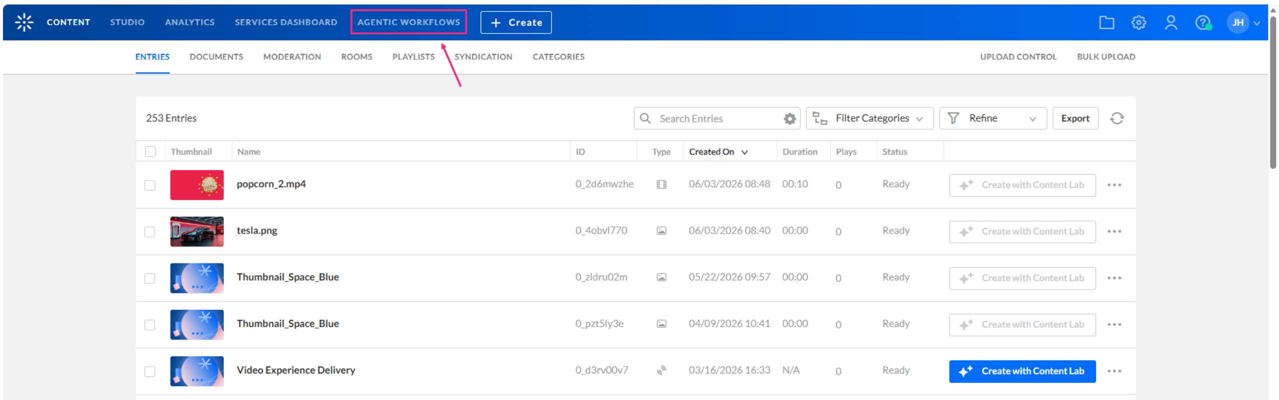
Looking for more information about this feature? Feel free to contact your Kaltura representative.

Before you start

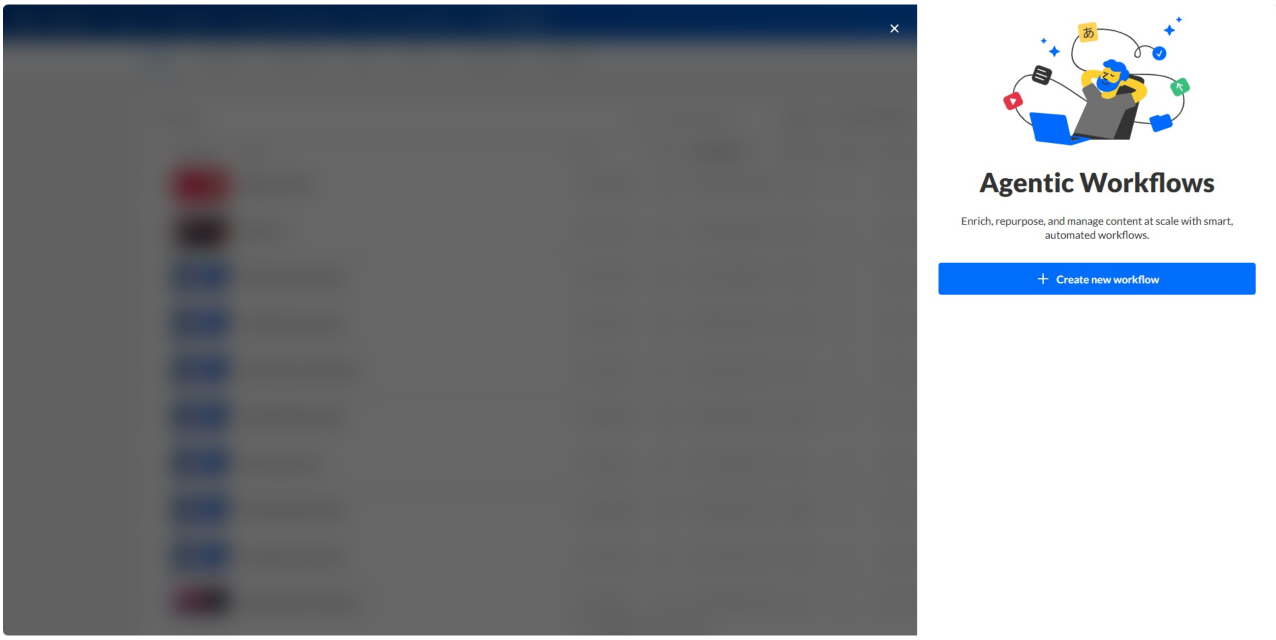
- Your account must have Agentic Workflows enabled.
- If you want to use REACH-based actions (such as captions, translation, dubbing, moderation, audio description, chaptering and metadata enrichment), your account must have an active REACH profile and relevant catalog item(s) configured.

Access Publishing Workflow

In the Rich Media CMS, Publishing Workflow is accessible via the **Agentic Workflows** button on the top navigation bar.



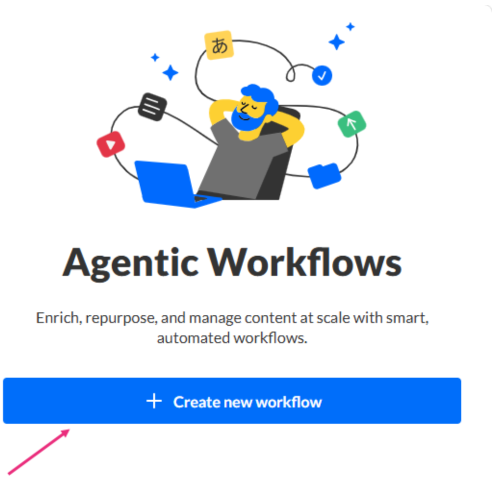
Click the **Agentic Workflows** button and the 'Agentic Workflows' screen displays. If you've already created workflows in the past, those workflows will be listed below the **Create new workflow** button.



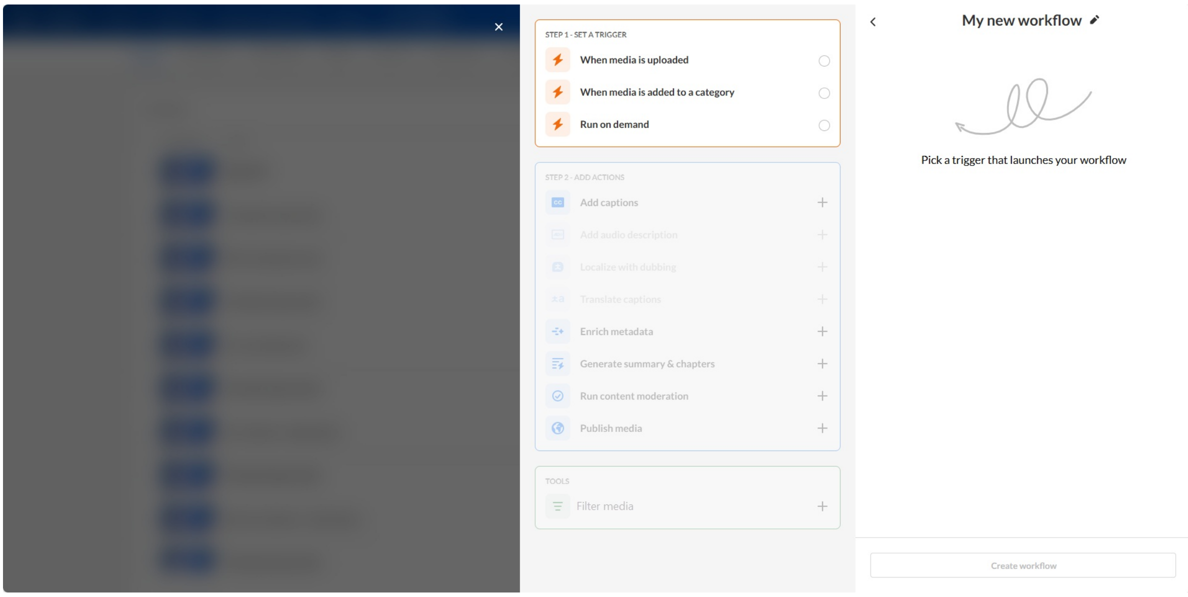
Set a trigger

A trigger defines when the workflow runs.

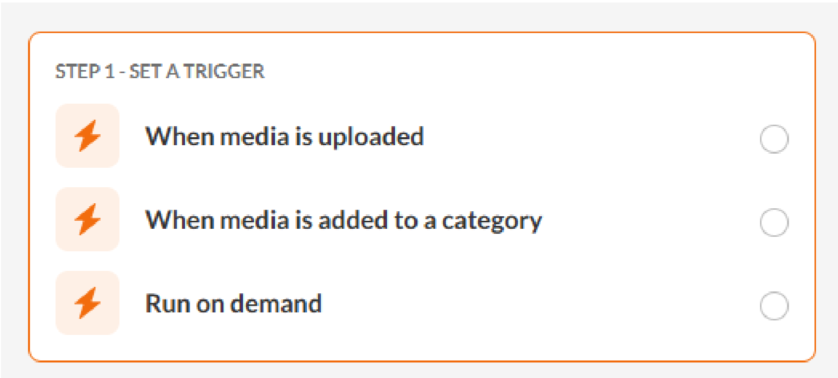
1. Click the **Create new workflow** button.



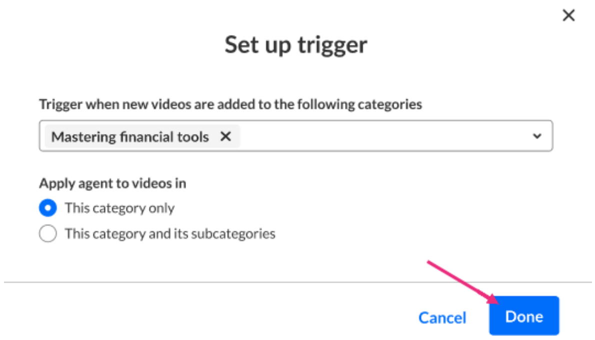
2. The 'My new workflow' screen displays.



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.

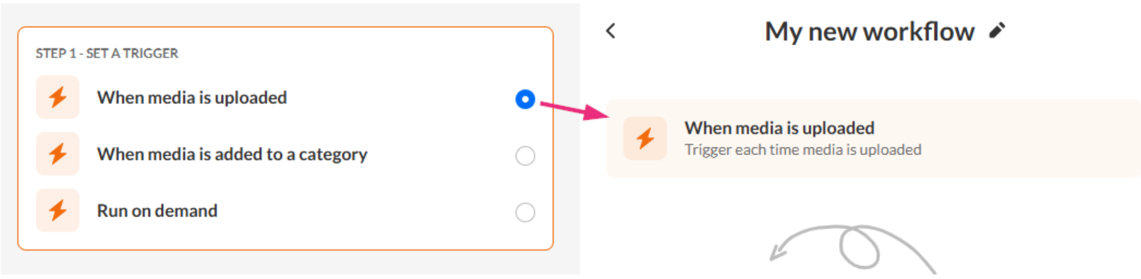


- **When media is uploaded** – Runs when an uploaded entry finishes processing and reaches 'Ready' status (fully playable).
- **When media enters a category** – Runs when an entry is added to a category.
  - Start typing a category name and select it from the dropdown.
  - Choose whether the *added to category* trigger is activated when media is added to the selected categories only, or to both the selected categories and any of their subcategories.
  - Click **Done**.



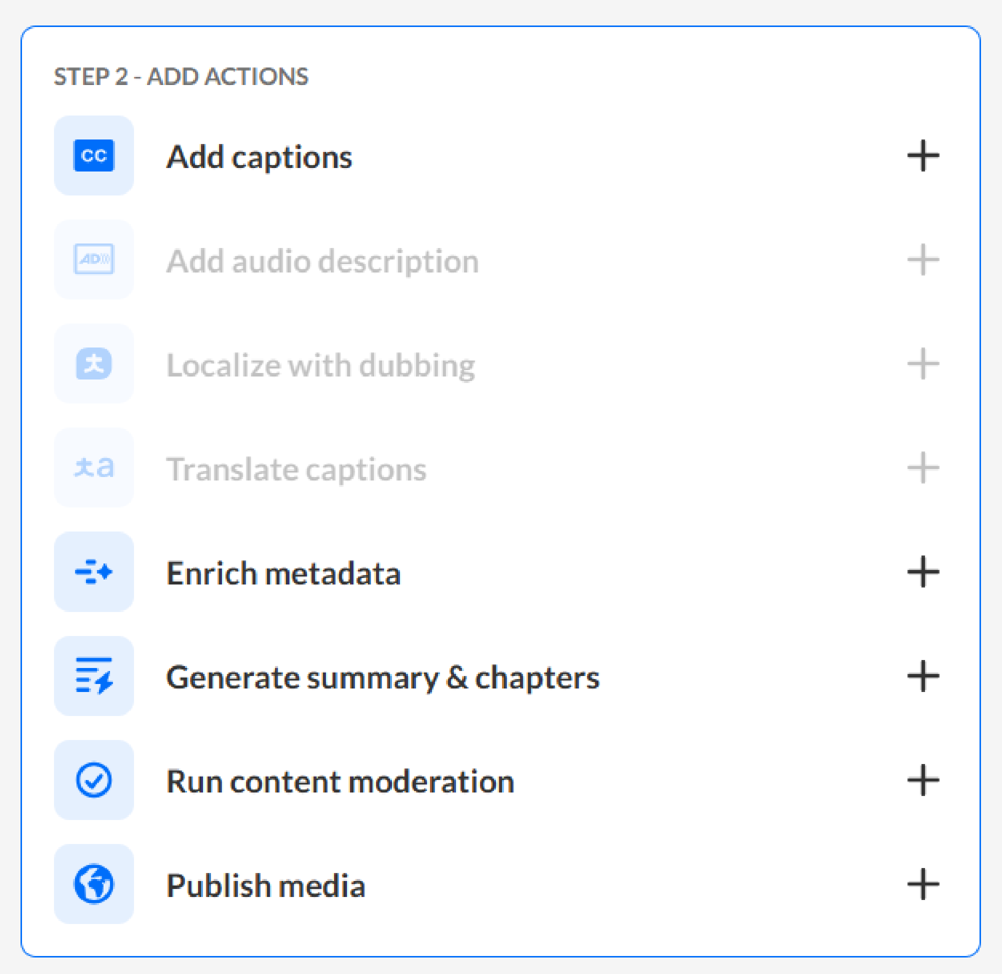
- **Run on-demand** – Lets you manually select media when running the workflow. When selecting this trigger, a message displays which explaining that automatic actions will take place when enabled.

Once selected, the trigger appears in the right-hand panel.



Add actions

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



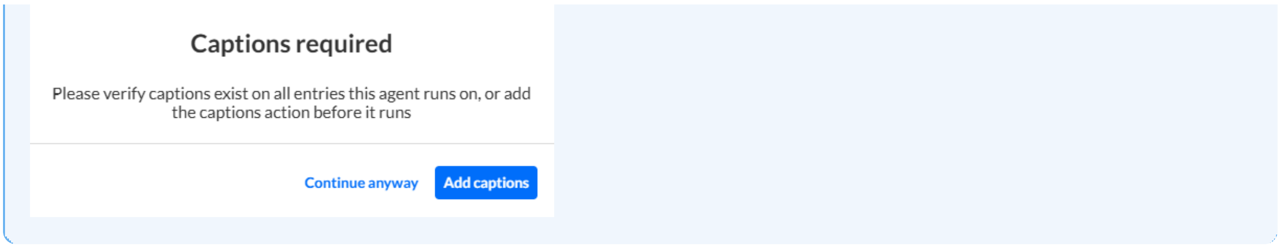
Not all actions are always available to run. Here’s what you might see:

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:

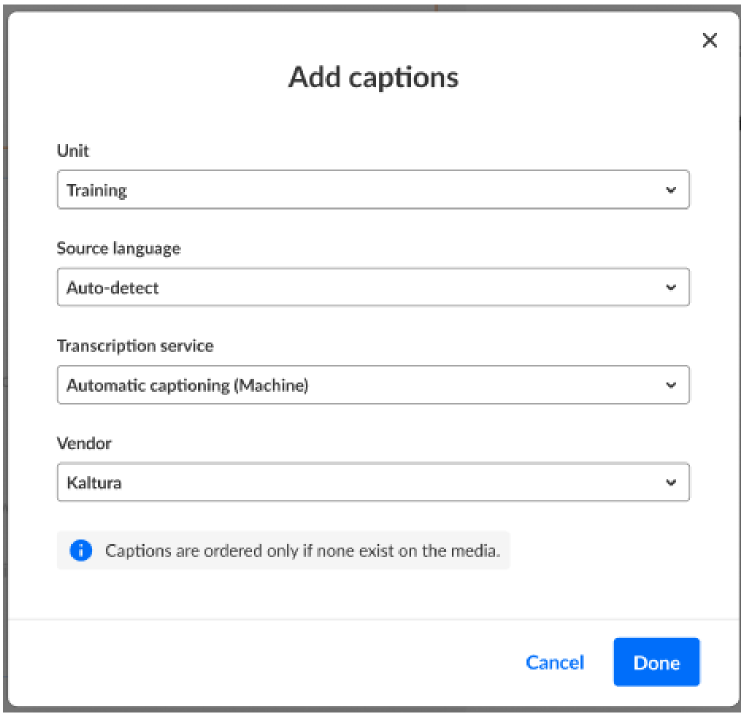
- **Enrich metadata**
- **Generate summary & chapters**
- **Run content moderation**
- **Translate captions**

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



Add captions

Set a workflow to add captions to your videos.



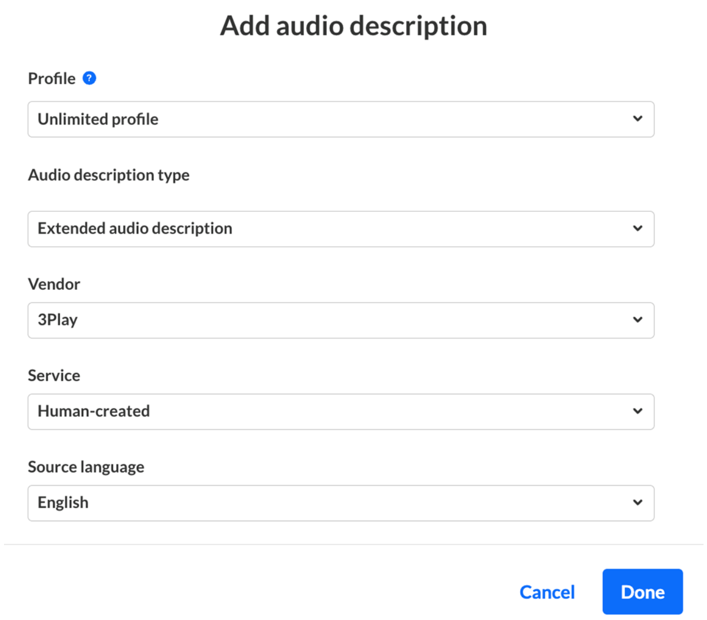
1. Configure the following fields:

- **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.



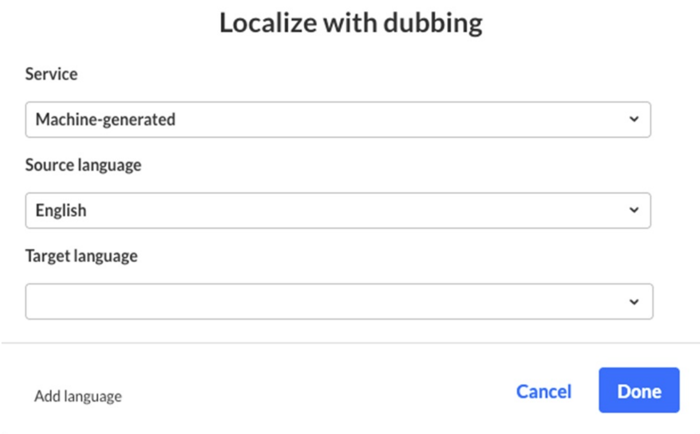
1. Configure the following fields:

- **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.



1. Configure the following fields:

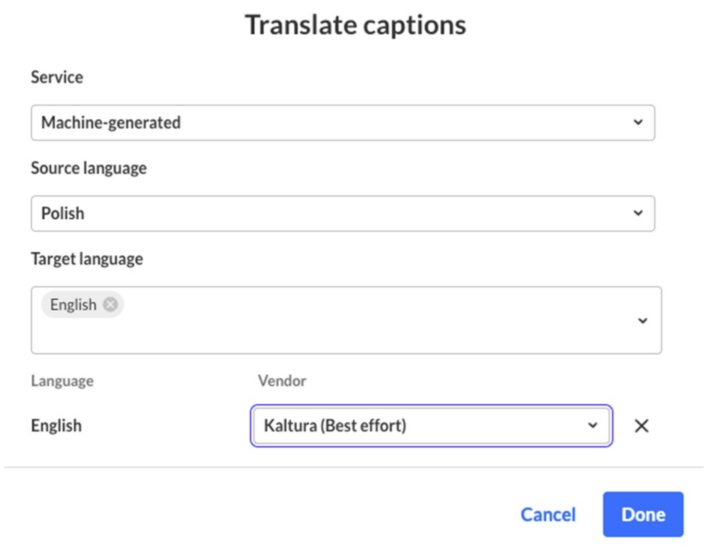
- **Service** – Select the service type (for example, Machine-generated).
- **Source language** – Select the spoken language in the video.
- **Target language** – Select one or more languages for the dubbed audio tracks.

- 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.



1. Configure the following fields:

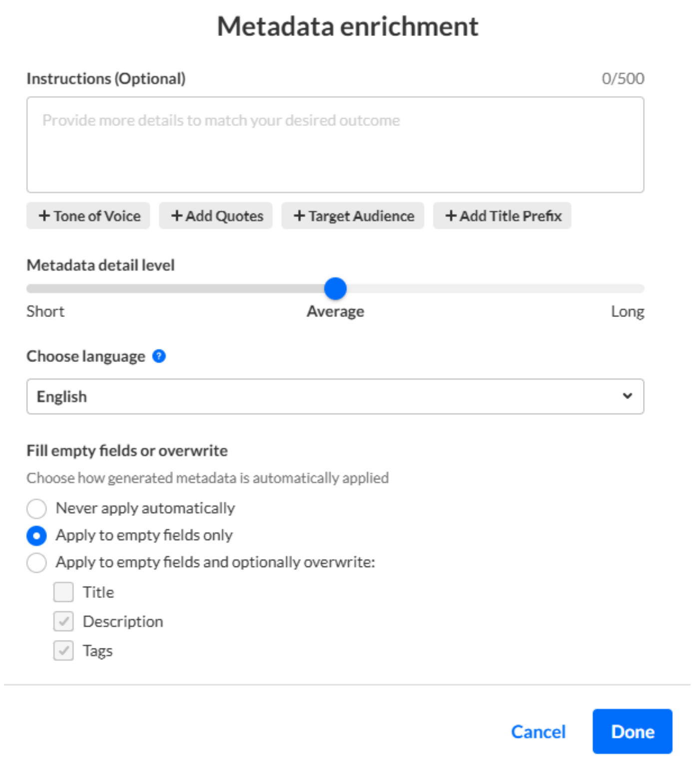
- **Service** – Select the service type (for example, Machine-generated).
- **Source language** – Select the language of the existing captions.
- **Target languages** – Select one or more languages to translate the captions into.
- **Vendor** – If multiple vendors are available, select one. If only one 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.



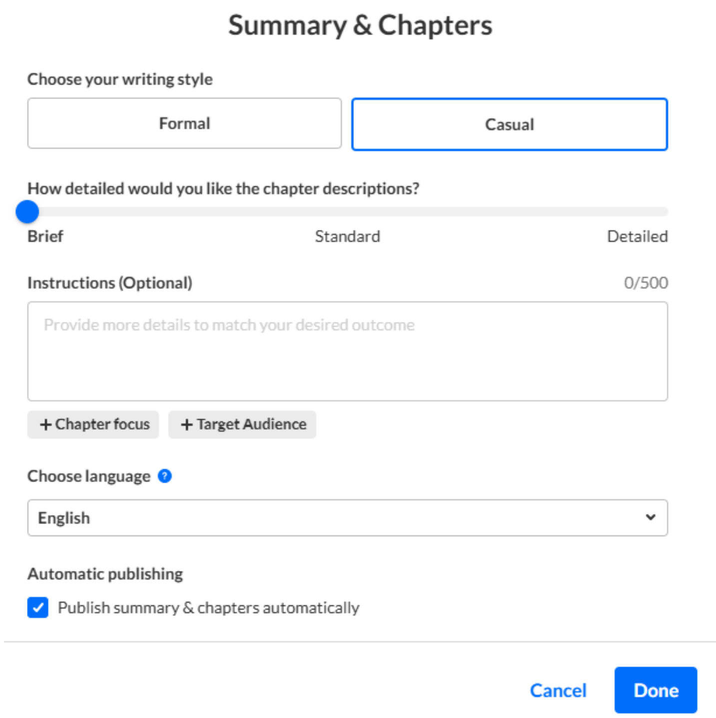
1. Enter your own instructions or select from preset tags (e.g., tone of voice, target audience, add prefix).
2. Adjust metadata length and select output language. For detailed configuration options, see our article Enrich metadata with AI.
3. Decide how the generated metadata will be applied. In **Fill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

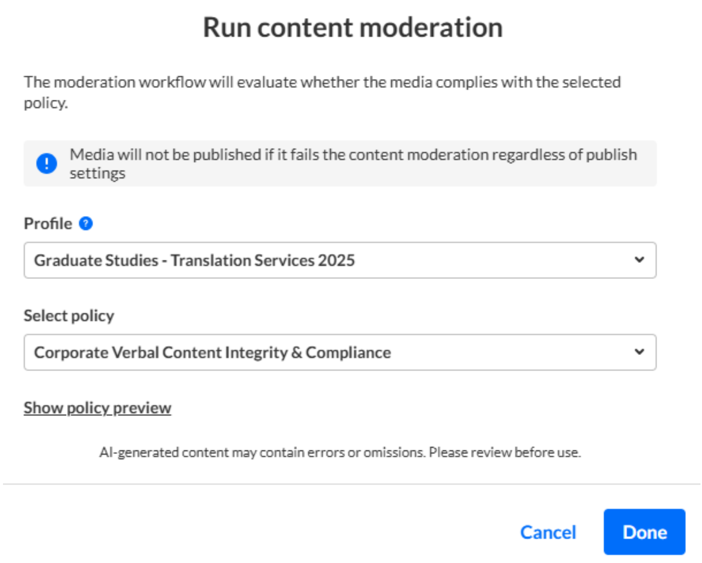


1. Choose style (formal or casual), level of detail (brief, standard, or detailed), output language. For detailed configuration options, see our article Create a summary and chapters with AI.
2. If you want the summary and chapters to be automatically published, click the option **Automatic publishing**.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

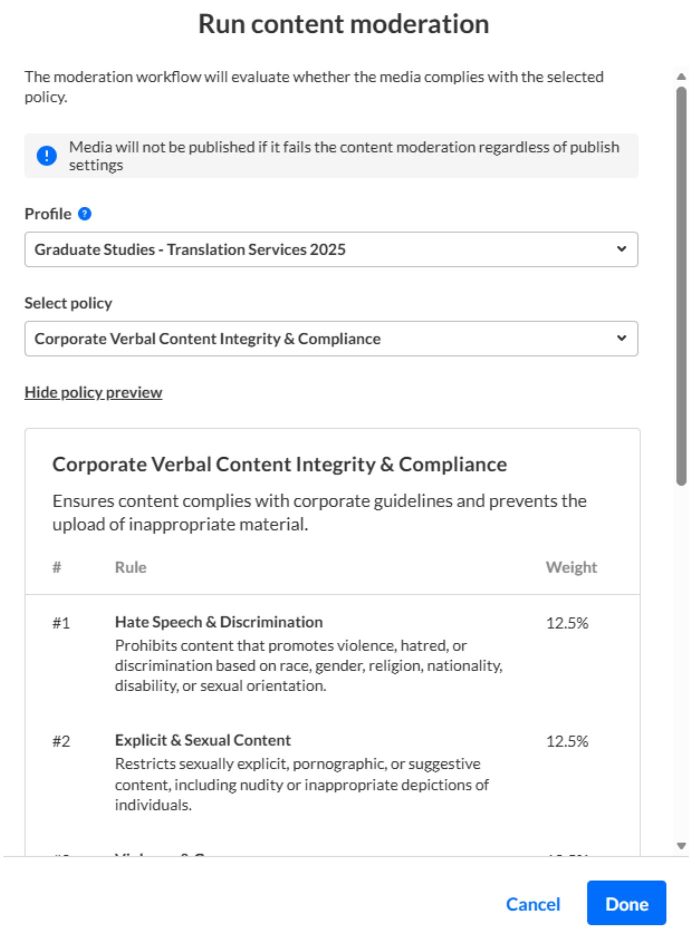
Run content moderation

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.



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



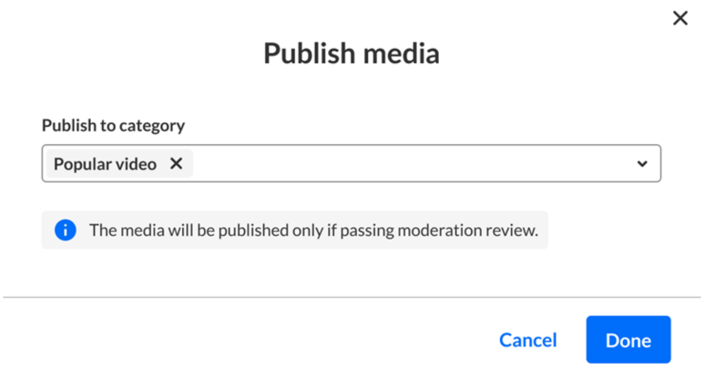
4. Click **Done**.

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

Publish media

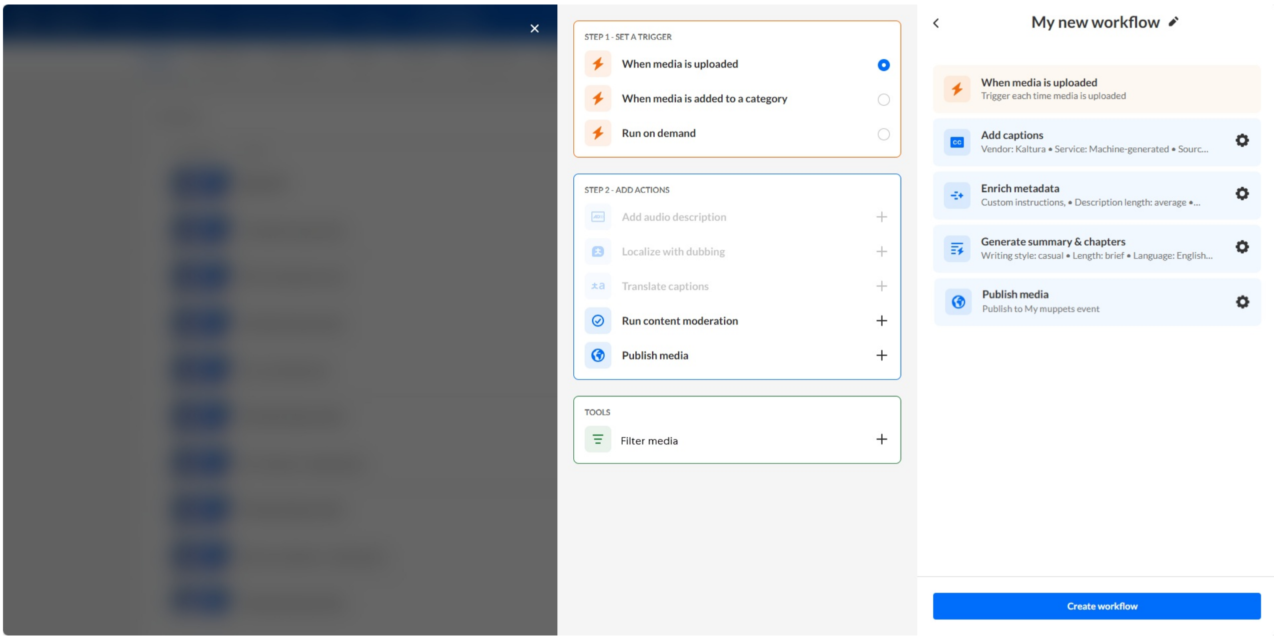
Publish to a channel or category.

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



2. Click **Done**.

Once you've set actions, they are displayed in the right-side panel. In our example below, we've set four actions - Add captions, Enrich metadata, Generate summary & chapters, and Publish media.

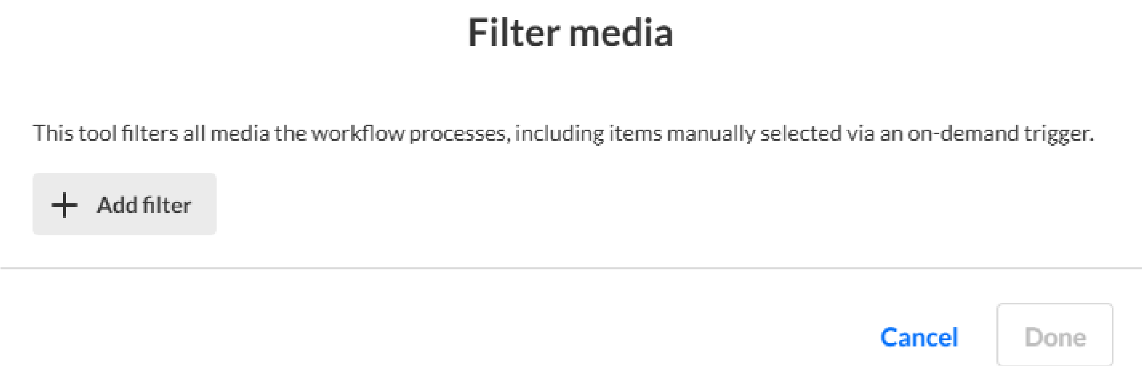


Filter media

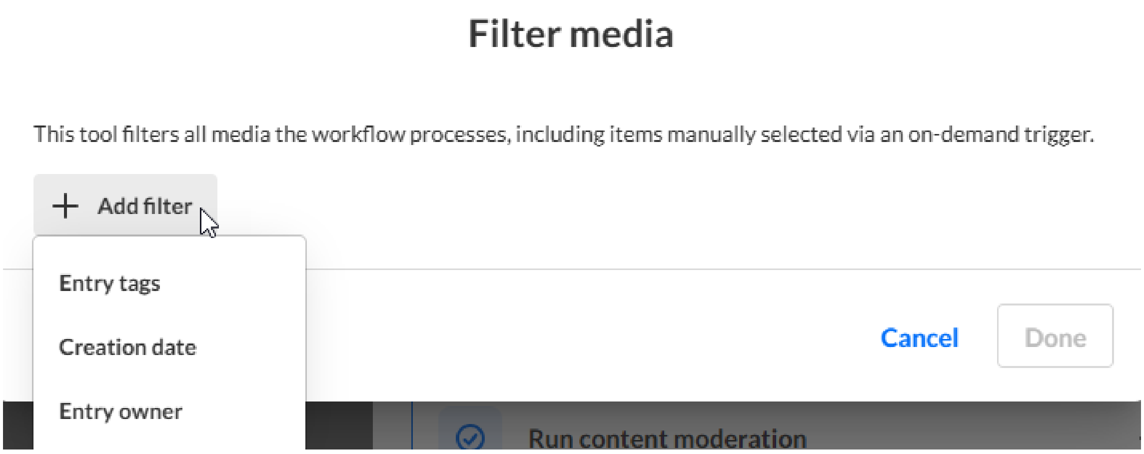
In the **TOOLS** section of the 'My new workflow' screen, add filters to fine tune which entries your workflow processes.

1. Click on **Filter media**.

The Filter media screen displays.



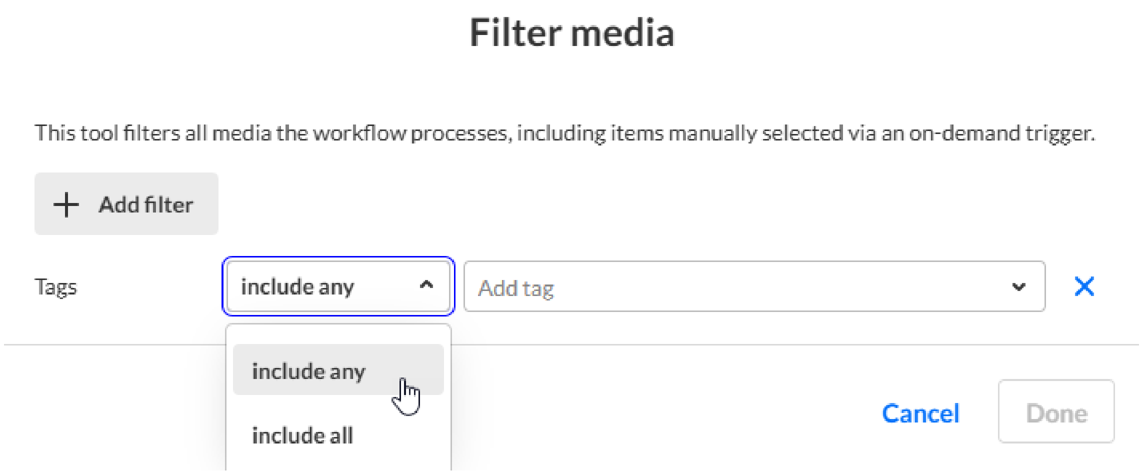
2. Click **+ Add filter**. Three choices display - Entry tags, Creation date, and Entry owner.



3. Choose your desired filter.

Entry tags

Add this filter and your workflow will only process media including specific tags.



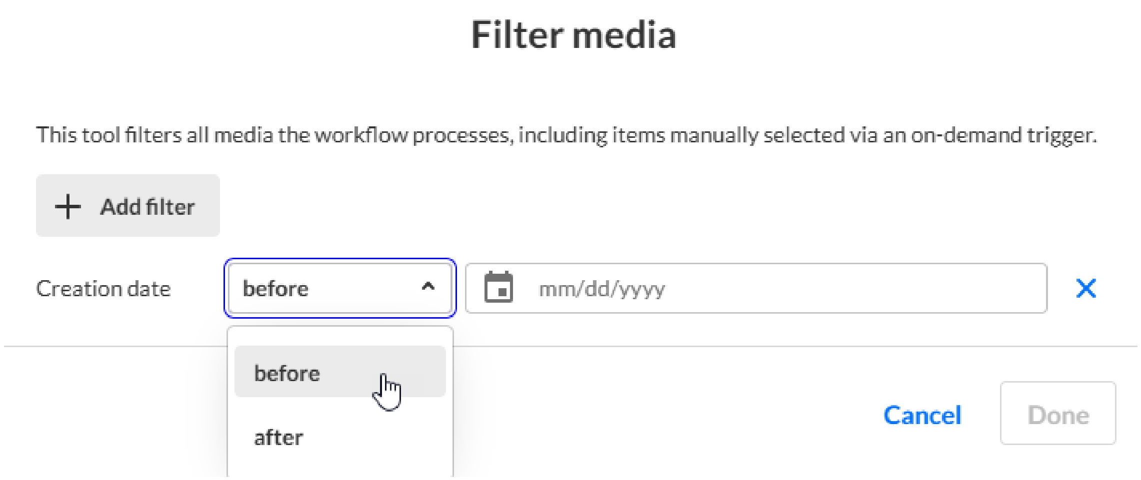
1. Choose whether you want to include **any** or **all** of the tags you select.

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.

Creation date

Add this filter and your workflow will only process media created before or after a certain date.



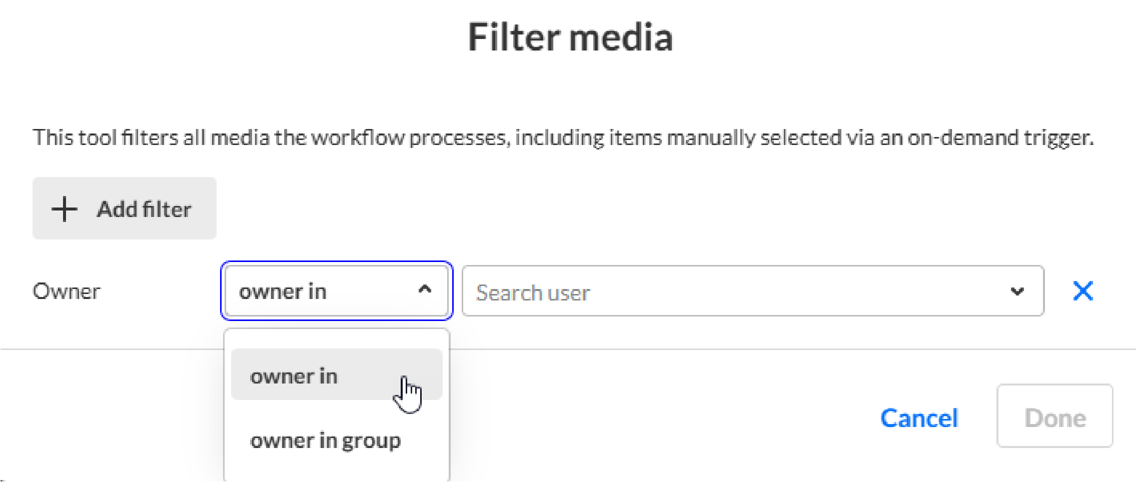
1. Choose whether you want to filter for media **before** or **after** the date entered.

2. Choose a date.

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

Entry owner

Add this filter and your workflow will only process media owned by certain users or groups.

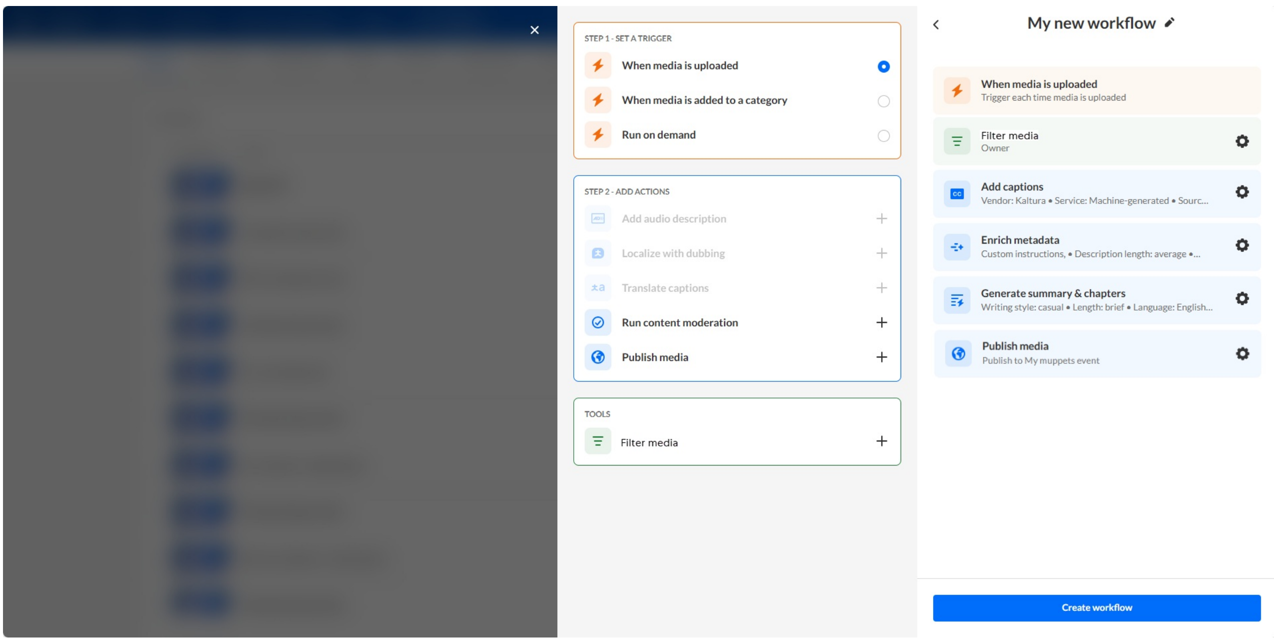


1. Choose whether you want to filter for media with a **specific owner** or **group of owners**.

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 group.

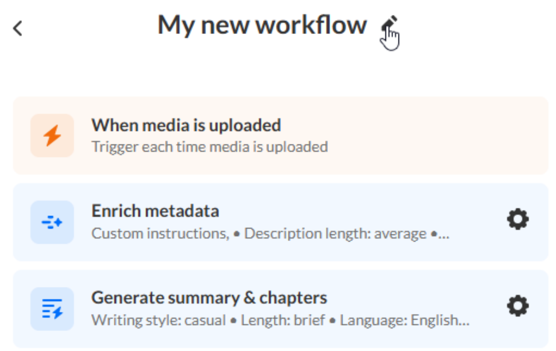
3. Click **Done** or move on to adding another filter.

Once you've added all your filters, they are displayed in the right-side panel. In our example below, we've set one filter - Entry owner.



Name your workflow

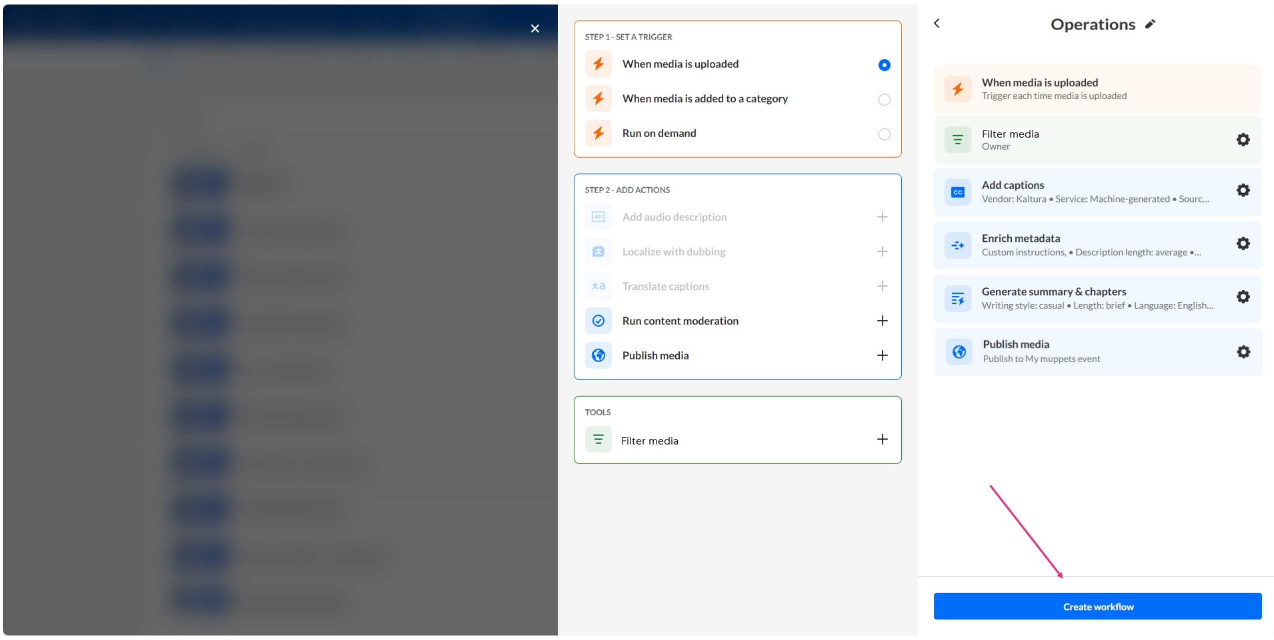
Click the pencil (edit) icon to the right of your workflow name, delete "My new workflow" (default) and type a name for your workflow, then press **Enter** on your keyboard.



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.



You receive notification that your workflow was successfully created.

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