


## Create a workflow

Last Modified on 06/15/2026 4:44 pm IDT

 This article is designated for all users.

### About

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

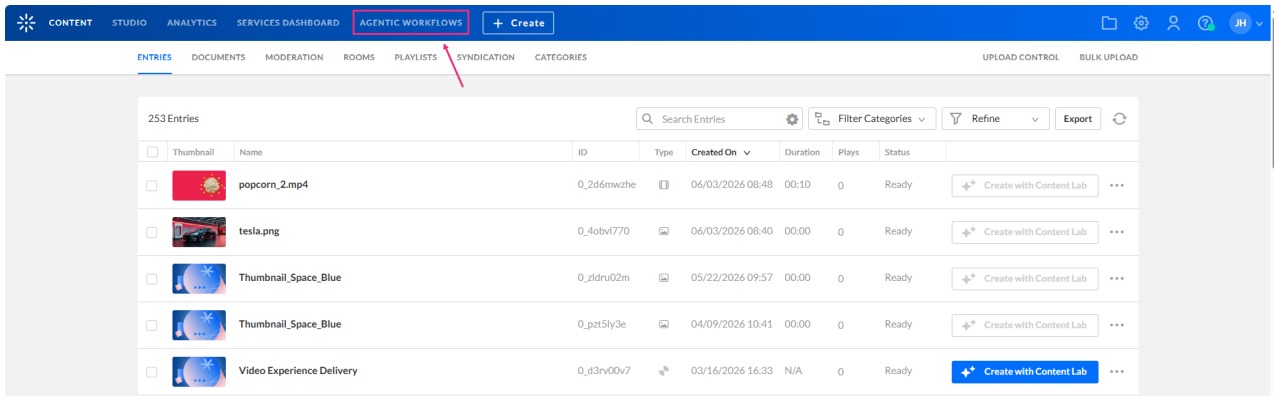
 Looking for more information about this feature? Feel free to contact your Kaltura representative.
















### 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.

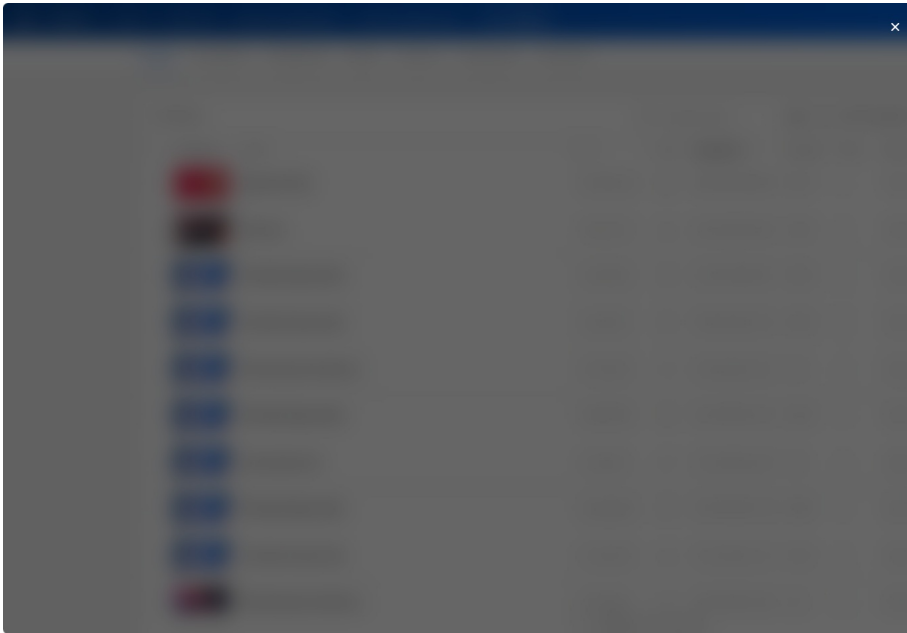
### Access Agentic Workflows

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



Thumbnail	Name	ID	Type	Created On	Duration	Plays	Status	
	popcorn_2.mp4	0_2d6mwzhe		06/03/2026 08:48	00:10	0	Ready	 Create with Content Lab ...
	tesla.png	0_4obvl770		06/03/2026 08:40	00:00	0	Ready	 Create with Content Lab ...
	Thumbnail_Space_Blue	0_zldru02m		05/22/2026 09:57	00:00	0	Ready	 Create with Content Lab ...
	Thumbnail_Space_Blue	0_pzt5ly3e		04/09/2026 10:41	00:00	0	Ready	 Create with Content Lab ...
	Video Experience Delivery	0_d3rv00v7		03/16/2026 16:33	N/A	0	Ready	 Create with Content Lab ...

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.



## Agentic Workflows

Enrich, repurpose, and manage content at scale with smart, automated workflows.

+ Create new workflow

## Set a trigger

A trigger defines when the workflow runs.


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



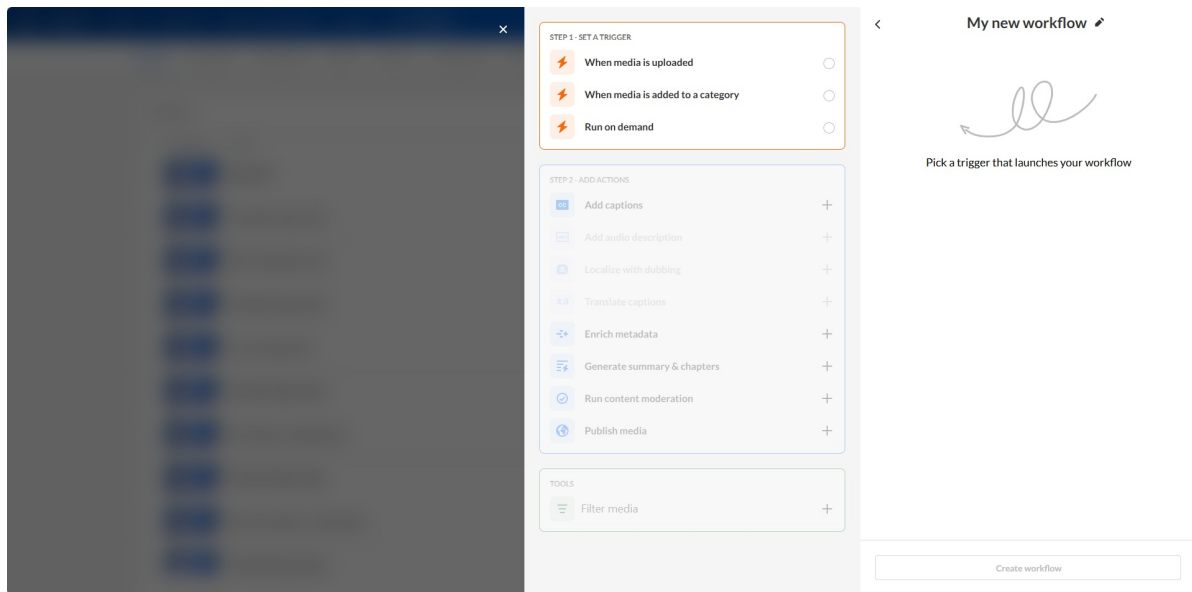
## Agentic Workflows

Enrich, repurpose, and manage content at scale with smart, automated workflows.

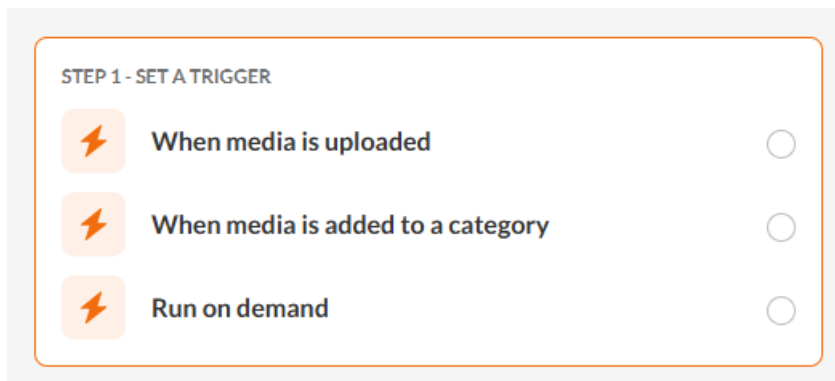
+ Create new workflow



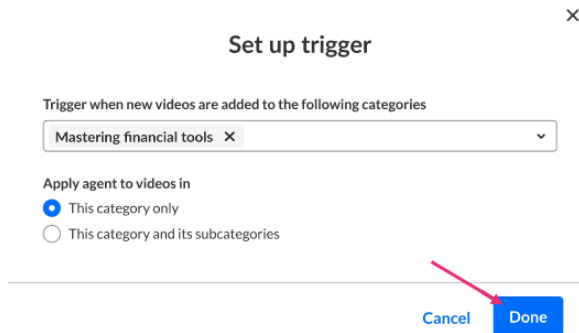
2. The 'My new workflow' screen displays.



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.

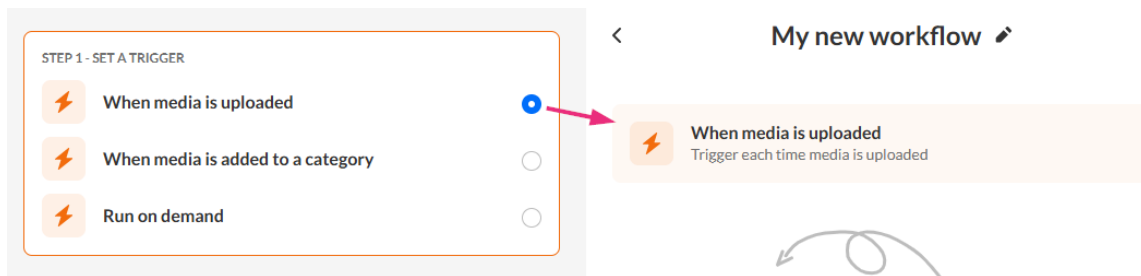


- **When media is uploaded** – Runs when an uploaded entry finishes processing and reaches 'Ready' status (fully playable).
- **When media enters a category** – Runs when an entry is added to a category.
  - Start typing a category name and select it from the dropdown.
  - Choose whether the *added to 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.

**STEP 2 - ADD ACTIONS**

	<b>Add captions</b>	<b>+</b>
	Add audio description	+
	Localize with dubbing	+
	Translate captions	+
	<b>Enrich metadata</b>	<b>+</b>
	<b>Generate summary &amp; chapters</b>	<b>+</b>
	<b>Run content moderation</b>	<b>+</b>
	<b>Publish media</b>	<b>+</b>



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.

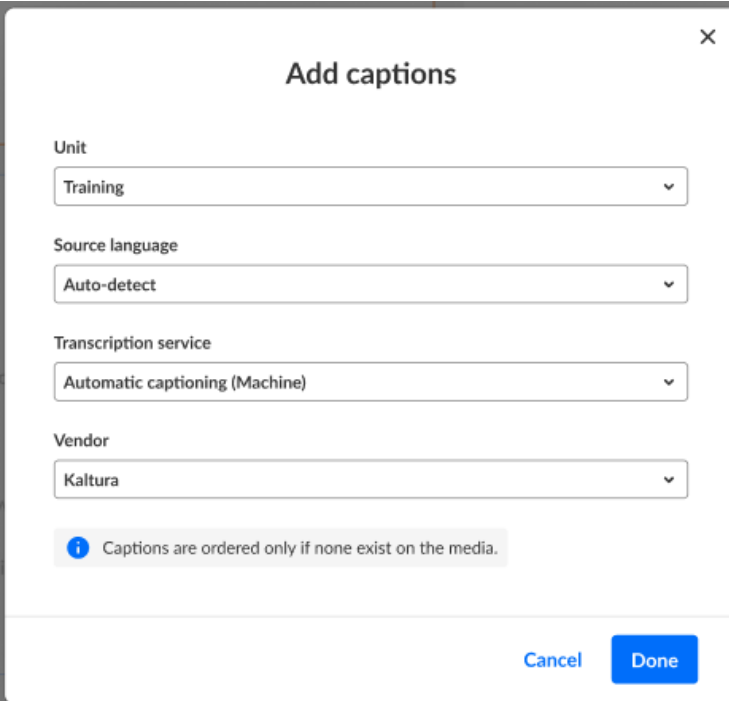
### Captions required

Please verify captions exist on all entries this agent runs on, or add the captions action before it runs

[Continue anyway](#) [Add captions](#)

## Add captions

Set a workflow to add captions to your videos.



The screenshot shows a dialog box titled "Add captions" with a close button (X) in the top right corner. It contains four dropdown menus: "Unit" (set to "Training"), "Source language" (set to "Auto-detect"), "Transcription service" (set to "Automatic captioning (Machine)"), and "Vendor" (set to "Kaltura"). Below the dropdowns is an information icon and the text "Captions are ordered only if none exist on the media." At the bottom right, there are "Cancel" and "Done" buttons.

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.

### Add audio description

Profile 

Unlimited profile 

Audio description type

Extended audio description 

Vendor

3Play 

Service

Human-created 

Source language

English 

Cancel

Done

#### 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.

### Localize with dubbing

Service

Machine-generated

Source language

English

Target language

Add language

Cancel

Done

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.

### Translate captions

Service

Machine-generated

Source language

Polish

Target language

English

Language

English

Vendor

Kaltura (Best effort)

Cancel

Done

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.

## Metadata enrichment

Instructions (Optional) 0/500

Provide more details to match your desired outcome

+ Tone of Voice + Add Quotes + Target Audience + Add Title Prefix

Metadata detail level

Short Average Long

Choose language ?

English ▼

### Fill empty fields or overwrite

Choose how generated metadata is automatically applied

- Never apply automatically
- Apply to empty fields only
- Apply to empty fields and optionally overwrite:
  - Title
  - Description
  - Tags

Cancel Done

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.

## Summary & Chapters

Choose your writing style

How detailed would you like the chapter descriptions?

Brief Standard Detailed

Instructions (Optional)

0/500

Choose language 

Automatic publishing

Publish summary & chapters automatically

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.

### Run content moderation

The moderation workflow will evaluate whether the media complies with the selected policy.

**Media will not be published if it fails the content moderation regardless of publish settings**

Profile ⌵  
 Graduate Studies - Translation Services 2025

Select policy  
 Corporate Verbal Content Integrity & Compliance

[Show policy preview](#)

AI-generated content may contain errors or omissions. Please review before use.

Cancel Done

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

### Run content moderation

The moderation workflow will evaluate whether the media complies with the selected policy.

**Media will not be published if it fails the content moderation regardless of publish settings**

Profile ⌵  
 Graduate Studies - Translation Services 2025

Select policy  
 Corporate Verbal Content Integrity & Compliance

[Hide policy preview](#)

**Corporate Verbal Content Integrity & Compliance**

Ensures content complies with corporate guidelines and prevents the upload of inappropriate material.

#	Rule	Weight
#1	<b>Hate Speech &amp; Discrimination</b> Prohibits content that promotes violence, hatred, or discrimination based on race, gender, religion, nationality, disability, or sexual orientation.	12.5%
#2	<b>Explicit &amp; Sexual Content</b> Restricts sexually explicit, pornographic, or suggestive content, including nudity or inappropriate depictions of individuals.	12.5%

Cancel Done

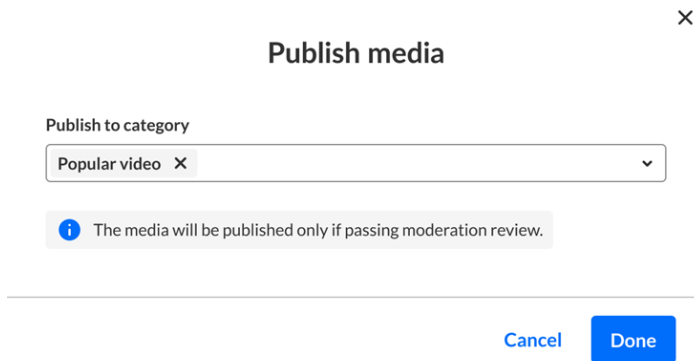
4. Click **Done**.

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

## Publish media

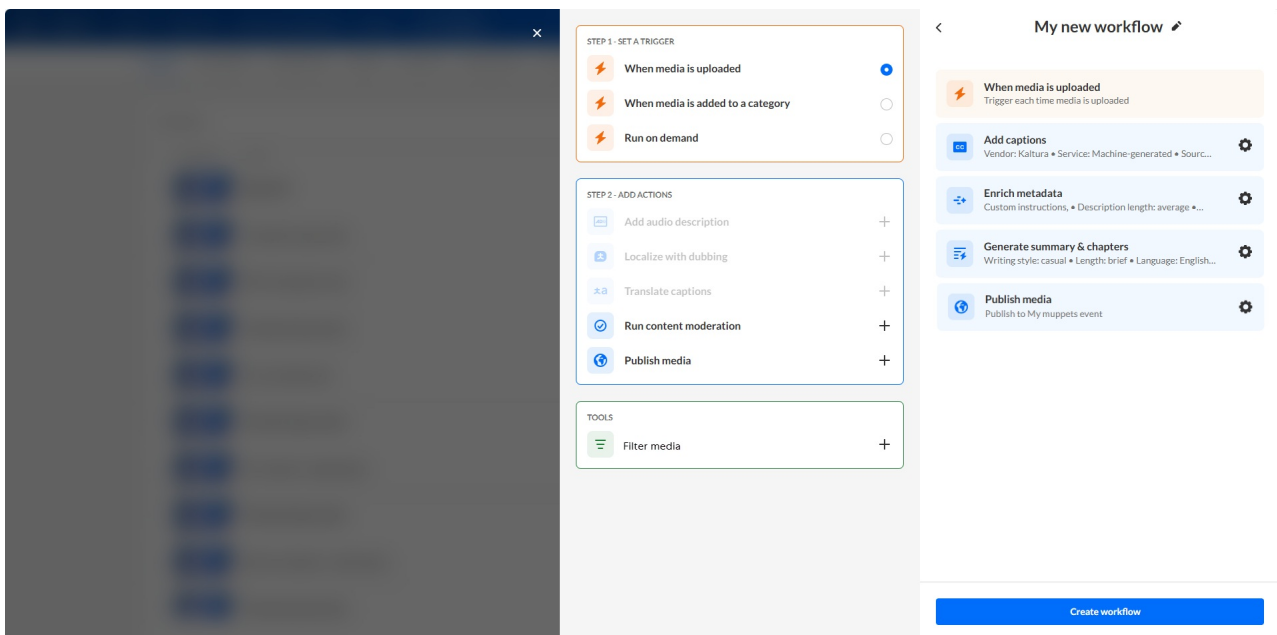
Publish to a channel or category.

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.

## Filter media

This tool filters all media the workflow processes, including items manually selected via an on-demand trigger.

+ Add filter

Cancel

Done

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

## Filter media

This tool filters all media the workflow processes, including items manually selected via an on-demand trigger.

+ Add filter

Entry tags

Creation date

Entry owner

Cancel

Done

Run content moderation

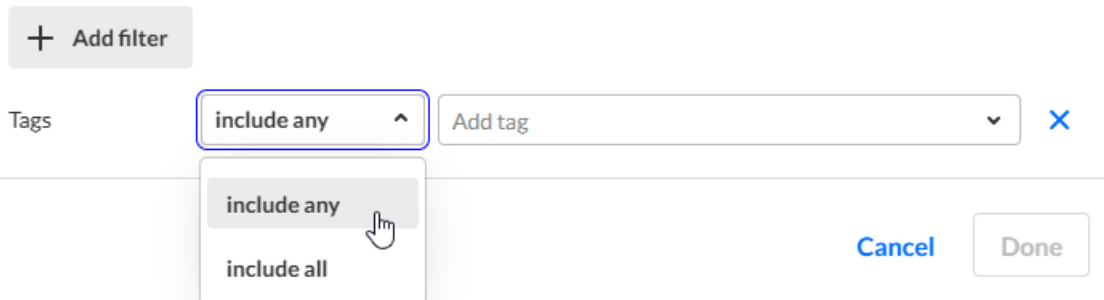
3. Choose your desired filter.

### Entry tags

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

## Filter media

This tool filters all media the workflow processes, including items manually selected via an on-demand trigger.



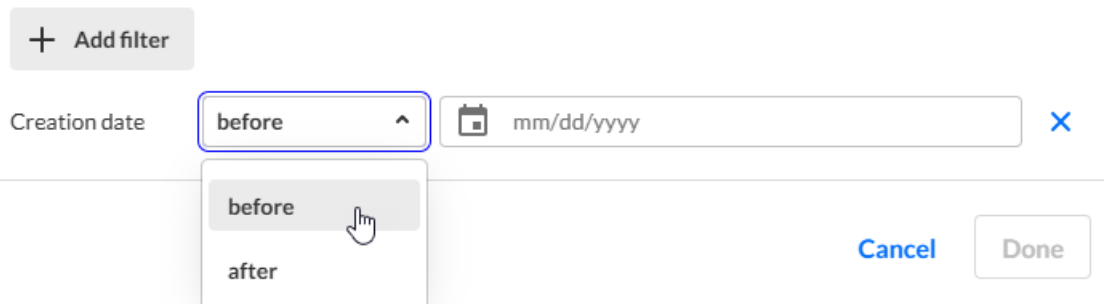
1. Choose whether you want to include **any** or **all** of the tags you select.
2. Click in the Add tag field. Start typing the first few letters of a tag and a list of matching tags will populate for you. Click to select the checkbox next to the desired tag.
3. Click **Done** or move on to adding another filter.

## Creation date

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

## Filter media

This tool filters all media the workflow processes, including items manually selected via an on-demand trigger.



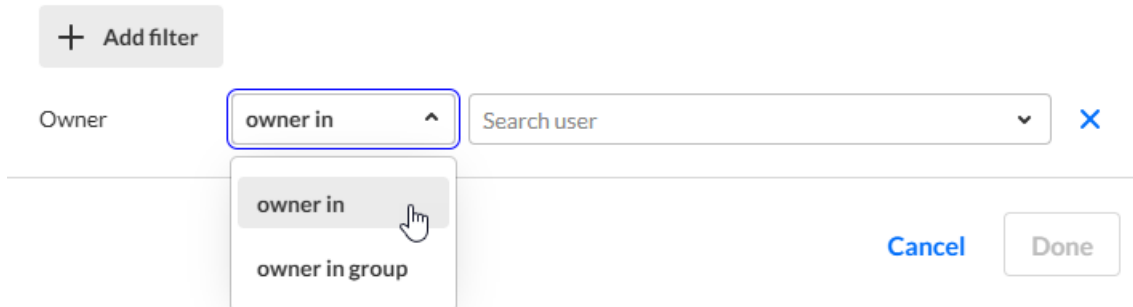
1. Choose whether you want to filter for media **before** or **after** the date entered.
2. Choose a date.
3. Click **Done** or move on to adding another filter.

## Entry owner

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

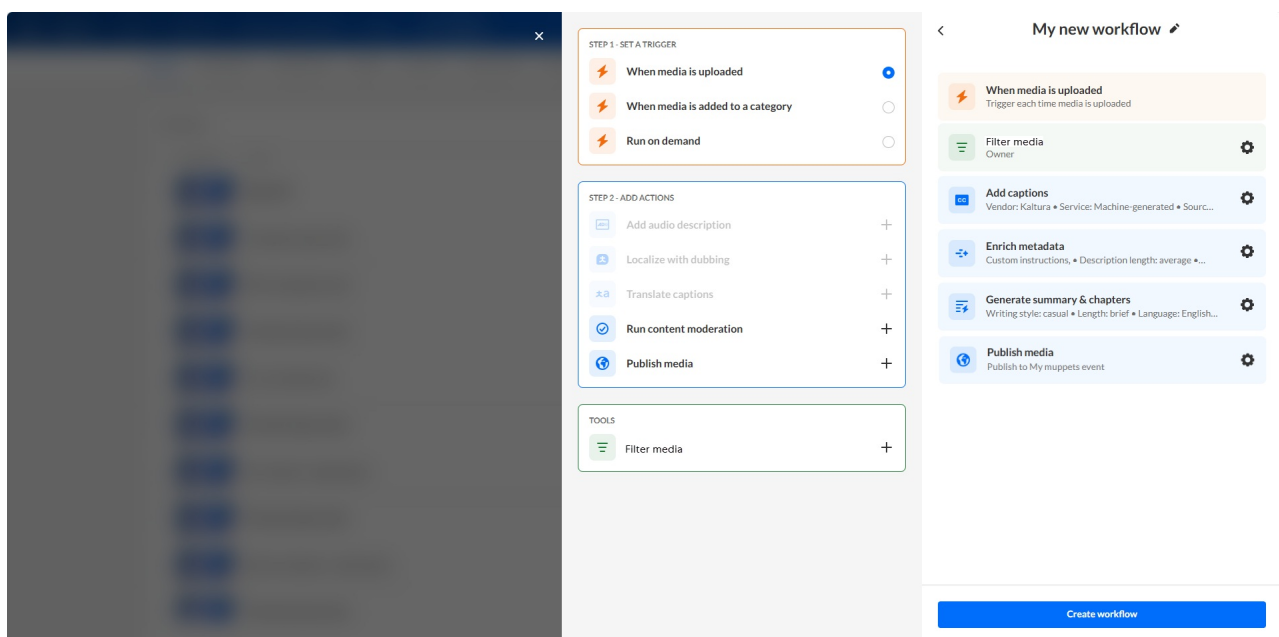
## Filter media

This tool filters all media the workflow processes, including items manually selected via an on-demand trigger.



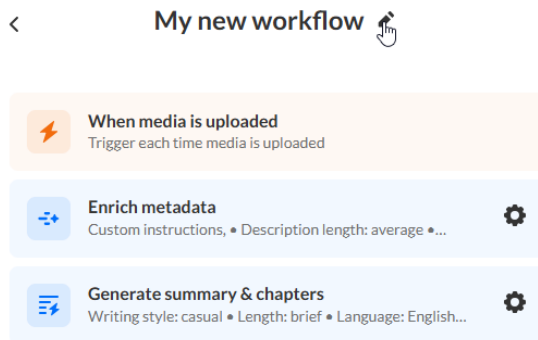
1. Choose whether you want to filter for media with a **specific owner** or **group of owners**.
2. Depending on which option you chose, click in the Search user or Search groups field. Start typing the first few letters of a user or group and a list of matching users or groups will populate for you. 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

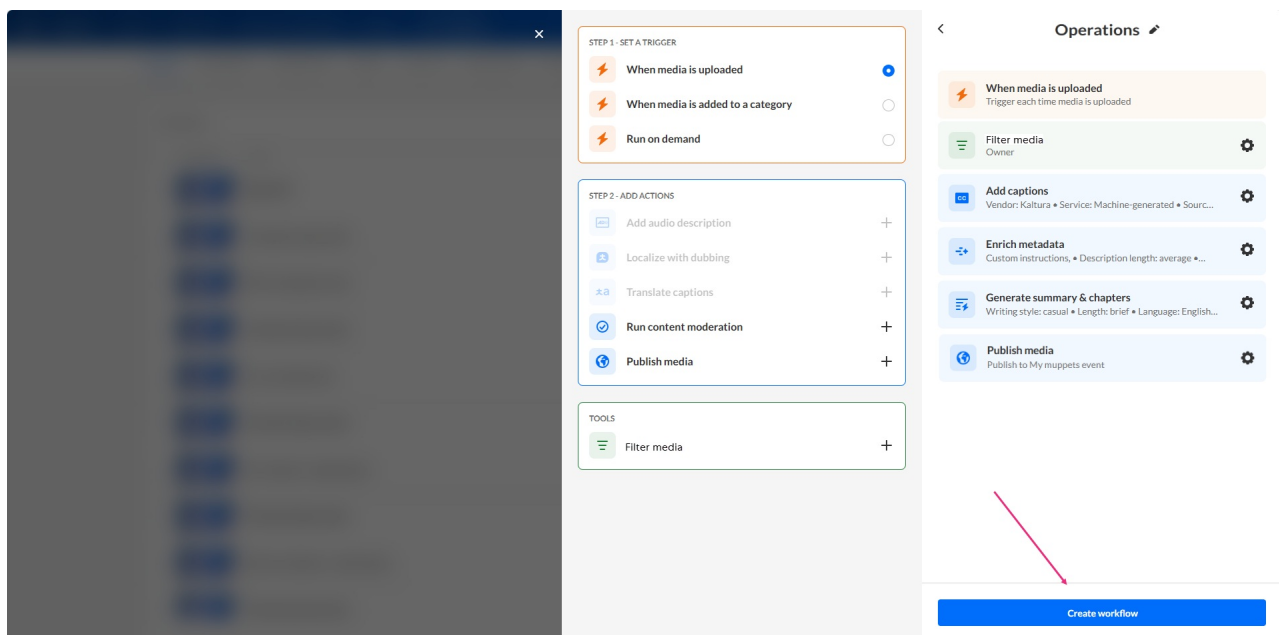
Click the pencil (edit) icon to the right of your workflow name, delete "My new workflow" (default) and type a name for your workflow, then press **Enter** on your keyboard.



## 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](#).