Create and manage rules in Automation Manager

Content updated: 12/28/2025

This article is designated for administrators.

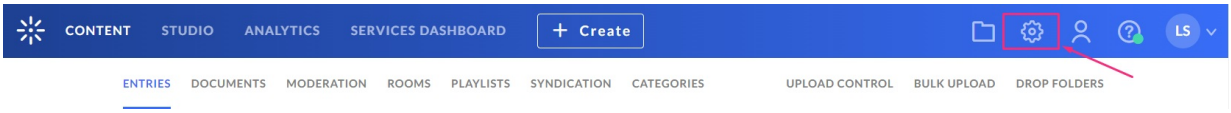
About

Automation Manager rules define how and when your media is processed. This article explains how to create rules, configure general settings, and manage existing rules from the **Rules** page.

A single rule can't manage multiple lifecycle stages over time. If you want to apply different actions at different points (for example, archive content first and delete it later), you must configure separate rules for each stage.

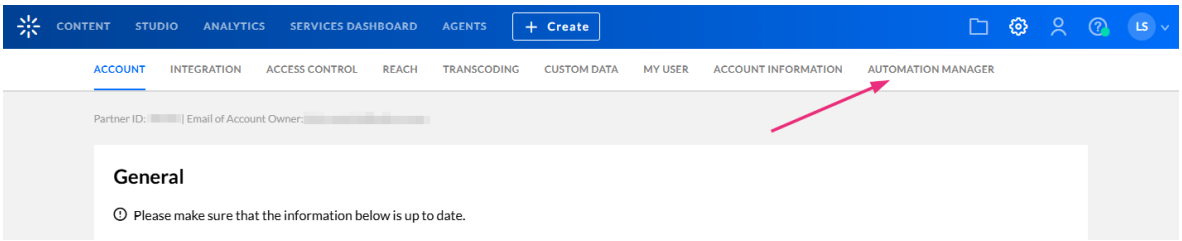
Access the Rules page

1. Log into your Rich Media Content Management System.
2. In the top navigation menu, click the **settings icon** at the far right.



The Account settings page opens.

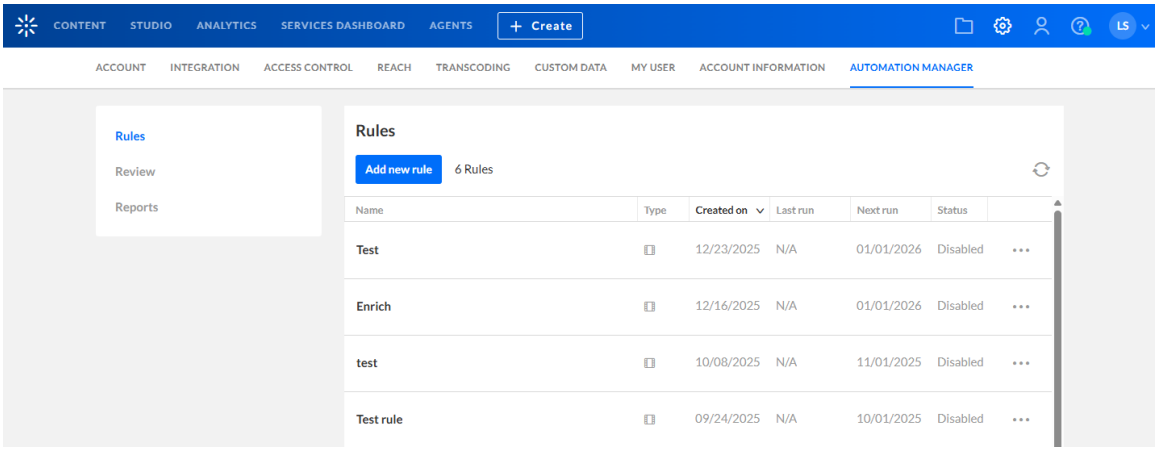
3. Click the **Automation Manager** tab at the far right.



If you don't see the **Automation Manager** tab, contact your administrator to enable it.

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

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Rules page overview

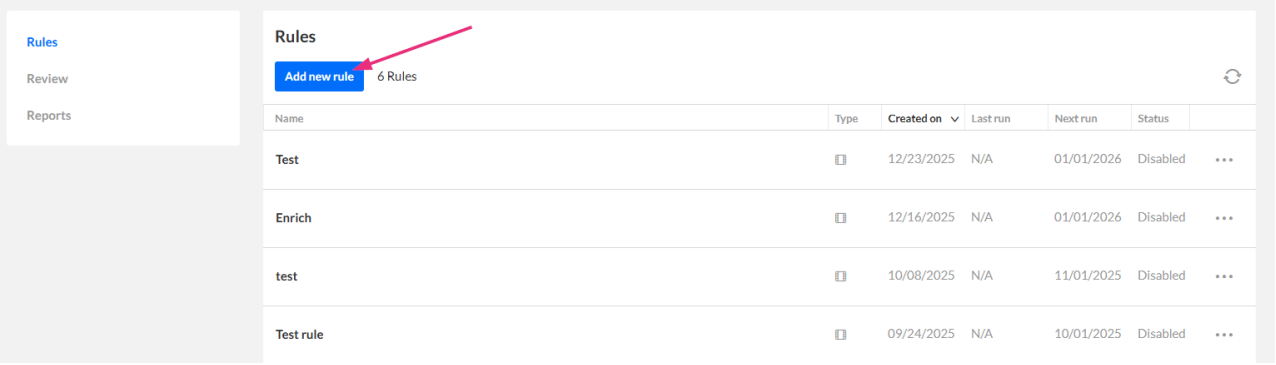
The Rules page is the main workspace for managing Automation Manager rules. Each rule appears as a row in a table with the following information:

- **Name** - name of rule
- **Description** - description of rule
- **Created on** - date the rule was created
- **Last run** - date the rule was last run
- **Next run** -next scheduled run
- **Status -** enabled or disabled

The columns are sortable.

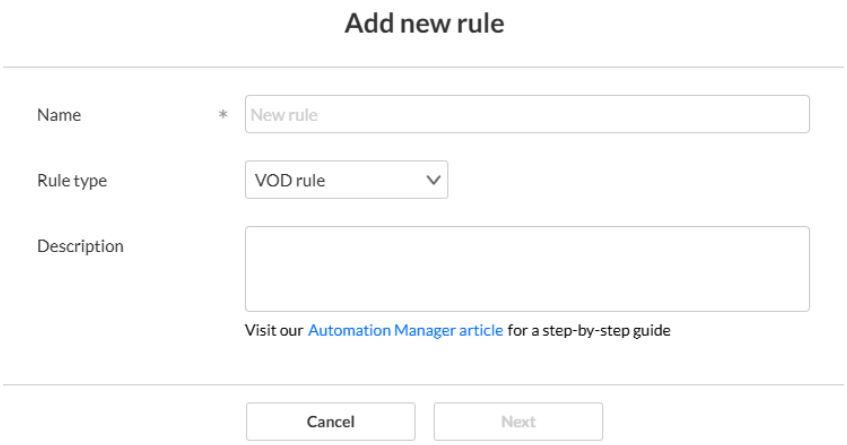
Create a new rule

1. On the Rules page, click **Add new rule**.



The 'Add new rule' window opens.

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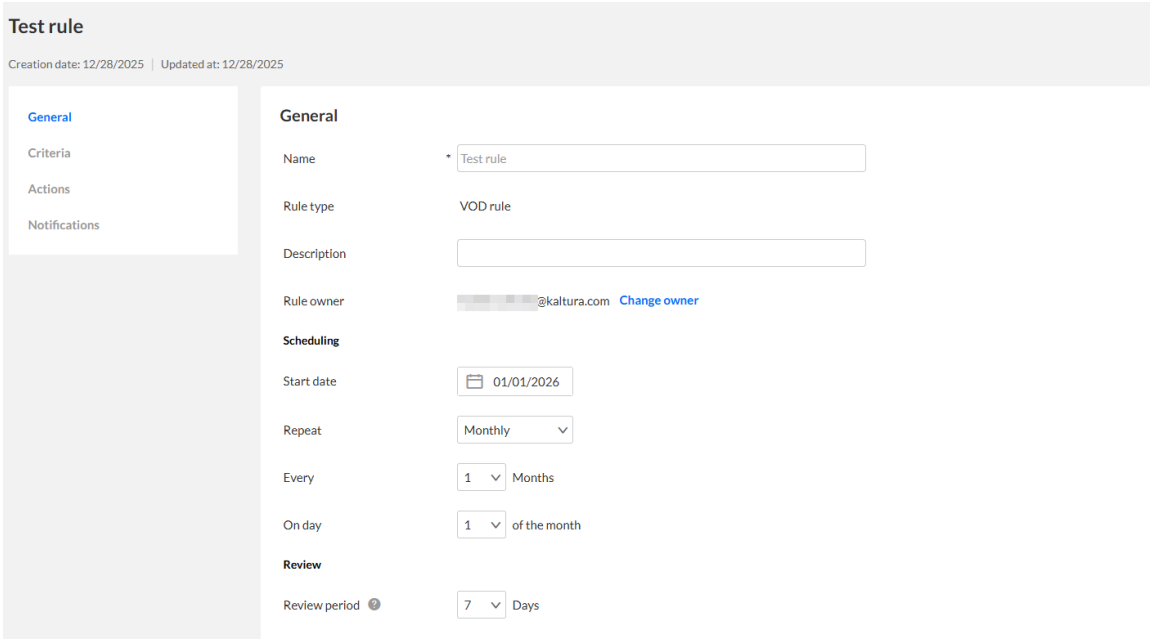


2. In the 'Add new rule' window, enter:

- **Name** (required)
- **Rule type** – Select VOD rule or Live rule (the rule type can’t be changed after creation)
- **Description** (optional)

3. Click **Next**.

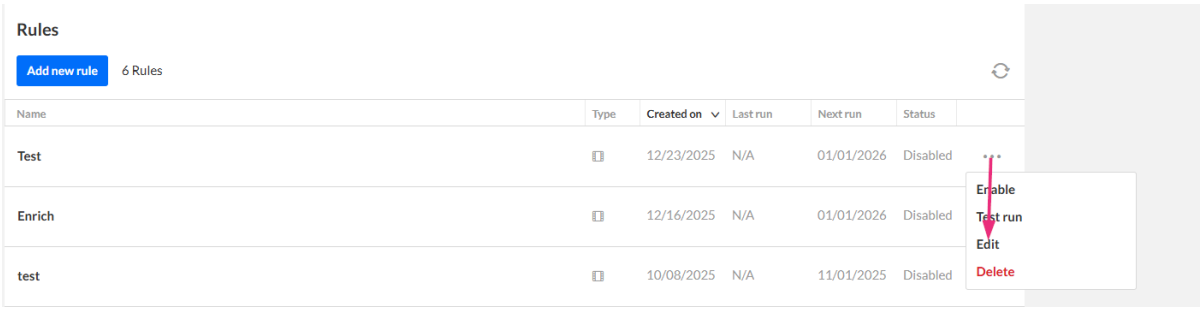
The rule configuration page opens with the **General** tab selected by default.



Edit an existing rule

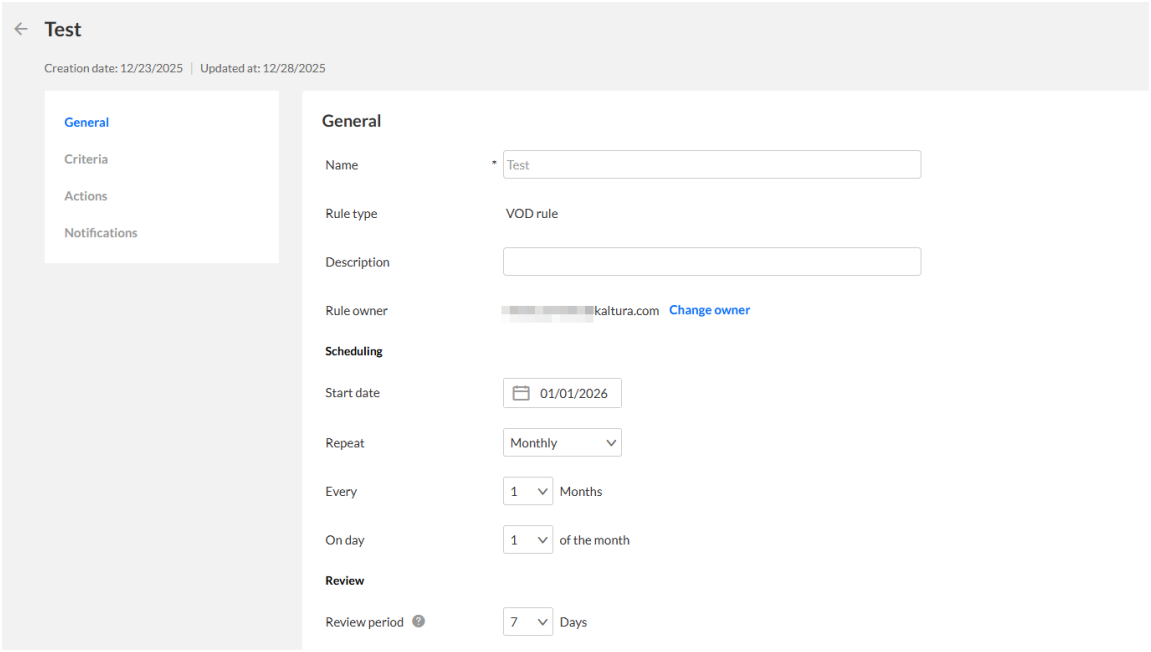
On the Rules page, click the **three-dot menu** at the end of the row and select **Edit**.

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The rule configuration page opens, where you can update the following settings:

- **General**
- **Criteria**
- **Actions**
- **Notifications**



Configure general settings

The **General** page controls when the rule runs and how selected media is handled.

From this tab, you can configure:

- **Rule name and description**
- **Rule owner**
- **Schedule**
  - Start date
  - Run frequency
- **Review settings**

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- Review period
- Whether admin approval is required before actions run

If media is selected by a rule but not approved or rejected during the review period, it won’t appear again in future runs of the same rule. To include it again, create a new rule with the same settings.

Define rule criteria

After configuring general settings, define which media the rule applies to. On the **Criteria** page, you select one or more conditions that media must meet to be included in the rule. All criteria must be met.

For the full guide, see Define rule criteria for Automation Manager.

Configure rule actions

On the Actions page, define what happens to media selected by the rule.

For the full guide, see Configure rule actions for Automation Manager.

Manage rules

From the Rules page, click the **three-dot menu** for a rule to access the following options:

- **Enable / Disable** – Control whether the rule runs on its schedule
- **Test run** – Check which entries match the rule criteria. The test runs immediately, regardless of the configured schedule, and doesn't apply actions or add entries to the Review queue. When complete, a CSV report containing the matching entry IDs is available on the Reports page.
- **Edit** – Update rule settings
- **Delete** – Permanently remove the rule

Rules without criteria can’t be enabled.

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