# Create and manage rules in Automation Manager

Content updated: 12/28/2025

**This article is designated for administrators.**

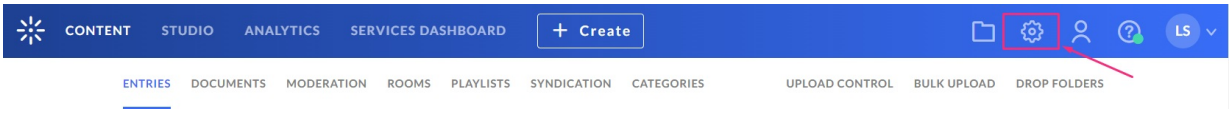
## About

A rule tells **Automation Manager** which media to process, what to do with it, and when. This article explains how to create rules, configure their 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.

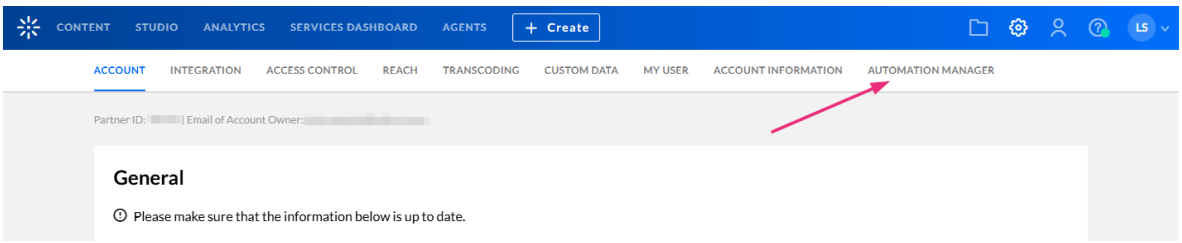
## Access the Rules page

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




The Account settings page opens.

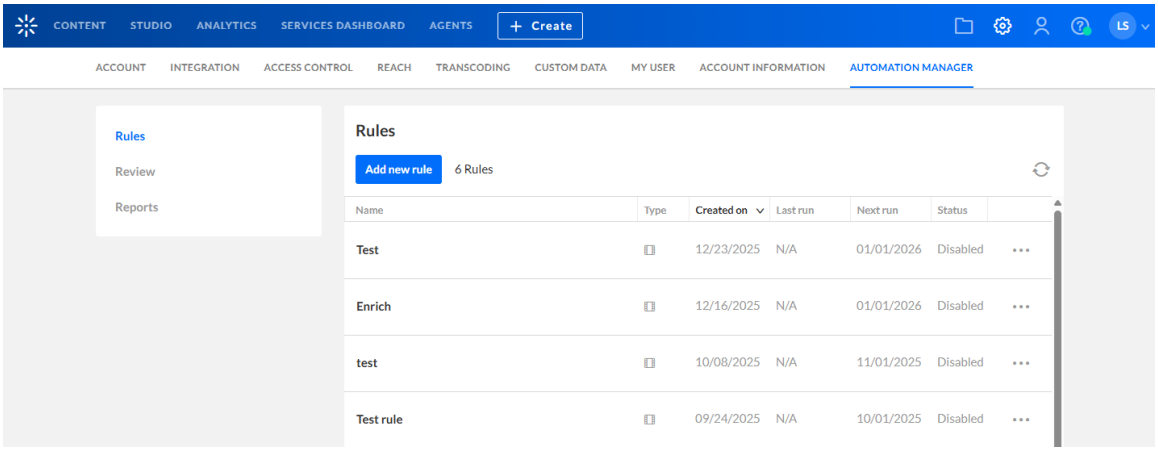
3. Select the **Automation Manager** tab at the far right.




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.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.




## Rules page overview

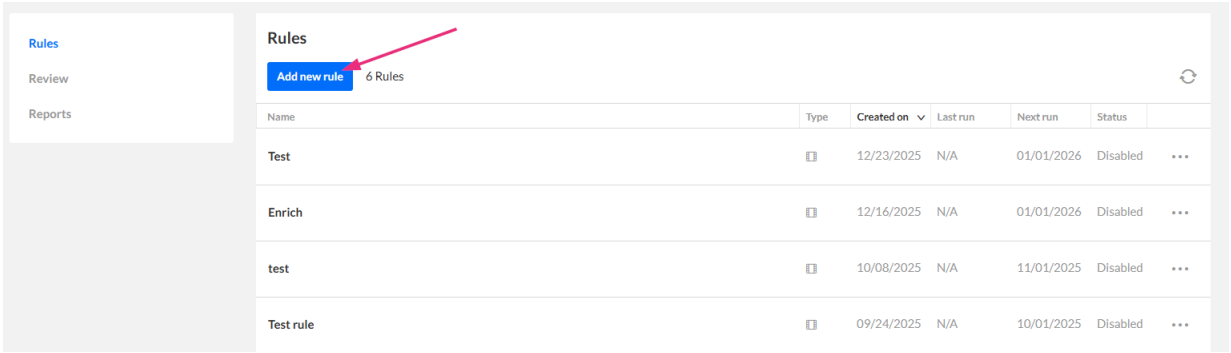
The Rules page is the main workspace for managing Automation Manager rules. Each rule appears as a row in a table with the following information:

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

The columns are sortable.

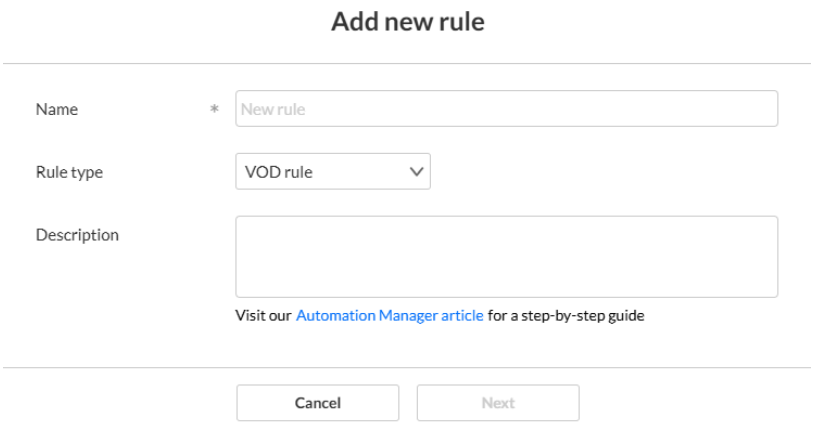
## Create a new rule

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

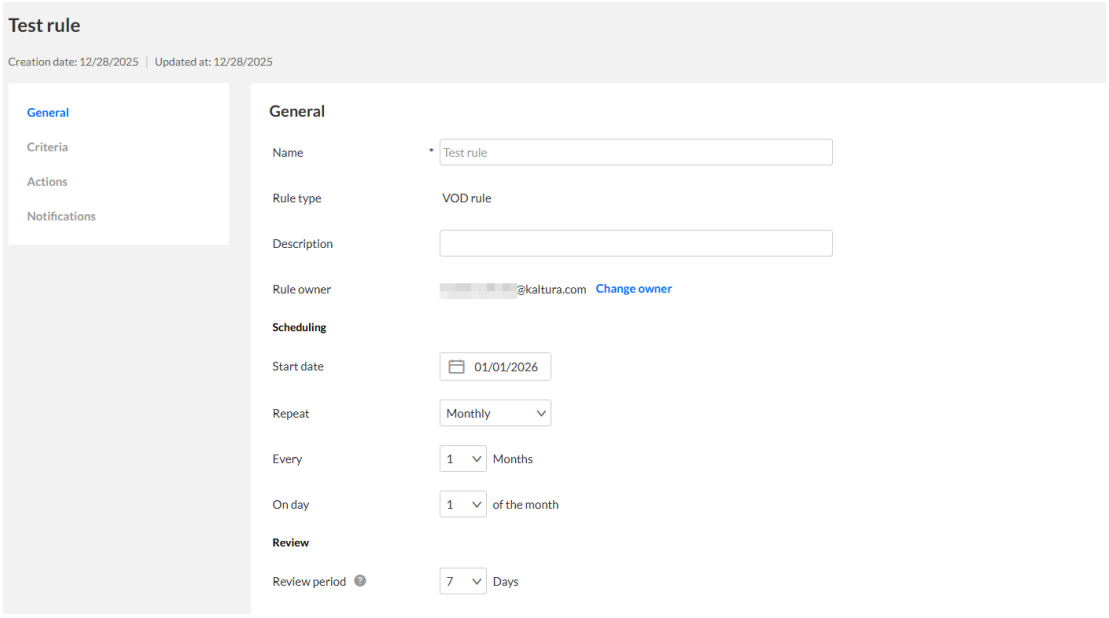



The **Add new rule** window opens.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.



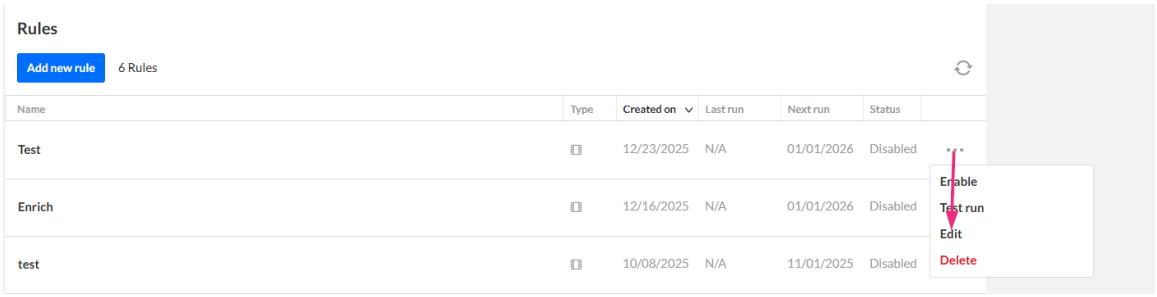

2. In the **Add new rule** window, enter:
   - **Name** (required)
   - **Rule type** - select **VOD rule** or **Live rule**. You can't change the rule type after you create the rule.
   - **Description** (optional)
3. Select **Next**.
   The rule configuration page opens with the **General** tab selected by default.




## Edit an existing rule

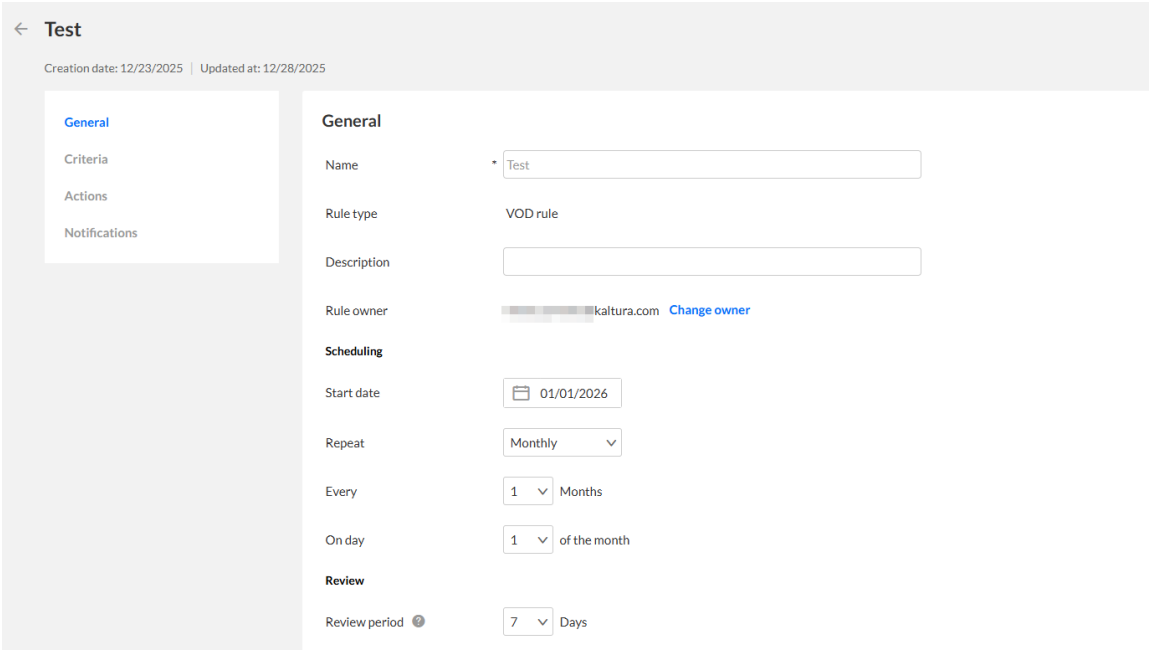
1. On the Rules page, select the **three dots** at the end of the row, and then select **Edit**.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.




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

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




## Configure general settings

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

From this tab, you can configure:

- **Name** and **Description**
- **Rule owner**
- **Scheduling**
  - **Start date**
  - **Repeat**, **Every**, and **On day** - how often the rule runs
  - **Allow repeated entry catch**

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.

- **Review**
  - **Review period**
  - **Requires admin approval** - whether an admin must approve the media before actions run

### Allow repeated entry catch

By default, a rule doesn't select a media entry again after it has handled that entry once, even if the entry still matches the rule. Turn on **Allow repeated entry catch** if you want the rule to select the same entry again on a later run. This setting is off by default.

For example, a rule reminds users when a scheduled publishing period is about to end. A user extends the period. With **Allow repeated entry catch** turned on, the rule reminds them again as the new end date approaches.

When the setting is on, the rule selects entries again on every run while they still meet the rule criteria and aren't pending review. This includes entries the rule handled before, whether its actions ran on them or an admin rejected them. The rule can select up to 10,000 entries at a time.

## 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, select the **three dots** for a rule to open the three-dot menu, which has the following options:

- **Enable / Disable** - control whether the rule runs on its schedule
- **Test run** - check which media entries match the rule criteria. The test runs immediately, regardless of the configured schedule, and doesn't apply actions or add media entries to the Review queue. When the test is complete, a CSV report

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.

containing the matching entry IDs is available on the Reports page.

- **Edit** - update the rule settings
- **Delete** - permanently remove the rule

Rules without criteria can’t be enabled.

Copyright © 2025 Kaltura Inc. All Rights Reserved. Designated trademarks and brands are the property of their respective owners. Use of this document constitutes acceptance of the Kaltura Terms of Use and Privacy Policy.