Creating Intelligent Agents

Why Do I Need This Workflow?

Intelligent agents are a great way to support learner success and automate communication. If the criteria are fulfilled, the intelligent agent sends an email to the learner to alert them. Instructors or course facilitators can create intelligent agents anytime they are required in a course. This workflow takes you through the steps for creating an intelligent agent.

How: Workflow Steps

1. Access your course, and select Edit Course in the navbar.

2. Select Intelligent Agents then select New Agent on the Agent List page.

Agent List

- NewAgent
- Edit Categories
- More Actions
3. Enter **an Agent Name**. If desired, enter a **Description** and add the purpose of the agent. Ensure the **Agent is enabled** checkbox is selected.
4. In the **Scheduling**, pick the frequency you want the agent to run, this will open up further options. Choose how often the agent repeats, what time it should start, and the start and end dates. The agent will automatically stop at the end of your course if you choose not to set an end date.
5. In the **Criteria** section, choose the settings based on how you want this agent to perform.

### Criteria

**Role in Classlist**
- All users visible in the Classlist
- Users with specific roles:

**Take Action on Activity**
- Login Activity
  - User has not logged in during the last [ ] day(s)
  - User has logged in during the last [ ] day(s)

- Course Activity
  - User has not accessed the course in the last [ ] day(s)
  - User has accessed the course during the last [ ] day(s)

**Release Conditions**

[Create]  [Browse]
6. In the **Actions** area, select the repetition you prefer.

2. **Actions**

   **Repetition**

   - Take action only the first time the agent's criteria are satisfied for a user
   - Take action every time the agent is evaluated and the agent's criteria are satisfied for a user

   *Which Action Repetition setting should I use?*

7. While still in the **Actions** area, select the option to **Send an Email**.

   **Send an Email**

   - Send an email when the criteria are satisfied

   *Name that the emails come from: d2lhelp@msutexas.edu*

   *Reply-To address for responses: d2lhelp@msutexas.edu*

   *How can I change the default From and Reply settings?*

   - To:
   - Cc:
   - Bcc:

8. In the **To** section, you will want to put in the following: `{InitiatingUser}`

   **Send an Email**

   - Send an email when the criteria are satisfied

   *Name that the emails come from: d2lhelp@msutexas.edu*

   *Reply-To address for responses: d2lhelp@msutexas.edu*

   *How can I change the default From and Reply settings?*

   - To: `{InitiatingUser}`
9. Enter an **Email Subject**. You can use special replace strings in this field. Remember, if you add yourself to CC or BCC you will receive an email for every user that satisfies the criteria.

10. Enter a **Message** that lets the learner know why they are receiving this email. Suggested action: add in a quicklink to a course discussion or other activity to help make it easy for the learner to re-engage. **Note:** You can also add images to your email.

11. Click **Save and Close**.

12. Next you will want to change the default “Reply to” email address so that if a student replies to one of the automated messages, it will come to your email address. To do this, go to **Settings** on the Intelligent Agent page.

Once there, click on the make sure “Set custom values for this course” is checked. Once it is, enter your name in the “Name that emails come from” box. Then enter the email of your chose in the “Reply-To address for responses” box. Hit Save when finished.
Intelligent Agents Settings

[Option radio button] Use the system defaults

Name that emails come from: d2lhelp@unt.edu
Reply-To address for responses: d2lhelp@mwsu.edu

[Option radio button] Set custom values for this course

Name that emails come from: Your Name!!
Reply-To address for responses: Your Email!!

These settings will affect all future emails sent by an agent.

The email address that agent emails come from cannot be set to your personal address due to how spam filters operate, but you can add a personal touch by setting the Name for the address, and you can set the Reply-To address if you want to receive replies.

Scheduled Agents Run Time

Scheduled agents will run at approximately 12:00 AM (Unknown Region - GMT) / 7:00 PM (United States - Chicago)

[Save] [Cancel]