

# Creating Intelligent Agents

## Why Do I Need This Workflow?

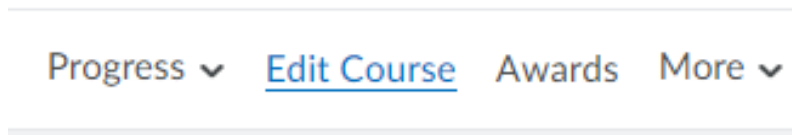
Intelligent agents are a great way to support learner success and automate communication. If the criteria is fulfilled, the intelligent agent sends an email to the learner to alert them. Instructors or course facilitators can create intelligent agents anytime they are required in a course. This workflow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

Some ideas: send an automated welcome message, congratulate students after they complete the first week's work, or contact individuals who have not accessed your course content in several days, all while having D2L figure out who needs to receive the email.

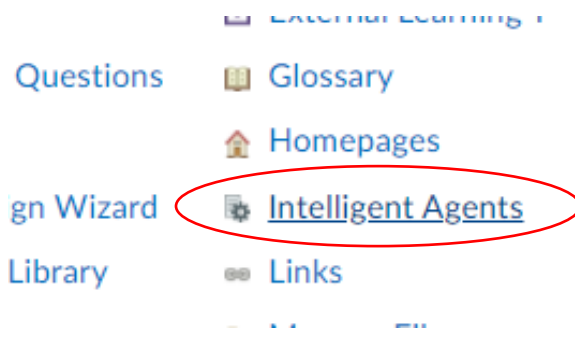
**\*Note:** When you copy your content into a new course page, Intelligent Agents do copy but settings do not. Each semester you'll have to adjust the settings and enable your Agents. This is to prevent Agents from running when they shouldn't.

## How: Workflow Steps

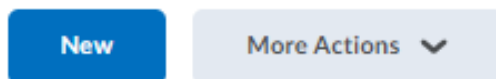
1. Access your course, and select **Edit Course** in the navbar.



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



## Agent List



3. Enter an **Agent Name**. If desired, select **Edit Description** and add the purpose of the agent Ensure the **Agent is enabled** checkbox is selected.

## New Agent

Agent Name: \*

Edit Description

Description:

Status:

Agent is enabled

4. In the **Criteria** section, choose the settings based on how you want this agent to perform.

### 1. Criteria

#### Role in Classlist

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

#### Login Activity

- Take action when the following login activity is satisfied:
- User has not logged in during the last  day(s)
  - User has logged in during the last  day(s)

#### Course Activity

- Take action when the following course activity is satisfied:
- User has not accessed the course in the last  day(s)
  - User has accessed the course during the last  day(s)

#### Release Conditions

Attach Existing

Create and Attach

 Remove All Conditions

There are no conditions attached to this item.

- 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?](#)

- While still in the **Actions** area, select the option to **Send an Email**. In the “**to**” field, you can enter the replace string {InitiatingUser} to personalize the 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:

- 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
- 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.
- Select **Use Schedule**.

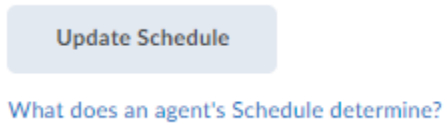
### Scheduling

- Use Schedule

No schedule defined

Next Run Date: No schedule defined

10. Click on the **Update Schedule** button.



11. Enter your preferences. Click **Update** once finished.

Update Agent Schedule

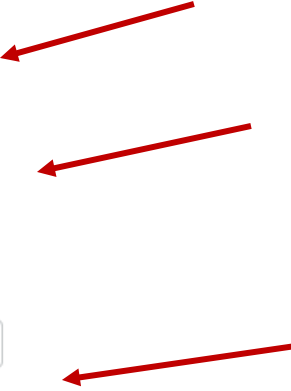
Repeats:

Repeats Every: \*  day(s)

Schedule Dates:

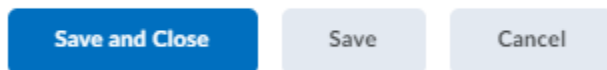
Has Start Date

Has End Date



**\*IMPORTANT:** Put an **end date** on your agent to make sure it stops running after your course is closed.

12. Click **Save and Close**.



### Reply-to:

Create a "reply-to" email address so that students can reply to any email sent by an Intelligent Agent.

1. On the intelligent Agents page click the **Settings** icon.

## Agent List

Settings

New

More Actions

View: All agents

Apply

2. Select **Set custom Values for this course**.

## Intelligent Agents Settings

Use the system defaults

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

**Set custom values for this course**

3. Enter a name into the **Name that emails come from** field. We recommend using a proper name and not an email address.

Name that emails come from	Reply-To address for responses
<input type="text"/>	<input type="text"/>

4. Enter an email address in the **Reply-To address for responses** field.

Name that emails come from	Reply-To address for responses
<input type="text"/>	<input type="text"/>

5. Click the **Save** button.

Save

Cancel

The Agent List is empty until you create an Agent. Once you create your Agent(s), here are some things to note:

The screenshot shows the 'Agent List' interface. At the top left, there is a 'New' button and a 'More Actions' dropdown menu. At the top right, there is a 'Settings' gear icon and a 'View: All agents' dropdown menu with an 'Apply' button. Below these are icons for 'Enable', 'Disable', and 'Delete'. The main part of the interface is a table with the following columns: 'Agent', 'Results of Last Run', 'Last Run Date', and 'Next Run Date'. Red circles with numbers 1 through 5 are overlaid on the interface to highlight specific features: 1 points to the 'Agent' column header, 2 points to the 'Results of Last Run' column header, 3 points to the 'Last Run Date' column header, 4 points to the 'Next Run Date' column header, and 5 points to the 'View: All agents' dropdown menu.

Agent	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/> Deactivated Course Page This is to notify students that the course page is temporarily deactivated. It has to be manually sent.	0 users identified	Apr 3, 2017 10:21 AM	-
<input type="checkbox"/> Falling grade in course Send instructor a notice when a student's final grade is 50% or less.		-	-
<input type="checkbox"/> Lack of Course Activity This emails students who have not visited the course page in at least one week.	12 users identified	Apr 4, 2017 10:04 AM	-
<input type="checkbox"/> Late Registrants Remind late registrants they have until the second week of classes to make-up work they missed. Remember to: 1. update the run schedule 2. adjust the notification language depending upon the number of weeks in the semester 3. update the release condition	13 users identified	Mar 16, 2017 5:00 PM	-
<input type="checkbox"/> Welcome Email Welcome message sent to newly enrolled students. Remember to: change the release condition - org unit enrollment.	0 users identified	Apr 3, 2017 10:07 AM	Tuesday, June 5, 2018

1. **Agent column:** Lists the names and descriptions of your Intelligent Agents. Click on the column header to sort by alphabetical order.
2. **Results of Last Run column:** Indicates how many users met the criteria the last time the Agent ran. Click on the # users identified link to open the list of names and the action taken.
3. **Last Run Date column:** Lists the date and time each Agent last ran. Click on the column header to sort by run date.
4. **Next Run Date column:** Lists the day and date the Intelligent Agent is scheduled to run next. Click on the column header to sort by next run date.
5. **View menu:** Click on the view box to filter your agents so you see only those agents that are Enabled or Disabled, then click Apply. This is useful, for example, if you want to mass enable your agents at the start of a new semester.

### Practice Run:

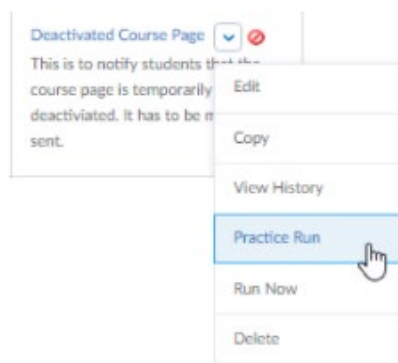
A Practice Run allows you to test your Intelligent Agent.

For example, if you want a list all of students who have not submitted an assignment, create an Intelligent Agent and do a practice run.

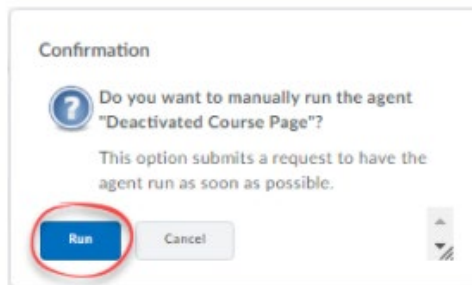
1. Click on the **down arrow** next to the Agent of interest.

<input type="checkbox"/>	Agent ▲	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/>	<b>Deactivated Course Page</b> This is to notify students that the course page is temporarily deactivated. It has to be manually sent.	0 users identified	Apr 3, 2017 10:21 AM	-

2. Select **Practice Run**.



3. In the confirmation window, select **Run**.



4. View the results of your practice run through the **View History** option.

Send out an email or collect data at any time, with a manual run.

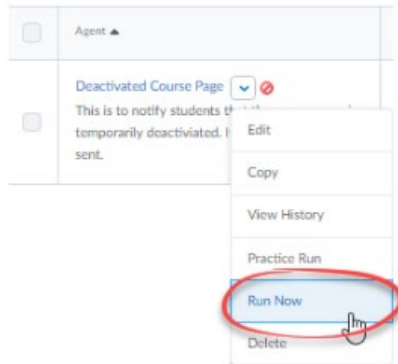
### Manual Run:

You can do a manual run even when your agent is disabled or your course site is inactive.

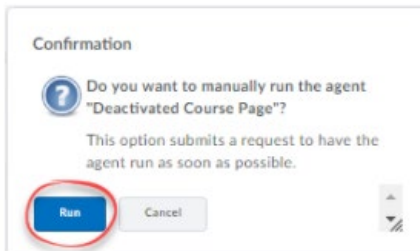
1. Click on the **down arrow** next to the Agent of interest.

<input type="checkbox"/>	Agent ▲	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/>	Deactivated Course Page This is to notify students that the course page is temporarily deactivated. It has to be manually sent.	0 users identified	Apr 3, 2017 10:21 AM	-

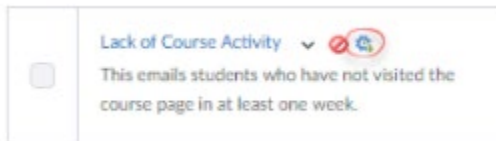
2. Select **Run Now**.



3. In the confirmation window, select **Run**.



4. While your agent is manually running, you will see a "Manual Run" Icon (cog and arrow) next to your Agent.




5. View the results of your practice run through the **View History** option.

## History:

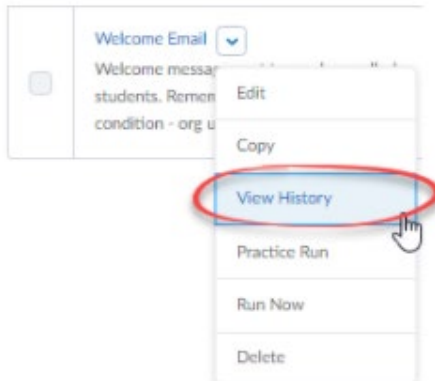
History refers to the users identified and the action taken (e.g. email sent) during a given run of an Intelligent Agent.



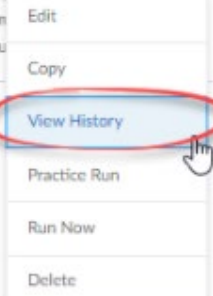


1. Click the **down arrow** next to the Intelligent Agent of interest.

	<b>Welcome Email</b>  Welcome message sent to newly enrolled students. Remember to: change the release condition - org unit enrollment.	<a href="#">0 users identified</a>	yesterday at 5:00 PM	Monday, June 11, 2018
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2. Select **View History**.



	<b>Welcome Email</b>  Welcome message sent to newly enrolled students. Remember to: change the release condition - org unit enrollment.	
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3. To see who met the criteria for an Intelligent Agent run, click on the **# users identified** link.

Date	Result	Type	Run By
33 minutes ago	<a href="#">13 users identified</a>	Practice Run	Georgia Davis

4. In the window that appears, you can click on any link in the "Action Taken" column for more details.

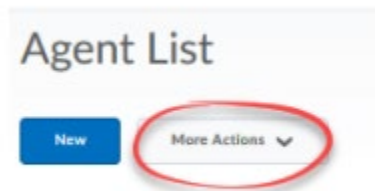
Scheduled run  
12 users identified

First Name ▲, Last Name	Action Taken
Attentive Student	<a href="#">Email sent</a>
Confused Student	<a href="#">Email sent</a>
Cool Student	<a href="#">Email sent</a>
D2L Student4	<a href="#">Email sent</a>

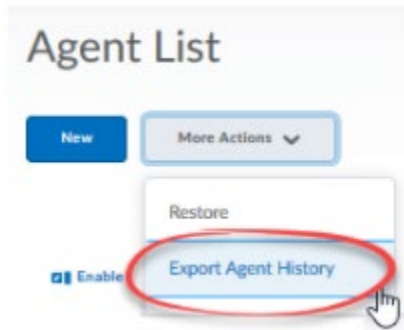
## Export:

Export data to a CSV file, which you can open in Excel or other spreadsheet software.

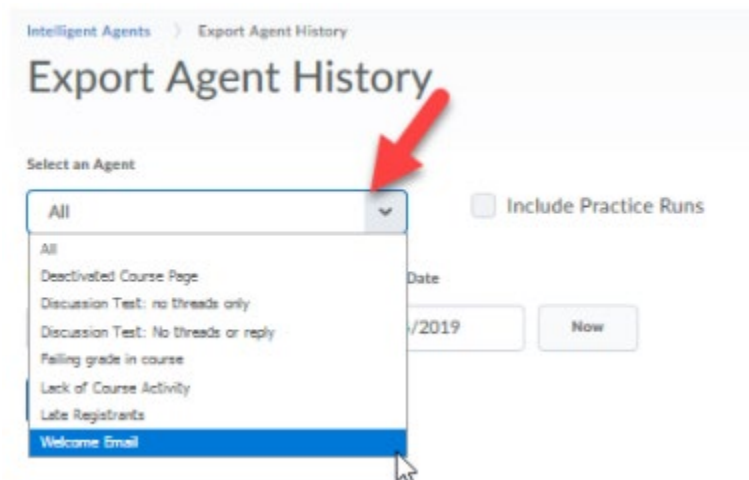
1. Click **More Actions**.



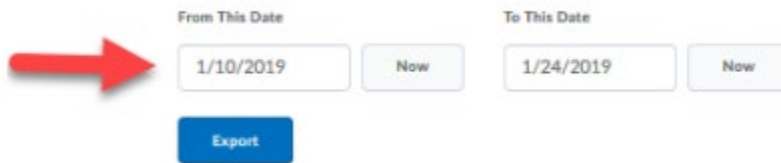
2. Choose **Export Agent History**.



3. Select the **Agent**, or leave it on **All** to export the results of all of your Intelligent Agent runs.

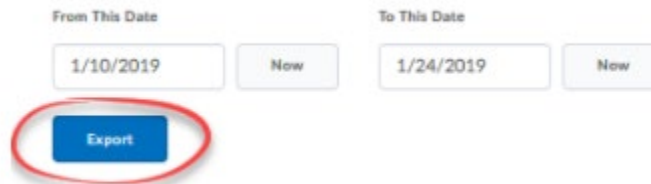


4. Enter a date range. The spreadsheet will show the results of all runs between the "from" and "to" dates.



The screenshot shows a date range selection interface. It has two sections: "From This Date" and "To This Date". Under "From This Date", there is a text input field containing "1/10/2019" and a "Now" button. Under "To This Date", there is a text input field containing "1/24/2019" and a "Now" button. Below these fields is a blue "Export" button. A red arrow points to the "1/10/2019" input field.

5. Click the **Export** button.



The screenshot shows the same date range selection interface as above. The "Export" button is circled in red, indicating it should be clicked.

### Enable/Disable:

When agents are disabled, they will be marked with the disabled icon. When agents are enabled, they will have no icon. Do the following to enable or disable an agent.

1. Click the **checkbox** next to the Intelligent Agent(s) you wish to enable/disable.

<input type="checkbox"/>	Agent ▲	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/>	<b>Deactivated Course Page</b> ▼ ⓧ This is to notify students that the course page is temporarily deactivated. It has to be manually sent.	0 users identified	1 minute ago	-
<input checked="" type="checkbox"/>	<b>Failing grade in course</b> ▼ ⓧ Send instructor a notice when a student's final grade is 50% or less.	1 users identified	6 minutes ago	-
<input checked="" type="checkbox"/>	<b>Lack of Course Activity</b> ▼ ⓧ This emails students who have not visited the course page in at least one week.	13 users identified	11 minutes ago	-

2. Select either the **Enable** or **Disable** icon.

Enable     Disable