Creating Intelligent Agents

Why Do I Need This Workflow?

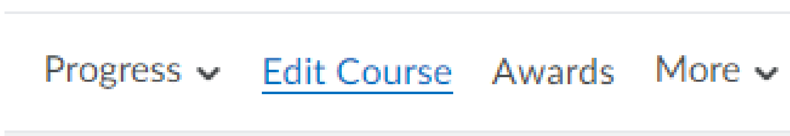
Intelligent agents are a great way to support learner success and automate communication. If the criteria is fulfilled, the intelligent agent sends an email to the learner to alert them. Instructors or course facilitators can create intelligent agents anytime they are required in a course. This workflow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

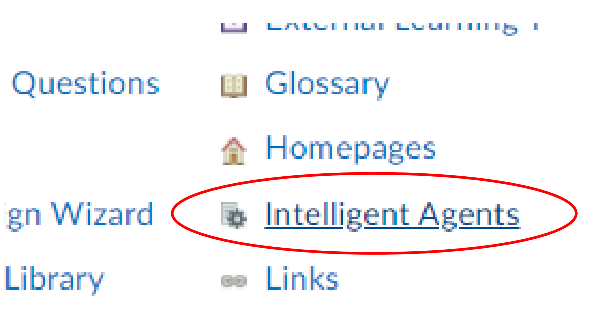
***Note**: When you copy your content into a new course page, Intelligent Agents do copy but settings do not. Each semester you'll have to adjust the settings and enable your Agents. This is to prevent Agents from running when they shouldn't.

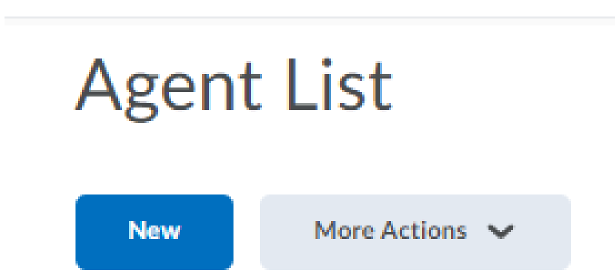
How: Workflow Steps

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

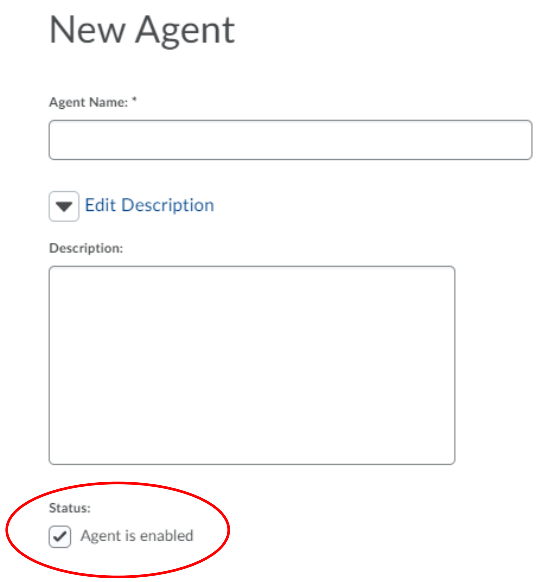


2. Select **Intelligent Agents**, then select **New** on the Agent List page.

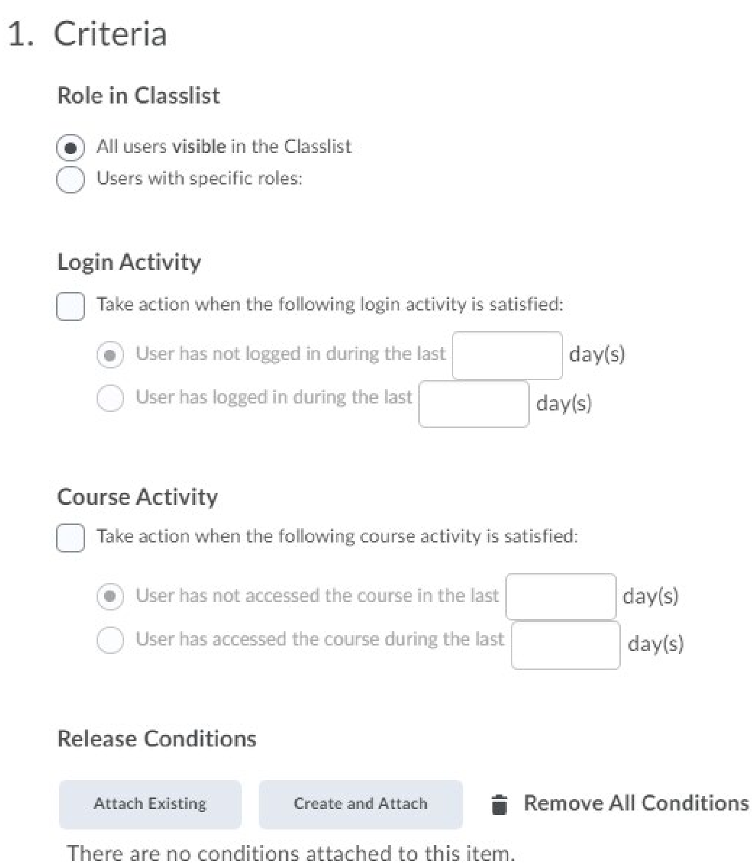




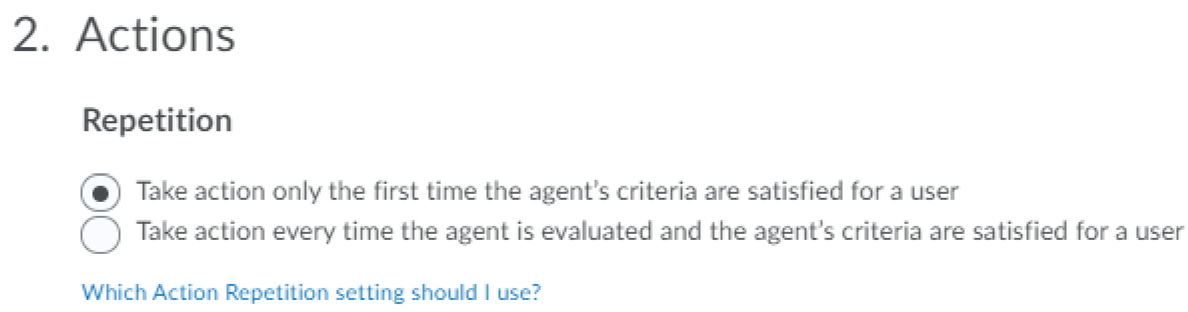
3. Enter **an Agent Name**. If desired, select **Edit Description** and add the purpose of the agent Ensure the **Agent is enabled** checkbox is selected.



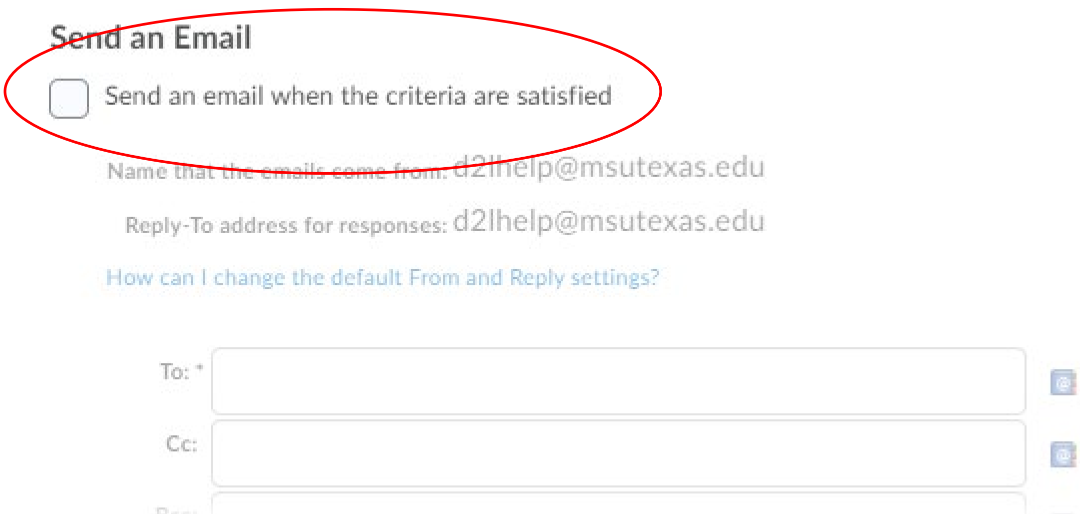
4. In the **Criteria** section, choose the settings based on how you want this agent to perform.



5. In the **Actions** area, select **the repetition you prefer**.



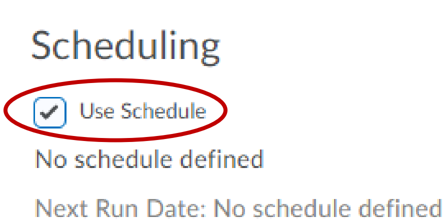
6. While still in the **Actions** area, select the option to **Send an Email**. In the "**to**" field, you can enter the replace string {InitiatingUser} to personalize the email.



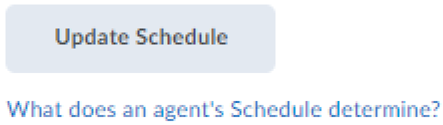
7. Enter an **Email Subject**. You can use special replace strings in this field. Remember, if you add yourself to CC or BCC you will receive an email for every user that satisfies the criteria

8. 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.

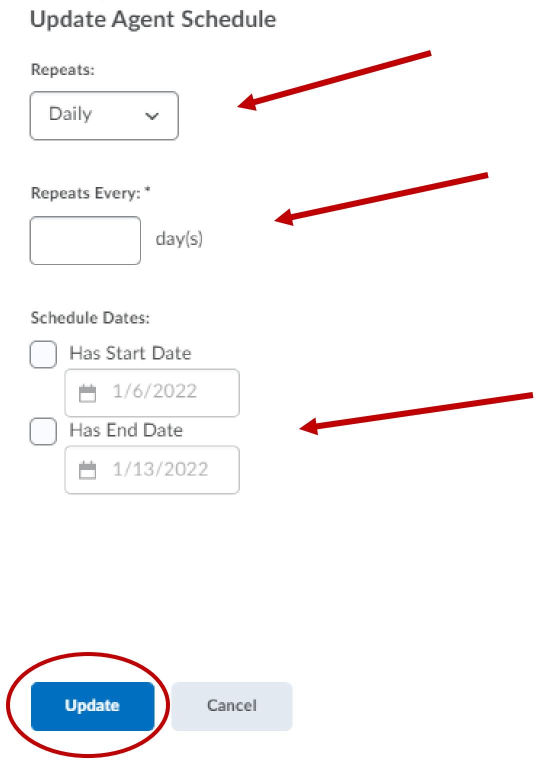
9. Select **Use Schedule**.



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



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



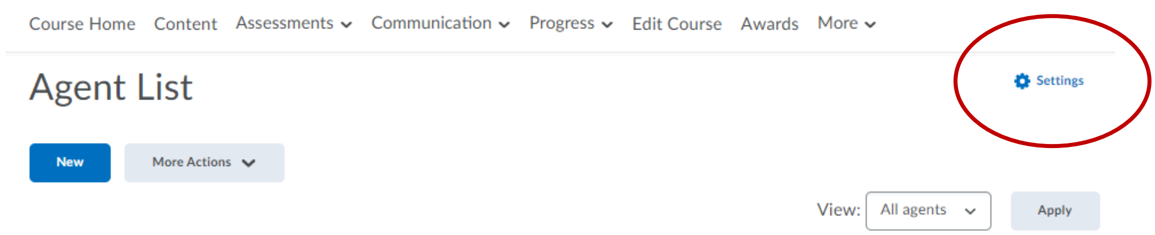
***IMPORTANT: Put an end date on your agent to make sure it stops running after your course is closed.**

12. Click **Save and Close**.

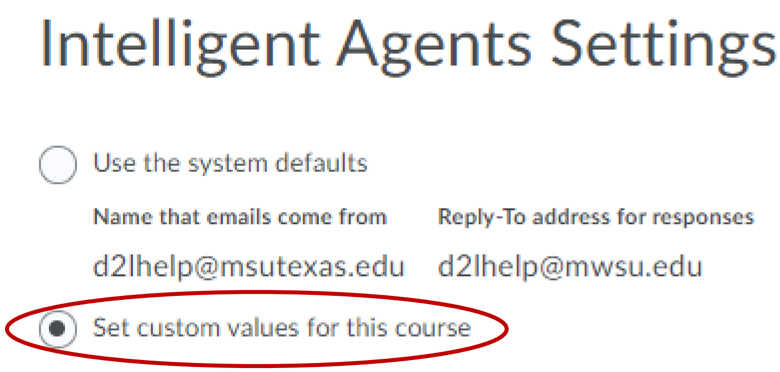
Reply-to:

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

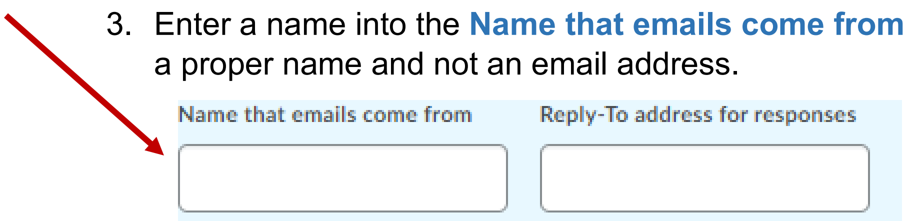
1. On the intelligent Agents page click the **Settings** Icon.



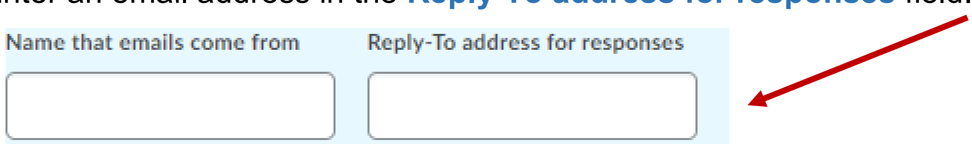
2. Select **Set custom Values for this course**.



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

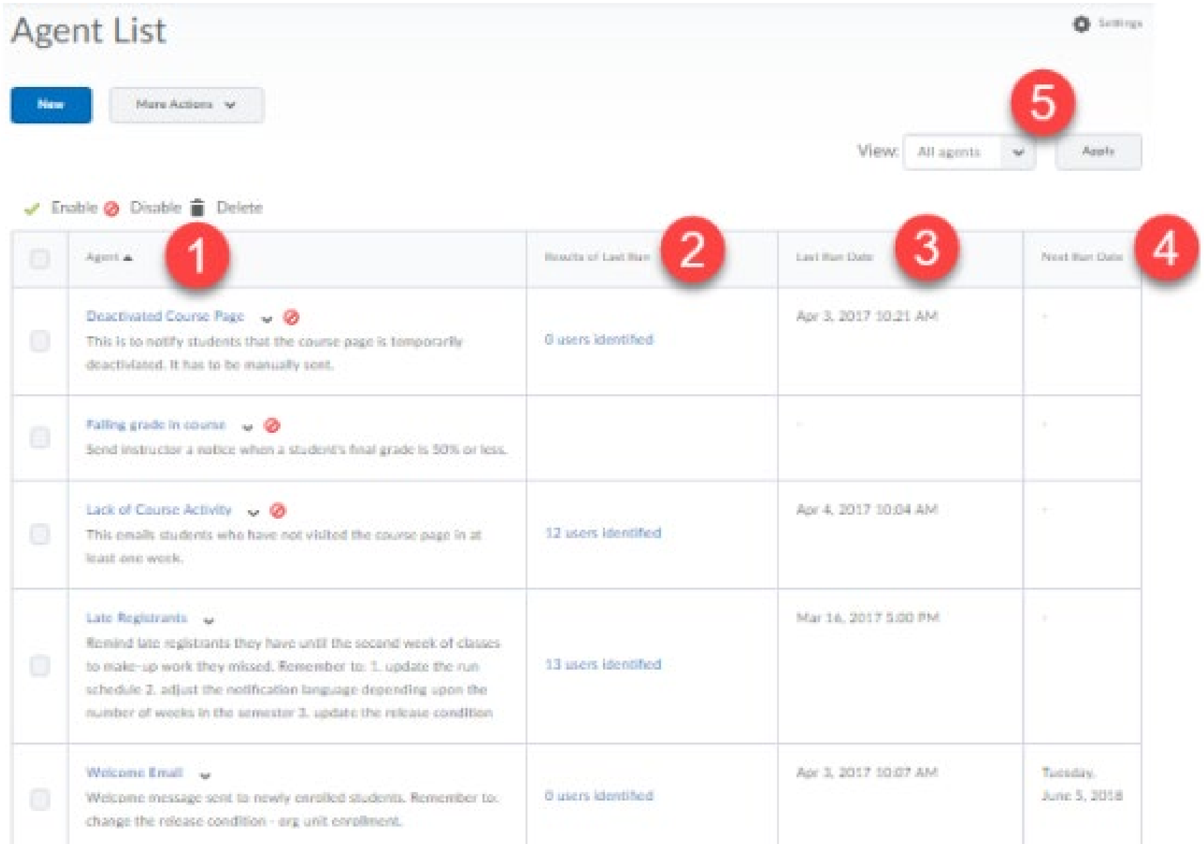


4. Enter an email address in the **Reply-To address for responses** field.



5. Click the **Save** button.

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



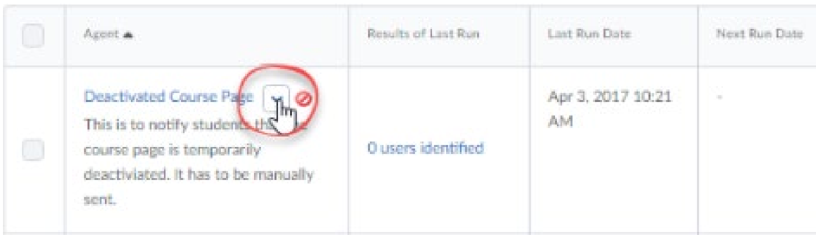
1. **Agent column**: Lists the names and descriptions of your Intelligent Agents. Click on the column header to sort by alphabetical order.
2. **Results of Last Run column**: Indicates how many users met the critera the last time the Agent ran. Click on the # users identified link to open the list of 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:

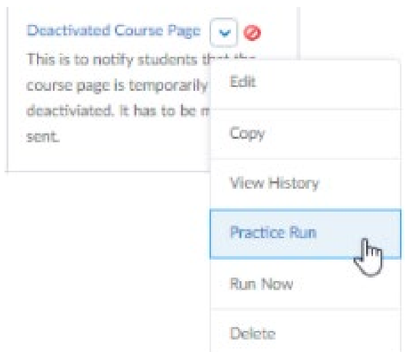
A Practice Run allows you to test your Intelligent Agent.

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.

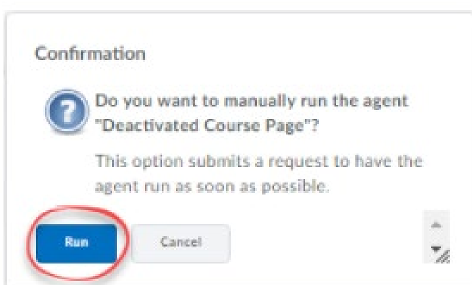
1. Click on the **down arrow** next to the Agent of interest.



2. Select **Practice Run**.



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



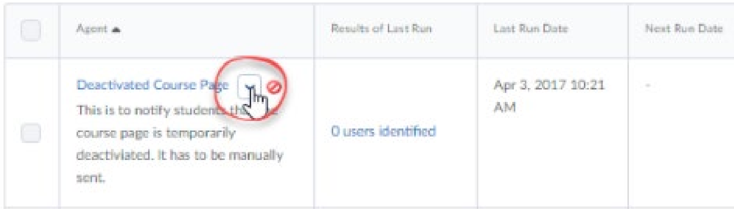
4. View the results of your practice run through the **View History** option.

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

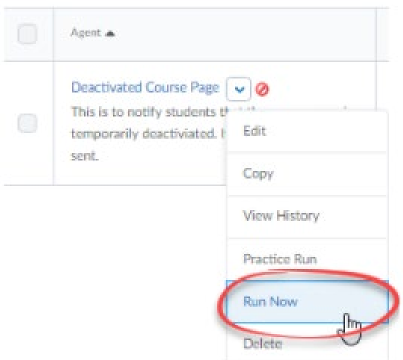
Manual Run:

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

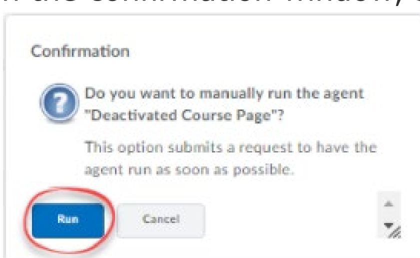
1. Click on the **down arrow** next to the Agent of interest.



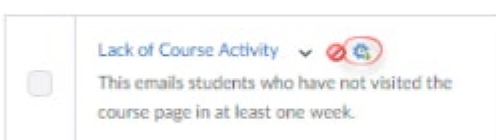
2. Select **Run Now**.



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.



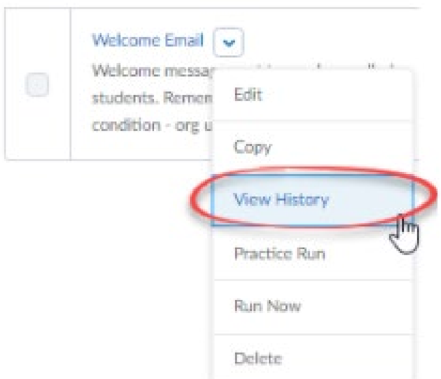
5. View the results of your practice run through the **View History** option.

History:

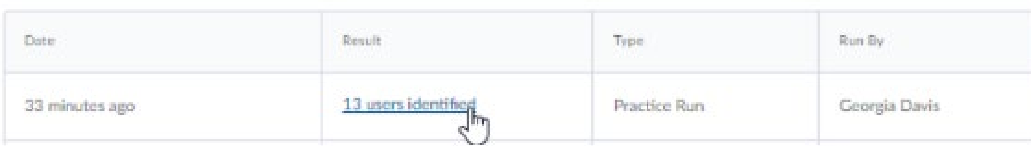
History refers to the users identified and the action taken (e.g. email sent) during a given run of an Intelligent Agent.

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

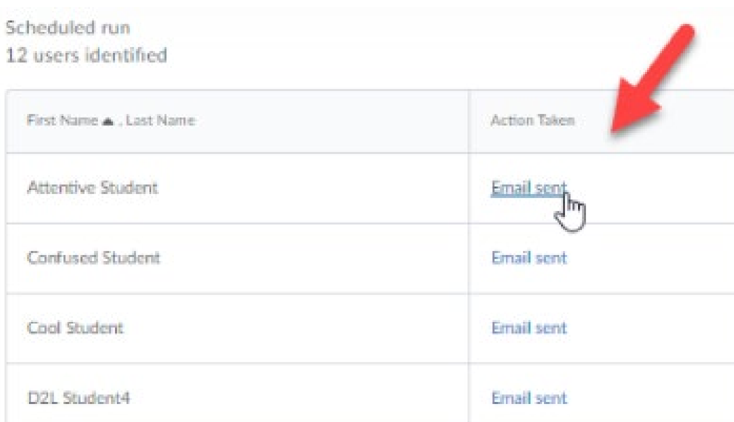
2. Select **View History**.



3. To see who met the criteria for an Intelligent Agent run, click on the **# users identified** link.



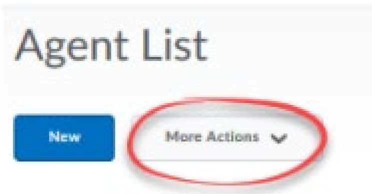
4. In the window that appears, you can click on any link in the "Action Taken" column for more details.



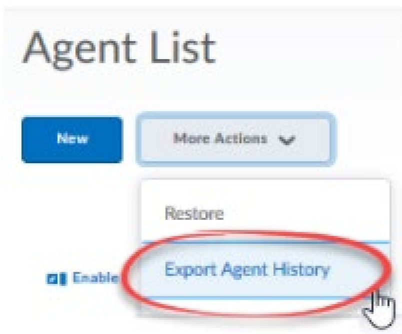
Export:

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

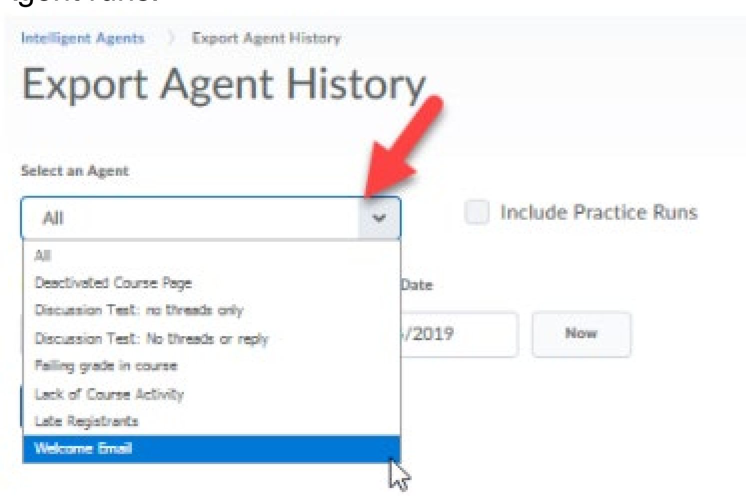
1. Click **More Actions**.



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.

5. Click the **Export** button.

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.

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