



# Creating Intelligent Agents

## Why Do I Need This Workflow?

Intelligent Agents help support learner success by automating communication. When set criteria are met, the agent sends an email to the learner. Instructors or facilitators can create agents at any time. This workflow guides you through creating an Intelligent Agent. Examples include sending a welcome message, congratulating students after completing the first week, or contacting those who haven't accessed course content in several days—all automatically.

**\*Note:** Intelligent Agents copy into new courses, but their settings do not. Each term, you'll need to update settings and enable them to ensure they run correctly.

## Workflow Steps:

### Step one:

From your course homepage, click **Edit Course** in the navbar.

Communication ▾ Progress ▾ **Edit Course** More ▾

### Step two:

Select **Intelligent Agents**.

## Communication

 Discussions

 **Intelligent Agents**

 News

### Step three:

Enter an **Agent Name**, add a **Description**, select a **Category**, and check **Agent is enabled**.

## Agent List

[New Agent](#) [Edit Categories](#) [More Actions](#) ▾

[Agent List](#) > [New Agent](#)

## New Agent

Agent Name: \*

Description:

Category:

No Category ▾ [Add Category](#)

Status:

Agent is enabled

### Step four:

In the Scheduling section, you can select a **Frequency**. Click to drop-down menu to select: One-time run, Hourly, Daily, Weekly, Monthly, or Annually.

## Scheduling

### Frequency

No Schedule ▾

### Step five:

In the **Criteria** section, choose the settings based on how you want this agent to perform. Select **Create** once you have those settings in place.

#### Criteria

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##### 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

### Step six:

In the **Actions** area, select the **Repetition** you prefer.

#### Actions

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##### 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

[What Action Repetition setting should I use?](#)



### Step seven:

While still in the **Action** tab, check the box to **Send an Email**. In the “To:” field, you can enter the replace string {InitiatingUser} to personalize the email. 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

#### 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:

[What special email addresses can I use?](#)

Subject: \*

[What replace strings can I use in the subject and message?](#)

### Step eight:

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.

Message:

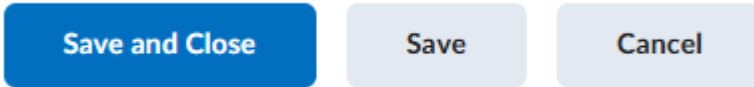
Paragraph ▾ | **B** | *I* | U ▾ | ~~A~~ | ≡ ▾ | ≡ ▾ | 🎧

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### Step nine:

Click **Save and Close** once finished.



### Reply To:

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

### Step one:

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

## Agent List



### Step two:

Select **Set custom values for this course**.

Use the system defaults

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

Set custom values for this course

### Step three:

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" value="d2lhelp@msutexas.edu"/>	<input type="text" value="d2lhelp@msutexas.edu"/>

### Step four:

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" value="d2lhelp@msutexas.edu"/>	<input type="text" value="d2lhelp@msutexas.edu"/>



## Step five:

Click the **Save** button.



## Note:

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

## Agent List

[Settings](#)

The screenshot shows the 'Agent List' interface. At the top, there are three buttons: 'New Agent' (blue), 'Edit Categories' (light gray), and 'More Actions' (light gray with a dropdown arrow). To the right, there is a 'View:' dropdown menu currently set to 'All agents', with a red circle '5' above it, and an 'Apply' button. Below these are four action icons: 'Enable' (checked), 'Disable' (unchecked), 'Delete' (trash icon), and 'Bulk Edit' (pencil icon). The main part of the interface is a table with four columns: 'Agent', 'Results of Last Run', 'Last Run Date', and 'Next Run Date'. Each column header has a red circle with a number (1, 2, 3, 4) above it. The 'Agent' column has a dropdown arrow. The 'Results of Last Run' column has a '#' symbol. The 'Last Run Date' and 'Next Run Date' columns have '-' symbols. Below the table, there is a search bar labeled 'Agent Name' with a dropdown arrow.

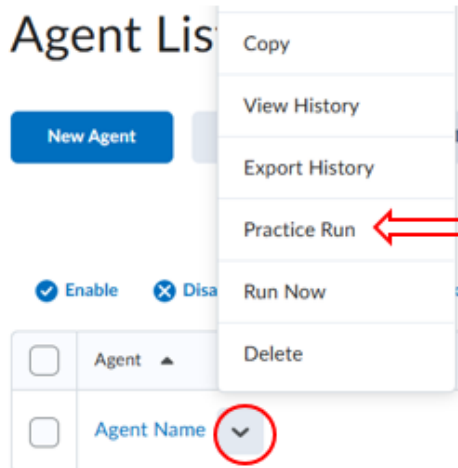
1. **Agent column:** Lists the names and descriptions of your Intelligent Agents. Click on the column header to sort by alphabetical order.
2. **Results of Last Run column:** Indicates how many users met the criteria the last time the Agent ran. Click on the # users identified link to open the list of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

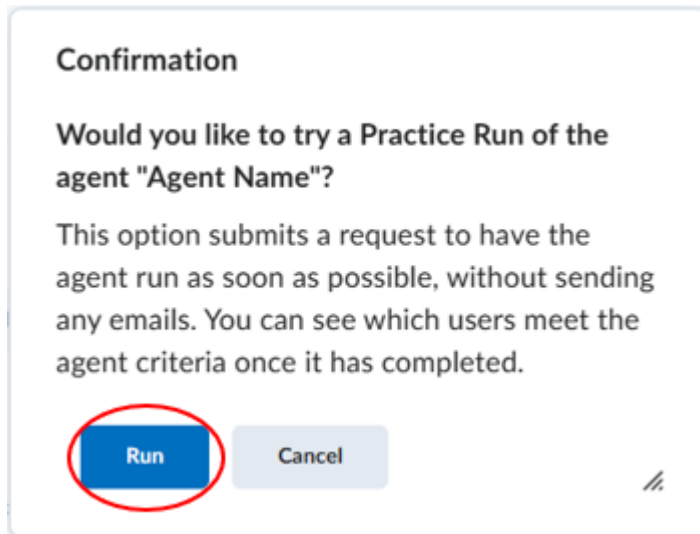
### Step one:

Click on the down arrow next to **Agent Name**, then select **Practice Run**.



### Step two:

In the Confirmation window, select **Run**.



### Step three:

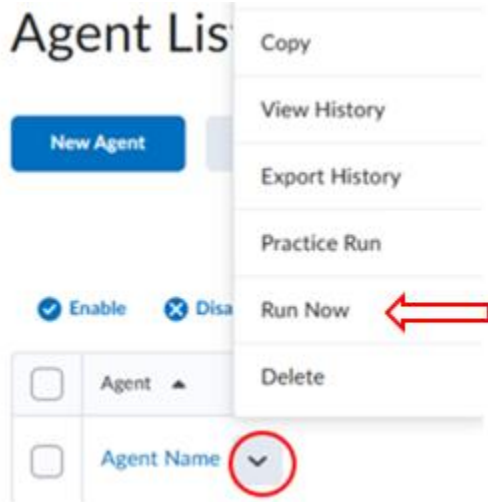
View the results of your practice run by clicking the down arrow next to Agent Name, then select the **View History** option. Send out an email or collect data at any time, with a manual run.

## Manual Run:

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

### Step one:

Click on the down arrow next to the Agent Name, then select **Run Now**.



### Step two:

While your agent is manually running, select **Done**.

## Manually Run Agent Confirmation

A request to run agent "Agent Name" at Tuesday, April 28, 2026 4:33 PM CDT has been submitted.

An email will be sent to the account [jillian.cope@d2lmail.msutexas.edu](mailto:jillian.cope@d2lmail.msutexas.edu) when your request has been completed. You can then check the results of the manual run from the Agent List page.

**Note:** Processing time varies based on server load and the priority of other scheduled agents.



### Step three:

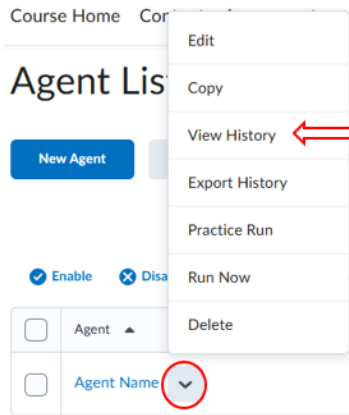
View the results of your practice run by clicking the down arrow next to Agent Name, then select the **View History** option.

## History:

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

### Step one:

Click the down arrow next to Intelligent Agent Name, then select **View History**.



### Step two:

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

[Intelligent Agents](#) > [Agent Name](#) > History

## Agent Name

Date	Result	Type
yesterday at 4:33 PM	<a href="#">4 users identified</a>	Manual Run

### Step three:

In the next window, click on any link in the **Action Taken** column for more details.

## Agent Name

Date	Result
yesterday at 4:33 PM	<a href="#">4 users identified</a>

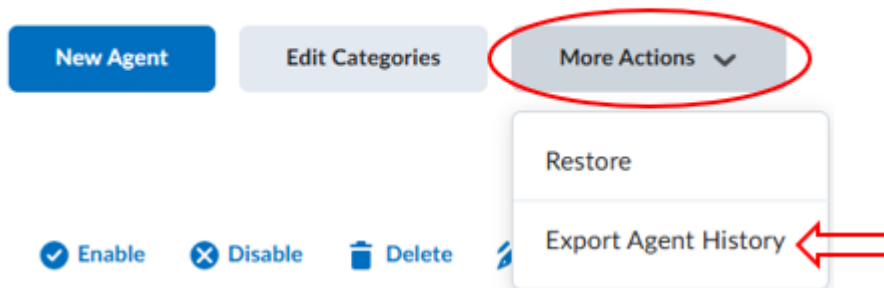
## Export:

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

### Step one:

Click **More Actions**, then select **Export Agent History**.

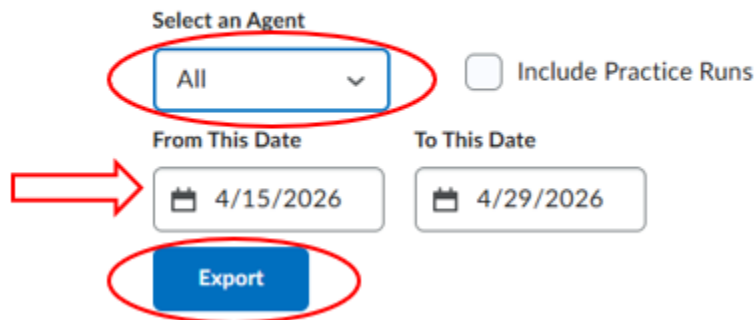
## Agent List



### Step two:

Select an Agent, or leave it on **All** to export the results of all of your Intelligent Agent runs. Enter a **date range**. The spreadsheet will show the results of all runs between the "From" and "To" dates. When you are finished, select **Export**.

## Export Agent History





## 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.

### Step one:

Check the box next to the Intelligent Agent(s) you wish to enable/disable. Then select either the Enable or Disable icon.

Enable    Disable    Delete    Bulk Edit

<input type="checkbox"/>	Agent ▲	Results of Last Run	Last Run Date
<input checked="" type="checkbox"/>	Agent Name ▼	4 users identified	yesterday at 4:33 PM