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** 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.

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.

5. 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?
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.

   ![Send an Email](Image)

   **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?

   ![Email Fields](Image)

   - **To:**
   - **Cc:**
   - **Bcc:**

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. Click **Save and Close**.

   ![Save and Close Buttons](Image)

   **Save and Close**  **Save**  **Cancel**

**Check for Success:** Look for the agent you created in the Agent List. If you see it there, you were successful!