

Intelligence Agents

Upon completion of this workshop instructors will be able to:

1. Access the Intelligent Agent feature
2. Create and schedule an Intelligent Agent
3. Manually run an Intelligent Agent

Intelligence Agents monitor a class and can either send a notification to the instructor or an email to students based on criteria set by the instructor. The Agent does not have the capability to email every student at one time, please use the Classlist feature of D2L to accomplish this task.

An Intelligence Agent can monitor login activity on a system level (not course level) and by release conditions within the LMS. Currently the release conditions for an Agent require an action on the part of the student rather than inaction (not turning in an assignment). An instructor can run an Agent manually or set it up to automatically run on a daily, weekly, monthly or annual schedule. When an agent runs, it logs information on its activity and sends an email to the instructor.

① Accessing the Intelligence Agent

1. In the red navigation bar, click on Edit Course. The Course Admin page appears.
2. Click on the Intelligent Agent link.

② Creating New Intelligent Agents

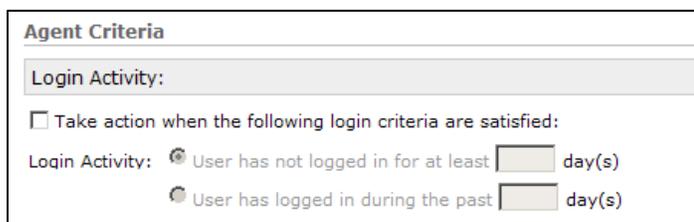
1. Click on the New Agent button.



The screenshot shows a form titled "Agent Details". It contains a text input field for "Agent Name" with a red asterisk indicating it is required. Below it is a larger text area for "Description". At the bottom, there is a checkbox labeled "Status: Agent is enabled".

2. In the Agent Name text box, type a descriptive name for the Agent.
3. If desired, in the Description text box, type in the description of the Agent.
4. To activate the Agent, click on the checkbox next to Status:

Choose an Agent criteria:



The screenshot shows a form titled "Agent Criteria". It has a section for "Login Activity" which is highlighted. Below this section is a checkbox labeled "Take action when the following login criteria are satisfied:". Underneath, there are two radio button options: "User has not logged in for at least [] day(s)" and "User has logged in during the past [] day(s)".

- a. Login Activity
 - i. Click on the checkbox next to “Take action when the following login criteria are satisfied:”
 - ii. Choose a login activity to track
 - 1. Enter the number of days in the box within that related item.

b. Release Conditions



- i. Click on the Attach Existing button if a release condition was already created.
- ii. Create a new release condition by clicking on the Create and Attach button.
 - 1. Choose a Condition Type from the Menu - Release conditions area generally those actions that a student takes within the platform such as completing a checklist or a quiz.
 - 2. Choose the appropriate Condition Detail from the dropdown menu.
 - 3. Click on the Create button.

5. Choose an Agent Action

- a. Choose the appropriate Action Repetition by clicking on the radio button.
The Action Repetition setting determines how many emails an agent might send to users who satisfy its criteria.
 - i. Only take action when users satisfy the agent's criteria for the first time.
When an instructor selects this option, all users that satisfy the agent's criteria receive only one email no matter how many times the agent is evaluated.
 - ii. Always take action when users satisfy the agent's criteria
When an instructor select this option, the agent sends an email to all users that satisfy its criteria every time the agent is evaluated.
6. Choose a Schedule if desired
 - a. The agent's action schedule determines how frequently the Learning Environment evaluates the agent's criteria and so how often the agent takes action for users who satisfy its criteria. If no action schedule is defined for the agent, you must manually run the agent to evaluate its criteria and initiate the associated action.
7. Choose and Email format
8. Fill in the To: textbox by choosing a special address string from the choices below
 - a. Instructors can use the following replace strings in the To, Cc, and Bcc address fields to send the agent email to specific recipients:
 - i. {InitiatingUser} – Sends an email to the student that meets the criteria.
 - ii. {InitiatingUserAuditors} – Sends an email to the instructor. Must be in the BCC area.
9. Enter a subject for your email in the Email Subject: textbox.
10. In the Message textbox, type the message that will be sent to students who meet the Agent criteria.
 - a. Personalizing the message
Instructors have the option of replacing a students name with a string. A string is a code used to place information from a database into an email or letter. Creating a form letter in Microsoft Word is a good example of using strings. The following are replace strings you can use in the subject line and the message (email body).

{OrgName} - The name of the organization.
{OrgUnitCode} - The code for the org unit.
{OrgUnitName} - The name of the org unit.
{OrgUnitStartDate} - The start date specified for the org unit.
{OrgUnitEndDate} - The end date specified for the org unit.
{InitiatingUserFirstName} - The first name of the student.
{InitiatingUserLastName} - The last name of the student.
{InitiatingUserUserName} - The username of the student.
{InitiatingUserOrgDefinedId} - The Org Defined ID of the student.
{LoginPath} - The address of the login path for the site.
11. Click on the Save button.

12. Below is a test email example that displays how each of the strings performs when the Intelligence Agent is run.

You've completed the checklist!

Desire2Learn

To: [Inst Design & Develop Service](#)

Joy,

Glad you've completed the checklist and you're well on your way to Week 2.

Donna

Shippensburg University of Pennsylvania - The name of the organization.

IDDS100_D2L_Faculty_Self-Paced_Tutorial - The code for the org unit.

IDDS100_D2L_Faculty_Self-Paced_Tutorial - The name of the org unit.

this org unit has no start date - The start date specified for the org unit.

this org unit has no end date - The end date specified for the org unit.

Joy - The first name of the student.

Doe - The last name of the student.

JoyDoe - The username of the student.

IDDS - The Org Defined ID of the student.

<https://d2l.ship.edu/> - The address of the login path for the site.

③ Manually Run an Agent

To manually run an agent:

1. On the Agent List page, click on the blue icon next to the trash can icon.
2. A message will appear asking the instructor to confirm the choice to run the Agent.
3. Click on the Run button.
4. A notice will be sent to the instructor when the Agent processed is complete.