Intelligence Agents

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 you run an agent manually, it sends a confirmation email to the user that requested or set up the agent.

This email lists the following information:

- org unit code and name
- which agent ran
- time and date the request was submitted
- time and date the request was finished
- whether the agent took action
- any error text

## Example uses for intelligent agents include:

- email for users with grades below a certain level
- check for users that have not logged in within a specific number of days
- check for users that view a specific content topic

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.

Creating New Intelligent Agents

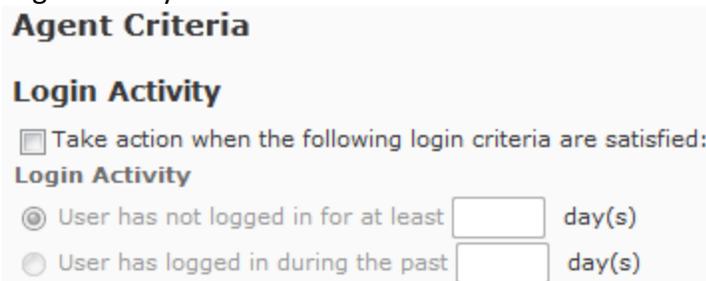1. Click on the **New** button.
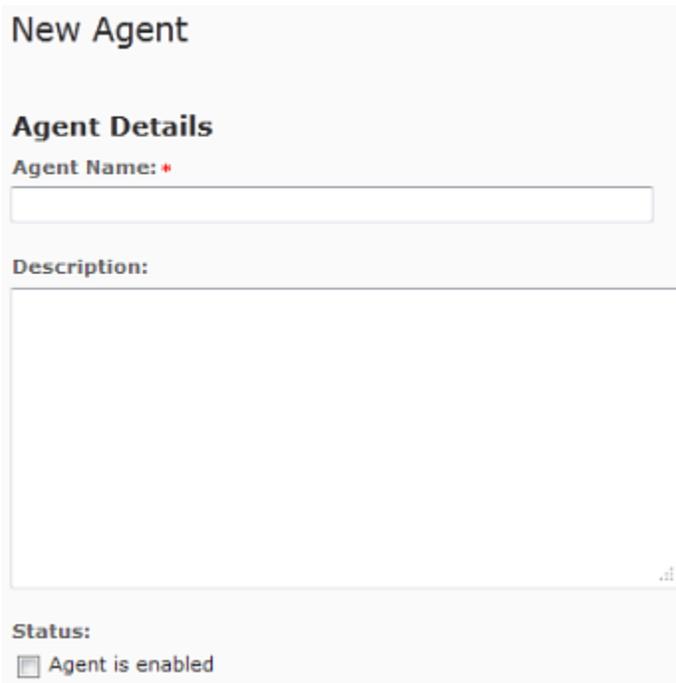
New Agent

Agent Details

Agent Name: *

Description:

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.
5. Choose an Agent criteria:
   a. Login Activity

   Agent Criteria

   Login Activity

   ☐ Take action when the following login criteria are satisfied:
   Login Activity
   ◉ User has not logged in for at least [   ] day(s)
   ◯ User has logged in during the past [   ] day(s)

   i.   Click on the checkbox next to "Take action when the following login criteria are satisfied:"
   ii. Choose a login activity to track and enter the number of days in the box within that related item.

b. Course Activity

Course Activity

☐ Take action when the following course activity criteria are satisfied

Course Activity

◉ User has not accessed course for at least [＿＿＿] day(s)

○ User has accessed course during the past [＿＿＿] day(s)

    i.   Click on the checkbox next to "Take action when the following course activity criteria are satisfied:'

    ii.   Choose a course activity to track and enter the number of days in the textbox within that related item.

c. Release Conditions

Release Conditions

[**Attach Existing**]   [**Create and Attach**]   **Remove All Conditions** 🗑

There are no conditions attached to this item.

    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 drop-down 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 drop-down menu.

        3.   Click on the **Create** button.

6. Choose an Agent Action

Agent Action

Action 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 should I use?

Schedule:
- ☐ Use Schedule

No schedule defined
Next Run Date: No schedule defined

Update Schedule

What does an agent's action schedule determine?

Email Format:
- ⦿ HTML
- ○ Plain text

To: *

Cc:

Bcc:

What special email addresses can I use?

Email Subject: *

What replace strings can I use in the subject and message?

Message:

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 selects this option, the agent sends an email to all users that satisfy its criteria every time the agent is evaluated.
7. Choose a Schedule, if desired.
    a. The agent's action schedule determines how frequently the Learning Environment evaluates the agent's criteria and 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.
8. Choose an Email format.
9. 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.

10. Enter a subject for your email in the Email Subject: textbox.
11. 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 student's 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 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.
12. Click on the **Save** button.

Manually Run an Agent

To manually run an agent:

1. On the Agent List page, click on **Run Now** from the context (drop-down) menu next to the Agent name.
2. A confirmation dialog box 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.