Intelligent Agents

Use Intelligent Agents to send automatic email notifications from D2L based on conditions the faculty member sets up. For example, you might use Intelligent Agents to email students based on their grades, login history or activity completion. You can also automate standard communications, such as welcome messages, season greetings and congratulations.

Example uses for intelligent agents include:

- **Grades**: Emailing users with grades below a certain level.
- **Login**: Checking for users that have not logged in within a specific number of days.
- **View content**: Checking for users that view a specific content topic.

ACCESSING INTELLIGENT AGENTS

- Click **Edit Course** on the navigation bar.
- Under **Communication**, click **Intelligent Agents**.

CREATING INTELLIGENT AGENTS

When you create a new agent you need to determine:

- What criteria it looks for.
- What the content is for the email that the agent sends when its conditions are met.
- How often it looks for users meeting its criteria.

How to create an intelligent agent

1. Click **New** on the Agent List page.
2. Enter an Agent Name.
3. Enter a Description.
4. Under **Status**, select the **Agent is enabled** check box if you want the agent enabled immediately once the agent is saved.

5. **Agent Criteria** – You may determine the criteria for the agent to run by login history, course activity OR release conditions. Note that you may also combine criteria such as Login Activity AND release conditions.
   a. Under **Login Activity**: If you want the agent to search for login activity to D2L, select the **Take action when the following login criteria are satisfied** check box and choose which of the two login activities you want to monitor.

   b. Under **Course Activity**: If you want the agent to search for course activity, select the **Take action when the following course activity criteria are satisfied** check box and choose which of the two course activities you want to monitor.

   c. Under **Release Conditions**: Click **Attach Existing** or **Create and Attach** to select or create release conditions for the agent to monitor. Under “To access this item, users must satisfy”, the default is “All conditions must be met”. If there are multiple release conditions, you have the option to select “All conditions must be met” OR “Any conditions must be met”.

6. Under **Agent Action**, determine the action the agent takes when its conditions are met:
   a. Under **Action Repetition**, select one of the Action Repetition options to set whether the agent takes action once or every time the conditions are met.
   b. Under **Schedule**, if you want the agent to run on a schedule, select the **Use Schedule** check box, then click the **Update Schedule** button.

   The agent's Schedule determines how frequently the D2L Learning Environment evaluates the agent's criteria and how often the agent takes action for users who satisfy its criteria. If no schedule is defined for the agent, you must manually run the agent to evaluate its criteria and initiate the associated action.
c. Set the schedule in the Update Agent Schedule pop-up.

![Update Agent Schedule](image)

d. Click Update to save the schedule and return to the New Agent page.

7. Under Email Format, select HTML or Plain Text for the email format. HTML will enable pictures and is the default value.

8. Enter the names of recipients in the To, Cc, and Bcc fields or you can use special replace strings in these fields. (See Replace strings for intelligent agents below)

9. **Important note:** Intelligent Agents automatically are sent from the WCU D2L Services email, not the faculty member. Therefore if students reply to Intelligent Agent email, they are replying to D2L Services not the instructor. It is recommended that faculty add themselves in CC (not BCC) so that if students reply to all, the faculty member will receive the communication.

![Email Format](image)

10. Enter the Email Subject. (You can use special replace strings in this field)

11. Enter a Message. (You can use special replace strings in this field)

12. Click Save and Close.
REPLACE STRINGS SPECIFIC TO INTELLIGENT AGENTS

Replacement strings are generally used when one would like to personalize messages without creating several individually targeted items. These strings are used when you would like to personalize messages, instructions, or other information for students. Note that some intelligent agents can only be used with specific tools in D2L.

Email Address Replace Strings (copy and paste the replace string in the To, CC or BCC field)

At WCU, we recommend the use of the following replace strings in the Email address field.

<table>
<thead>
<tr>
<th>Replace String</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>{InitiatingUser}</td>
<td>The user who performs the action that meets the agent’s criteria.</td>
</tr>
</tbody>
</table>

Email Subject

At WCU, we recommend the use of the following replace strings in the Email Subject line.

<table>
<thead>
<tr>
<th>Replace String</th>
<th>Description</th>
<th>What will be displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>{OrgUnitName}</td>
<td>The name of the Org Unit.</td>
<td>Course name</td>
</tr>
<tr>
<td>{InitiatingUserFirstName}</td>
<td>The first name of the initiating user.</td>
<td>First name (ex. Henry)</td>
</tr>
<tr>
<td>{InitiatingUserLastName}</td>
<td>The last name of the initiating user.</td>
<td>Last name (ex. Smith)</td>
</tr>
<tr>
<td>{InitiatingUserOrgDefinedId}</td>
<td>The Org Defined ID of the initiating user.</td>
<td>User’s org id (ex. AB123456)</td>
</tr>
</tbody>
</table>
Email Body Text Replace Strings *(copy and paste the replace string within the body of email)*

<table>
<thead>
<tr>
<th>Replace String</th>
<th>Description</th>
<th>What will be displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>{OrgUnitName}</td>
<td>The name of the Org Unit.</td>
<td>Course name</td>
</tr>
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<td>The last name of the initiating user.</td>
<td>Last name (ex. Smith)</td>
</tr>
<tr>
<td>{InitiatingUserOrgDefinedId}</td>
<td>The Org Defined ID of the initiating user.</td>
<td>User’s org id (ex. AB123456)</td>
</tr>
</tbody>
</table>

At WCU, we recommend the use of the following replace strings in the body of the email.
EDITING AN INTELLIGENT AGENT

1. On the Agent List page, select **Edit Agent** from the agent dropdown menu.

2. Make your changes.
3. Click **Save and Close**.

DELETING AN INTELLIGENT AGENT

1. On the Agent List page, select **Delete** from the agent dropdown menu.

2. Make your changes.
3. On the confirmation pop up window, click **Delete**.

Note: You cannot recover deleted agents.
Running an intelligent agent manually

Typically, intelligent agents are set up to run automatically. If you do not have a regular schedule set up for an agent, you must run it manually.

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:

- Course 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.

To run an intelligent agent manually

On the Agent List page, click Run Now from the agent dropdown menu.

Note: The agent will only run while the course is active. Once the course is changed to inactive the agent will not run regardless of the scheduled settings.