

D2L INTELLIGENT AGENTS

Create personalized automated messages based on a set of criteria.

Contents

- What is an Intelligent Agent?2
- Key considerations for setting up Intelligent Agents2
- Best practices for Setting up Intelligent Agents.....2
- Customizing Reply Settings3
- Create a New Intelligent Agent4
 - Example Email Reply9
 - Agent List Menu Options 10
- Edit an Intelligent Agent 10
- Copy an Intelligent Agent 10
- Delete an Intelligent Agent 11
 - Restore a Deleted Intelligent Agent 11
- Filter Intelligent Agents 11
- Run an Intelligent Agent..... 12
 - Practice Run 12
 - Manual Run..... 12
 - Scheduled Run..... 12
- Export Agent History to CSV 13

What is an Intelligent Agent?

An Intelligent Agent is a handy tool that sends personalized emails to students for you. It keeps them updated, offers recommendations, gives feedback, and provides support regarding course activities, helping to enhance communication and engagement within the learning environment. Below are some examples of when to use automated messages:

- Remind students who haven't logged into the course yet.
- Notify students with grades below an acceptable level.
- Prompt students who haven't submitted assignments to the Dropbox.
- Remind students who haven't completed a quiz.
- Encourage students who haven't participated in a discussion board.
- Confirm group enrollment in a self-enrolled group.

Key considerations for setting up Intelligent Agents

- **Criteria:** The Intelligent Agent operates based on the conditions you define to trigger the email. These conditions may include course activity, release conditions, or login activity.
- **Content:** Consider the content of the email the agents sends to students once its criteria are met.
- **Run time:** If you do not schedule the agent, then you must trigger manually by selecting 'Run Now' from the dropdown menu of the agent found on the Agent List page. Be sure to select a start and end time. The run time can vary to:
 - No schedule
 - One-Time Run
 - Hourly
 - Daily
 - Weekly
 - Monthly
 - Annually

Best practices for Setting up Intelligent Agents

Some best practices include:

- Employ a clear naming convention that succinctly describes the purpose of each agent in its title.
- Assess whether the agent requires multiple runs and select the most appropriate run time to fulfill its objectives effectively.

- Personalize emails using replacement strings. Refer to the available [list](#) for suitable options.
- Utilize the description text box to provide helpful reminders or notes regarding adjustments needed for the agent.
- Maintain consideration for students by avoiding excessive email notifications generated by intelligent agents, ensuring a balanced and non-intrusive communication approach.

Customizing Reply Settings

To customize the reply address for automated messages, follow these steps:

1. Go to Edit Course on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Click on the gear icon for **Settings** located on the right-hand side of the page.

Agent List Settings

New Agent
Edit Categories
More Actions ▼

View: All agents ▼
Apply

Enable
 Disable
 Delete
 Bulk Edit

	Agent ▲	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/>	Dropbox ▼ No submission to dropbox	0 users identified	Jul 28, 2023 12:00 PM	-
<input type="checkbox"/>	Login ▼ To determine which students who have not logged in to the course and send a reminder email to log in.	0 users identified	yesterday at 5:44 PM	-

3. Select the option to 'Set custom values for this course.'

Intelligent Agents Settings

Use the system defaults

Name that emails come from Reply-To address for responses
Marquette D2L d2l@marquette.edu

Set custom values for this course

Name that emails come from Reply-To address for responses

These settings will affect all future emails sent by an agent.

The email address that agent emails come from cannot be set to your personal address due to how spam filters operate, but you can add a personal touch by setting the Name for the address, and you can set the Reply-To address if you want to receive replies.

4. Enter your name in the 'Name that emails come from' field.
5. Enter your email address in the 'Reply-To address for responses' field.
6. Save your changes by clicking the **Save** button.

After completing these steps, if a student replies to your automated message, the email will be directed to you instead of the default sender (Marquette D2L d2l@marquette.edu). You'll also receive a copy of the sent automated email with the reply address showing your name followed by d2l@marquette.edu

Create a New Intelligent Agent

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. On the Agent List page, select **New Agent**.

3. Enter a name for the agent.

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

New Agent

Agent Name: *

e.g., Course Login Monitoring

Description:

e.g., Sends an email when the student has been absent from accessing the course site.

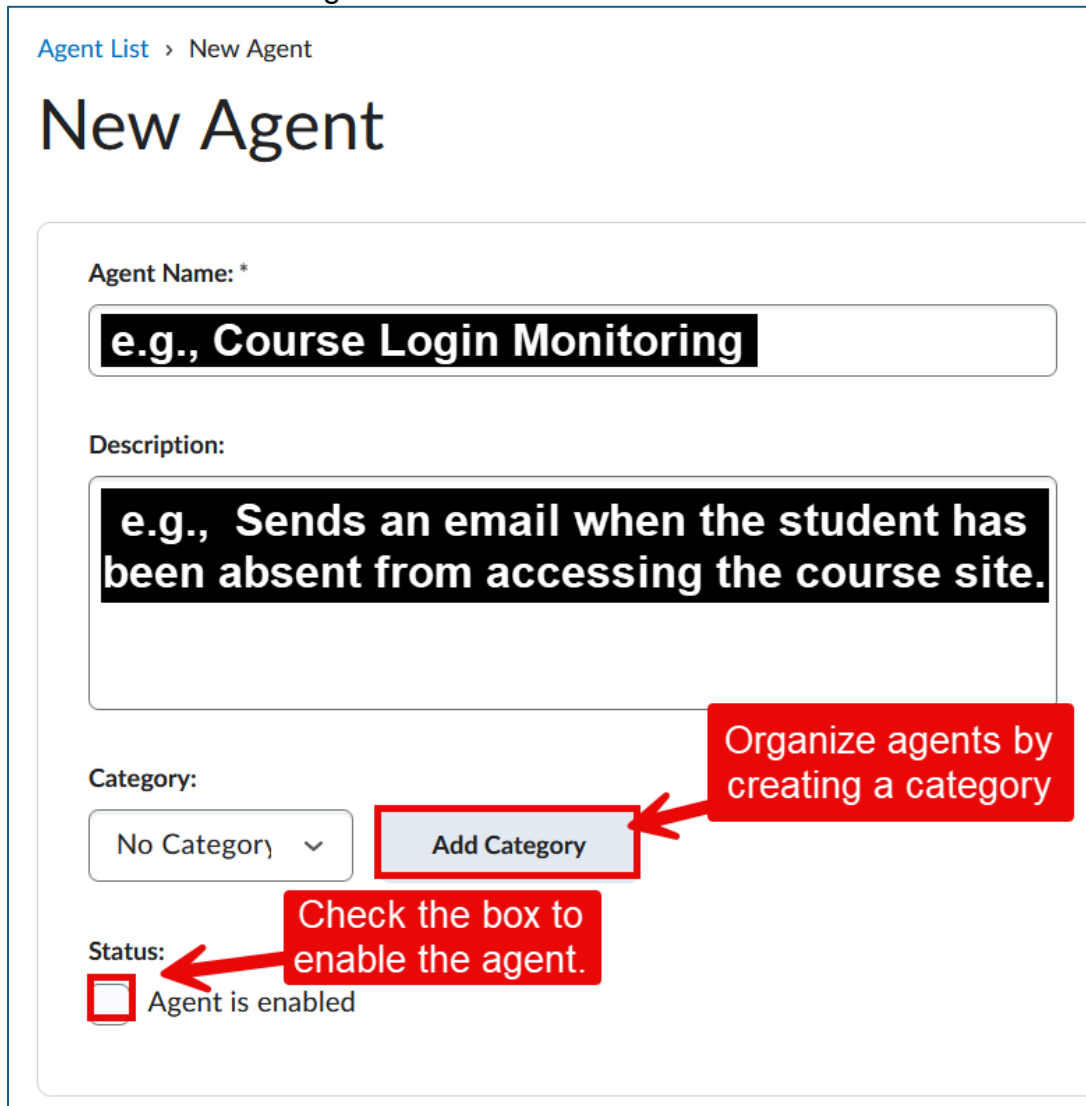
Category:

No Category ▾ **Add Category**

Status: Agent is enabled

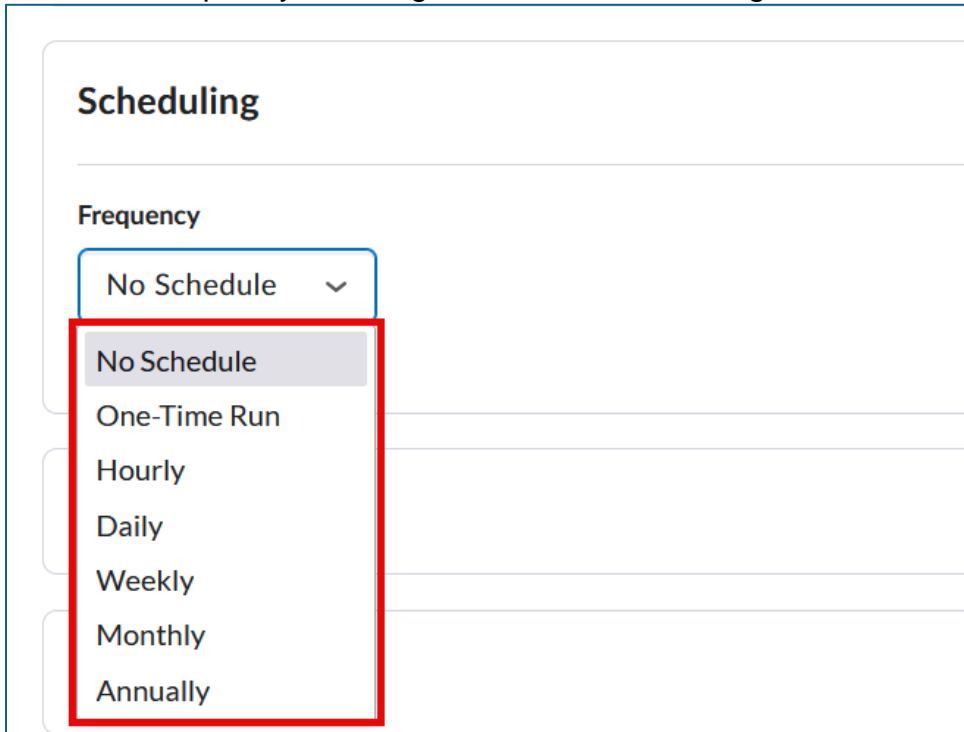
Organize agents by creating a category

Check the box to enable the agent.



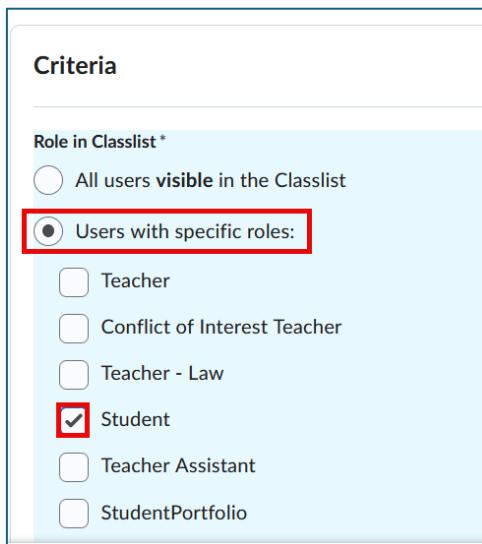
4. Enter a description of the agent.
5. Assign a category if you would like to organize your agents. **Note:** Create your category first by selecting the **Add Category** button.
6. Enable the agent by selecting the check box.

7. Select the frequency of the agent from the Scheduling section.



The screenshot shows a 'Scheduling' section with a 'Frequency' dropdown menu. The dropdown is open, showing the following options: 'No Schedule', 'One-Time Run', 'Hourly', 'Daily', 'Weekly', 'Monthly', and 'Annually'. The 'No Schedule' option is highlighted with a red box.

8. Select who the agent will affect by selecting the role in the Classlist from the Criteria section.



The screenshot shows a 'Criteria' section with a 'Role in Classlist*' section. There are two radio button options: 'All users visible in the Classlist' and 'Users with specific roles:'. The 'Users with specific roles:' option is selected and highlighted with a red box. Below this, there are several checkboxes for roles: 'Teacher', 'Conflict of Interest Teacher', 'Teacher - Law', 'Student', 'Teacher Assistant', and 'StudentPortfolio'. The 'Student' checkbox is checked and highlighted with a red box.

9. Select the Criteria (e.g., Login Activity, Course Activity, or Release Condition).

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

▾

First enrolled at least 3 days ago in the current org unit: **Sandbox2 - Christina Johnson** ×

10. Choose how often you would like the agent to repeat. For assistance in making this decision, click 'What Action Repetition setting should I use?'

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

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

Send an Email

Send an email when the criteria are satisfied

11. Check the box to **Send an email when the criteria are satisfied.**

Actions ▼

To: 📧

Cc: 📧

Bcc: 📧

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

Subject: *

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

Message:

Paragraph ▼ | **B** | *I* | U | *A* | | | | | | | | Lato (Recom... ▼ | ...

19px ... ▼ | | | | | |

{InitiatingUserFirstName},

I hope this email finds you well. I wanted to reach out to you regarding your recent activity in [Course Name]. Our records indicate that you haven't accessed the course in a few days, and I wanted to check in to see if everything is going okay on your end.

I understand that life can sometimes get busy, and keeping up with coursework can be challenging. However, consistent engagement with the material is crucial for your success in the course. If you're experiencing any difficulties or have any questions about the content, please don't hesitate to reach out to me or the support team. We're here to help you every

- Enter a replace string for the To: field. Click on the 'What special email addresses can I use?'
- Enter the details (i.e., add a headline for the Subject field, message in the text box).
- Attachments of documents, video notes and recordings of audio and video are possible.
- Use replace strings to personalize the message. For a list of options, click 'What replacement strings can I use in the subject and message' or see chart below.

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

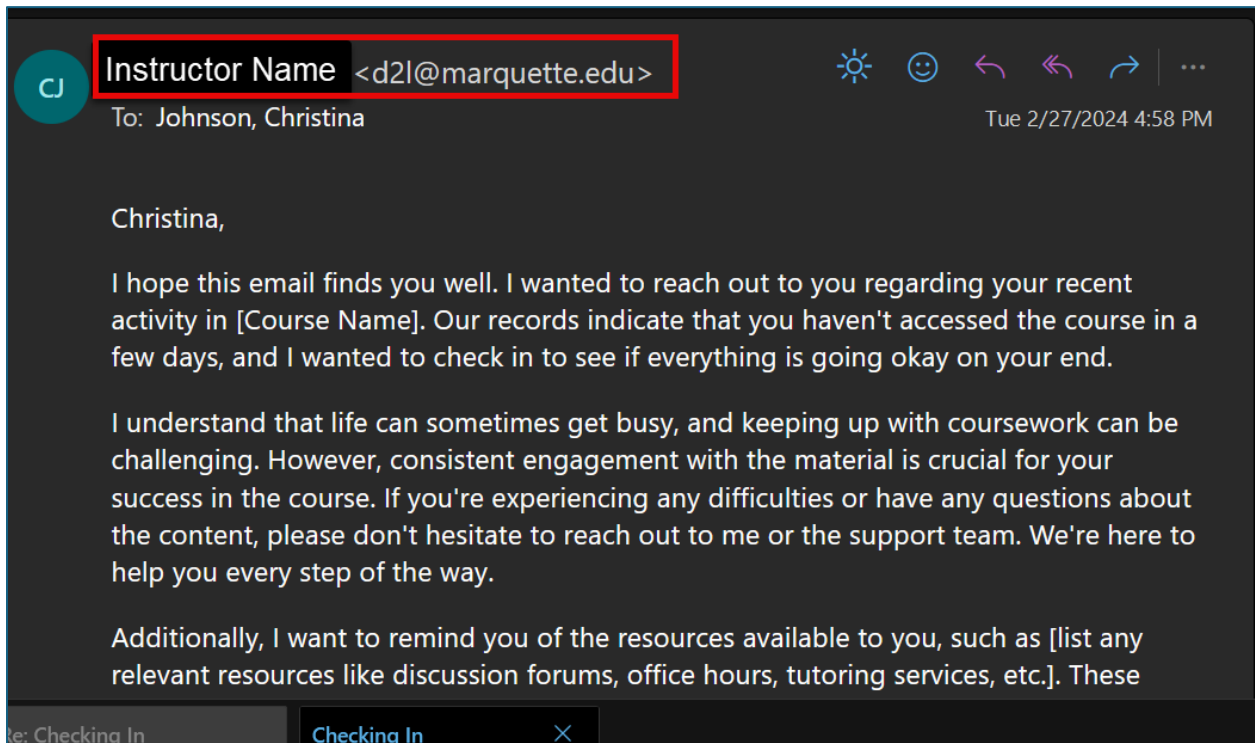
Replace String	Generated Text
{OrgName}	The name of the organization.
{OrgUnitCode}	The code for the org unit.
{OrgUnitName}	The name of the org unit.
{OrgUnitStartDate}	The start date specified for the org unit.
{OrgUnitEndDate}	The end date specified for the org unit.

{OrgUnitId}	The id for the org unit.
{InitiatingUserFirstName}	The first name of the initiating user.
{InitiatingUserLastName}	The last name of the initiating user.
{InitiatingUserUserName}	The username of the initiating user.
{InitiatingUserOrgDefinedId}	The Org Defined ID of the initiating user.
{LoginPath}	The address of the login path for the site.
{LastCourseAccessDate}	The date the initiating user last accessed the course.
{LastLoginDate}	The date the initiating user last logged in.

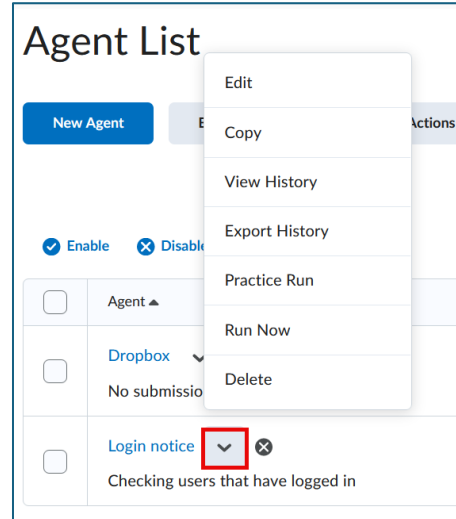
12. Click **Save and Close**.

Example Email Reply

Although a student will see the d2l@marquette.edu address initially, if the student replies, they should see your Marquette email address in To: field.



Agent List Menu Options



Edit an Intelligent Agent

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select **Edit** from the drop-down menu of the agent's name.
3. Edit any of the fields: name, description text box, category, status, Scheduling section, Criteria section, Actions section.
4. Click **Save and Close**.
5. Use the **Bulk Edit** button if you would like to edit more than one agent at once for the following: title, category, active/inactive status.

Copy an Intelligent Agent

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select **Copy** from the drop-down menu of the agent's name.
3. A duplicate of the agent will appear with 'Copy of' in the title of the agent's name.
4. Select Edit from the drop-down menu to edit the name of the agent as well as other fields.

Note: Copied agents are automatically disabled. This also applies to the case of copying from one course site to another.

Delete an Intelligent Agent

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select **Delete** from the drop-down menu of the agent's name.
3. A confirmation popup will appear asking if you want to delete the agent. Click the **Delete** button to confirm.

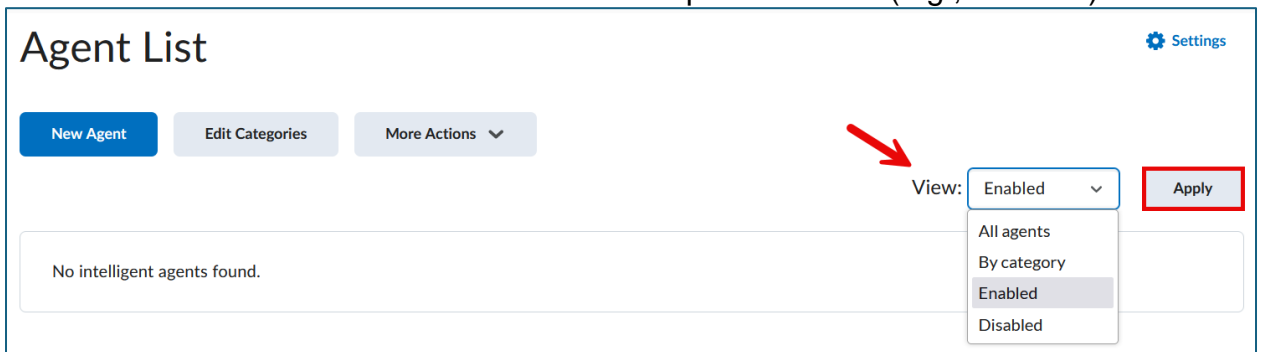
Note: An alternative way to delete the agent is by selecting the check box(es) and clicking the delete icon located above the agent list. Deleted agents do not run if they have a recurring schedule.

Restore a Deleted Intelligent Agent

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select **Restore** from the drop-down menu of the **More Actions** button.
3. Click the **Restore** button for the agent(s) you would like undeleted.

Filter Intelligent Agents

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select from choices available from the View: drop-down menu (e.g., Enabled).



The screenshot shows the 'Agent List' interface. At the top left, there are three buttons: 'New Agent' (blue), 'Edit Categories' (grey), and 'More Actions' (grey with a dropdown arrow). To the right of these buttons is a 'View:' dropdown menu. A red arrow points to this dropdown menu, which is currently open and showing three options: 'All agents', 'By category', and 'Enabled'. The 'Enabled' option is highlighted. To the right of the dropdown menu is an 'Apply' button, which is highlighted with a red box. Below the buttons and dropdown menu, there is a large empty box containing the text 'No intelligent agents found.' In the top right corner of the interface, there is a 'Settings' link with a gear icon.

3. Click the Apply button to trigger the search.

Run an Intelligent Agent

Practice Run

A practice run will not send emails to those identified by the agent. Its purpose is to list which students will be identified if it happened to run. Practice runs can be completed on disabled agents.

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select **Practice Run** from the drop-down menu of the agent's name.
3. A confirmation popup will appear asking if you want to try a Practice Run from the agent. Select **Run**.
4. Click the **Done** button. An email will be sent to your email address you provided once the request has processed. Check the results of the practice run on the Agent List page.

Manual Run

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select **Run Now** from the drop-down menu of the agent's name.
3. A confirmation popup will appear asking if you want to run the agent. Click the **Run** button to confirm.

Scheduled Run

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select **View History** from the drop-down menu of the agent's name.

3. Click the hyperlink under the Result column to identify the students/users who received an email and copy of email sent (i.e., Action Taken).

Intelligent Agents > Login notice > History

Login notice

Date	Result	Type	Run By
Jul 27, 2023 9:05 AM	4 users identified	Manual Run	Christina Johnson
Jul 26, 2023 4:13 PM	4 users identified	Scheduled run	System
Jul 25, 2023 4:13 PM	4 users identified	Scheduled run	System
Jul 24, 2023 4:22 PM	4 users identified	Practice Run	Christina Johnson

Export Agent History to CSV

1. Navigate to **Edit Course** on the course navbar and choose **Intelligent Agents** under the Communication section.
2. Select **Export History** from the drop-down menu of the agent's name.
3. Select an agent.
4. Select dates.
5. Click **Export** button.

Note: To quickly select all agents, navigate to the **More Actions** button and select **Export Agent History**.