D2L Intelligent Agents (IA)

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Intelligent Agents (IA) are a way to provide automated notifications to yourself and your students. They can be used to welcome students, contact ones who haven’t logged into D2L in a while, acknowledge students’ accomplishments, and supply additional materials for those who didn’t do as well on assignments and quizzes.

Intelligent Agent Settings
One of the first things you’ll want to do is change the name that the emails come from and Reply-To address for responses. After selecting the Settings link in the upper right corner of the Agents List screen, you should see the Intelligent Agents Settings screen.

![Intelligent Agents Settings](image)

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.

Scheduled Agents Run Time

Scheduled agents will run at approximately 11:00 AM (Unknown Region - GMT) / 6:00 AM (United States - Chicago)

[Save] [Cancel]
Select the Set custom values for this course radio button. Two fields will become available:

- Name that emails come from
- Reply-To address for responses

Type your name and email address in the corresponding fields so your students know the emails come from you and, if they reply to the message, it will go to your Outlook Inbox.

**Creating a New Agent**

**General IA Information**

After you’ve selected the New Agent button, you’ll be taken to the New Agent creation screen. You’ll need to fill out some general information about this agent.

![New Agent Creation Screen](image)

A. **Name** – type a title for this agent. You can put numbers in the name if you want them in a specific order.

B. **Description** – type what it is intended to do, when it’s supposed to run, how often, who it’s intended for (students, instructor, both, other), etc. in this text area.

C. **Category** – use the dropdown menu to select a category or use the Add Category button to create a new one.

D. **Agent is enabled** – select the check box when it’s ready to be active. **Note:** If the IA is only for practice runs, leave unchecked.

**Scheduling**

In the Scheduling section, you’ll select how frequently this IA will run.
The Frequency dropdown menu has one-time run, hourly, daily, weekly, or monthly options. Once you select an option, the fields that you need to fill in and/or select will appear below the Frequency dropdown menu.

If you select the One-Time Run option, you’ll see:

![One-Time Run Example](image)

The Scheduled Date fields is where you can select the date and time you want this IA to run. This option could be used for a “Welcome to Class” message that you only want to run on the first day of class.

If you select the Hourly, Daily, Weekly, or Monthly option, you’ll see:

![Weekly Example](image)

For this example, we’ve selected Weekly, so the available settings will be in terms of a week, the other Frequency options will have different settings.

A. Repeats Every week(s) – type the number of weeks you want this IA to run. For example, if you type 1, it will run every week. If you type 2, it will run every other week.

B. Repeats On - select the day(s) of the week you want this IA to run on. You can select multiple days if you want this IA to run several times a week.

C. Scheduled Time – type time you want this IA to run at on the day(s) you selected.
D. Scheduled Dates: Has Start Date – check this setting and select a start date if you want this IA to run only after a specific date. **Note:** If you leave this blank, this IA will run as soon as the course opens.

E. Scheduled Dates: Has End Date – check this setting and select an end date if you want this IA to run only before a specific date. **Note:** If you leave this blank, this IA will run for as long as the course is open. D2L Brightspace courses close 21 days after the official end date.

This Weekly option could be used to check to make sure your students are logging into D2L Brightspace to avoid them falling behind in your course and risk receiving a FN.

**Criteria**
In the Criteria section, you’ll select who the IA should run for and what causes the IA to run for them.

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A. Role in Classlist – select the default All users visible in the Classlist for everyone in course to be included (students, teachers, teaching assistants, etc.); select “Users with specific roles:” option if it’s for specific people, then select the role(s) you want to be eligible. For this example, we’ve selected Users with specific roles and selected Student so only students in this course would be evaluated by the criteria. **Note:** The role list in the screenshot has been shortened for display purposes, you’ll see the full list when you’re creating the IA.
B. Take Action on Activity: Login Activity – only select this if the IA is for students who haven’t/have logged into D2L Brightspace in a while. For this example, we’ve left this unchecked.

C. Take Action on Activity: Course Activity - only select this if the IA is for students who haven’t/have accessed your course in a while. For this example, we’ve left this unchecked.

D. Take Action on Activity: Release Conditions – select the activity the students must meet or haven’t met for the IA to be sent. For this example, we’ve selected three conditions that must all be met:
   a. Visits the content topic: Syllabus.
   b. Adds 1 threads to discussion topic: Course Basics – Section 1/Introduce Yourselves.
   c. Submits to folder: Sample Assignment.

Note: It’s recommended that only one of the Take Action on Activity options are used per IA.

Action
In the Action section, you’ll select what happens after the students have met the criteria.
A. Repetition – use default if the IA is only to be sent the first time the criteria is satisfied; use the “Take action every time the agent is evaluated” option if the IA needs to be sent several times a semester for a student. The What Action Repetition setting should I use? link will explain these options. For this example, we’ve left the default “Take action only the first time the agent’s criteria are satisfied for a user”.

B. Send an Email – select this option if you want an email notification to be sent if the IA’s criteria have been met. The email could be sent to you, the student, or both. If you just want to see who meets the criteria but don’t want any action taken, leave this option unchecked. **Note:** It’s recommended that you change the Name that the emails come from and the Reply-to address for responses to your name and email address. You’d do this on the Agents List screen using the Settings link.

C. To: - If you want the email to go to the students, use the replace string {InitiatingUser} to make sure only people who meet the criteria receive this message. **Note:** Do not manually type student email addresses in any of the address fields, D2L Brightspace will use the replace string to do this for you when it sends out the individual emails.

D. Bcc: - use this field to send a copy of the email to yourself if you want to be notified as students meet the criteria. **Note:** You’ll receive an email for each student who meets the criteria.

E. Subject: - briefly type the purpose for the email that will be sent. Use the replace string {OrgUnitName} if you’d like to include the course name without having to type it. This is helpful if you plan to copy these IAs into a different course. The What replace strings can I use in the subject and message? link will explain which code can used in those fields. For this example, we’ve typed “{OrgUnitName} First Week Activities Completed!” as the subject.

F. Message: - type the message you or your students should receive if the criteria is met. If you include the replace string {InitiatingUserFirstName}, the person’s first name will appear in the message body. If you’re sending the message to yourself, you might want to also include the replace string {InitiatingUserLastName} so you’ll know which student has met the criteria. The What replace strings can I use in the subject and message? link will explain which code can used in those fields. For this example, we’ve typed a congratulations message and included the activities they’ve completed for the first week of class.

G. Attachments – upload or choose an existing file, or record audio. For this example, we didn’t include any attachments. **Note:** This would go to all students who meet the IA’s criteria so the file shouldn’t include information for a specific student.

H. Email Format: - use default, HTML, to be able to include formatting and multimedia in the message.

I. Saving options: Save and Close, Save, and Cancel - click the button that works best for you. For this example, we’ve selected Save and Close.
What Variables or Strings can be used for Intelligent Agents?

To, Cc, Bcc Fields

<table>
<thead>
<tr>
<th>Replace Strings</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>{InitiatingUser}</td>
<td><a href="mailto:John.Smith@lsc.edu">John.Smith@lsc.edu</a></td>
</tr>
<tr>
<td>{InitiatingUserAuditor}*</td>
<td>N/A</td>
</tr>
</tbody>
</table>

*This replace string isn't recommended as it won't send an email to students.

Message Field

<table>
<thead>
<tr>
<th>Replace Strings</th>
<th>What is it?</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>{OrgName}</td>
<td>The campus's name for the</td>
<td>Minnesota State</td>
</tr>
<tr>
<td>{OrgUnitName}</td>
<td>The name of the D2L Brightspace course</td>
<td>Introduction to Economics</td>
</tr>
<tr>
<td>{OrgUnitCode}</td>
<td>The course offering code for</td>
<td>20203000509</td>
</tr>
<tr>
<td>{OrgUnitStartDate}</td>
<td>The D2L Brightspace course start date</td>
<td>January 10, 2022</td>
</tr>
<tr>
<td>{OrgUnitEndDate}</td>
<td>The D2L Brightspace course end date</td>
<td>May 31, 2022*</td>
</tr>
<tr>
<td>{OrgUnitId}</td>
<td>The id for the org unit, i.e. the OU number</td>
<td>1234567</td>
</tr>
<tr>
<td>{InitiatingUserFirstName}</td>
<td>First name of the user</td>
<td>John</td>
</tr>
<tr>
<td>{InitiatingUserLastName}</td>
<td>Last name of the user</td>
<td>Smith</td>
</tr>
<tr>
<td>{InitiatingUserUserName}</td>
<td>The user's login username;</td>
<td>Ab1234cd</td>
</tr>
<tr>
<td>{InitiatingUserOrgDefinedId}</td>
<td>ID # of the user used internally by the system</td>
<td>01234567</td>
</tr>
<tr>
<td>{LoginPath}</td>
<td>The URL of the campus D2L</td>
<td><a href="https://lsc.learn.minnstate.edu">https://lsc.learn.minnstate.edu</a></td>
</tr>
<tr>
<td>{LastCourseAccessDate}</td>
<td>The date the initiating user last accessed the course or Never if they have not accessed the course.</td>
<td>Thursday, May 19, 2022 9:39 AM CDT or Never</td>
</tr>
<tr>
<td>{LastLoginDate}</td>
<td>The date the initiating user last</td>
<td>Monday, May 16, 2022 4:14</td>
</tr>
</tbody>
</table>

*D2L Brightspace courses close 21 days after the official end date.

Note: The Replace String information was taken from the Minnesota State D2L Support KA #1400.