



Intelligent Agents

Intelligent agents (IAs) automatically scan the Learning Environment for user-defined criteria. If the criteria are fulfilled, the intelligent agent sends an email to pre-defined addresses to alert them. This can be accomplished by using the email address in question or by utilizing [replace strings](#). Intelligent agents work well with release conditions, but also use some unique criteria. See the [Release Conditions](#) Guide for further information on release conditions. For information on copying IAs from course to course please see [Copy Course Components](#).

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Tutorial Video(s)

- [Intelligent Agents - Create an Intelligent Agent](#)
- [Intelligent Agents - Perform a Practice Run](#)
- [Intelligent Agents - Manually Run an Intelligent Agent](#)
- [Intelligent Agents - View and Edit the Schedule of an Intelligent Agent](#)
- [Intelligent Agents - Delete and Restore Intelligent Agents](#)
- [Encourage Learners to Engage Using Intelligent Agents](#)

Why use Intelligent Agents?

Use the Intelligent Agents tool in your course to:

- Send emails to stakeholders if users have not logged into the system for a prescribed period of time.
- Trigger an email to stakeholders if users have not accessed a course for a prescribed period of time.
- Alert stakeholders if a user has met the criteria established by a release condition.
- Email stakeholders if a combination of the criteria above are met.

Criteria Unique to Intelligent Agents

Intelligent Agents incorporate the same release conditions criteria found throughout the Learning Environment. They also have two unique sets of conditions not found in release conditions.

- Login Activity: The agent will activate if users haven't logged into the system for a prescribed period of time.
- Course Activity: The agent will activate if users haven't accessed a course for a prescribed period of time.

These criteria can be combined with each other and/or with release conditions. You can make the agent as general or specific as you like (i.e., agent will activate if user hasn't accessed the course for five days and/or hasn't accessed the Learning Environment for two days and/or scored less than 50% on a quiz and/or hasn't participated in a discussion).

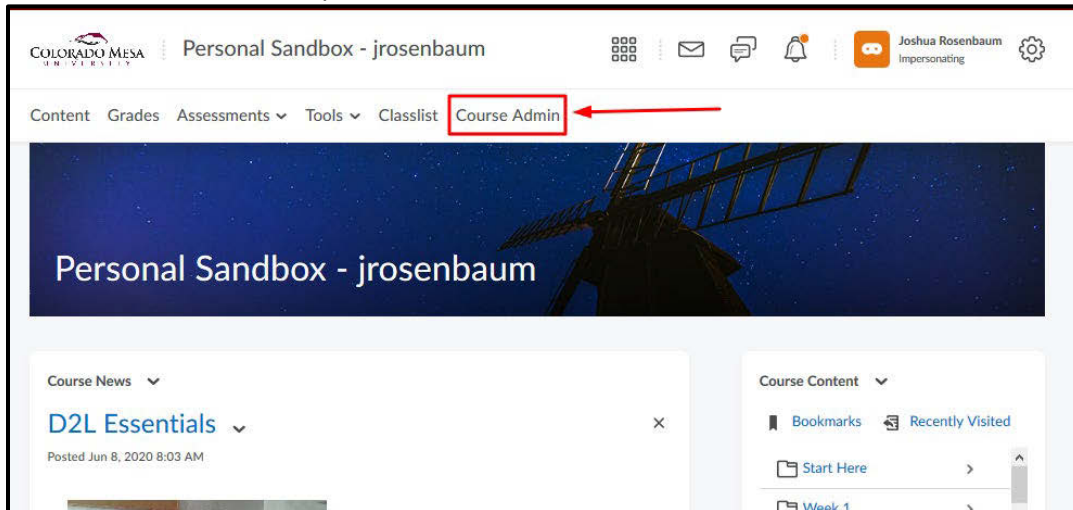
What tools interact with Intelligent Agents?

Intelligent Agents work with release conditions, which means that they can be connected to any tools that use release conditions. The links to the tools that work with release conditions can be found below:

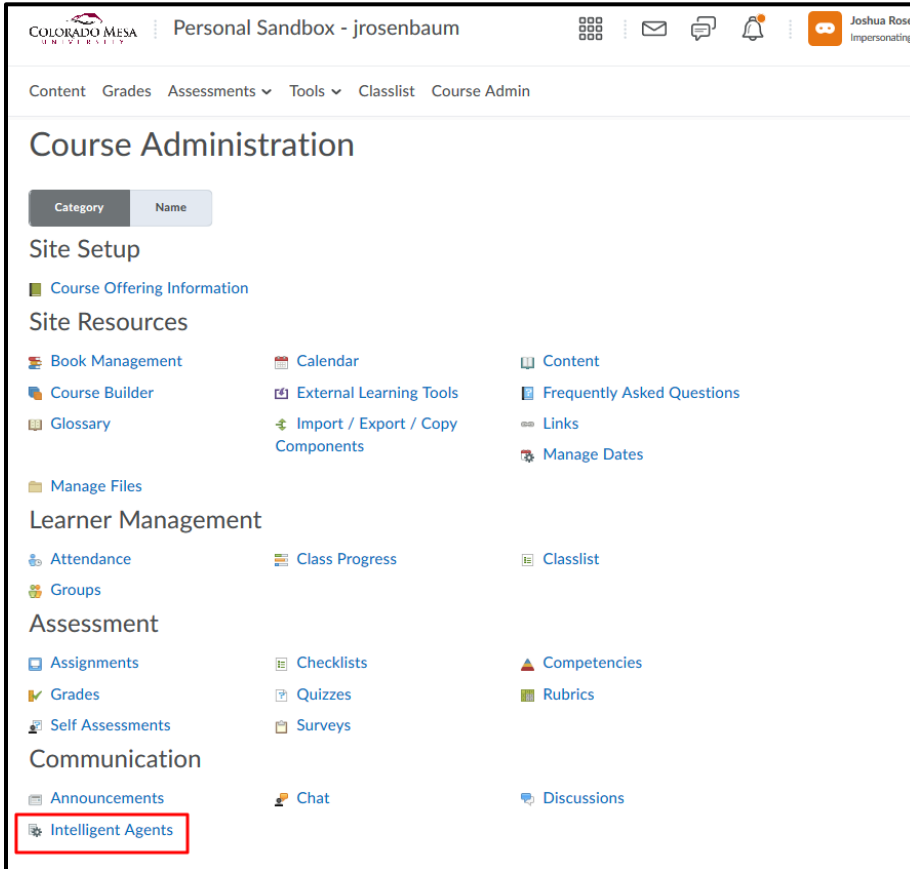
- [Assignments](#)
- [Checklists](#)
- [Classlist](#)
- [Content](#)
- [Discussions](#)
- [Quizzes](#)
- [Surveys](#)

Create an Agent

1. On a course navbar, click **Course Admin**.



2. Click **Intelligent Agents**.



Personal Sandbox - jrosenbaum

Content Grades Assessments Tools Classlist Course Admin

Course Administration

Category Name

Site Setup

- Course Offering Information

Site Resources

- Book Management
- Course Builder
- Glossary
- Manage Files
- Calendar
- External Learning Tools
- Import / Export / Copy Components
- Content
- Frequently Asked Questions
- Links
- Manage Dates

Learner Management

- Attendance
- Groups
- Class Progress
- Classlist

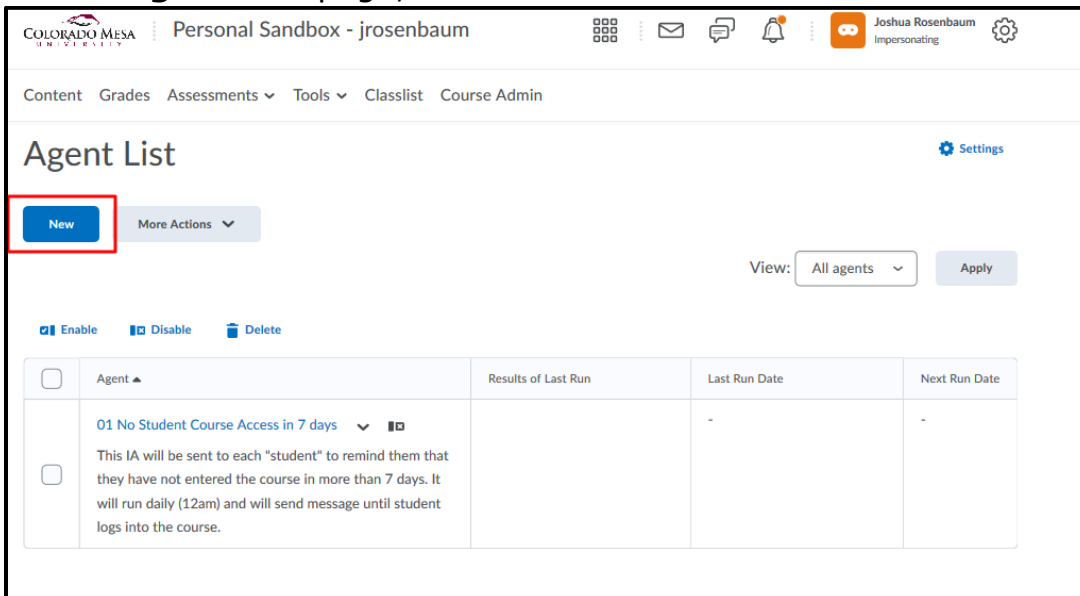
Assessment

- Assignments
- Grades
- Self Assessments
- Checklists
- Quizzes
- Surveys
- Competencies
- Rubrics

Communication

- Announcements
- Intelligent Agents
- Chat
- Discussions

3. On the **Agent List** page, click **New**.



Personal Sandbox - jrosenbaum

Content Grades Assessments Tools Classlist Course Admin

Agent List

Settings

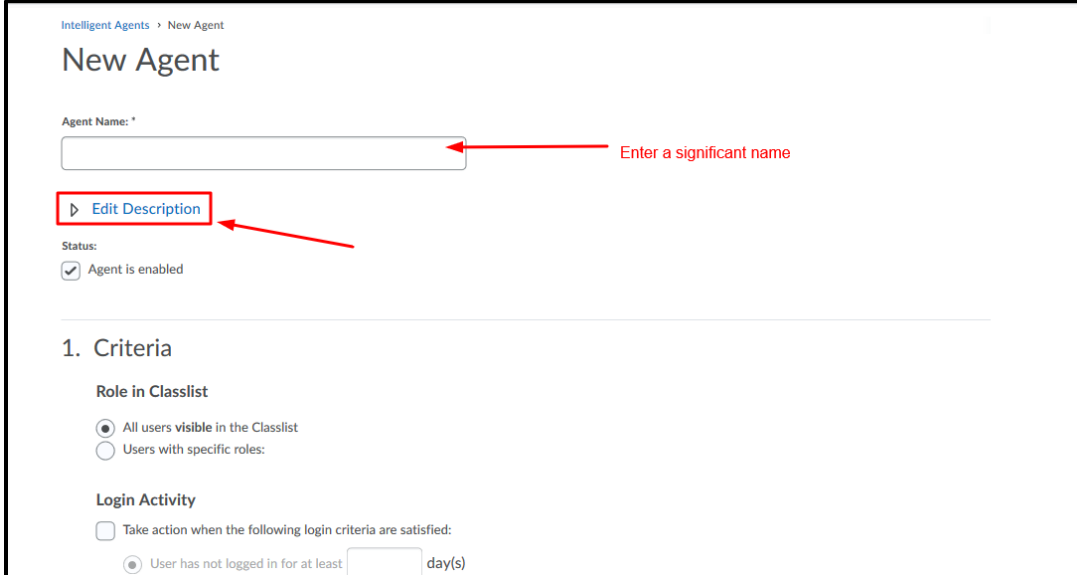
New More Actions

View: All agents Apply

Enable Disable Delete

<input type="checkbox"/>	Agent ▲	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/>	<p>01 No Student Course Access in 7 days</p> <p>This IA will be sent to each "student" to remind them that they have not entered the course in more than 7 days. It will run daily (12am) and will send message until student logs into the course.</p>		-	-

4. On the **New Agent** page, enter a name. Expand the **Edit Description** label and enter a description.



Intelligent Agents > New Agent

New Agent

Agent Name: *

Enter a significant name

[▶ Edit Description](#)

Status:

Agent is enabled

1. Criteria

Role in Classlist

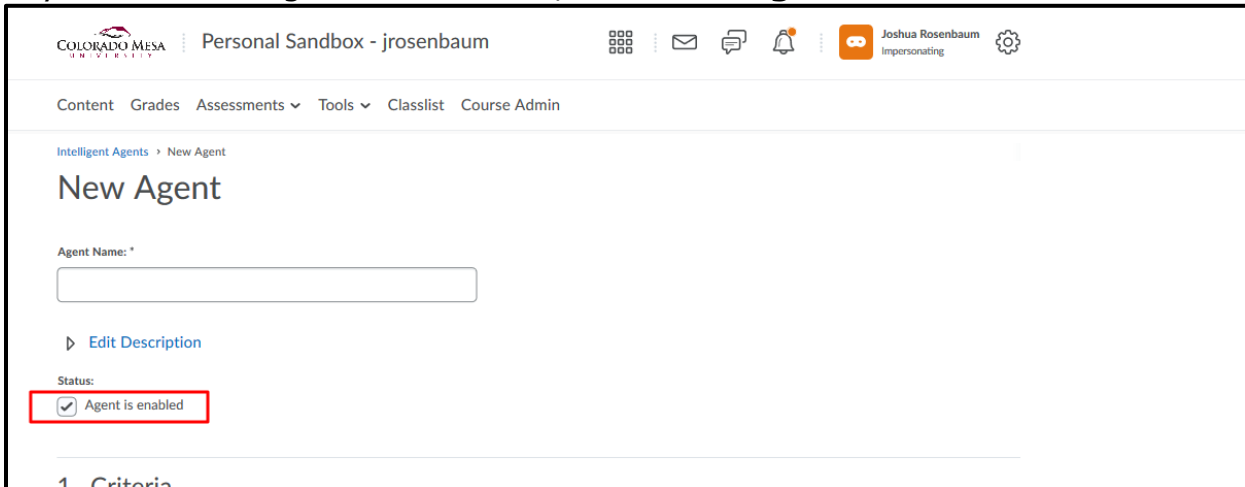
All users visible in the Classlist
 Users with specific roles:

Login Activity

Take action when the following login criteria are satisfied:

User has not logged in for at least day(s)

5. If you want the agent to be active, select the **Agent is enabled** check box.



COLORADO MESA UNIVERSITY Personal Sandbox - jrosenbaum

Content Grades Assessments Tools Classlist Course Admin

Intelligent Agents > New Agent

New Agent

Agent Name: *

[▶ Edit Description](#)

Status:

Agent is enabled

1. Criteria

6. Under **Criteria > Role in Classlist**, do one of the following:
- If you want the intelligent agent to be applicable to all roles in the Classlist, select the **All users visible in the Classlist** check box.

1. Criteria

Role in Classlist

All users visible in the Classlist

Users with specific roles:

Login Activity

Take action when the following login criteria are satisfied:

User has not logged in for at least day(s)

User has logged in during the past day(s)

- If you want the intelligent agent to be applicable to select roles, select the **Users with specific roles** check box and select the respective roles.

1. Criteria

Role in Classlist

All users visible in the Classlist

Users with specific roles:

Instructor

Assessment Shell Manager

Course - Adm

CMU Faculty

CMU Advisor

Co-Instructor

Course Evaluator

Department Head

Demo Student

DELETED

External Reviewer

...PartEnroll_DM

7. If you want your agent to target users' login habits, under **Criteria > Login Activity**, enter your criteria. **Note:** Login activity refers to logins at the platform level.

Login Activity

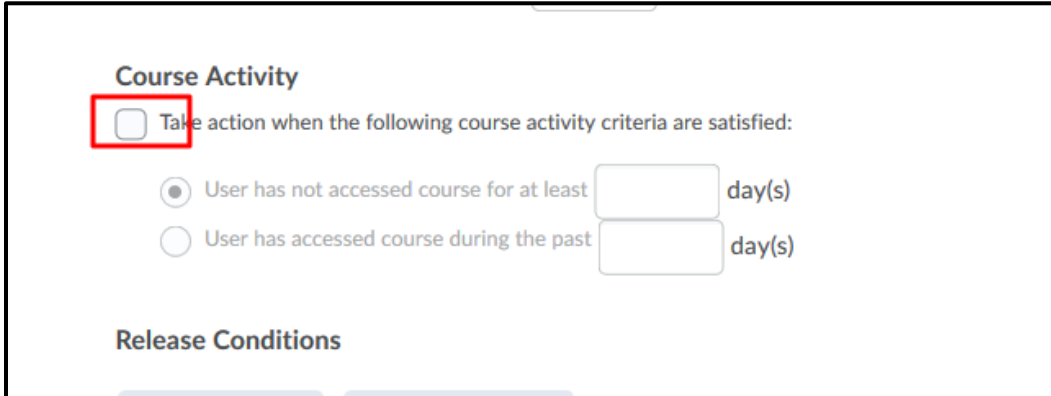
Take action when the following login criteria are satisfied:

User has not logged in for at least day(s)

User has logged in during the past day(s)

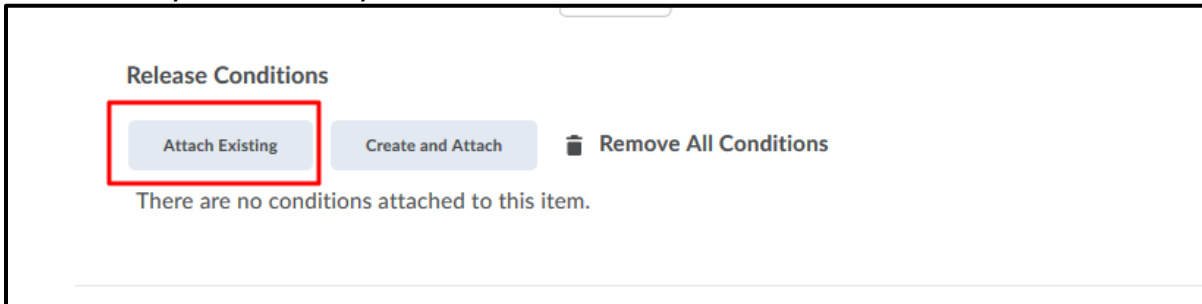
Course Activity

8. If you want your agent to target users' course habits, under **Criteria > Course Activity**, enter your criteria.



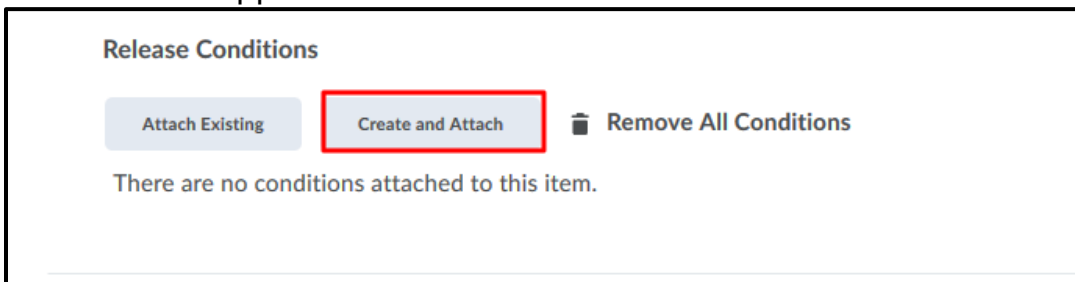
The screenshot shows the 'Course Activity' section of a configuration interface. At the top, there is a section header 'Course Activity'. Below it is a checkbox labeled 'Take action when the following course activity criteria are satisfied:', which is highlighted with a red box. Underneath this checkbox are two radio button options: 'User has not accessed course for at least [input field] day(s)' and 'User has accessed course during the past [input field] day(s)'. At the bottom of the section is the text 'Release Conditions'.

9. If you want your agent to run when a specific existing condition has been met, under **Criteria > Release Conditions**, click **Attach Existing**. Select the check box for any condition you want to attach and click **Attach**.



The screenshot shows the 'Release Conditions' section of a configuration interface. It features three buttons: 'Attach Existing', 'Create and Attach', and 'Remove All Conditions'. The 'Attach Existing' button is highlighted with a red box. Below the buttons, the text reads 'There are no conditions attached to this item.'

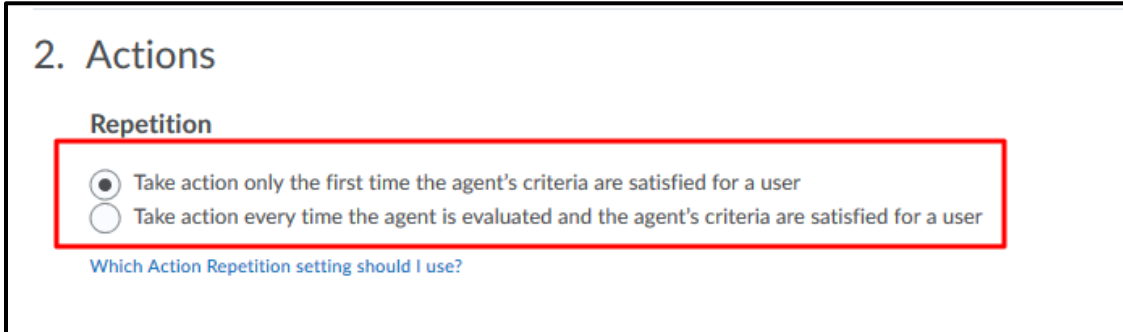
10. If you want your agent to run when a specific new condition has been met, under **Criteria > Release Conditions**, click **Create and Attach**. Select a **Condition Type** from the drop-down list. Complete any additional **Condition Details** that appear and click **Create**.



The screenshot shows the 'Release Conditions' section of a configuration interface. It features three buttons: 'Attach Existing', 'Create and Attach', and 'Remove All Conditions'. The 'Create and Attach' button is highlighted with a red box. Below the buttons, the text reads 'There are no conditions attached to this item.'

Follow this link to learn more about [Release Conditions](#)

11. Under **Actions > Repetition**, select how often you want the agent to take action.



2. Actions

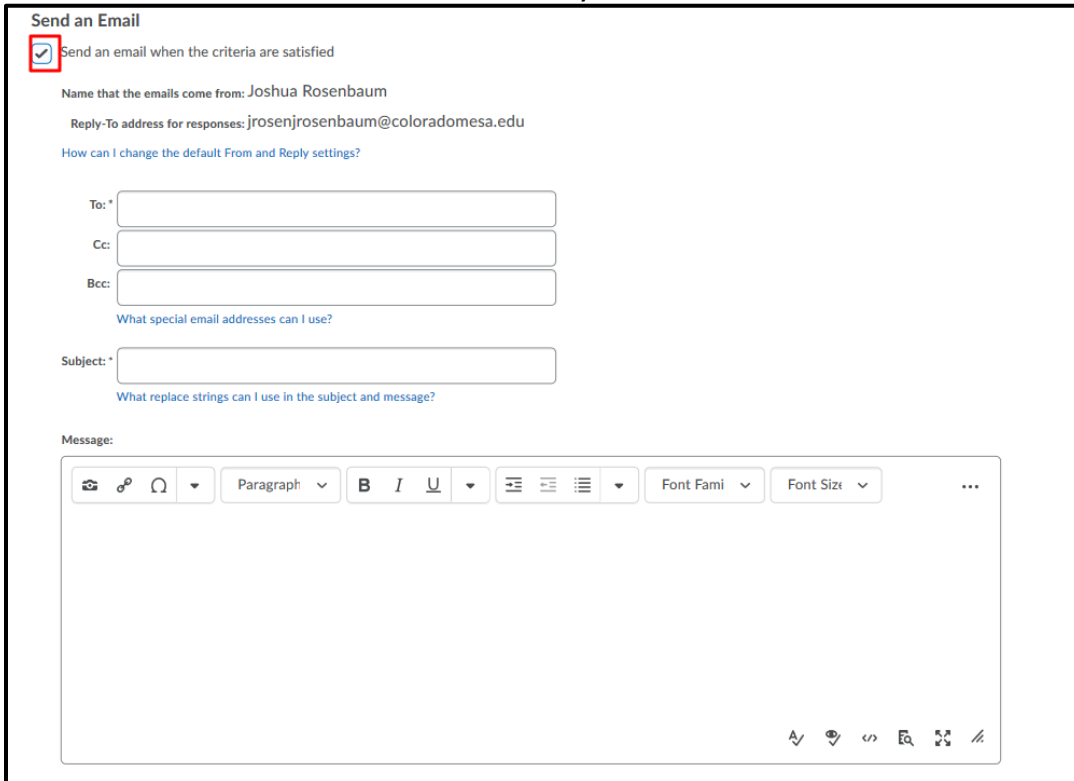
Repetition

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

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

12. If you want the agent to send an email when the set criteria are satisfied, under **Actions > Send an Email**, select the **Send an email when the criteria are satisfied** check box and enter your email details and relevant attachments.



Send an Email

Send an email when the criteria are satisfied

Name that the emails come from: Joshua Rosenbaum

Reply-To address for responses: jrosenjrosenbaum@coloradomesa.edu

[How can I change the default From and Reply settings?](#)

To: *

Cc:

Bcc:

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

Subject: *

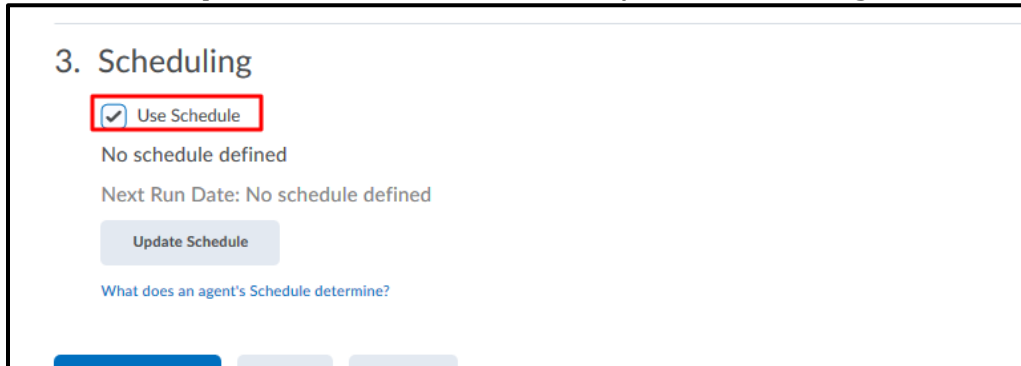
[What replace strings can I use in the subject and message?](#)

Message:

Rich text editor toolbar: Undo, Redo, Link, Unlink, Paragraph, Bold, Italic, Underline, List, Font Fami, Font Size, ...

Please see [Replace Strings](#) to understand their use in Intelligent Agent Emails

13. If you want to schedule how frequently Brightspace Learning Environment evaluates the agent criteria, under **Scheduling**, select the **Use Schedule** check box. Click **Update Schedule** and set your scheduling details.



Note: Scheduled intelligent agents do not stop running if the course is inactive, past its end date, or deleted. You should set your IA's schedule to occur during the time of your course being active.

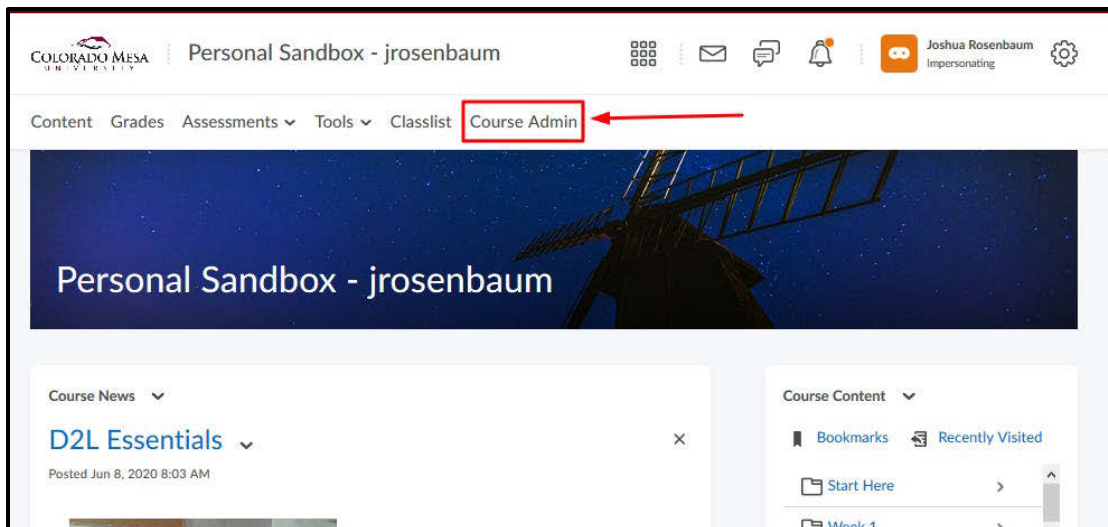
You can still set up a practice run or a manual run of an intelligent agent at any time in a course with a passed end date.

14. Click **Save and Close**.

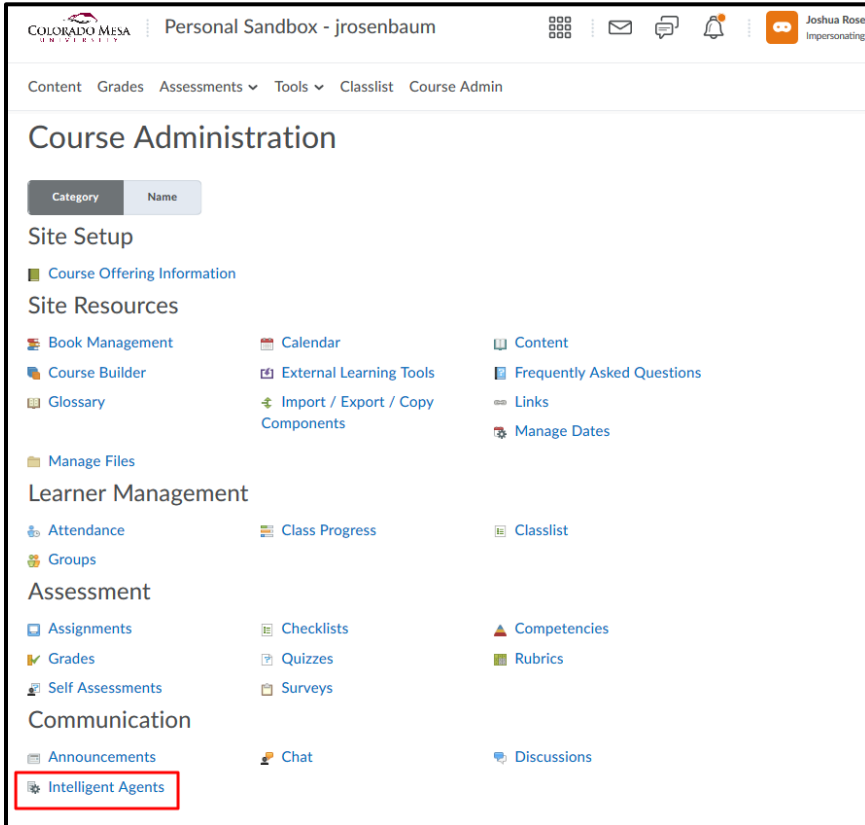
Setting Return Email Address

The default return email address is noreply@coloradomesa.edu. Your students will not be able to reply to an email that is sent via intelligent agent unless you change the return address.

1. On the NavBar click **Course Admin**.



2. Choose **Intelligent Agents**.



Personal Sandbox - jrosenbaum

Content Grades Assessments Tools Classlist Course Admin

Course Administration

Category Name

Site Setup

- Course Offering Information

Site Resources

- Book Management
- Course Builder
- Glossary
- Calendar
- External Learning Tools
- Import / Export / Copy Components
- Content
- Frequently Asked Questions
- Links
- Manage Dates

Manage Files

Learner Management

- Attendance
- Groups
- Class Progress
- Classlist

Assessment

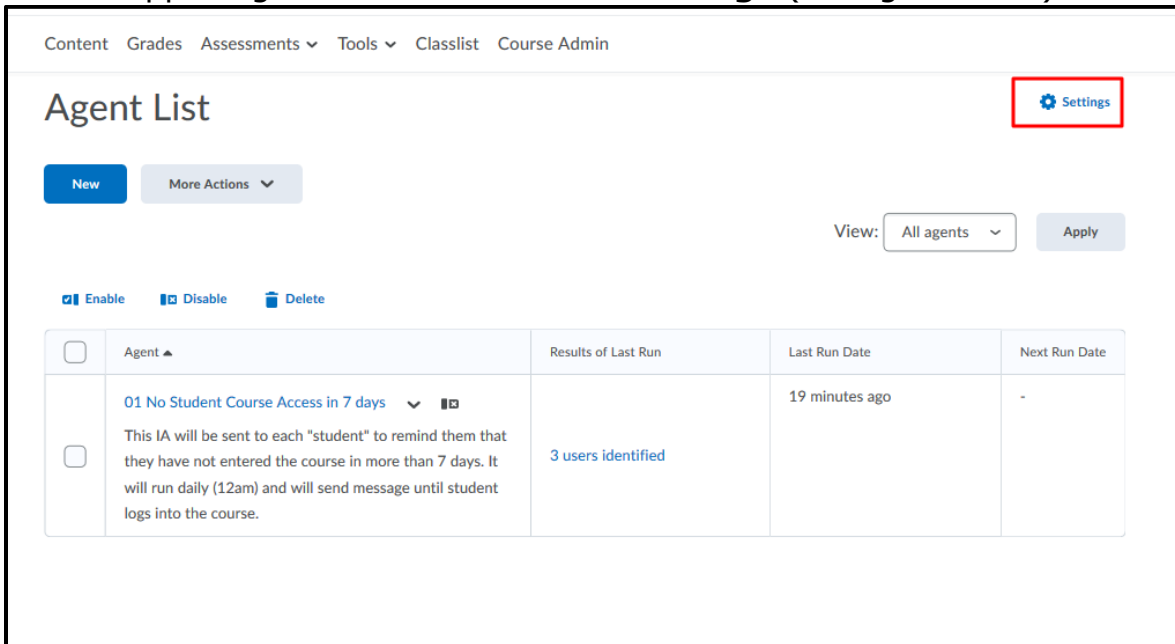
- Assignments
- Grades
- Self Assessments
- Checklists
- Quizzes
- Surveys
- Competencies
- Rubrics

Communication

- Announcements
- Chat
- Discussions

Intelligent Agents

3. On the upper right-hand corner select **Settings** (the "gear" icon).



Content Grades Assessments Tools Classlist Course Admin

Agent List

Settings

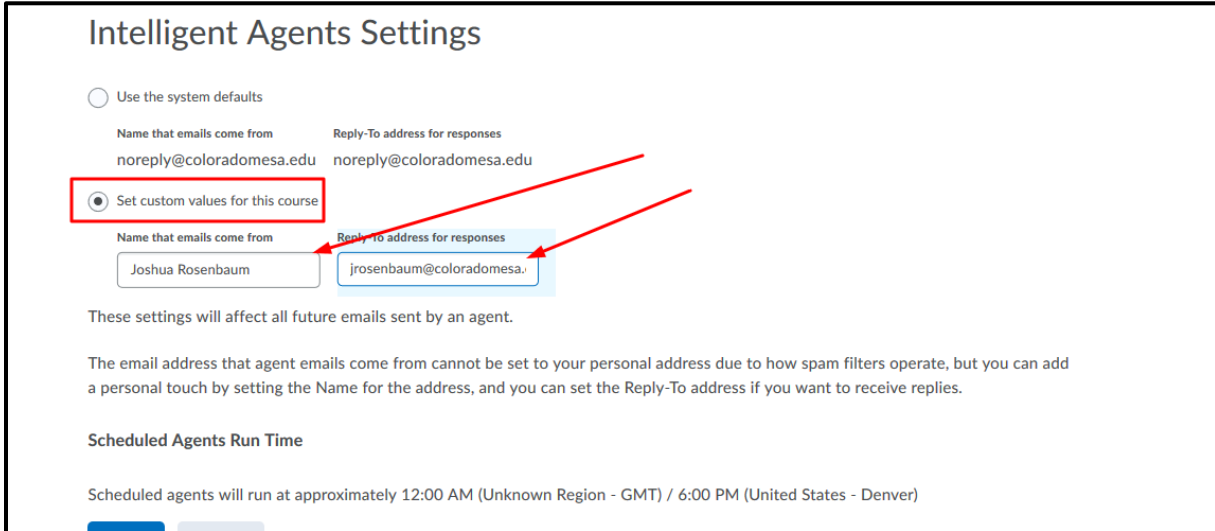
New More Actions

View: All agents Apply

Enable Disable Delete

<input type="checkbox"/>	Agent ▲	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/>	<p>01 No Student Course Access in 7 days</p> <p>This IA will be sent to each "student" to remind them that they have not entered the course in more than 7 days. It will run daily (12am) and will send message until student logs into the course.</p>	3 users identified	19 minutes ago	-

4. Choose to **Set custom values for this course**. Add your name as you would like it to appear in emails along with your CMU email address.



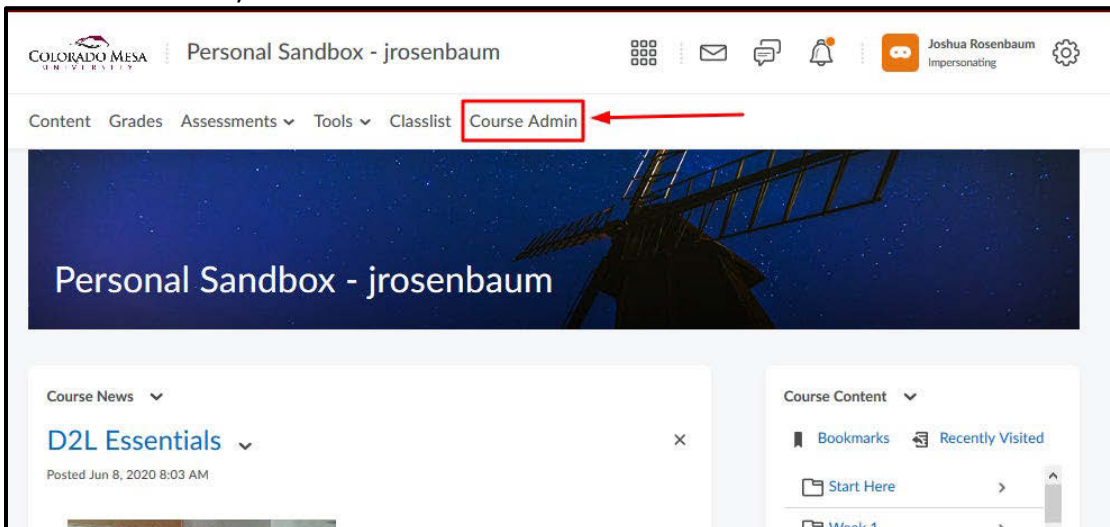
The screenshot shows the 'Intelligent Agents Settings' page. At the top, there are two radio buttons: 'Use the system defaults' (unselected) and 'Set custom values for this course' (selected and highlighted with a red box). Below the first option, the 'Name that emails come from' and 'Reply-To address for responses' are both set to 'noreply@coloradomesa.edu'. Below the second option, the 'Name that emails come from' is 'Joshua Rosenbaum' and the 'Reply-To address for responses' is 'jrosenbaum@coloradomesa.edu'. Red arrows point from the text in step 4 to these two input fields. Below the form, there is a note: 'These settings will affect all future emails sent by an agent.' and another note: '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.' At the bottom, there is a section for 'Scheduled Agents Run Time' with the text: 'Scheduled agents will run at approximately 12:00 AM (Unknown Region - GMT) / 6:00 PM (United States - Denver)'.

5. Click **Save**.

Perform a Practice Run on an Agent

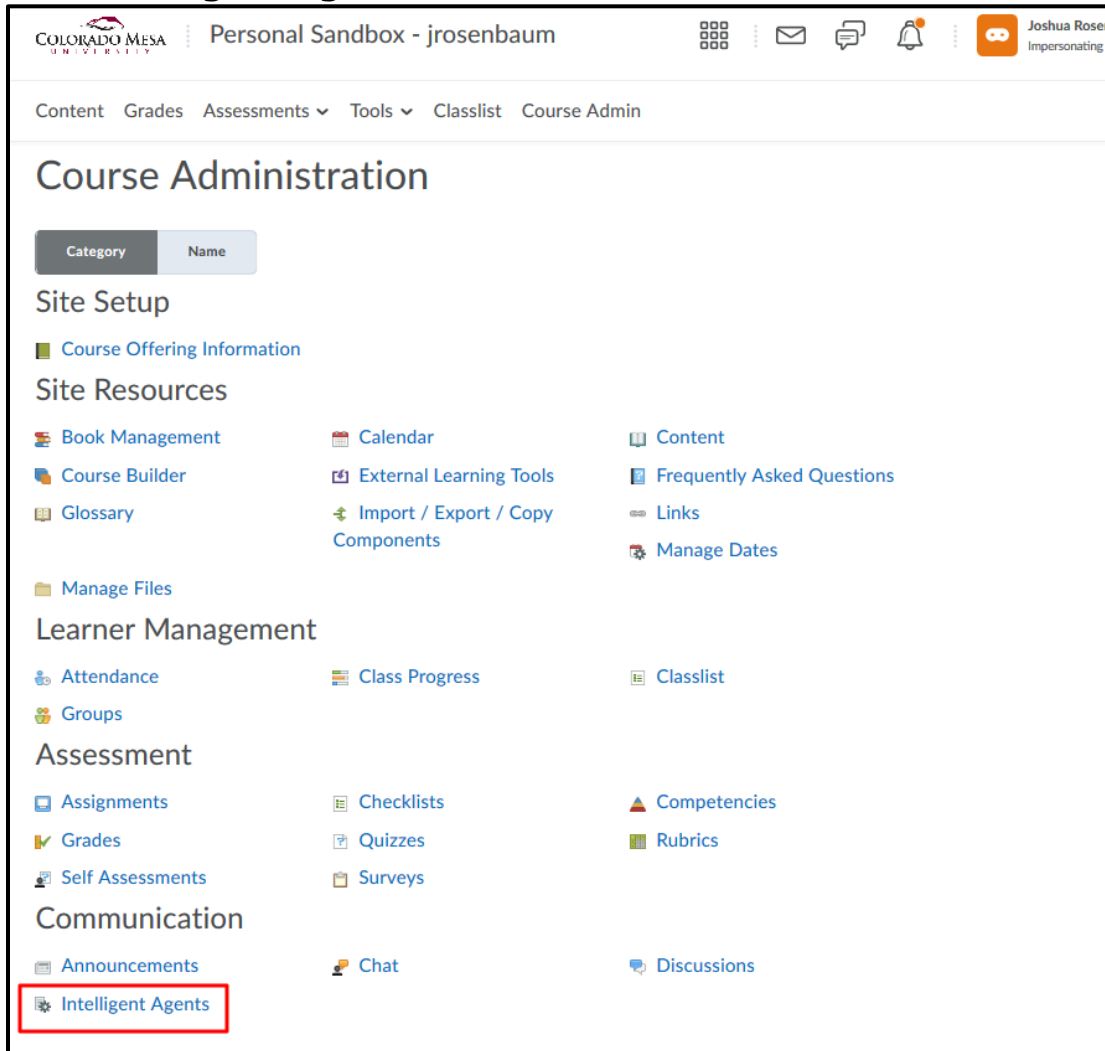
You can have an agent perform a practice run to see who will be identified by the agent without sending those users an email. Agents do not need to be enabled to perform a practice run.

1. On the navbar, click **Course Admin**.



The screenshot shows the top navigation bar of a personal sandbox. The title is 'Personal Sandbox - jrosenbaum'. On the right, there are icons for a grid, mail, chat, and a user profile for 'Joshua Rosenbaum Impersonating'. Below the title bar, there is a horizontal menu with items: 'Content', 'Grades', 'Assessments', 'Tools', 'Classlist', and 'Course Admin'. A red arrow points to the 'Course Admin' item. Below the menu is a large banner image of a windmill at night with the text 'Personal Sandbox - jrosenbaum'. At the bottom, there are two panels: 'Course News' with a 'D2L Essentials' item and 'Course Content' with 'Bookmarks' and 'Recently Visited' sections.

2. Click **Intelligent Agents**.



Personal Sandbox - jrosenbaum

Content Grades Assessments Tools Classlist Course Admin

Course Administration

Category Name

Site Setup

- Course Offering Information

Site Resources

- Book Management
- Course Builder
- Glossary
- Calendar
- External Learning Tools
- Import / Export / Copy Components
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- Frequently Asked Questions
- Links
- Manage Dates

Manage Files

Learner Management

- Attendance
- Groups
- Class Progress
- Classlist

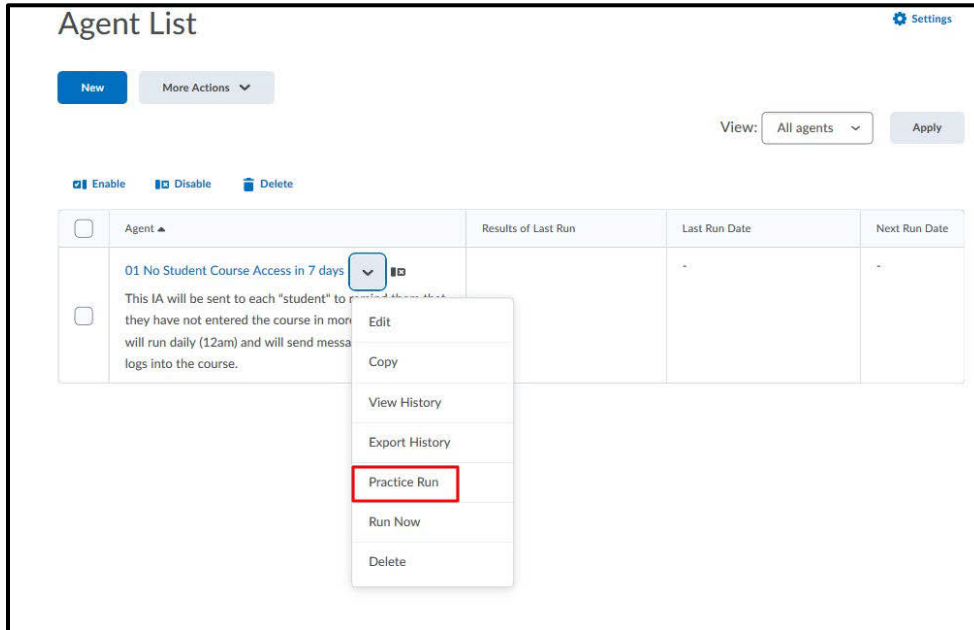
Assessment

- Assignments
- Grades
- Self Assessments
- Checklists
- Quizzes
- Surveys
- Competencies
- Rubrics

Communication

- Announcements
- Intelligent Agents
- Chat
- Discussions

- From the context menu of the agent for which you want to perform a practice run, click **Practice Run**.



- To view the users identified, on the Agent List, in the Results of Last Run column, click the link.



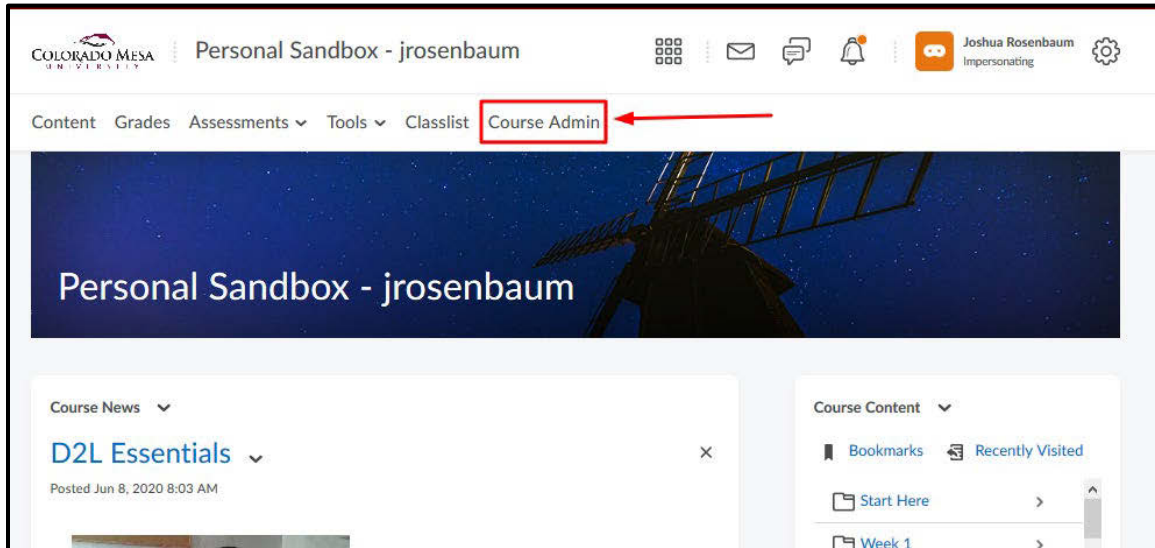
Run an Agent Manually

Typically, 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.

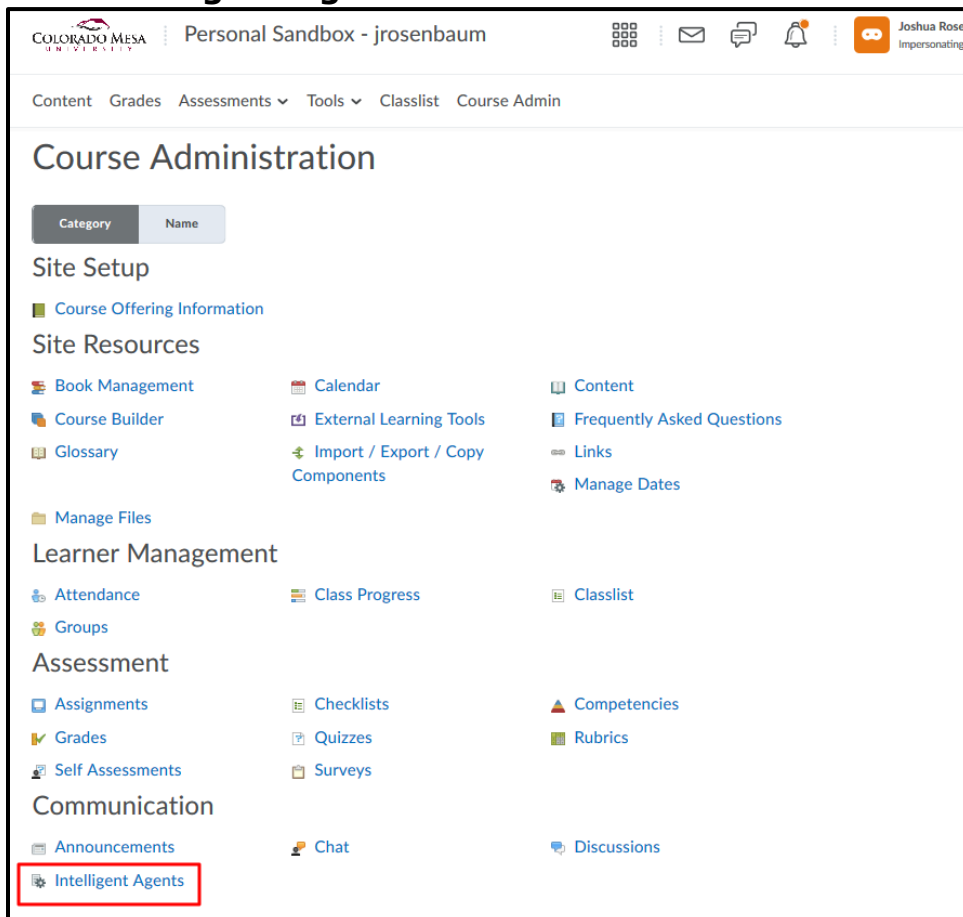
When you run an agent manually, it sends a confirmation email to the user that requested or set up the agent. This email contains the following information: org unit code and name, which agent ran, time and date the request was submitted, time and date the request was finished, and whether the agent took action.

You can set up a manual run of an intelligent agent at any time in a course with a passed end date. Agents do not need to be enabled in order to set up a manual run.

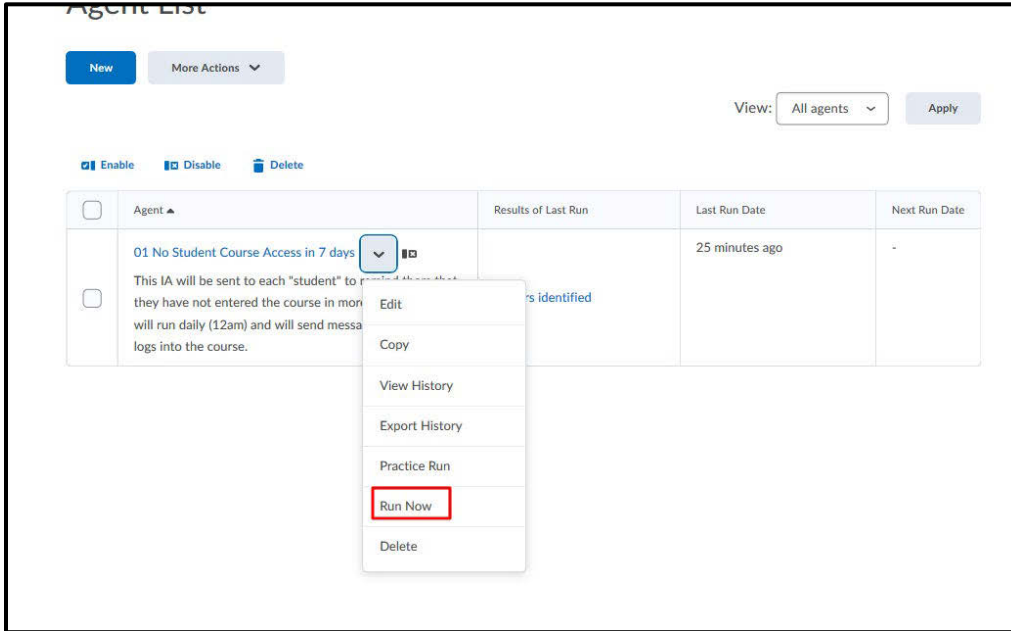
1. On the navbar, click **Course Admin**.



2. Click **Intelligent Agents**.

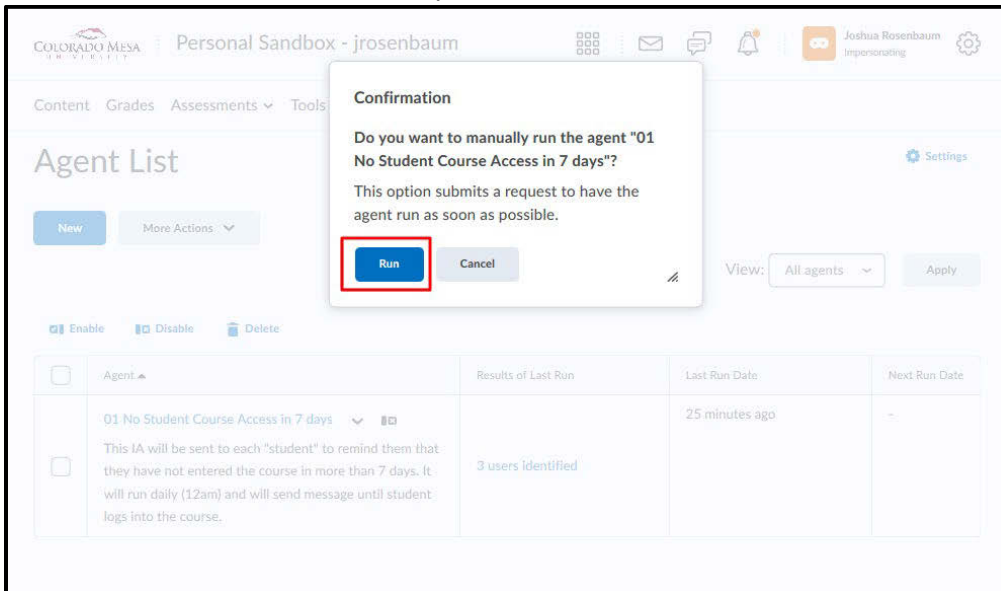


3. From the context menu of the agent you want to run manually, click **Run Now**.



The screenshot shows the 'Agent List' interface. At the top, there are buttons for 'New' and 'More Actions', and a 'View: All agents' dropdown. Below these are 'Enable', 'Disable', and 'Delete' icons. The main area is a table with columns: Agent, Results of Last Run, Last Run Date, and Next Run Date. The first row contains an agent named '01 No Student Course Access in 7 days'. A context menu is open over this agent, listing options: Edit, Copy, View History, Export History, Practice Run, Run Now (highlighted with a red box), and Delete.

4. To confirm the manual run, click **Run**.

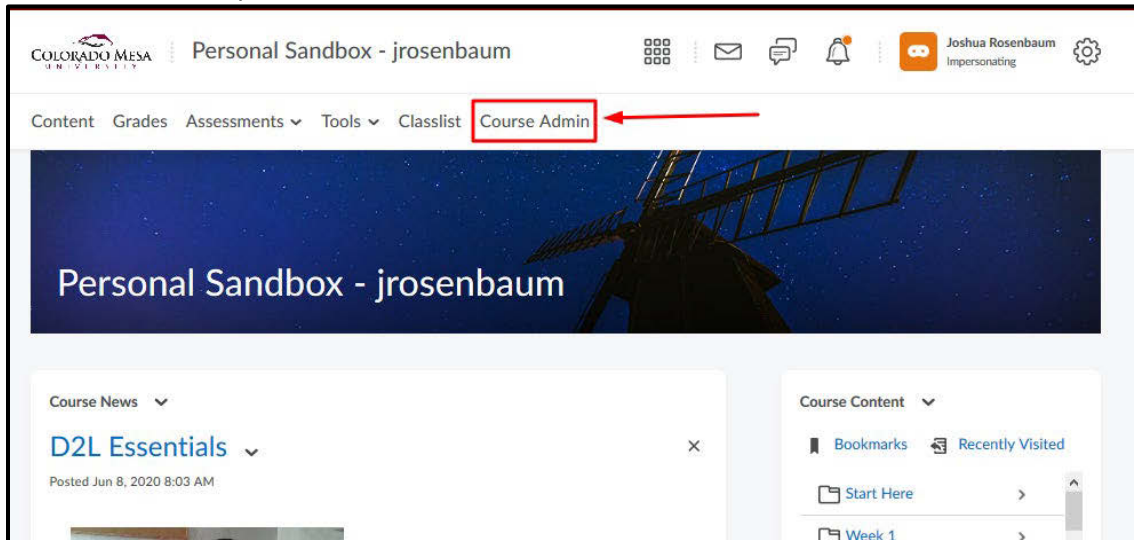


The screenshot shows the 'Agent List' interface with a confirmation dialog box open. The dialog box has the title 'Confirmation' and asks: 'Do you want to manually run the agent "01 No Student Course Access in 7 days"?'. Below the question, it states: 'This option submits a request to have the agent run as soon as possible.' At the bottom of the dialog, there are two buttons: 'Run' (highlighted with a red box) and 'Cancel'. The background shows the same table as in the previous screenshot, but the 'Run Now' button is no longer visible.

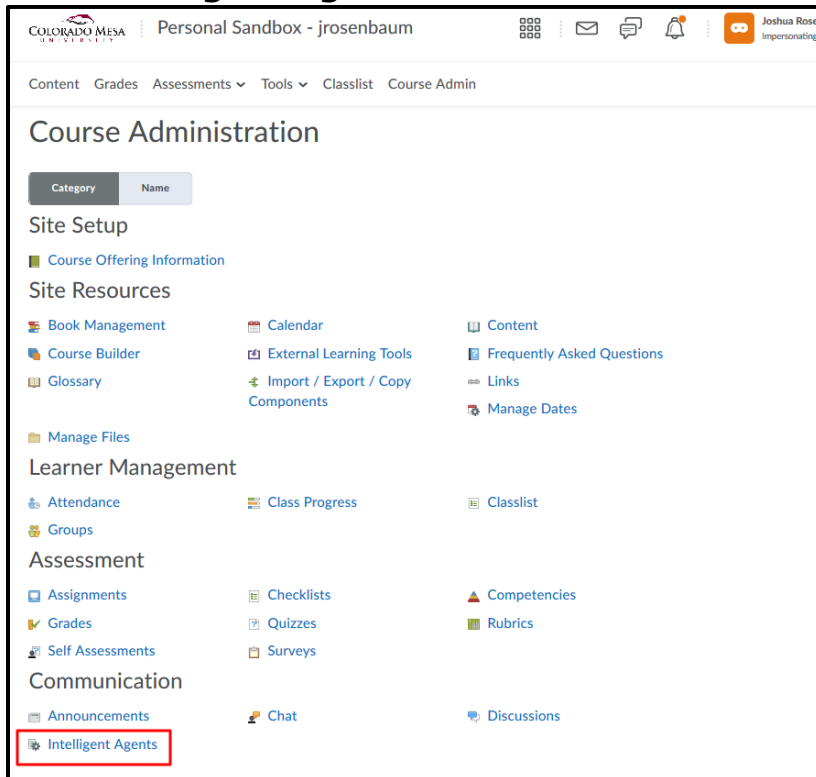
Delete an Agent

You can delete an agent individually or in bulk. Deleted agents do not run if they have a recurring schedule.

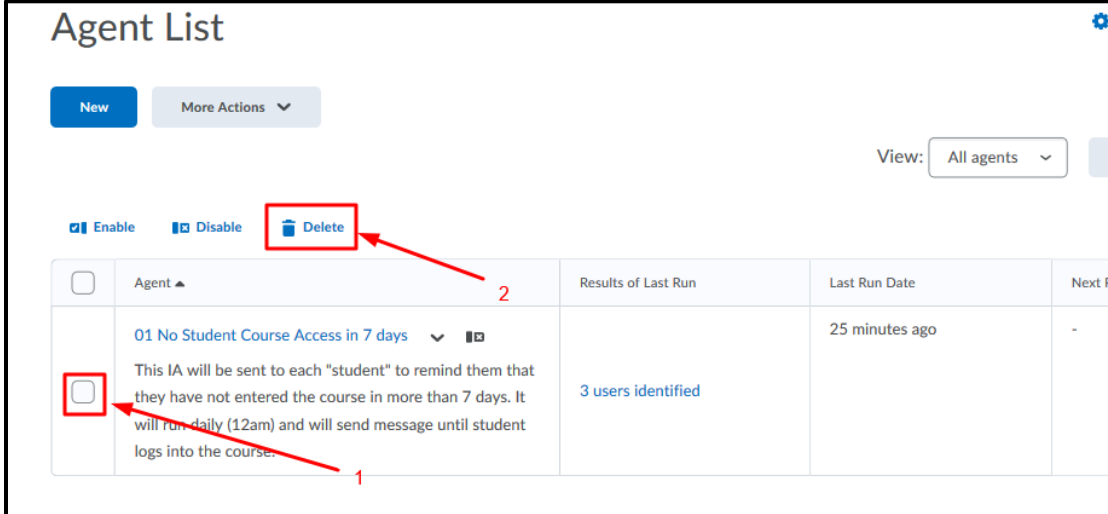
1. On the navbar, click **Course Admin**.



2. Click **Intelligent Agents**.



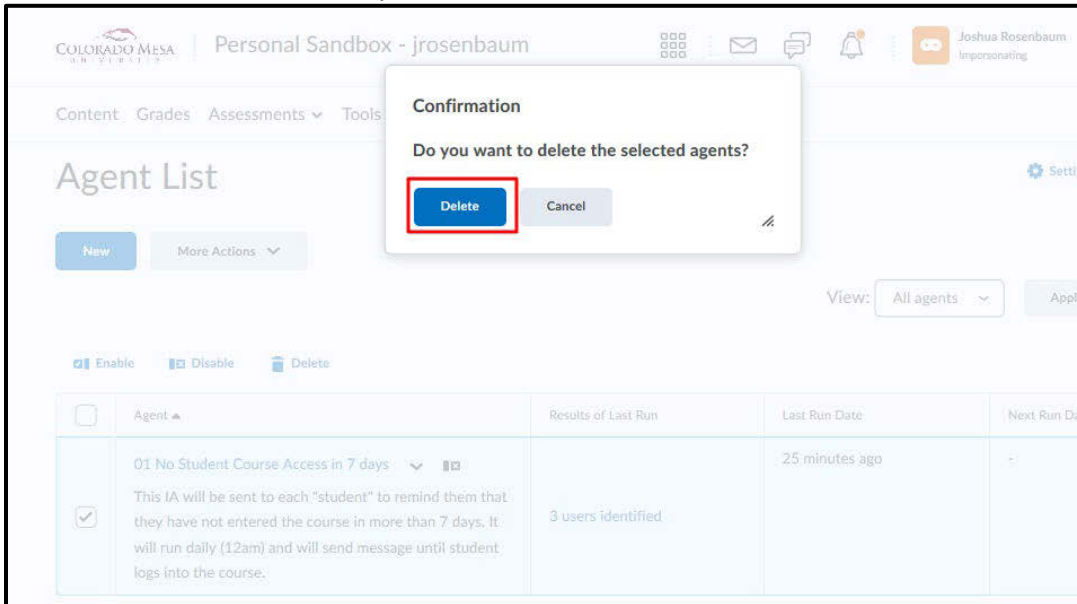
3. In the **Agent List**, select the check boxes of the agents you want to delete and click **Delete**.



The screenshot shows the 'Agent List' interface. At the top, there are buttons for 'New' and 'More Actions'. On the right, there is a 'View: All agents' dropdown. Below these are 'Enable', 'Disable', and 'Delete' buttons. A table lists agents with columns for 'Agent', 'Results of Last Run', 'Last Run Date', and 'Next Run Date'. The first agent is '01 No Student Course Access in 7 days'. Its description is: 'This IA will be sent to each "student" to remind them that they have not entered the course in more than 7 days. It will run daily (12am) and will send message until student logs into the course.' The results show '3 users identified'. The last run date is '25 minutes ago'. A red box highlights the 'Delete' button, and a red arrow points to it with the number '2'. Another red box highlights the checkbox for the first agent, with a red arrow pointing to it and the number '1'.

Agent	Results of Last Run	Last Run Date	Next Run Date
01 No Student Course Access in 7 days This IA will be sent to each "student" to remind them that they have not entered the course in more than 7 days. It will run daily (12am) and will send message until student logs into the course.	3 users identified	25 minutes ago	-

4. To confirm the deletion, click **Delete**.



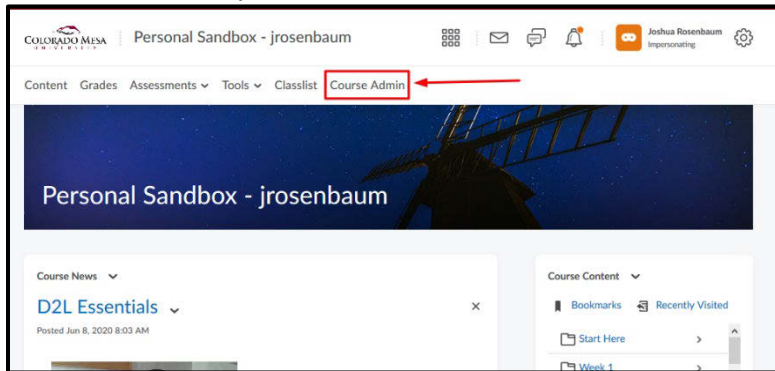
The screenshot shows the 'Agent List' interface with a confirmation dialog box overlaid. The dialog box asks 'Do you want to delete the selected agents?' and has 'Delete' and 'Cancel' buttons. The 'Delete' button is highlighted with a red box. The background shows the same agent list as the previous screenshot, but with the checkbox for the first agent checked.

Agent	Results of Last Run	Last Run Date	Next Run Date
01 No Student Course Access in 7 days This IA will be sent to each "student" to remind them that they have not entered the course in more than 7 days. It will run daily (12am) and will send message until student logs into the course.	3 users identified	25 minutes ago	-

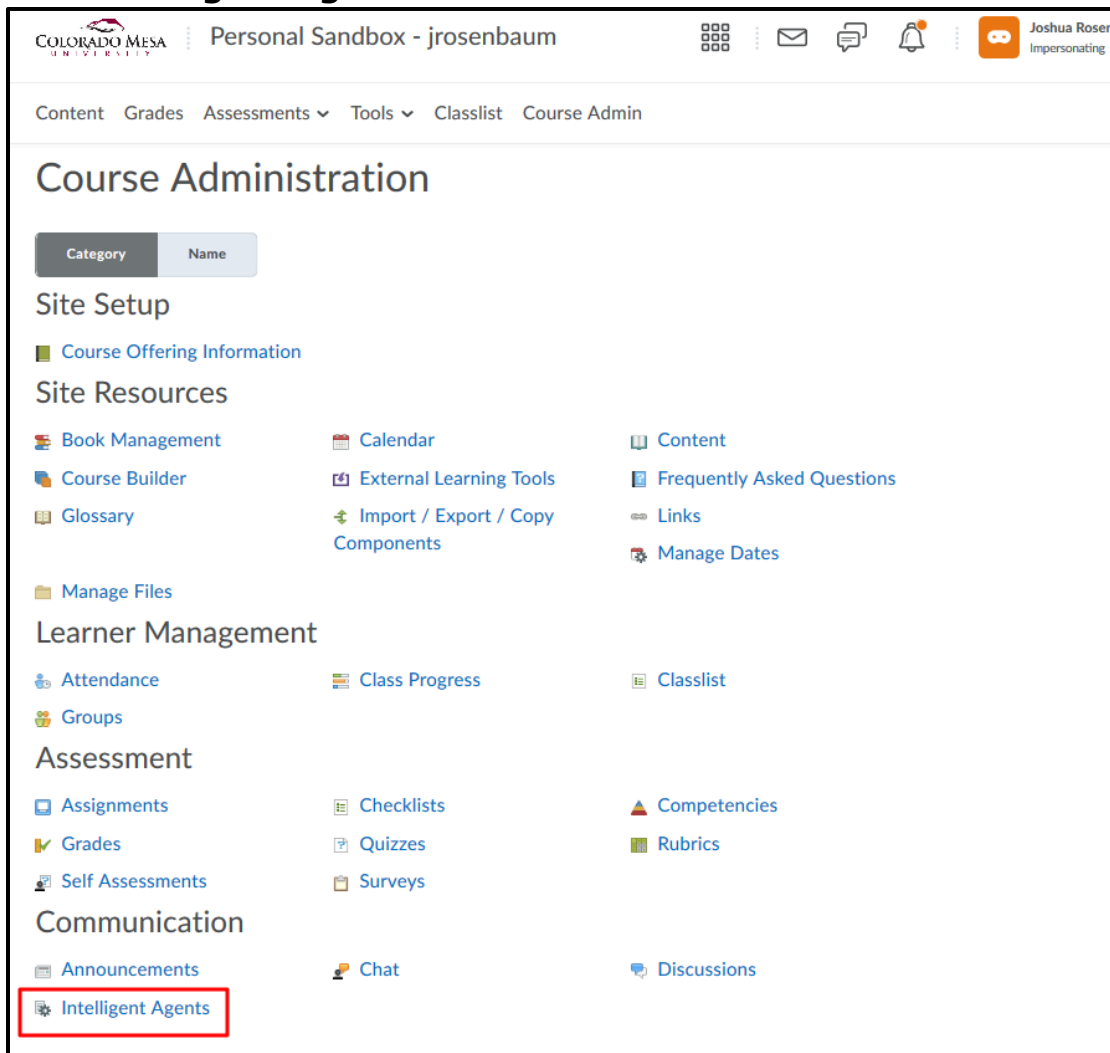
Restore an Agent

You can restore deleted agents. All restored agents maintain existing properties and history.

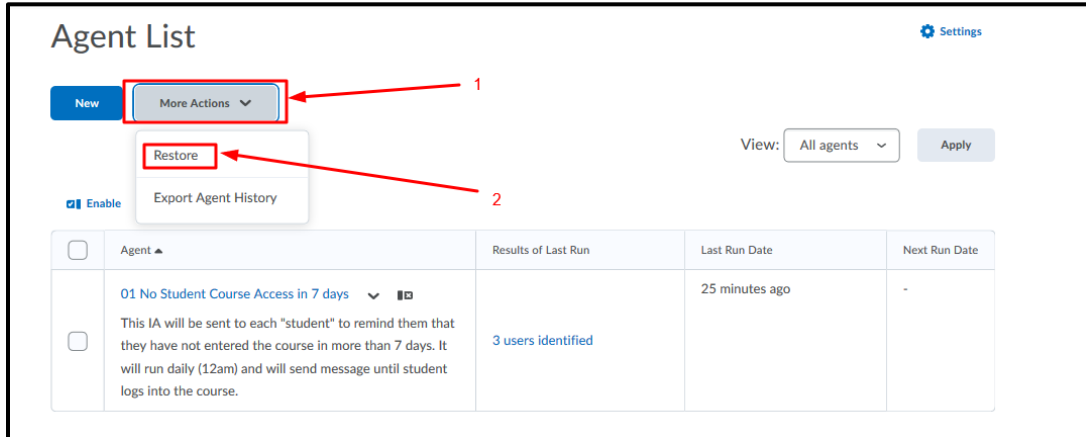
1. On the navbar, click **Course Admin**.



2. Click **Intelligent Agents**.



3. In the **Restore Agents** page, click Restore to restore any of the deleted agents.



Replace Strings

Replace strings call system databases to automatically replace the string with names and terms by using curly brackets { }. For example, you could write the following:

Hi {InitiatingUserFirstName},

Our records indicate that you haven't logged in to your {OrgUnitName} course in more than 5 days.

Remember it is important to keep in regular contact and to set aside time every few days to login and work on your course.

If there are reasons that you haven't been able to login, then please contact your instructor right away. Here is the link to the site. We hope to see you soon.

{LoginPath}

If you would like to respond to this email, please reply to the CC'd email above. Just choosing "Reply" will not work because it comes from a different account.

Hi Bill,

Our records indicate that you haven't logged in to your English 101 course in more than 5 days.

Remember it is important to keep in regular contact and to set aside time every few days to login and work on your course.

If there are reasons that you haven't been able to login, then please contact your instructor right away. Here is the link to the site. We hope to see you soon.

<https://academy.desire2learn.com>

If you would like to respond to this email, please reply to the CC'd email above. Just choosing "Reply" will not work because it comes from a different account.

Replace Strings for Addresses:

{InitiatingUser} - The user whose behavior meets the agent's criteria, for example, a student who has not logged in for 5 days.

{InitiatingUserAuditors} - The auditors for the user whose behavior meets the agent's criteria.

Replace Strings for Body Text:

{OrgName} - The name of the organization.

{OrgUnitCode} - The code for the Org Unit.

{OrgUnitName} - The name of the Org Unit.

{LoginPath} - The address of the site login path.

{OrgUnitStartDate} - The start date specified for the Org Unit.

{OrgUnitEndDate} - The end date specified 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.

{LastCourseAccessDate} - The date the initiating user last accessed the course.

{LastLoginDate} - The date the initiating user last logged in.