

# Use Intelligent Agents for Early Alerts

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**Intelligent Agents** are tools that can be used to track certain student behaviors. You can use these agents to identify students who are not actively participating in the course, who have missed important assignments, or whose scores on quizzes or assignments are low. Once those students are identified, you can follow the [Early Alert for Faculty Job Aid \(Reviewer, Faculty, Staff\)](https://mylonestar.sharepoint.com/:f:/s/Completion/EuY3CpGIDk1GqH7hd45ms2IBXT9MXN1EDK18oWRU7e=dGuFOL) (<https://mylonestar.sharepoint.com/:f:/s/Completion/EuY3CpGIDk1GqH7hd45ms2IBXT9MXN1EDK18oWRU7e=dGuFOL>) job aid to submit an early alert form.

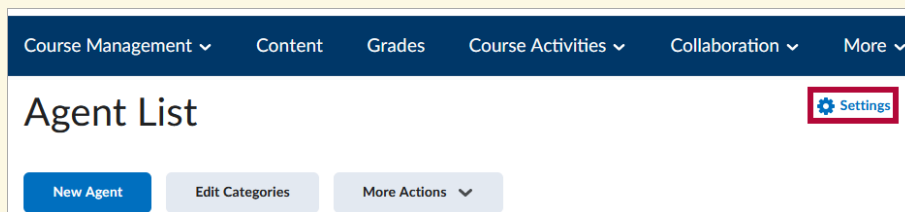
For other uses of Intelligent Agents, see D2L's [Intelligent Agents Templates](https://dyzz9obi78pm5.cloudfront.net/app/image/id/620ebbbc492453ce517b259c/n/intelligent-agents-templates.docx) (<https://dyzz9obi78pm5.cloudfront.net/app/image/id/620ebbbc492453ce517b259c/n/intelligent-agents-templates.docx>).

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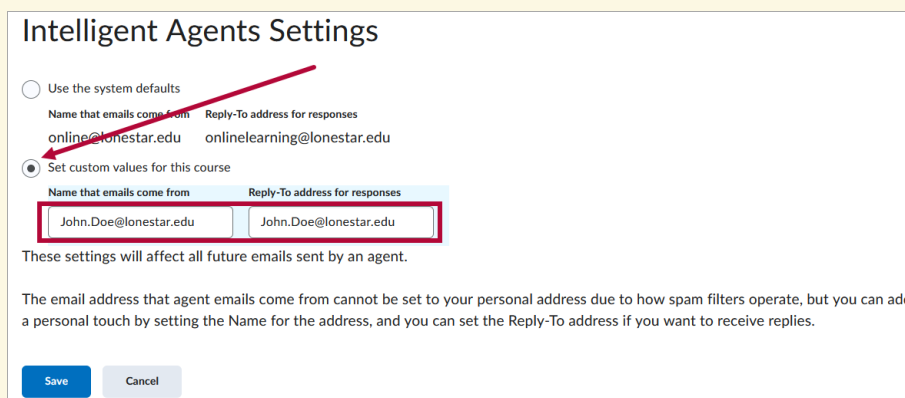
## Updating the the "From" and "Reply-To" Fields in Settings

- To change the **From** and **Reply-To** fields in the email so that messages appear that they are sent by the instructor, and for student replies to be delivered to your inbox, go to the **[Settings]** link in the top right corner.



- Choose the **[Set custom values for this course]** option, then enter the email address you would like the emails to come from and the email address you'd like to use as the Reply-To addresses.

**NOTE:** This will allow students to reply to an IA email. Otherwise, they get a bounce back error.

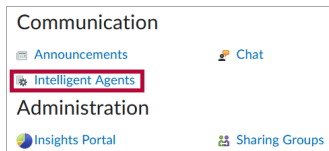


- The user-specific data is not transferable when the Intelligent Agent is copied from one course to another. This is due to the fact that the data is tied to the user account.

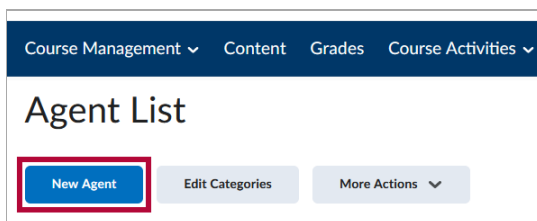
Hence, it is necessary to manually input the user-specific data, such as the instructor's name and email, in the settings of the Intelligent Agent for each course.

## Setting Up an Intelligent Agent

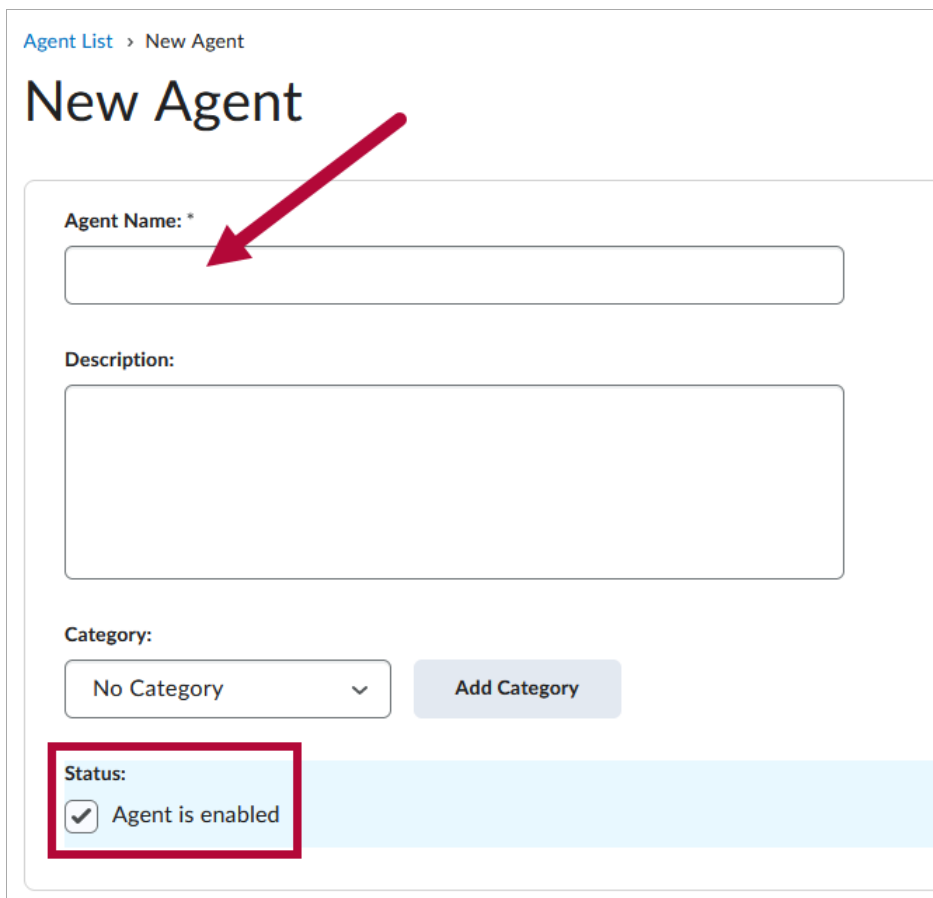
1. Click on **[Course Management]** and choose **[Course Admin]**.
2. Click on **[Intelligent Agents]**.



3. Click **[New Agent]**.




4. Enter a name for your agent, and check the **[Agent is enabled]** checkbox.

A screenshot of the 'New Agent' form. A red arrow points to the 'Agent Name' input field. The 'Agent is enabled' checkbox is checked and highlighted with a red rectangular box. The form also includes a 'Description' text area, a 'Category' dropdown menu (set to 'No Category'), and an 'Add Category' button.

5. Under **Scheduling**, choose a **Frequency** to bring up options.

### Scheduling

**Frequency**

Weekly 

**Repeats Every:**

week(s)

**Repeats On:**

Monday  Tuesday  Wednesday  Thursday


Friday  Saturday  Sunday

**Scheduled Time \***


1:44 PM

**Schedule Dates:**

Has Start Date

 10/4/2022

Has End Date

 10/5/2022

6. A schedule will determine when the agent will run. With **No Schedule** selected for the Frequency, you will need to manually run the Intelligent Agent from the Agent List.
7. Under **Criteria**, you can choose which users the agent evaluate and why.

### Criteria

**Role in Classlist \***

All users **visible** in the Classlist

Users with specific roles:

**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**

**NOTE:** **Login Activity** is when a user simply logs into D2L, while **Course Activity** is when a user goes inside the course. The activity options are useful for setting up [Student Inactivity Alerts \(https://vtac.lonestar.edu/help/creating-student-inactivity-alerts\)](https://vtac.lonestar.edu/help/creating-student-inactivity-alerts).

8. The **Role in Classlist** options will allow you to choose specific users to have the agent evaluate. This will usually be **[Student]**.

**Criteria**

**Role in Classlist \***

All users **visible** in the Claslist

Users with specific roles:

- Template Instructor
- Template Student
- Faculty
- Student
- Archived User
- Group Manager
- Test\_Student
- Observer
- WebEx User
- Incomplete Student
- Student Orientation
- LOR Editor
- Capture Editor
- Teaching Assistant
- Advisor
- Needs Orientation
- Not Used

9. You can also set [release conditions](https://vtac.lonestar.edu/help/a150) (<https://vtac.lonestar.edu/help/a150>) that have to be met for the agent to be triggered. Examples include:

- A student has scored less than 50% on a quiz.
- A student has not completed an assignment.
- A student who has not visited a specific content module.

10. To set the release condition, click **[Create]**, or **[Browse]** if you already have release conditions created.

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**

11. Create a **Release Condition**.

### Create a Release Condition ✕

Release this item when the following condition is met:

Condition Type

#### Condition Details

Quiz

Criteria:

Grade  
 %

**NOTE:** If you copy your Intelligent Agent to another course, you need to make sure you copy any attached Release Conditions (this will happen automatically if you copy the entire course).

12. Under **Actions**. You can change the repetition to **[Take action every time the agent is evaluated and the agent's criteria are satisfied for a user]**.
13. Click **[Send an email when the criteria are satisfied]**. With both this and the previous option selected, an email will be sent to the user every time they meet the criteria when the agent is run.

### 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

Name that the emails come from: **John.Doe@LoneStar.edu**  
 Reply-To address for responses: **John.Doe@LoneStar.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?

14. Enter the email address(es) of those who need to be notified (e.g. the Instructor, an Online Student Advisor, the assigned Advisor for a specific HUMD/Developmental Education course, and/or the student).
  - To maintain privacy, {InitiatingUser} can be used in the **Bcc** field to send the email to

the student(s) meeting the agent criteria.

- You can add your email address to the **To** field to receive a copy of every Intelligent Agent notification sent out.

To: John.Doe@LoneStar.edu

Cc:

Bcc: {InitiatingUser}

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

Subject: \*

{OrgUnitName} Course Inactivity

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

**NOTE:** The "initiating user" is any student who performs the actions necessary to satisfy the agent's criteria.

15. To personalize a standard email for each recipient, enter the appropriate string. Click on **[What replace strings can I use in the subject and message ?]** below the **Subject** textbox to see a list of possible strings or see functional strings below. (In these strings, the Org Unit is the course and the OrgDefinedID is the student ID.)

The following are replace strings you can use in the subject line and the email message:

- {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.

16. Type the body of the email message. Click **[Save and Close]** when completed.

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

Message:

Format

Font

Attachments

Drop files here, or click below!

Email Format:

HTML

Plain text

## Testing an Intelligent Agent

1. From your list of Intelligent Agents, click the down arrow and choose **[Practice Run]** from the menu that appears.

Agent List

View:

Enable  Disable

<input type="checkbox"/>	Agent <input type="button" value="▲"/>	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/>	2 Weeks - No Course Access <input type="button" value="▼"/> See if anyone has not accessed course in 2 weeks or more.	30 users identified	10 minutes ago	-
<input type="checkbox"/>	75% of Content <input type="button" value="▼"/> <input checked="" type="checkbox"/>	Completed	18 minutes ago	-
<input type="checkbox"/>	Passed the Quiz <input type="button" value="▼"/> <input checked="" type="checkbox"/> Congratulations for Passing an or Quiz.	Completed	18 minutes ago	-
<input type="checkbox"/>	Quiz is Almost Due! <input type="button" value="▼"/> <input checked="" type="checkbox"/> Your current quiz is almost due turned in!	Completed	Mar 29, 2022 7:03 PM	-
<input type="checkbox"/>	Thank You Message <input type="button" value="▼"/>	5 users identified	Apr 1, 2022 11:51 AM	-

2. In the confirmation box that appears, click the **[Run]** button.
3. Click the **[Done]** button from the confirmation page.
4. Once you receive the email that the agent has finished running, select the **[# users identified]** link to see who the agent found.

# Apr 1, 2022 11:51 AM

Manual Run

5 users identified

Last Name, First Name	Action Taken ▼
[Redacted]	Email sent
[Redacted]	Email sent
[Redacted]	Email sent
[Redacted]	Email sent
[Redacted]	Email sent

20 per page ▼

**NOTE:** Choosing **[Practice Run]** will simply create a list of students that would receive an email if the Intelligent Agent were run. No email or notification is sent to the student when using Practice Run.

## Editing an Intelligent Agent

1. From your list of Intelligent Agents, click the name of the agent to edit, or click the down arrow and choose **[Edit]** from the menu that appears.
2. Make desired changes to the Intelligent Agent.
3. Click **[Save and Close]** at the bottom of the page.

## Running an Intelligent Agent Manually

1. From your list of Intelligent Agents, click the down arrow and choose **[Run Now]**.
2. In the confirmation box that appears, click **[Run]**.
3. Click **[Done]** from the confirmation page.

## Bulk Edit and Offset Dates for Recurring Intelligent Agents

In addition to editing an intelligent agent in the **Intelligent Agents** tool, you can **Edit** and/or **Offset** multiple intelligent agents that have already been set up with both a recurring schedule (for example, daily or weekly) and either a **Start Date** or **End Date**, using the **Manage Dates** tool.

- For instructions on **Editing** multiple intelligent agents, see the [Edit Dates Using Manage Dates](https://vtac.lonestar.edu/help/edit-dates) (<https://vtac.lonestar.edu/help/edit-dates>) article, and for instructions on **Offsetting**

multiple intelligent agents, see the [Offset Course Dates using the Manage Dates Tool](https://vtac.lonestar.edu/help/offset-course-dates) (<https://vtac.lonestar.edu/help/offset-course-dates>).

**NOTE:** Intelligent agents that have a one-time run schedule, or repeat but have neither a **Start Date** nor an **End Date**, do not appear in **Manage Dates** and must be updated in the **Intelligent Agents** tool.

## Submit, Review & Track the Status of Alerts

- [Early Alert for Faculty Job Aid](https://dyzz9obi78pm5.cloudfront.net/app/image/id/631a60418d9e4b5fed0e68bd/n/early-alert-job-aid-for-faculty-71822.pdf)  
(<https://dyzz9obi78pm5.cloudfront.net/app/image/id/631a60418d9e4b5fed0e68bd/n/early-alert-job-aid-for-faculty-71822.pdf>)
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