

## KODIAK QUICK GUIDE – Intelligent Agents

### Overview

Intelligent Agents send an automated email when instructor-defined criteria are met. For example, instructors can email students who have not logged in recently, whose grades have fallen below a certain level, or who have viewed a specific content topic.

### How to Access the Intelligent Agents Tool

Click **Course Admin** in the course navigation bar, and then click  **Intelligent Agents**.

### In This Guide

1. Creating Intelligent Agents
2. Running an Intelligent Agent Manually
3. Replace Strings for Intelligent Agents

## Creating Intelligent Agents

You can create, edit, and delete intelligent agents from the “Agent List” page. When you create a new agent, you must first determine:

1. the criteria it looks for;
2. the content for the email that the agent sends when its conditions are met; and
3. how often it looks for students meeting its criteria.

Every time an agent runs, it logs information on its activities and sends a list of them to the instructor by email.

### Create an Intelligent Agent

1. Click **Course Admin** in the course navigation bar.
2. Click **Intelligent Agents**. The “Agent List” page will open.
3. Click **New** at the top of the page.
4. Enter an agent name (required) and description (optional).
5. Select **Agent is Enabled** if you want the agent to be active as soon as you create it (Figure 1). This setting only applies if you set your agent to run automatically on a schedule. See below for instructions on creating a schedule.



Figure 1

6. Determine the criteria the agent looks for:
  - If you want the agent to send an email to a student who has not accessed your course recently, select **Take action when the following course activity criteria are satisfied**, and enter a number in the “User has not accessed the course for at least [#] days” field (Figure 2).
  - If you want the agent to send an email when a student views or interacts with a specific item in the course, click **Create and Attach** in the “Release Conditions” section (Figure 3). Choose a condition that must be met from the options on the “Condition Type” menu (Figure 4), and then specify the actions the student must take in the “Condition Details” section. Click **Create** when you are done selecting release conditions.

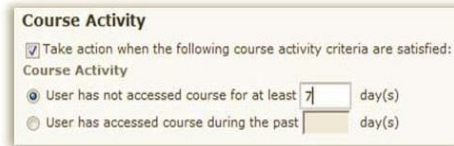


Figure 2



Figure 3

**Note:** Release conditions are based on positive conditions, such as posting to a Discussion topic, submitting files to an Assignment folder, or completing a Quiz. They do not work with negative conditions, such as “Quiz not completed.”

5. Determine how the agent sends email when its conditions are met:
  - Select one of the “Action Repetition” radio buttons to set whether the agent sends email once or any time the conditions are met.

**Note:** If an agent is set to only run once, it will ignore future situations in which its conditions are met.

- If you want the agent to run automatically, select the “Use Schedule” checkbox, and then click **Update Schedule**. The “Update Agent Schedule” window will open. Set the frequency and dates in the fields provided, and click **Update**.
1. Enter the replace string in the “To” field (Figure 5). See page 3 to learn more about replace strings.
  2. Enter a subject and message for the email sent by the Intelligent Agent. You can use special replace strings in these fields as well.
  3. Click **Save and Close**.

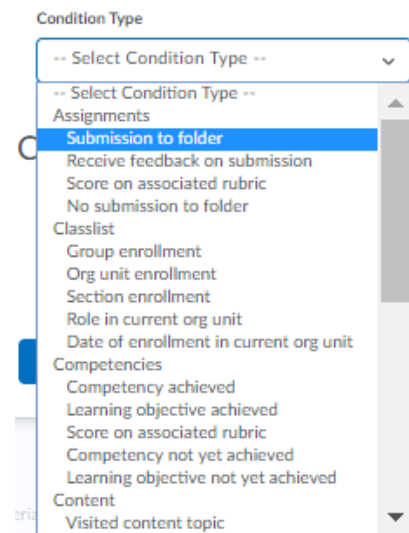


Figure 4

#### 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?

##### Send an Email

Send an email when the criteria are satisfied

Name that the emails come from: edtech@wne.edu  
 Reply-To address for responses: edtech@wne.edu  
 How can I change the default From and Reply settings?

To:

Cc:

Bcc:

What special email addresses can I use?

## Edit an Agent

1. On the “Agent List” page, click the name of the agent you want to edit.
2. Enter any changes you want to make.
3. Click **Save**.

## Running an Intelligent Agent Manually

If your agent is not set up to run on a schedule, you will need to run it manually every time you want it to check for students who meet its criteria and send an email to them.

1. Click the drop-down arrow next to an agent's name on the "Agent List" page.
2. Select **Run Now** (Figure 6). A confirmation dialog box will open.
3. Click **Run**.

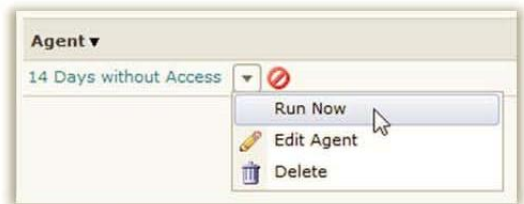


Figure 6

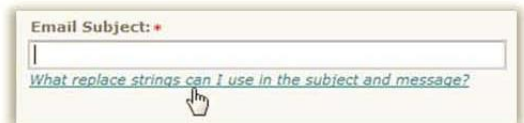


Figure 7

## Replace Strings for Intelligent Agents

Replace strings are specially formatted codes that you can enter in automated emails; they replace the need to enter information that might change from student-to-student. For example, you might want to send a personalized message to each student in your class of 60, but you don't have time to change the name in the salutation for 60 emails. Instead, you can use the replace string `{InitiatingUserFirstName}`, and the names of your students will be filled in automatically, so you only have to send the message once.

See the table to the right for all of the replace string options and the text they generate. You can also click **What replace strings can I use in the subject and message?** under the email subject text box to see a list of replace string options (Figure 7).

Here is a sample email using replace strings:

Dear `{InitiatingUserFirstName}`,  
You have not logged into the `{OrgUnitName}` course site in the last week. Please remember that regular participation in course activities is essential for success in this course! Please log in to the course site as soon as possible.

See you in class,  
Dr. Kodiak

### Replace Strings

The following are replace strings you can use in the subject line and body of an email message.

`{OrgUnitCode}` = your class number (e.g., ENG\_000\_101\_0920)

`{OrgUnitName}` = the name of your class

`{InitiatingUserFirstName}` = the student's first name

`{InitiatingUserLastName}` = the student's last name

`{InitiatingUserUserName}` = the student's Campus Connection username

`{InitiatingUserOrgDefinedId}` = the student's ID number

`{LoginPath}` = the web address for D2L