

# Create and Trigger Intelligent Agents

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## Overview

Intelligent agents are used to monitor user activity and can be used to make personalized communication more efficient. Intelligent agents are customizable messages automatically emailed to individual learners when they fulfill a particular task. For example, an instructor may choose to set an intelligent agent to let a student know when they have missed a deadline on an assignment, or acknowledge achievement of an exceptional score on a quiz.

## Objectives

By following the guide, you will be able to:

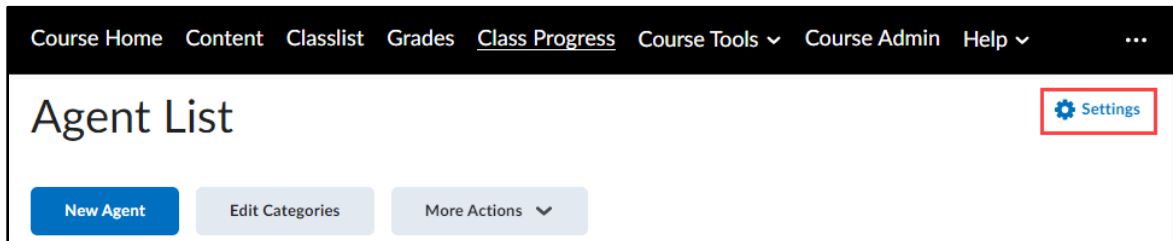
Part 1: Change your default Settings (initial set up)

Part 2: Set up an Intelligent Agent

Part 3: Set up a customized email

## Part 1: Change your Default Settings

1. From the navigation bar, click **Course Admin**.
2. Click on **Intelligent Agents**.
3. Note: As an initial set up, you will want to change the default Settings.
4. Click **Settings**.

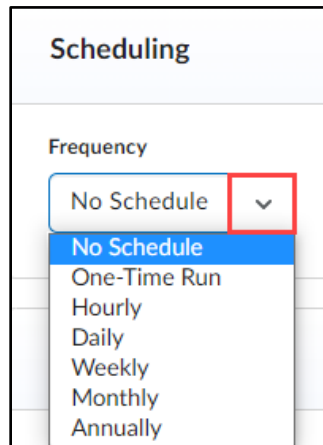


5. Click the second option: **Set custom values for this course**.
  - Add your name (or name that you want to display) in the **Name that emails come from** field
  - Add the your PFW email address in the **Reply-To address for responses** field
6. Click **Save**.

## Part 2: Set up an Intelligent Agent Report (No customized email)

1. From the navigation bar, click **Course Admin**.
2. Click on **Intelligent Agents**.
3. Click on **New Agent**.
4. Give your agent a title (*For example: Course Access*)

- Under **Status**, check the box for “**Agent is enabled**”  
Note: This must be selected for the agent to run.
- Under **Scheduling**, click the dropdown arrow to expand the menu. Choose how often you want the agent to run.



- Your choice will open a new set of options.
  - For example, if you chose a **Weekly** frequency, you can run the agent every 1 week on Sundays. You can also choose to set it to run during a specific date range by setting a start and end date.

- Under **Criteria**, select the user roles to receive the email notification.  
For example, **All users visible in the Classlist**.
- Under **Criteria**, select the appropriate criteria for the agent.
  - For example, to look for Course Activity, check the box for **Course Activity**
  - Select whether you want to see which students **HAVE** accessed the class or which students have **NOT** accessed the course. The report will show which students met the criteria you chose.

- Specify how many days can pass since the last course access.

**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: *In this example:* “User has not accessed the course in the last 7 days” will look for any students that have not entered the course for 7 days.
  - If a student accessed the course 7 days ago, they will meet the agent’s criteria and be included in the report.
  - If a student accessed the course 6 days ago, they will not meet the agent’s criteria and will not be included in the report.

10. Under **Actions**, select the appropriate action for the agent.

- Note:** If you are not sure what action you want to use? Use the linked blue text that says *What Action Repetition setting should I use?*
- For example, choose “Take action every time the agent is evaluated and the agent’s criteria are satisfied for a user”
- Note: Based on this example, each time the agent runs you will be able to see a report of which students met the criteria.

11. Under Actions, leave the **Send an Email** unchecked.

Note: You will be able to review a report after it runs from the Agent List page.

**Send an Email**

Send an email when the criteria are satisfied

12. Click **Save and Close**.

### Part 3: Set up an Intelligent Agent Notification (Customized email)

Alternatively, you can set up the agent to automatically email any students who meet the criteria. To do so, follow these additional steps:

1. Follow steps from Part 2, steps 1-10.
2. Check the box to **Send an Email when the criteria are satisfied**.
3. Enter the replace string (For example: {InitiatingUser}) into the To: box.
  - **Note:** If you are not sure what action you want to use? Use the linked blue text that says *What special email addresses can I use?*
4. If preferred, enter your email address in the cc field to get a copy of *each email* that is sent.
5. Add a Subject name for the email message (For example: Checking in).
6. In the Message box, type the email you want each student to receive.
  - This message will be sent to each student who triggers the agent.
  - You can personalize the email by using the replace string "{InitiatingUserFirstName}" – this will enter the first name of the student into the email.
  - **Note:** If you are not sure what action you want to use? Use the linked blue text that says *What replace strings can I use in the subject and message?*

To: {InitiatingUser}

Cc:

Bcc:

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

Subject: \*

Checking In

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

Message:

Paragraph | B | I | U | A | | | | | | | | | | Lato (Reco... | ...

19px... | | | | | | | | | |

Dear {InitiatingUserFirstName},

I noticed it's been about a week since you logged into our class. I'm worried about you and want to make sure everything is okay. Can you send me an email and let me know how you're doing?

Sincerely,

Professor Mastodon

7. Click **Save and Close**.