



Intelligent Agents 8.3.1

User Guide

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eLearning *your way*

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305 King Street West, Suite 200
Kitchener, Ontario
N2G 1B9 Canada

www.Desire2Learn.com

Please send feedback on Desire2Learn documentation to: Docs@Desire2Learn.com.

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What are Intelligent Agents?

Intelligent agents monitor an org unit to find activity that matches criteria that you set. The criteria that the agents search for are:

- login activity
- release conditions in the Learning Environment.

You can use existing release conditions, or create new ones for your agents. The agent then sends a separate email to the user that created the agent when it finds users matching its criteria.

You can run agents manually or set them to run on a schedule; daily, weekly, monthly, or annually.

Every time the agent runs, it logs information on its activity. It also sends a confirmation email to the user that requested or set up the agent.

Uses for intelligent agents

You can use intelligent agents to:

- email for users with grades below a certain level
- check for users that have not logged in within a specific number of days
- check for users that view a specific content topic

Accessing the intelligent agent tool

If you have access to the intelligent agent tool, you can access it two ways.

- Click the **Intelligent Agents** link in the org unit administration widget on the org unit's homepage.
- Click the **Edit Course** link and choose **Intelligent Agents** on the course admin tools page.

Running agents manually

If you do not have a regular schedule for an agent, you must run it manually from the Agent List page.

▶ **Run an agent manually**

From the Agent List page, click the **Manually run agent** icon.

Confirmation Emails

Every time the agent runs, it sends a confirmation email to the user that requested or set up the agent.

This email lists 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
- whether the agent took action
- any error text

Creating new intelligent agents

You can create new intelligent agents from the Agent List page. When you create a new agent you need to determine:

- what criteria it looks for
- what the content is for the email that the agent sends when its conditions are met
- how often it looks for users meeting its criteria

► **To create a new intelligent agent**

- 1 Click **New Agent** on the top toolbar on the Agent List page.
- 2 Type a name for the agent.
- 3 Type a description if you want.
- 4 Clear the **Status** checkbox if you do not want the agent enabled once you save.
- 5 Determine the criteria the agent looks for:
 - a If you want the agent to search for login criteria, select the **Take action when the following login criteria are satisfied** checkbox and choose which of the two login activities you want to monitor.
 - b Click the **Attach Existing**, or **Create and Attach** button to select or create release conditions for the agent to monitor.
- 6 Determine the action the agent takes when its conditions are met:
 - a Select one of the **Action Repetition** radio buttons to set whether the agent takes action once or anytime the conditions are met.
 - b If you want the agent to run on a schedule, select the **Schedule** checkbox, then click the **Update Schedule** button.
 - c Set the schedule in the Update Agent Schedule pop-up.
 - d Click the **Update** button in the Update Agent Schedule pop-up to save the schedule and return to the New Agent page.
- 7 Select **HTML** or **Plain Text** radio buttons for the email format.
- 8 Type the names of recipients in the **To**, **Cc**, and **Bcc** field. You can use special replace strings in these fields. See Replace strings.
- 9 Type the subject in the **Email Subject** field. You can use special replace strings in this fields. See Replace strings.
- 10 Type the body of your email in the **Message** field.

11 Click **Save**.

Replace strings for intelligent agents

Email Address Replace Strings

You can use the following replace strings in the address fields for the agent emails.

Replace String	Description
{InitiatingUser}	The user who performed the action that met the agent's criteria.
{InitiatingUserAuditors}	The auditors for the user who performed the action that met the agent's criteria.

Email Body Text Replace Strings

You can use the following replace strings in the HTML editor for the agent email body.

Replace String	Description
{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.
{InitiatingUserFirstName}	The first name of the initiating user.
{InitiatingUserLastName}	The last name of the initiating user.
{InitiatingUserUserName}	The user name of the initiating user.
{InitiatingUserOrgDefinedId}	The Org Defined Id of the initiating user.
{LoginPath}	The address of the login path for the site.

Editing agents

You can edit any part of the agent details; criteria, release conditions, action or schedule.

▶ **Edit an agent**

- 1 Click the name of the agent you want to edit.
- 2 Edit the criteria, release conditions or any other part of the agent.
- 3 Click **Save**.

Deleting agents

You can delete agents from the Learning Environment. Deletion is permanent and you cannot recover agents you delete.

- ▶ **Delete an agent**

On the Agent List page, click the  **Delete** icon for the agent you want to delete.

Agent logs

Every time the agent runs, it logs information on its activity.

Value	Description
OrgUnitId	The Org Unit Id for the agent
AgentId	The ID of the agent that ran
StartDate	The date and time the agent started
EndDate	The date and time the agent finished
ActionTaken	Whether or not the agent took action
NumEmailSent	The number of emails the agent sent for this iteration
ErrorText	Error text for any errors encountered while running the agent

Appendix B: Revision History

Edition	Notes
Second (Nov. 4, 2008)	Corrected typo in the Creating new intelligent agents section.

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