

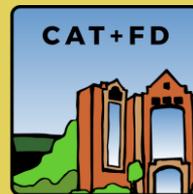


# Automate Communications Using Intelligent Agents

Ms. Janice Florent, Technology Coordinator

Dr. Jason S Todd, Director

Center for the Advancement of  
Teaching & Faculty Development  
XAVIER UNIVERSITY OF LOUISIANA



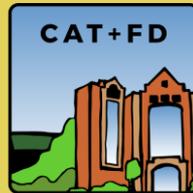
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# Automate Communications Using Intelligent Agents

Credit: Image by AS\_Photography from Pixabay / Image desaturated from original

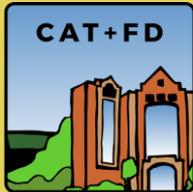


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# Agenda

- Benefits of using Intelligent Agents
- Example of Intelligent Agents used in a course
- Creating and running Intelligent Agents
- Effective practices for setting up and using Intelligent Agents



# Quick Poll

Do you use Intelligent Agents?

- Yes
- No
- What is an Intelligent Agent?

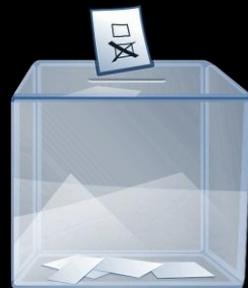
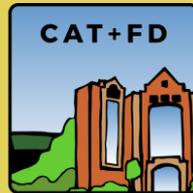


Image Credit: [Image](#) by Clker-Free-Vector-Images from [Pixabay](#)



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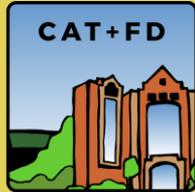
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# Intelligent Agents

- Can be used to:
  - Automate email notifications
  - Help students stay on track

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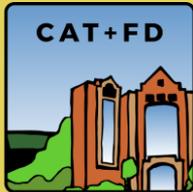


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# Why Use Intelligent Agents?

## Instructor-learner engagement

- Examples:
  - Welcome learners to your course
  - Re-engage inactive learners
  - Invite low performing learners to meet
  - Provide encouragement after low score
  - Congratulate on a job well done



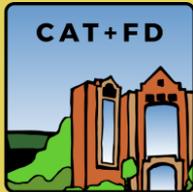
# Early intervention in college classes and improved student outcomes

*Economics of Education  
Review*

Vol. 72, Oct. 2019  
pp. 23-29

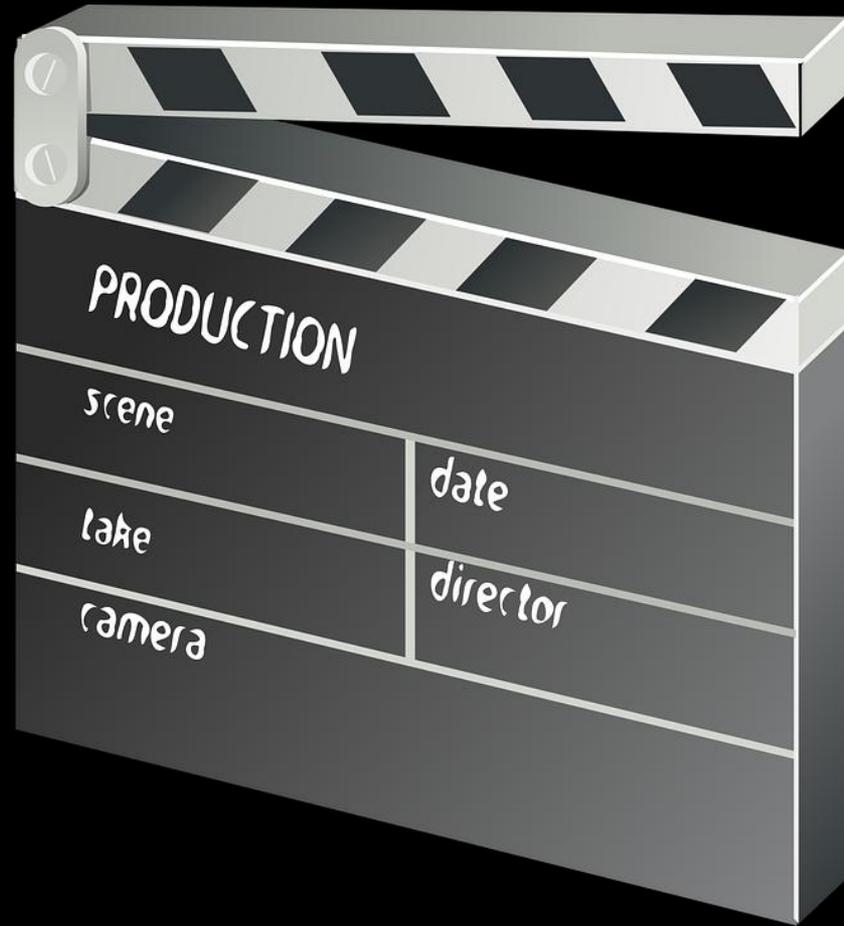
- Interaction
  - Fourth week of class emails
    - 70% threshold on a performance measure
    - Attendance rate < 75%
  - Referral to the Student Success Center
- Results
  - Student scores on common questions on the final exam improved by 6.5 to 7.5 percentage points

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# Intelligent Agents in Action



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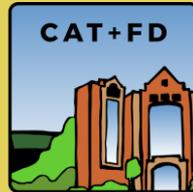


Image Credit: [Image](#) by OpenClipart-Vectors from [Pixabay](#)

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# IA in Action: The End Results

## XCOR 1000 - Class Performance

Inbox x



**Jason Todd** <jtodd1@xula.edu> 12:09 PM (0 minutes ago) ☆ ↶ Reply ⋮  
to me ▾

Hi, Finn.

Currently, your grade for XCOR 1000 is below a C. This is most likely because you have not turned in all of your assignments. Please get in touch with me to discuss any problems you are having. We can work out a plan to get you caught up. However, please do not simply submit your missing work without talking to me first.

Thanks.

JT

=====

Jason S. Todd, Ph.D. ([jtodd1@xula.edu](mailto:jtodd1@xula.edu))

Associate Professor, Department of English ([xula.edu/english](http://xula.edu/english))

Associate Director, Center for the Advancement of Teaching and Faculty Development ([cat.xula.edu](http://cat.xula.edu))

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Pronouns: He/Him/His

- Get on my Calendar: [https://calendly.com/jason\\_s\\_todd](https://calendly.com/jason_s_todd)
- Meet me on Zoom: <https://xula.zoom.us/my/jason.s.todd>
- Follow me on Twitter: [@jason\\_s\\_todd](https://twitter.com/jason_s_todd)
- Follow me on LinkedIn: [jason-s-todd](https://www.linkedin.com/in/jason-s-todd)

## XCOR 1000 Class Engagement

Inbox x



**Jason Todd** <jtodd1@xula.edu> 3:32 PM (0 minutes ago) ☆ ↶ Reply ⋮  
to me ▾

Hi, Finn.

According to Brightspace, you have not accessed our class in over a week. You need to be checking the class regularly. It is the only way you can keep up with the work and deadlines for this class.

Please let me know if you are having any problems with Brightspace, internet access, or the class itself.

Thanks.

JT

=====

Jason S. Todd, Ph.D. ([jtodd1@xula.edu](mailto:jtodd1@xula.edu))

Associate Professor, Department of English ([xula.edu/english](http://xula.edu/english))

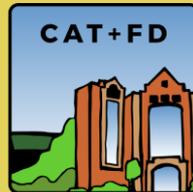
Associate Director, Center for the Advancement of Teaching and Faculty Development ([cat.xula.edu](http://cat.xula.edu))

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Pronouns: He/Him/His

- Meet me on Zoom: <https://xula.zoom.us/my/jason.s.todd>
- Follow me on Twitter: [@jason\\_s\\_todd](https://twitter.com/jason_s_todd)
- Follow me on LinkedIn: [jason-s-todd](https://www.linkedin.com/in/jason-s-todd)

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# IA in Action: Behind the Scenes

Agent List Settings

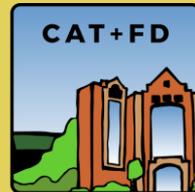
[New](#) [More Actions](#) ▼

View: All agents ▼ [Apply](#)

[Enable](#) [Disable](#) [Delete](#)

<input type="checkbox"/>	Agent ▲	Results of Last Run	Last Run Date	Next Run Date
<input type="checkbox"/>	ALERT - Student has less than 70% course grade (Pre-midterm) ▼	12 users identified	Sat at 8:32 PM	Monday, October 5, 2020
<input type="checkbox"/>	ALERT - Student has not logged into class for 7 days ▼	3 users identified	September 25 at 3:00 PM	Friday, October 2, 2020
<input type="checkbox"/>	Welcome Message ▼		-	-

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# IA in Action: The End Results

Checking in Inbox x

 **Jason Todd** <jtodd1@x... 12:23 PM (0 minutes ago) ☆ Reply to me ▾

Hi, Finn.

You seem to have had more difficulty with the exercises for Module 4 than you have with our previous modules. I wanted to check in to see if you think there was something in these most recent chapters that was giving you more trouble, or if this was just a busy week for you, or if there is something else disrupting your learning.

JT  
=====

Jason S. Todd, Ph.D. ([jtodd1@xula.edu](mailto:jtodd1@xula.edu))  
Associate Professor, Department of English ([xula.edu/english](http://xula.edu/english))  
Associate Director, Center for the Advancement of Teaching and Faculty Development ([cat.xula.edu](http://cat.xula.edu))  
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- Get on my Calendar: [https://calendly.com/jason\\_s\\_todd](https://calendly.com/jason_s_todd)
- Meet me on Zoom: <https://xula.zoom.us/my/jason.s.todd>
- Follow me on Twitter: [@jason\\_s\\_todd](https://twitter.com/jason_s_todd)
- Follow me on LinkedIn: [jason-s-todd](https://www.linkedin.com/in/jason-s-todd)

Reply Forward

## Release Conditions

Attach Existing Create and Attach Remove All Conditions

To access this item, users must satisfy

All conditions must be met ▾

---

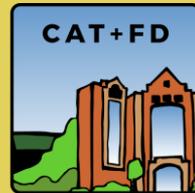
Receives greater than or equal to 80 % on the quiz: Exercises for Module 2 X

---

Receives greater than or equal to 80 % on the quiz: Exercises for Module 3 X

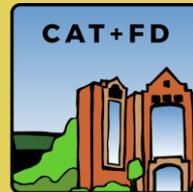
---

Receives less than or equal to 80 % on the quiz: Exercises for Module 4 X



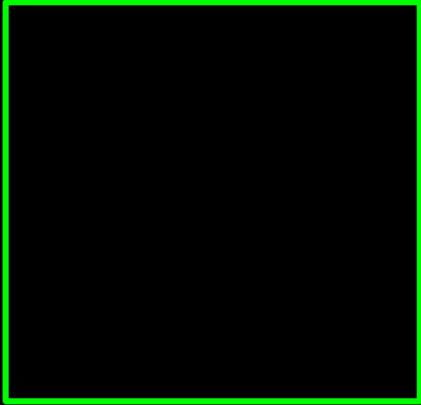
# Common Replace Strings used in IAs

Replace String	Description	Replacement that will be used
{InitiatingUser}	The user whose actions satisfy the agent's criteria.	<b>Email Address</b> (ex. jdoe@xula.edu)
{OrgUnitName}	The name of the Org Unit.	<b>Course name</b> (ex. Spring 2026 - Intro Oceanography)
{InitiatingUserFirstName}	The first name of the initiating user.	<b>First name</b> (ex. Jayne)
{InitiatingUserLastName}	The last name of the initiating user.	<b>Last name</b> (ex. Doe)
{InitiatingUserOrgDefinedId}	The Org Defined ID of the initiating user.	<b>User's org id</b> (ex. 900123456)
{LastCourseAccessDate}	The date the initiating user last accessed the course.	<b>Date/time course last accessed</b> (ex. Monday, February 20, 2026 2:30 PM CST)

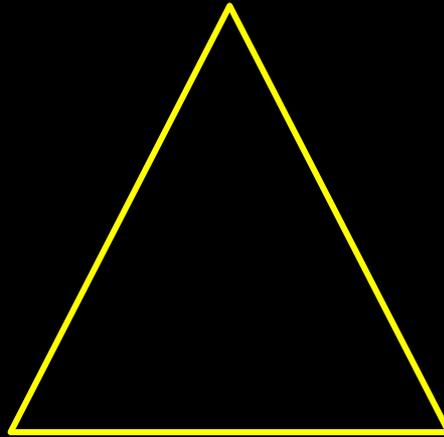


# Check-in

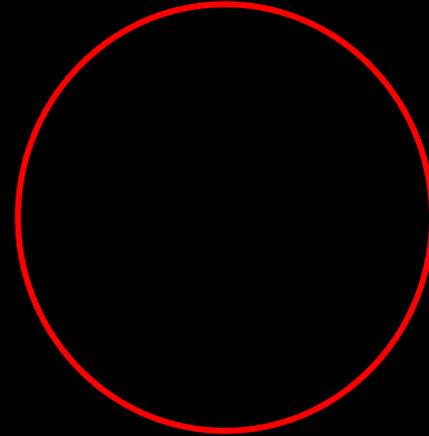
(Square, Triangle, or Circle)



Squared with  
my thinking

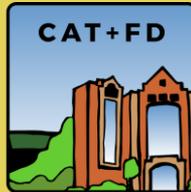


Gained three  
key/important ideas



Question still circling  
in my mind

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# Effective Practice #1

- Create IAs to generate action reports

## Edit Agent

Agent Name: \*

Early Bird Badge for Writing Assignment #2

Description:

Purpose: This notification identifies students who submitted their assignments early.

Audience: Report to be generated for instructor. No email is sent.

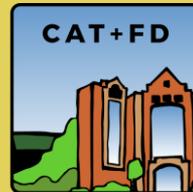
Work Schedule: Runs on Tuesday during the scheduled start and end

Category:

Action Reports ▾ [Add Category](#)

Status:

Agent is enabled



# Effective Practice #1 (cont'd)

### Scheduling

Frequency

One-Time Run

Scheduled Date: \*

2/3/2026 11:59 PM

### Criteria

Role in Classlist \*

All users visible in the Classlist

Users with specific roles

Instructor

Lumi

XU Org Leader

TA

Course Builder

Student

Take Action on Activity

Login Activity

User has not logged in

User has logged in

Course Activity

User has not accessed the course

User has accessed the course during the last 0 day(s)

Release Conditions

Create Browse

All conditions must be met

Submits to folder: Writing Assignment #2

### Actions

Repetition

Take action only the first time the agent's criteria are satisfied for a user

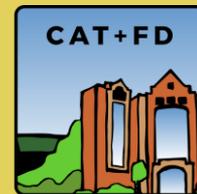
Take action every time the agent is evaluated and the agent's criteria are satisfied for a user

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

Send an Email

Send an email when the criteria are satisfied

Save and Close Save Cancel



# Effective Practice #1 (cont'd)

## Agent List

 Settings

New Agent

Edit Categories

More Actions 

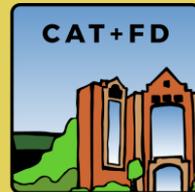
View: By category 

Apply

 Enable  Disable  Delete  Bulk Edit

<input type="checkbox"/>	Agent	Results of Last Run	Last Run Date	Next Run Date
	Action Reports			
<input type="checkbox"/>	<p><a href="#">Early Bird Badge for Writing Assignment #2</a> </p> <p>Purpose: This notification identifies students who submitted their assignments early. Audience: Report to be generated for instructor. No email is sent. Work Schedule: Runs on Tuesday during the scheduled start and end dates for the week.</p>	<p>2 users identified</p>	<p>11 minutes ago</p>	<p>-</p>

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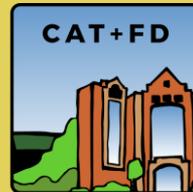
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# Effective Practice #2

- Think carefully about whether you want the Intelligent Agent (IA) to send an email to the student, or to you, or both



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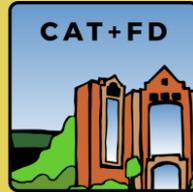
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# Effective Practice #3

- Have an action plan for when the IA sends notification



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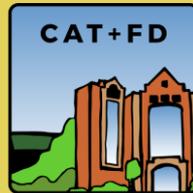
# Effective Practice #4

- Be concise in your email
- Use IAs sparingly, repetitive emails may lose effectiveness
  - Is there a better way of communicating?
    - Would an announcement work better?
    - Would a personally crafted email work better?
    - Would a discussion board posting work better?



Credit: Image generated by Google Gemini AI, 24 Feb 2026, using the prompt

"An image of scrabble tiles that spell out the acronym TL;DR using five tiles laying on top of other tiles that are blank."

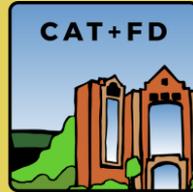


# Effective Practice #5

- Carefully consider the implication of **manual** versus **automatic** running of IAs



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# Effective Practice #6

- Be very descriptive in the **Agent Name** and **Description**

## Edit Agent

Agent Name: \*

Unit 1 - Supplemental Resources

Description:

Purpose - The agent will identify learners who earned  $\leq 79\%$  on Unit 1 Quiz and notify them that Unit 1: Supplemental Resources are available.  
Audience - The email will be sent to learners.  
Work Schedule - Run once after Unit 1 quiz scores are posted.

Category:

Nudges

Status:

Agent is enabled

## Edit Agent

Agent Name: \*

Low Grade on Quiz 1

Description:

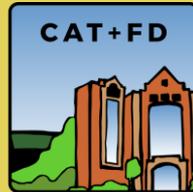
Purpose - The agent will scan the system to identify learners who received  $\leq 75\%$  on Quiz #1 and send email to offer suggestions for improvement.  
Audience - the email will be sent to students (CC instructor).  
Work Schedule - provide notification email once for learners who meet criteria.

Category:

Nudges

Status:

Agent is enabled



# Effective Practice #7

- Use **categories** to organize your Intelligent Agents

## Edit Agent

Agent Name: \*

Unit 1 - Supplemental Resources

Description:

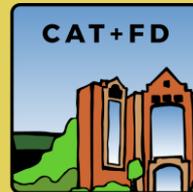
Purpose - The agent will identify learners who earned  $\leq 79\%$  on Unit 1 Quiz and notify them that Unit 1: Supplemental Resources are available.  
Audience - The email will be sent to learners.  
Work Schedule - Run once after Unit 1 quiz scores are posted.

Category:

Nudges

Status:

Agent is enabled

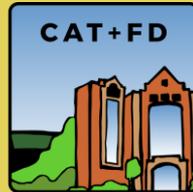


# Effective Practice #8

- If you are expecting the IA to send you a lot of email, create rules in your email inbox to manage the incoming email



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# Effective Practice #9

- Utilize **Quicklinks** to provide a direct link to content

Subject: \*

{OrgUnitName} - Unit 1 Supplemental Resources

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

Message:

Paragraph **B** *I* U ~~A~~ Lato (Recomm... 19px (... ...

Hi {InitiatingUserFirstName},

I hope this email finds you well. I wanted to reach out regarding your recent performance on the Unit 1 Quiz in your {OrgUnitName} course. While I know you worked hard, I understand that the material may have presented some challenges.

To help you review and reinforce key concepts, I have made available some [supplemental resources for Unit 1](#) that you can access via this hyperlink and the supplemental resources can also be found in the Unit 1 module in the course. These resources include practice problems, additional notes, and video tutorials.

Remember, learning is a journey, and it's okay to encounter some bumps along the way. These resources are here to support your continued growth and understanding. Please don't hesitate to reach out if you have any questions or need further assistance. I am available during [office hours](#) and by appointment.



Image Credit: [Image](#) by Deedster from [Pixabay](#)



# Effective Practice #9 (cont'd)

- Utilize **Quicklinks** to provide a link to content

Subject: \*

{OrgUnitName} - Unit 1 Supplemental Resources

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

Message:

Paragraph | B | I | U | A | | | | | | | | | | Lato (Recomm... | 19px

Hi {InitiatingUserFirstName},

I hope this email finds you well. I wanted to reach out regarding your recent performance on the Unit 1 {OrgUnitName} course. While I know you worked hard, I understand that the material may have presented some challenges.

To help you review and reinforce key concepts, I have made available some [supplemental resources](#) for Unit 1. The resources include practice problems, additional notes, and video tutorials.

Remember, learning is a journey, and it's okay to encounter some bumps along the way. These resources are here to support your continued growth and understanding. Please don't hesitate to reach out if you have any questions or need further assistance. I am available during [office hours](#) and by appointment.

## Unit 1: Supplemental Resources

Francis,

Your recent performance on the Unit 1 Quiz may have been less than you were expecting. While I know you worked hard, I understand that the material may have presented some challenges.

To help you review and reinforce key concepts, I have made available these supplemental resources for Unit 1. The resources include practice problems, additional notes, and video tutorials.

Remember, learning is a journey, and it's okay to encounter some bumps along the way. These resources are here to support your continued growth and understanding. Please don't hesitate to reach out if you have any questions or need further assistance. I am available during [office hours](#) and by appointment.

Dr. Ima

0% 0 of 3 topics complete

- [Dive and Discover: Expeditions to the Sea Floor](#) Link
- [Beyond the Surface - Into to Oceanography: A Hidden World Within Earth's Oceans | Earth Science](#) Video
- [Unit 1 Self-Assessment](#) Self Assessment

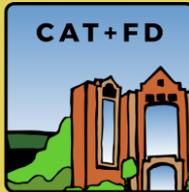


# Effective Practice #10

- Create email with accessibility in mind
  - **Readable Layouts:** Use Heading Levels to create a map for screen readers
  - **Visual Clarity:** Maintain high Color Contrast; avoid ALL CAPS and excessive italics
  - **Meaningful Links:** Use Descriptive Text instead of "Click Here" or "Link"
  - **Inclusive Imagery:** Always provide Alt Text for images to convey context



Image Credit: [Image by Deedster](#) from [Pixabay](#)



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# Effective Practice #11

- Utilize Brightspace Accessibility Checker

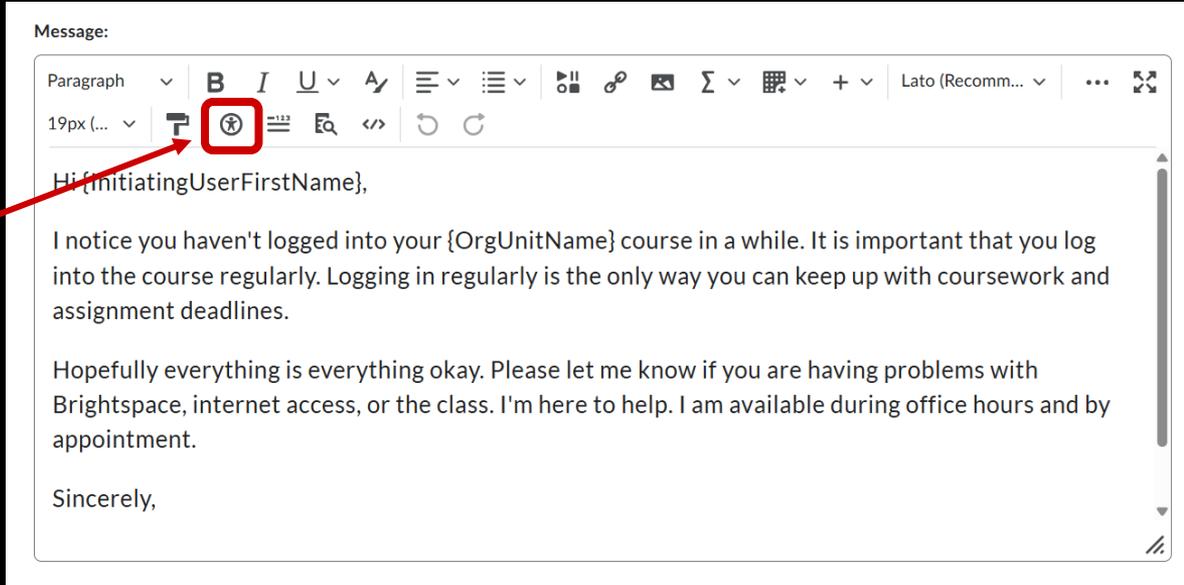


Image Credit: [Image by Deedster from Pixabay](#)

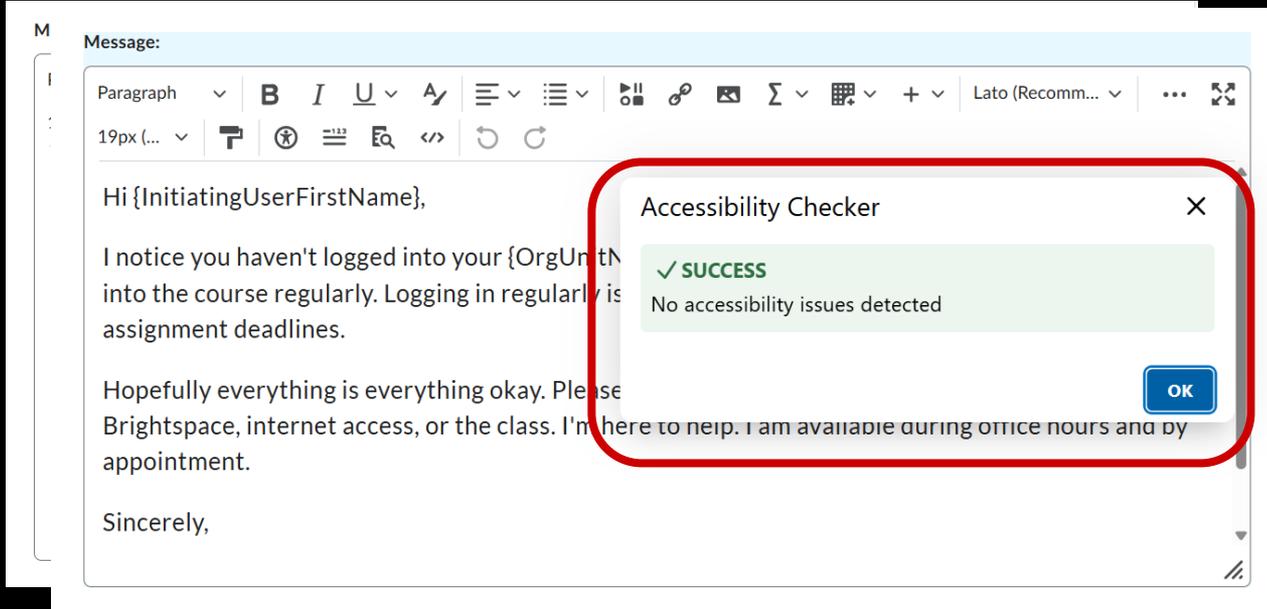
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# Effective Practice #11 (cont'd)

- Utilize Brightspace Accessibility Checker



Message:

Paragraph **B** *I* U ~~A~~ Lato (Recomm...

19px (...

Hi {InitiatingUserFirstName},

I notice you haven't logged into your {OrgUnitName} into the course regularly. Logging in regularly is important for assignment deadlines.

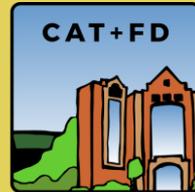
Hopefully everything is everything okay. Please contact me about Brightspace, internet access, or the class. I'm here to help. I am available during office hours and by appointment.

Sincerely,

**Accessibility Checker**

✓ **SUCCESS**  
No accessibility issues detected

**OK**

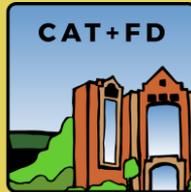


# Effective Practice #12

- Simplify your workflow by copying existing IAs to make similar ones



Image Credit: [Image by Deedster from Pixabay](#)



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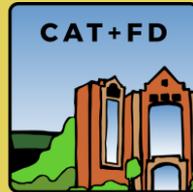
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# Effective Practice #13

- Test out your Intelligent Agents with a **Practice Run**



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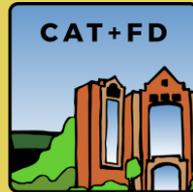
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# Potential Pitfall #1

- Be careful when using ***Replace Strings***, ensure that they are properly formed and use them sparingly



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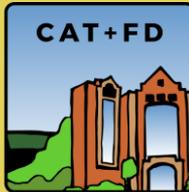
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# Potential Pitfall #2

- IAs that are copied from another course will be set to 'Inactive' by default
  - Enable each IA manually
  - Update the run schedule



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# Potential Pitfall #3

- Set custom values in Intelligent Agent Settings
  - Users cannot Reply to the primary “From” on Agent emails using default values

## Intelligent Agents Settings

Use the system defaults

Name that emails come from      Reply-To address for responses  
Xavier University of Louisiana      Do\_Not\_Reply@xula.edu

Set custom values for this course

Name that emails come from      Reply-To address for responses

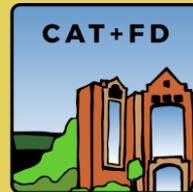
These settings will affect all future emails sent by an agent.

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.



Image Credit: [Image](#) by OpenClipart-Vectors from [Pixabay](#)

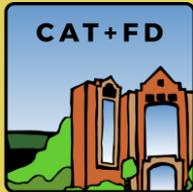




# Biggest Take Away

What is your #1 takeaway from today's workshop?

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# Workshop Slides, Recording, & Resources

<https://catwiki.xula.edu/ia>



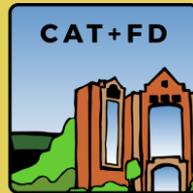
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Any  
Questions



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