

Proposal tasks in Courseloop

If you want someone to do something with a proposal in Courseloop, the easiest thing to do is to add a proposal task.

There are three types of task:

Standard – when you want someone to update something in the proposal or to add the proposal to a meeting;

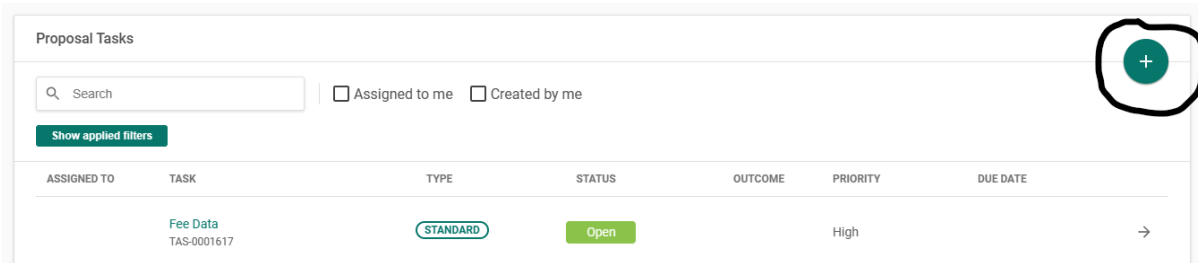
Endorsement – when you need someone such as a school director to support a proposal;

Approval – when someone needs to approve the proposal.

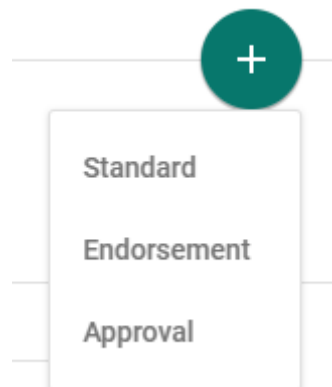
Endorsement and standard tasks are used most often.

Adding a task

In your proposal, scroll down to the Proposal Tasks section and press the + button.



ASSIGNED TO	TASK	TYPE	STATUS	OUTCOME	PRIORITY	DUE DATE
	Fee Data TAS-0001617	STANDARD	Open		High	→



Select the type of task you want to add:

Then complete all the fields marked * and press **Create**.

Create Endorsement



Title *

Please endorse this proposal

Priority *

High



Assigned to *

Jason Kirby

Description *

Jason - please endorse this proposal and submit to the next stage of approval.
Thanks
Graham

Due by *

17/03/2023

Notes

Status *

Open



Create

JK

Please endorse this proposal
APP-0001151

ENDORSEMENT

Open



High

17 Mar 2023



The task is now visible in the list of proposal tasks. When it is completed you will be notified by email.

Dealing with a task

If you are assigned a task you will receive an email like this:

Task Created



NoReplyCourseLoop <ljmuoemprod@service-now.com>

To Sherwood, Graham

The screenshot shows an email notification from Liverpool John Moores University. At the top is the university's logo and name. Below that, the text reads: 'The following task has been created and assigned to you:'. It then lists 'Task Number: TAS-0001533' and 'Title: Please endorse this proposal'. At the bottom, there is a blue link labeled 'View Task'.

Ref:MSG0032884 IdilOZFZKkfnID5bh5AD

In order to get to the proposal task, you will need to click on the link **two** times: the first click will take you to your Courseloop landing page – if you are off-campus then you will need to login using your LJMU username@ljmu.ac.uk and password and go through multi-factor authentication. Go back to the email and click on the link again. That should take you to the proposal.

Your proposal task will appear in the list of tasks: click on the right arrow to open the task:

ASSIGNED TO	TASK	TYPE	STATUS	OUTCOME	PRIORITY	DUE DATE	
GS	Please endorse this proposal APP-0001084	ENDORSEMENT	Open	↗	High	19 Oct 2022	→

Please endorse this proposal
×

ENDORSEMENT APP-0001084

Edit 🗑️

Title
Please endorse this proposal

Priority
High

Assigned to
GS Graham Sherwood

Description
Please review and endorse this proposal if you are supportive.

Due Date
📅 19 Oct 2022

Notes
-

Status
Open

Approval Status
Requested

Endorse
Reject
Remind

Once you have reviewed the proposal (if being asked to endorse) or carried out the requested action, please click on the **Endorse** or **Resolve task** button.

Endorse?

Add any final comments below for endorsing this task. Once the task is endorsed, this cannot be undone.

Close notes: *

Cancel
Confirm

You will need to add a short note before pressing **Confirm**

The task will then show as **Done**:

Please endorse this proposal
 APP-0001075

ENDORSEMENT

Done

✔

High

12 Oct 2022

→