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;
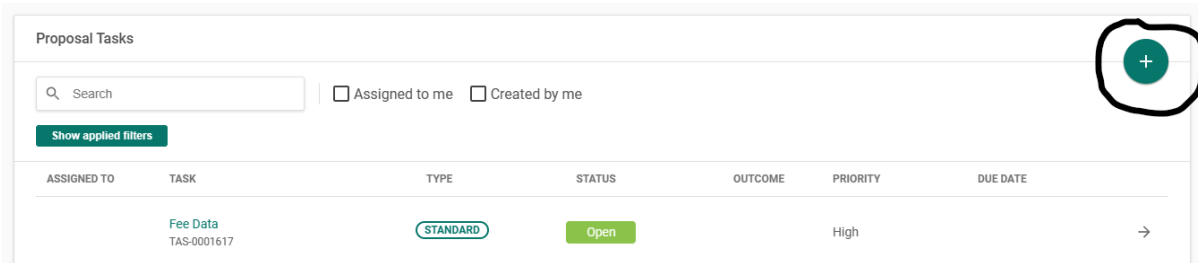
Endorsement – when you need someone such as a school director to support a proposal;
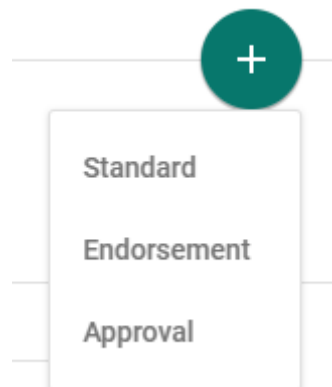
Approval – when someone needs to approve the proposal.

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.

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

LIVERPOOL JOHN MOORES UNIVERSITY

The following task has been created and assigned to you:

Task Number: TAS-0001533

Title: Please endorse this proposal

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	→

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.

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

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