

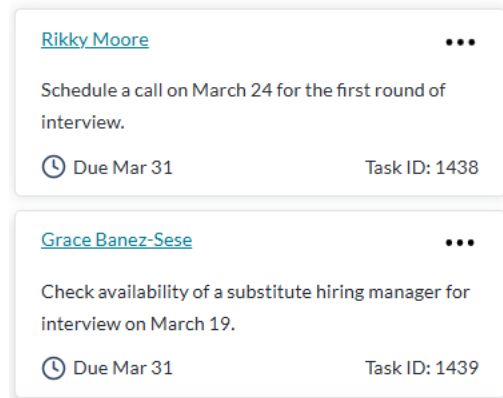
# Task Manager

Recruiters and sourcers usually track follow-ups and reminders about candidates in email or sticky notes. During a high-volume outreach, tracking outside symplr Talent Sourcing becomes difficult. Task Manager gathers such tasks into a centralized view so you can create, view, and complete follow-ups without leaving the platform. This reduces missed follow-ups, enhances candidate engagement, and helps your team stay organized.

## What is it?

Task Manager is a list of tasks that lets each user create and manage follow-up items that relate to their sourcing work. You can add a due date and description; see tasks in a due date-sorted list; reorder tasks; and archive completed tasks when they're done—updates save in real time.

You can create tasks from the Task Manager Dashboard or from a candidate's card. Only the user who created the tasks can view them.

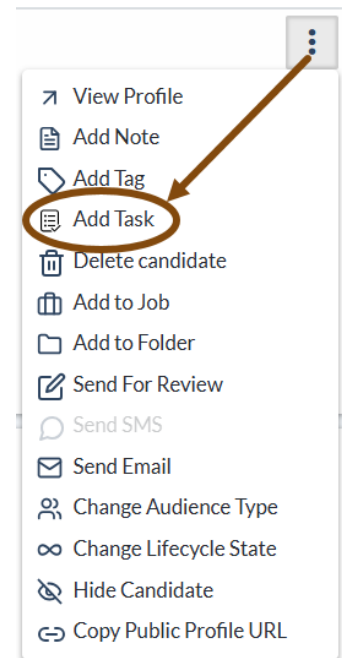


## How do I Create a Task?

To create a task, go to the **Source** page, and then select **Add Task** from the **Actions** menu of a candidate's card. This opens the **New Task** dialog box where you enter the details of the task that relates to the candidate.

The task creation process is completed over the course of three steps:

1. **Due date.** Here you specify a date by which you expect to complete the task. You can only specify the current date or a future date.
2. **Description.** Type a description about the purpose of the task. This helps you to quickly understand the task's nature when you view it on the Task Manager Dashboard.
3. **Save.** The last step in the task-creation process that saves your task's details to the Task Manager Dashboard.



**Note:** The system automatically enters the name of the selected candidate in the **Candidate** field. You can also create a task from the Task Manager Dashboard where after clicking **Add task** and selecting a candidate you repeat the preceding steps.

## Task Manager Dashboard

To access the Task Manager Dashboard, click **Task Manager** under the **Talent** area.

The screenshot shows the Task Manager Dashboard interface. The top navigation bar includes the symplr logo and 'TALENT SOURCING', a notification bell, a help icon, and a user profile icon labeled 'AS'. The main content area is titled 'Task Manager Dashboard' and includes a welcome message: 'Welcome to your Task Manager Dashboard. This page allows you to manage and complete tasks assigned to you.' There is an 'Add Task' button in the top right corner. The dashboard is organized into four columns based on task status: 'Overdue (3)', 'To Do (2)', 'Completed (1)', and 'Archived (5)'. Each column contains task cards with candidate names, descriptions, due dates, and task IDs. A sidebar on the left lists various apps, with 'Task Manager' highlighted and an arrow pointing to it.

Overdue (3)	To Do (2)	Completed (1)	Archived (5)
<p><b>Quinoa Cochran</b></p> <p>Schedule the interview</p> <p>Due Feb 20</p> <p>Task ID: 1410</p>	<p><b>Rikky Moore</b></p> <p>Schedule a call on March 24 for the first round of interview.</p> <p>Due Mar 31</p> <p>Task ID: 1438</p>	<p><b>Jason Miller</b></p> <p>Schedule second round of interview</p> <p>Task ID: 1405</p>	<p><b>Pavan Singh</b></p> <p>test</p> <p>Task ID: 1398</p>
<p><b>Christine Incropera</b></p> <p>Follow up on this task</p> <p>Due Feb 27</p> <p>Task ID: 1393</p>	<p><b>Grace Banez-Sese</b></p> <p>Check availability of a substitute hiring manager for interview on March 19.</p> <p>Due Mar 31</p> <p>Task ID: 1439</p>		<p><b>Hydee Shrader</b></p> <p>test</p> <p>Task ID: 1397</p>
<p><b>Yedanth Purad</b></p> <p>Schedule a call on 28th</p> <p>Due Feb 28</p> <p>Task ID: 1407</p>			<p><b>skomminen skomineni</b></p> <p>test</p> <p>Task ID: 1390</p>
			<p><b>Hydee Shrader</b></p> <p>test</p> <p>Task ID: 1275</p>
			<p><b>Kelly Nelson</b></p> <p>test test</p> <p>Task ID: 1388</p>

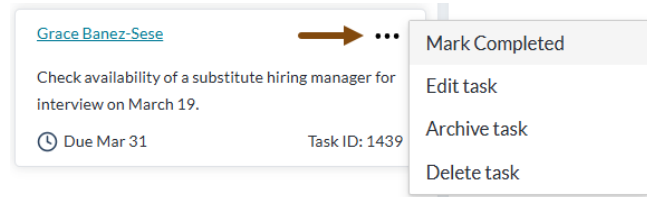
After you create a task, it moves to the Task Manager Dashboard. The dashboard acts as a single pane of glass that shows all your tasks, their states, and allows task-management activities. The dashboard shows tasks as cards, and each card contains the candidate's name, task's description, due date, and system-generated task ID. The system organizes these cards within four columns according to the tasks' states:

- **Overdue.** This is the first column on the dashboard. It contains tasks that are past their due date, which you should tackle immediately.
- **To Do.** This is the second column on the dashboard that contains outstanding tasks within their due dates. After you create a task, the system moves it to this column.
- **Completed.** The third column contains tasks that you have finished and whose state you have changed to **Completed**. You can archive or delete these tasks.
- **Archived.** The final column of the dashboard contains archived tasks.

**Note:** The columns sort tasks by their due date, but you can drag a task's card within a column to change its priority. You can also drag a card between columns to change the task's state.

## Managing Tasks

A task that you create automatically adds to the **To Do** column. Now you are ready to perform different activities on this task. To perform these activities, drag a card to a column (**Completed** or **Archived**) or use the **Actions** menu (click the dot icon on a card).



Use the following options on the **Actions** menu to perform these activities:

- **Mark Completed:** Sends a task that you have finished to the **Completed** column.
- **Edit task:** Changes an existing task's due date and description.
- **Archive task:** Sends a task that is pending or one that you have finished to the **Archived** column.
- **Delete task:** Deletes the task permanently.

**Note:** You can add a task from the dashboard too by clicking **Add task** and selecting a candidate. The system supports multiple tasks for the same candidate.

## Viewing a Candidate's Overview

Create tasks more effectively through better context and information about the candidate in question. Click the candidate's name on the card to see an overview of the candidate's profile.

A screenshot of a candidate's overview page. The page is titled "Grace Banez-Sese" and is part of a "SOURCE: Our Candidate Pool". The left sidebar contains personal information: "Updated: Nov 7, 2024", "Age of Resume: 5 years", "FALLS CHURCH, Virginia", "5712208860", "grace.sese@inova.org", "Not Specified", "Title: Medical Director-Apheresis", "Company: Inova Health Systems", and "Industry not specified". The main content area is divided into "RESUME" and "EXPERIENCE" sections. The "RESUME" section includes contact information (Home, Work, and Other Phone: 5712208860; Email: Grace.Sese@inova.org; Address: 3300 Gallows Road; Location: FALLS CHURCH, Virginia, 22043) and "Experience" (Medical Director-Apheresis, Inova Health Systems). The "EXPERIENCE" section shows "Inova Health Systems" with "Location Not Specified" and "Date Not Specified", and "Medical Director-Apheresis (Unknown length)". The footer contains copyright information: "© 2026 symplr. All rights reserved. | Privacy Policy | Terms of Use | Support".

Note that this overview is the read-only version of the overview section available on a candidate's profile that you access through the **Source** page.

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## The Fine Print

Nothing to worry about, just some additional details you'll want to keep in mind.

- A task is always associated with a specific candidate.
- Collapse or expand the columns on the Task Manager Dashboard by clicking the arrow at the top of a column. This controls how you can view columns and manages space on your screen.
- Overdue, pending, and completed tasks contain visual indicators to draw attention.
- The system automatically generates a task's ID.
- Completed tasks automatically move to the archived state after 30 days unless you move them manually.
- If you have any additional questions about the Task Manager, please reach out to a symplr support specialist by calling (800) 869-5200 or emailing [talentsupport@symplr.com](mailto:talentsupport@symplr.com)