Synapse-Plan

User & Administrator Guide

Enterprise Programme & Project Management Platform

Version 2.2 | Generated from the in-app Help centre

July 2026

Contents

Role tags show who can use each feature. System Admin can use every feature, so tags show the additional roles that have access (admin-only features are tagged System Admin). "Everyone" means all signed-in users, including Read-Only Guests.

1. Getting Started

Signing in

Who can use it: Everyone

Sign in with your email and password. A secure token keeps you signed in for 24 hours. Demo accounts all use the password Passw0rd! (e.g. admin@synapse.plan).

Navigating the app

Who can use it: Everyone

The left sidebar is grouped into Overview, Delivery, Finance and Insights & Admin. Menu items you do not have access to are hidden automatically based on your role.

Real-time updates (the Live pill)

Who can use it: Everyone

The "Live" pill on the Dashboard and project boards shows the real-time connection. Task changes, status moves and finance updates appear instantly for every connected user - no refresh needed.

Getting help

Who can use it: Everyone

The HELP button (top-right of every screen) opens this guide. Use the search box to jump straight to a topic. A printable PDF version is also included in the app's docs folder.

2. Roles & Access Control

How access works

Who can use it: Everyone

Every data-changing action checks your role. If you lack permission the app hides the control and the server returns "403 Forbidden". Viewing dashboards and data is open to all signed-in users; the tags in this guide show who can make changes.

System Admin

Who can use it: Everyone

Full control of everything, including user management, archiving/deleting programmes & projects, and the audit log.

Programme Manager

Who can use it: Everyone

Manages programmes and everything within them: projects, delivery, risks, resources, finances and reports.

Project Manager

Who can use it: Everyone

Manages projects, tasks, dependencies, risks, baselines, resources and project finances.

Project Controller

Who can use it: Everyone

Manages programme & project finances (budgets, currency, spend, POs) and views the finance dashboard.

Finance Manager

Who can use it: Everyone

Full finance analytics: the pivotable finance dashboard, exports, budgets, spend, invoices and purchase orders.

Team Member

Who can use it: Everyone

Works on tasks: create/edit tasks & work packages, log time and comment.

Read-Only Guest

Who can use it: Everyone

Views dashboards and data without making changes.

3. Programmes

Viewing programmes

Who can use it: Everyone

The Programmes page lists strategic initiatives with their budget (in their own currency) and project count.

Creating & editing a programme

Who can use it: Programme Manager

Use "+ New Programme" to create one with a name, budget, currency and description.

Programme roadmap

Who can use it: Everyone

The roadmap shows a Gantt-style timeline of every project in the programme with milestone markers.

Aggregated risk register

Who can use it: Everyone

A programme's Risks page shows its own risks plus every risk raised on its projects, in one view.

Programme overview

Who can use it: Everyone

The "Overview" button on a programme card opens a rolled-up view: every linked project with its sponsor, manager, start/end dates, budget and status, plus all their key benefits aggregated (qualitative vs. quantitative counts and realisation dates).

Setting programme finances

Who can use it: Finance Manager Project Controller Programme Manager

Budget and currency for a programme can be adjusted by finance roles.

Archiving or deleting a programme

Who can use it: System Admin

Only System Admins can archive (hide, reversible) or permanently delete a programme. Deleting cascades to its projects and all their data and cannot be undone - prefer Archive when unsure.

4. Projects & Views

Viewing projects

Who can use it: Everyone

The Projects page shows all projects as cards; open one to reach its workspace.

Creating & editing a project

Who can use it: Project Manager Programme Manager

Create a project with a name, key, currency, budget and optional parent programme.

Project templates

Who can use it: Project Manager Programme Manager

On a project's Overview tab, choose "Save as Template" to store its structure (milestones, tasks with relative dates, dependencies, benefits) in the Templates menu. From Templates, pick one and the "Use template" form pre-fills the template's details - you can change the project name, key, description, budget, currency, sponsor, start date and programme so the new project has its own information before creating it (dates lay out from your chosen start date; task statuses reset to To Do).

The project views

Who can use it: Everyone

Each project offers Overview, Board (Kanban), List, Gantt, Calendar, Finances and Risks tabs - different ways to work with the same data.

Project overview (sponsor, manager, dates, summary)

Who can use it: Project Manager Programme Manager

The Overview tab holds the project sponsor, project manager, start & end dates, budget and a short summary. Managers edit these inline (budget/currency needs a finance role).

Key benefits (qualitative / quantitative)

Who can use it: Project Manager Programme Manager

On the Overview tab, record the project's key benefits, classing each as Qualitative or Quantitative (with a value) and a realisation date. These roll up into the Programme Overview page.

Setting project finances

Who can use it: Finance Manager Project Controller Programme Manager

Project budget and currency are editable inline on the Budget page by finance roles.

Archiving or deleting a project

Who can use it: System Admin

System Admins can archive or permanently delete a project. Deletion cascades to tasks, risks, finances and all related data.

5. Task Management

Creating tasks, work packages & milestones

Who can use it: Project Manager Programme Manager Team Member

The "+ New" button in a project lets you create a Task, a Work Package, or a Milestone. A task can be standalone in the schedule or linked as a child of a work package. Work packages and standalone tasks can be linked to a milestone (a work package's child tasks inherit its milestone).

Editing tasks

Who can use it: Project Manager Programme Manager Team Member

Open a task to edit its title, status, priority, assignee, story points, estimated hours, start & due dates, description, work package and milestone.

Comments & subtasks

Who can use it: Everyone

Discuss a task in its comment thread and break work into subtasks from the task drawer.

Time tracking

Who can use it: Everyone

Use the start/stop timer or log hours manually. Logged time feeds resource cost on the finance sheet and capacity utilisation.

Linking tasks to finance lines

Who can use it: Finance Manager Project Controller Programme Manager Project Manager

Non-people revenue and capital spend is planned on the project finance sheet, not on the task. When adding a Revenue or Capital line you can link it to the related task so the planned spend is traceable back to the work that drives it.

Task IDs

Who can use it: Everyone

Every task gets a unique 8-character Task ID - a letter derived from its project key followed by 7 digits - shown in the List view, on board cards and in the task panel. IDs are unique across all projects.

Copying & duplicating tasks

Who can use it: Project Manager Programme Manager Team Member

In the List view, use the duplicate button to copy a task within the project. In the task panel, use "Copy to project…" to copy a task into another project. Copies start as To Do and receive their own new Task ID.

Deleting a task

Who can use it: Project Manager Programme Manager

Project & Programme Managers can delete tasks.

6. Gantt, Dependencies & Scheduling

The Gantt chart

Who can use it: Everyone

The Gantt view shows a year / month / week time scale that expands as the schedule grows, status-coloured task bars, a "today" line, and arrows for finish-to-start dependencies.

Linking dependencies (finish & start relations)

Who can use it: Project Manager Programme Manager

In a task, link it to another with one of four relations: "Finish after" / "Finish before" (finish-to-start) or "Start after" / "Start before" (start-to-start), each with an optional working-day lag. Finish-to-start arrows are cyan on the Gantt; start-to-start arrows are purple.

Automatic date compliance & rescheduling

Who can use it: Project Manager Programme Manager

When you add a dependency or edit a task's dates, the app enforces the rules: finish-to-start tasks cannot start before their predecessor finishes; start-to-start tasks cannot start before their predecessor starts (plus any lag). Non-compliant dates are automatically corrected and the change cascades to downstream tasks, skipping weekends and bank holidays.

7. Calendar & Working Days

Calendar view

Who can use it: Everyone

The Calendar view places tasks on their due dates and shades weekends and bank holidays as non-working days.

Managing bank holidays

Who can use it: Project Manager Programme Manager

Settings → Working Calendar lets managers add or remove bank holidays. These feed the scheduling engine and calendar shading (seeded with UK bank holidays).

8. Resources & Capacity

Capacity heatmap

Who can use it: Everyone

The Resources page shows each person's annual hours, hours allocated and hours remaining, with a utilisation bar (amber above 80%, red when over-allocated).

Setting annual hours & hourly rate

Who can use it: Project Manager Programme Manager

Edit a resource's annual capacity and hourly rate inline on the Resource Pool page. Allocations draw down from the annual hours, and the hourly rate drives all cost calculations (budget, finance sheet, resource lines).

Allocating resources

Who can use it: Project Manager Programme Manager

Assign a named person (or a generic unfilled role) to a project in hours. A person cannot be allocated beyond their remaining capacity - the app blocks over-allocation.

9. Risk Registers

Project & programme risks

Who can use it: Everyone

Each project has its own risk register (Risks tab); programmes show an aggregated register combining their own risks and their projects'.

Logging & editing risks

Who can use it: Project Manager Programme Manager

Log a risk with a probability and impact (1-5), plus a proximity date (when it may materialise) and a value (financial exposure). A live 5×5 heatmap highlights concentration; scores 15+ are high (red), 8-14 medium (amber).

Viewing a risk & updating status

Who can use it: Project Manager Programme Manager

Click any risk in the register to open its detail panel, where you can review it and change its status (Open / Mitigating / Closed), owner, scoring, proximity, value and mitigation.

Risk comments

Who can use it: Everyone

Any signed-in user can add comments to a risk from its detail panel, keeping a discussion thread alongside the register.

Deleting risks

Who can use it: Programme Manager

Programme Managers can remove risks from the register.

10. Budget & Finance

Budget page

Who can use it: Everyone

Compares planned vs. actual spend per currency; estimated cost = task estimated hours × rate, actual = logged hours × rate.

Editing budgets & currency

Who can use it: Finance Manager Project Controller Programme Manager

Finance roles can edit a project's budget and currency inline on the Budget page.

Finance Dashboard (portfolio)

Who can use it: Finance Manager Project Controller Programme Manager Project Manager

A pivotable view grouping budget, estimated, actual, variance and logged hours by programme / project / currency, with PDF & CSV export.

Project finance sheet

Who can use it: Everyone

Each project's Finances tab shows Total Budget, Spent and Remaining (green when positive, red on overspend), a spend-vs-remaining chart, a Forecast vs Actual summary with +/- variance, and line items grouped into Resources, Revenue and Capital.

Finance sheet lines

Who can use it: Finance Manager Project Controller Programme Manager Project Manager

Resource lines are generated automatically - forecast from allocated hours × rate, spend from time logged against tasks. Revenue and Capital (non-people) lines are added manually for planned expenditure, each with a forecast date for when spend will occur and an optional link to the related task.

Recording spend & invoices

Who can use it: Finance Manager Project Controller Programme Manager Project Manager

Book spend to a finance line with a date, description, invoice number and date received; invoices can be billed against a purchase order.

11. Purchase Orders & Invoices

Purchase orders

Who can use it: Finance Manager Project Controller Programme Manager Project Manager

Create a PO with a number, supplier, value and an uploaded copy of the PO document. Each PO tracks its invoiced total and PO remaining (green/red) across all its invoices.

Linking invoices to a PO

Who can use it: Finance Manager Project Controller Programme Manager Project Manager

When recording spend, use the "Link PO" selector to bill an invoice against a purchase order. One PO can carry many invoices; the PO's number and document are attached to each linked invoice.

12. Automations & Baselines

Automations

Who can use it: Project Manager Programme Manager

Create rules that fire on a task status change, e.g. "when status becomes Review, reassign to the Project Manager". Toggle rules on/off or delete them.

Baselines

Who can use it: Project Manager Programme Manager

Snapshot a project's schedule, then compare planned vs. current due dates and status to see slippage in days.

13. Reporting & Exports

Reports

Who can use it: Project Manager Programme Manager

Queue project exports in PDF, CSV or Excel. Generation runs in the background; completed files are listed with a secure download.

Finance exports

Who can use it: Finance Manager Project Controller Programme Manager Project Manager

The Finance Dashboard exports the full financial dataset as PDF or CSV.

14. Administration

User management

Who can use it: System Admin

System Admins create users and assign roles. Assign the least-privileged role that lets someone do their job. (Hourly rates are managed on the Resource Pool page, not here.)

Audit log

Who can use it: System Admin Programme Manager

An immutable, searchable trail of who changed what and when - every create, update, delete, login, allocation and finance change.

Single Sign-On (SSO)

Who can use it: System Admin

The Settings page shows configured SSO providers. SAML 2.0 and OAuth2 (Azure AD, Google Workspace, Okta) are enabled by setting environment variables and restarting the backend.