

Synapse-Apex — User Guide

A practical, task-oriented guide for everyday users (Bid Managers, Contributors, Finance and Approvers). For system setup and administration see the [Admin Guide](#).

1. Signing in

1. Go to the application URL (default **http://localhost:3000**).
2. Enter your email and password. New accounts are created by an administrator with a temporary password — you will be asked to **set a new password** on first login.
3. If multi-factor authentication (MFA) is enabled or enforced, you will scan a QR code with an authenticator app (e.g. Microsoft/Google Authenticator) and enter a 6-digit code. Store the **recovery codes** shown during setup somewhere safe — each can be used once if you lose your device.

Your name and roles are shown at the bottom of the left sidebar. **Sign out** is there too.

2. The dashboard

The landing page lists every bid in the workspace.

- **Summary tiles:** active bids, bids due within 14 days, and win rate.
- **Table columns:** reference, title, client, workflow state, submission date (with a countdown/overdue flag), completeness %, and the bid production cost (planned / actual).
- **View icon ():** opens that bid's own **workspace** — this is where all work on a bid happens.
- **+ New bid** (Bid Managers): opens the create form.

Creating a bid

Provide the title, client, **start date** and **submission date** (start must be before submission), the **opportunity value (£)**, **contract duration (months)**, an optional **opportunity web link** (e.g. the portal URL), the compliance frameworks to align to, and any win themes. You are taken straight into the new bid's workspace.

3. The bid workspace

Opened from the dashboard view icon. At the top sits the **workflow bar** (see §4), followed by tabs for each stage of work.

Overview

Shows and lets Bid Managers edit the opportunity details: client, value, duration, web link (click to open), dates and win themes. Use **Edit** -> change -> **Save**.

Documents

Upload the tender / ITT / RFP documents (PDF, DOCX, XLSX, TXT, MD). Uploaded files are listed with their type and size. The system extracts their text ready for analysis.

Requirements (the review gate)

- **Extract from tender** reads the uploaded documents and produces a list of every response the tender demands. (If AI is not configured, a placeholder requirement is created so you can still work.)
- Review the list carefully — **edit** any field inline, + **Add** missing requirements, or delete () irrelevant ones. Set a **word limit** per requirement where the tender imposes one, and tick **mandatory** where applicable.
- This is a deliberate **human gate**: nothing is generated until you are happy with the requirement list.

Responses

- **Generate all** drafts a response to every requirement, grounded in the approved capability library and aligned to the bid's frameworks and win themes. You can also **Generate** a single requirement's response.
- Each response shows a **live word count** against the requirement's word limit and turns red if you exceed it.
- **Edit** any response directly in the text box, then **Save edits**. Use **Mark in review** and **Approve** to move a response through its lifecycle, or **Regenerate** to redraft. AI-identified **gaps** ("no evidence for X") are flagged for a subject-matter expert.

Plan

- **Generate / rebuild plan** creates milestones and one task per requirement, **back-scheduled** from the submission date using working days.
- A **Gantt chart** renders automatically: milestones as diamonds, tasks as bars, a dashed line for today, and colour by status (indigo = task, gold = milestone, green = done, red = overdue).
- Record **actual hours** and update task **status** in the table below.

Cost

- Enter endpoint counts (servers, workstations, network devices, users, sites) and the contract **term**, then **Calculate**. The engine converts these into resource hours and licence costs using the effort rules and rate catalogue.
- Any cost line can be **overridden** by typing a new monthly/one-off value.
- **Non-people resource costs**: add hardware, travel, connectivity, facilities or any other cost directly (description + monthly and/or one-off amount). These persist across recalculations.
- Totals (monthly, one-off, total contract) are shown at the bottom.

Pricing

- Enter **risk contingency %**, **management contingency %** and **target margin %**, name the scenario, and **Price it**. Margin is applied **on the sell price**, shown as a transparent waterfall (base -> contingencies -> total cost -> margin -> sell price).
- **AI justification** drafts the price narrative and value statements.
- Save several scenarios; **Select** the one that flows into the final package.

Assistant

The Assistant is an **optional AI advisory tool** that helps you produce the highest quality, best-evidenced answers. It is layered on top of everything else — it never changes anything on its own.

- **Availability**: it only works if an administrator has enabled **AI Integration** (Administration -> Security). If they haven't, the tab tells you so.
- **Switch on per bid**: a Bid Manager turns the Assistant **on** or **off** for this specific bid using the button at the top of the tab.
- **Bid-level advice**: *Get bid-level advice* reviews the whole bid — coverage gaps, weak responses, win-theme opportunities, prioritisation — grounded only in the data in the application.
- **Enhance a response**: on the **Responses** tab, click **Ask Assistant** on any response. The Assistant drafts an improved version and lists specific advice.
- **Align to a framework**: on the **Responses** tab, click **Align to framework** to get suggestions that map a response more explicitly to the bid's active compliance framework(s) — which controls to reference and evidence to cite.
- **The thought cloud**: the Assistant surfaces its latest idea in a floating **thought cloud** in the corner of the workspace. It **pings** when it appears (you can mute/unmute with the speaker icon on the cloud — your choice is remembered). The cloud **disappears once you acknowledge it** (*Got it*), and only comes back when the Assistant has **another** idea, or when **you summon it** with the button. You can **Approve & apply**, **View** (open the Assistant tab), or acknowledge, all from the cloud.
- **Guard-rail indicator**: every suggestion shows whether the Assistant **self-checked for hallucinations** and how many unsupported claims it removed (Self-checked for hallucinations – N removed). Hover to see exactly what was removed. If AI is unavailable, it shows **Self-check unavailable**.

- **You are always in control:** an enhancement is applied to the response **only when you click *Approve & apply***. You can **Dismiss** any suggestion. Every decision — toggled on/off, advice generated, suggestion applied or dismissed, and by which login — is recorded in the bid's **Activity** trail.

Package

- **Assemble package** compiles the responses, compliance matrix, and selected pricing into a versioned package. Unapproved responses are flagged and block approval.
- **Export** the package as **DOCX** (main response), **XLSX** (cost & pricing) or **PDF** (summary).
- Approvers can **Approve** (locks the version) or **Request changes** (with a comment, which reopens the work).

Activity

A complete **audit trail for this bid** — every action, who (which login) performed it, and when. Use it to see progress and for governance.

3b. Answer Library (sidebar)

The **Answer Library** is a searchable catalogue of every tender question and its response — your team's growing bank of proven answers. Open it from the left-hand menu.

- **It fills itself.** Every time a bid response is **approved**, that question and answer are automatically added to the Library. When a bid is marked **won** or **lost**, that outcome is stamped onto its answers so you can tell winners from cautionary examples.
- **Search & filter.** Type keywords (e.g. "security operations centre", "SLA", "transition") and filter by category, client, outcome (won/lost), or framework. Results rank **master** answers first, then **won** answers, then most-reused.
- **Reuse to win faster.** On each answer card, **Copy answer** puts it on your clipboard; **View** opens the full detail with provenance (which bid/client, won or lost) and reuse history.
- **Insert straight into a bid.** On a bid's **Responses** tab, click **"Find in Answer Library"** on any response to search proven answers for that question and **Insert** the best one directly into your draft — the reuse is logged automatically.
- **Curate the best.** Bid Managers and Contributors can **Add** answers manually, edit them, tag/categorise them, **mark an answer as "master"** (the recommended canonical answer), or **archive** weak ones. Administrators and Bid Managers can **Harvest approved** to back-fill the Library from existing approved responses in one click.

Why it matters: winning tenders is largely about reusing and refining what already won. The Library turns every bid's best answers into an asset the whole team can draw on — faster drafting, consistent quality, and fewer weak answers under deadline pressure.

4. The workflow bar

The coloured rounded boxes across the top of the workspace show the bid's lifecycle:

Draft Planning In progress In review Approved Submitted -> outcome (won / Lost / Withdrawn).

- The **current** stage is filled indigo; **completed** stages are green; upcoming stages are light grey.
 - Boxes you are allowed to move to are **outlined in gold** and clickable — click one to advance (or step back) the bid. Only Bid Managers and Approvers can move the workflow; others see it read-only.
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5. Roles at a glance

You are a...	You can...
Bid Manager	Create/manage bids, upload docs, run generation, edit everything, move the workflow
Contributor	Edit/author responses, upload supporting docs, update plan tasks
Finance	Manage the cost sheet, non-people costs, pricing scenarios, and the rate catalogue
Approver	Review packages, approve or request changes, advance review/approval stages
Read-Only	View dashboards, bids and packages

Administrators can do everything, plus manage users and system settings (see the Admin Guide).

6. Tips

- **AI output is always a draft.** Review and edit before approving — the app never submits anything externally.
- If AI features are unavailable, the app still works end to end; AI steps produce clearly labelled placeholders for a human to complete.
- Assemble the package only once responses are approved — the package screen tells you how many are still outstanding.
- Exports reflect the **latest assembled** package, so re-assemble after changes.