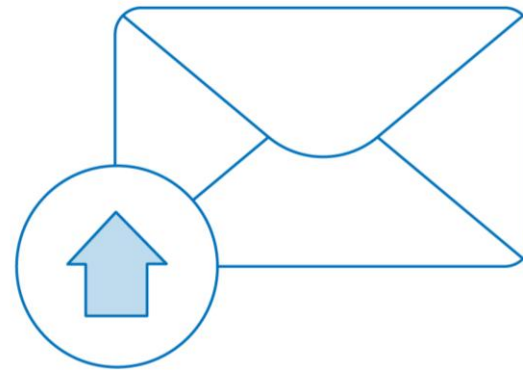


UNHCR • ACONEX TRAINING

Mail & Project Correspondence



August 2026



Formal Correspondence



How is the Mail Module relevant to a funded partnership agreement?

For each funded partnership agreement, the following mail types are useful!

Initial Request for Extension (of implementation period)

The extension request, justification, supporting correspondence, endorsements and the final approval or rejection.

Request for extension of the liquidation period

The partner's request, operational assessment, justification, endorsement and final decision.

Project-closure correspondence

Formal correspondence supporting closure of the Project Workplan, including confirmation of outstanding actions, balances, recoveries and completion of closure requirements.

Change Contract

Informing UNHCR that a partnership amendment is required

Request and confirmation on recovery of funds

Correspondence confirming the amount due from the partner and the agreed recovery method.

General Correspondence

General exchange with UNHCR vis-à-vis the funded partnership agreement

Not simply a shared email. All records assigned to the Aconex Mail module are subject to the standard retention period in Annex 2: six years following project closure, unless another applicable records rule requires longer retention.

01

What Aconex Mail Is

Mail is the project's formal record — not email

Controlled project correspondence: formal communication, decisions, submissions, responses and process tracking. The mail body has a maximum size of **4 MB** (excluding attachments; Aconex imposes no attachment-size limits within Mail).

ORDINARY EMAIL

- ✗ Can be edited, deleted or lost
- ✗ No shared, neutral audit trail
- ✗ Sits in personal inboxes
- ✗ No formal status or close-out

ACONEX MAIL

- ✓ Permanent — cannot be recalled or deleted
- ✓ Full audit trail of who sent what, when
- ✓ Held in the project, visible to your organisation
- ✓ Typed, numbered and able to be closed out

Mail is organisation-based — a critical distinction

Who can see your mail

- Authorised **within your** users **organisation** may see mail sent or received by colleagues — except confidential mail.
- Without that permission, a user sees only their own mail.
- Mail sent to another **authorised** organisation may be visible to **users there** — not only the named recipients.

The implications

- Do not assume ordinary mail is visible only to named individuals.
- Use **confidential mail** when access must be restricted.
- Select recipients based on organisational responsibility.
- Formal correspondence belongs to the project record, not a personal inbox.

This is a critical difference from **Outlook or Gmail** — Aconex is organised around participating organisations, not only individual users. [Aconex Support Library](#) ↗

Mail • Mail attachment • Transmittal



Mail

Communicates messages and manages partnership processes — meeting follow-ups, formal notices, requests for action, responses, confirmations of decisions.



Mail attachment

Simply attached to the correspondence. It does **not** register the file as a controlled document, does not transfer document metadata, and does not necessarily update the recipient's Document Register.



Transmittal

The controlled mechanism for sending **registered documents** between organisations. It can update the recipient's Document Register and preserves document-control information.

The practical rule: Mail for the message, request or decision • a Transmittal to issue controlled registered documents • a local attachment only when full register control is not needed. [Aconex Support Library](#) ↗

THE CORE PRINCIPLE

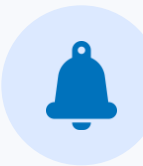
One formal communication process = one controlled Aconex mail thread.

Once sent, a mail **cannot be edited, recalled or lost** from the project record. It receives a unique mail number, and every reply and forward is tracked within the thread — an unalterable correspondence history.

02

Core Concepts

Core concepts



Mail number

The unique identity of every sent mail — supporting reference, search, audit trail, reporting and thread tracking. Depending on configuration and permissions it may be automatically generated, previewed before sending, or entered manually.

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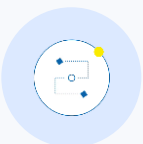
Subject

The clear business description of what the mail is about. A specific subject keeps the whole mailbox searchable and easy to follow.



Recipients (To / Cc)

To — principal recipients expected to read, act, respond or decide; when response tracking is on, they are the parties a response may be required from. **Cc** — for information and visibility; may show an N/A status as no response is expected. **Bcc** — available via the Directory; use only where consistent with organisational rules.



Threads

Contain related replies and forwards — every reply or forward is added to the thread. Thread view may display up to 250 mails; replies appear beneath the mail they answer, not in simple chronological order.



Status — Open / Closed

Closing out is how you show a query has been resolved and needs no further action.



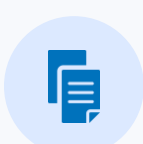
Read / unread state

Shows, per user, what has and has not yet been opened. It does not change the permanent record of the mail.



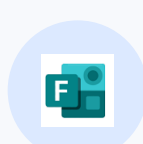
Confidential mail

Restricts who inside your organisation can see the message — the same principle as confidential documents.



Reference number

Links mail within a thread or process. Replying or forwarding normally retains it; it may be **reset** to create a separate tracked communication branch from within the thread.



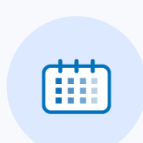
Mail body

Should state: why the mail is sent • what happened • what is required • who must act • what must be delivered • by when • relevant records • the decision or confirmation requested.



Response Required

Creates a **tracked obligation** : an outstanding task, an overdue task if missed, status changes and reporting. The administrator can make it mandatory for specific mail types.



Due date

When the response is expected. Drives the statuses **Outstanding, Overdue, Partial and Responded** . Set a realistic date — a genuine obligation, not a default.

Mail status logic — how a process is tracked

Outstanding

A due date is set and the required responses have not yet been received.

Overdue

The due date has passed and the required response has not been received.

Partial

Responses required from several parties, and only some have been received.

Responded

All required responses received, or the appropriate response formally identified.

Closed-Out

The initiating organisation has confirmed the process is complete — no further action.

N/A • No Action Needed

No due date, no response required, or viewing the mail as a Cc recipient.

No Action Required

Organisation-specific: removes the item from the recipient's own task list — **without changing the thread status** for other organisations.

Relabelled statuses

Administrators may use alternative labels — Answered, Completed, Closed, Confirmed, Accepted, Agreed.

03

Main Actions in the Mail Module



ACTION

Create & send new mail

The primary way formal correspondence is raised on the project.

1 Steps

- 1 Select the correct project
- 2 Open Mail → Blank / New Mail
- 3 Select the mail type
- 4 Review the mandatory fields
- 5 Review any auto-distribution message
- 6 Select To, Cc and, where used, Bcc
- 7 Enter a clear subject
- 8 Complete the body & project fields
- 9 Set Response Required + due date
- 10 Add attachments if appropriate
- 11 Options: numbering · confidentiality · reference
- 12 Preview mail & automatic recipients
- 13 Final quality check
- 14 Send

Mail types may add recipients through **distribution rules** — the sender can preview them but cannot remove them.

✓ Checks before sending

- ✓ Correct project · mail type?
- ✓ Correct recipient organisation & individuals?
- ✓ All mandatory fields completed?
- ✓ Subject specific · request explicit?
- ✓ Due date realistic?
- ✓ Attachment appropriate — or should it be a transmittal?
- ✓ Confidential classification correct?
- ✓ Automatic recipients reviewed?
- ✓ No sensitive information exposed unnecessarily?



ACTIONS

Add recipients, use mailing groups & reply

Add recipients

Type part of a name, or open the **Directory: Project** for users already invited to the project, **Global** for the wider Aconex instance. Select users or groups into To, Cc or Bcc, review, OK.

Can't find someone? Confirm they were invited to the project, check directory visibility, try Global, confirm the project and organisation.

Send to a mailing group

For recipients who repeatedly receive correspondence: open To or Cc → locate the group in the Project Directory → inspect the members if needed → select and add → complete and send.

Groups are **expanded into their individual users** when added to a mail.

Create or edit a group

Directory → **Create Mailing Group** → Edit Users → search and add → OK → name the group → optionally lock it → save. Edit the same way; authorised users can bulk-edit a user across groups.

Visible only within the creating organisation by default. Create **separate groups for To and Cc** populations.

The three responses

Reply / Reply to all

Answer the originator — or everyone on the original To and Cc. Select the appropriate **response mail type**. Replies do **not** automatically retain the original attachments. A reply normally marks the original as **Responded** when sent to the initiating organisation.

Forward

Send the correspondence to **new** recipients; keeps the thread relationship and can include the original attachments. Before Reply to All, check who really needs the response and whether it should be confidential.

Reset the reference number

When replying or forwarding, resetting the reference creates a **separate tracked branch** — e.g. forwarding an RFI to a consultant. Use sparingly: unnecessary resets fragment communication.



ACTIONS

Attach to mail – and when to transmit instead

Three attachment types

Registered document – Attach → Document → search your register → select → Attach. Only the *file* is attached; document metadata is not included. Verify version, revision, status and recipient authorisation first.

Another project mail – Attach → Project Mail → search → select. Useful for background, formal references or escalations – but prefer replying within the existing thread when continuing the same process.

Local file – Attach → Local File → browse or drag & drop → upload. Use carefully: it is not automatically a controlled Document Register record.

CRITICAL DISTINCTION

A mail attachment is not a transmittal.

A transmittal is the formal, controlled **issue** of documents and updates the recipient's Document Register. A mail attachment does not. When you are formally issuing controlled documents, use a **transmittal**.



ACTION

Send confidential mail

Procedure

Create the mail → select the mail type → complete the fields → open **Options** → select **Send as confidential mail** → review all recipients → preview any automatic recipients → send.

Visibility is restricted mainly to the **sender and the explicitly selected recipients**. Some organisations authorise specific users to view all confidential mail the organisation receives.

- ✓ Confirm every recipient individually
- ✓ Inspect distribution-rule recipients
- ✓ Avoid unnecessary Cc and Bcc recipients
- ✓ Review attachments • confirm restriction is genuinely needed



UNHCR
The UN Refugee Agency



PROMS

CRITICAL RULE

Confidentiality must be selected before sending.

A sent mail **cannot later be converted** into confidential mail. If sensitive information goes out as ordinary mail, it may be visible to authorised users in both organisations.



ACTIONS

Register correspondence received outside Aconex



External communications — normal email, physical letters, faxes, scans, messages from non-Aconex users — can be registered so the project record stays complete.

Register Incoming Mail

Mail → **Register Incoming Mail** → complete the fields → ensure at least one user from your organisation is in From, To or Cc → add the original sender in From (create them as a **guest** where necessary) → attach the original email, scan or letter → copy the text into the body if appropriate → Register.

Register an external response

When a reply to an existing Aconex mail arrives outside Aconex: Mail → Sent → open the original → Actions → **Register a Response** → enter the external sender, received date and content → attach the original correspondence → register.

Registered mail is **watermarked** with the registration date and registering user; the registration date becomes the sent date.

This preserves the relationship to the original **controlled thread** instead of creating an unrelated record.

Email notifications • Out-of-office risks • Mobile

Email notifications

Setup → Preferences → Notification settings:
Notification only • Entire Mail body • Entire body with attachments • None . In High Compliance Environments: on/off only — no bodies or attachments.

With the full body included, the mail may auto-mark as read, and Outlook replies may register in Aconex (Email mail type) if the address and subject are unchanged.

Oracle recommends managing Mail **directly in Aconex** — external delivery can be delayed or fail.

Out-of-office risks

Aconex has **no built-in out-of-office** . An Outlook auto-reply can register as a real response — incorrectly marking mail **Responded** , clearing outstanding tasks and distorting reports.

A preference can prevent email responses from updating mail status — the message is still received, but the process status is unchanged.

Oracle Aconex Mobile

On mobile users may view Inbox, Sent and Drafts, search and filter, switch between organisation and personal mail, open mail, review recipients and attachments, and reply or forward — depending on permissions and app version.

Mobile functionality may differ from the browser experience.

04

Permissions & Roles

What each user needs to send, see and manage mail.



Three tiers of capability



Standard partner user

- Select the correct project
- Know Mail ≠ ordinary email
- Select the correct mail type
- Identify the recipient organisation
- Use To and Cc appropriately
- Review automatically added recipients
- Write a clear subject & action-oriented body
- Set Response Required + a realistic due date
- Attach documents, mail or local files
- Recognise when a transmittal is required
- Save & retrieve drafts
- Reply within the correct thread
- Search & use Saved Searches
- Monitor Outstanding & Overdue mail
- Register external correspondence
- Use confidential mail for sensitive info
- Avoid duplicate communication threads



Advanced user / focal point

- Monitor organisation-wide mail
- Manage mailing groups & routing structures
- Use advanced search
- Build & share Saved Searches
- Monitor by type, status & organisation
- Produce Outstanding & Overdue lists
- Identify unclosed processes
- Close out completed mail
- Mark a sent item as the official response
- Register external correspondence
- Reconcile Aconex & external communications
- Inspect full thread history
- Manage internal notes
- Quality-check confidential mail
- Support mail approvals
- Investigate routing or response failures
- Monitor due-date performance & audits



UNHCR Project Administrator

- Mail types & mail forms
- Mandatory mail fields
- Response-required rules
- Default response times
- Allowed response mail types
- Mail-status labels
- Mail auto-numbering
- Distribution rules
- Project user groups
- Organisation access to mail types
- Field-value permissions
- Mail approvals & approval routing
- Search & reporting structures
- Process definitions
- Notification restrictions
- Mail-related permissions

Map the information flow and project roles
before implementing distribution rules.

05

Most Important Mistakes to Avoid

The mistakes that break the correspondence record

WRONG CHANNEL OR WRONG TYPE

Wrong mail type Wrong fields, wrong response behaviour, missing recipients, failed reporting, wrong approval route.	New mail instead of replying Breaks the thread and leaves the original task outstanding.	Replying to the wrong organisation The original stays Outstanding. Verify the initiator first.	Attachment instead of a transmittal No register update and no document-control metadata transfer.
Forwarding instead of replying A forward to the sender may not register as the formal response.	Sensitive info as normal mail Visible to authorised users in both organisations. Use confidential mail.	Incorrect To / Cc use Accountable person only in Cc, everyone in To, or the decision maker omitted.	Internal notes as formal comms Notes are invisible to the other organisation. Use Mail.

MANAGING THE PROCESS & THE RECORD

Unrealistic or missing due date Prevents accurate tracking or creates needless overdue items.	Vague subject line “Question about project” → “PPA 2026-014 – Clarification: Q2 expenditure variance”.	Unclear action request The recipient shouldn't infer what's required, who acts, by when, in what format.	Closing out too early Close-Out removes tasks — and cannot be directly undone.
Leaving completed processes open Inaccurate reports, cluttered task lists, misleading dashboards.	No Action Required to dodge a task Hides it only for you; the project process stays unresolved.	Relying on Outlook notifications External email may be delayed, filtered or misrouted. Check Aconex directly.	Unnecessary reference resets Fragments one process into disconnected communication branches.

Nearly every mistake traces back to one habit: **identify the process first, then reply within the existing thread using the correct mail type.** [Aconex Support Library ↗](#)

Recommended end-to-end procedures

13 • New mail

Select the correct project
Mail or Transmittal?
Select the mail type
Review mandatory fields
Identify accountable organisations
Add To and Cc
Preview rule recipients
Write a specific subject
Explain the context
State the required action
Identify who must act
Set Response Required + due date
Attach supporting records
Set confidentiality if needed
Review numbering & reference
Preview • check • **Send**
Verify status • monitor • close out

14 • Responding

Open the original mail
Review the complete thread
Identify the question or action
Confirm the due date
Confirm **which organisation** asked
Reply or Reply to All
Use the correct response type
State the answer clearly
Attach evidence
Transmittal for controlled docs
Review recipients • Send
Confirm Responded or Partial
If not, verify recipient & type
Use “Make this your Response” only if authorised

15 • External correspondence

Does it belong in the project record?
Locate the related Aconex thread
New external item → **Register Incoming Mail**
External reply → **Register a Response**
Add the actual sender
Attach the original source
Copy relevant text into the body
Confirm the registration date
Verify the watermark and record
Continue formally **within Aconex**

16 • Closing a process

Review the full thread
Confirm all requested responses received
Confirm decisions are documented
Confirm attachments or transmittals exist
Confirm no dependent action remains open
Confirm the status is Responded
Select **Closed-Out**
Verify the task is removed
Retain the thread as the authoritative record

Close-Out cannot be directly undone — confirm everything first.

The eighteen core principles of Aconex Mail

- 1** Mail is a permanent project record, not ordinary email.
- 2** Every sent mail has a unique number and cannot be edited or recalled.
- 3** Mail types define the business process and required information.
- 4** Replies and forwards should preserve thread continuity.
- 5** To recipients are accountable; Cc recipients are informed.
- 6** Response Required and due dates generate task and status tracking.
- 7** Outstanding, Overdue, Partial, Responded and Closed-Out represent process progress.
- 8** Sending and receiving *organisations* — not only individuals — are central to visibility and responsibility.
- 9** Confidential mail must be used where ordinary organisational visibility is inappropriate.
- 10** Attachments are not equivalent to controlled registered documents.
- 11** Transmittals should be used to formally issue controlled documents.
- 12** Distribution rules standardise routing and cannot be bypassed by the sender.
- 13** Internal notes remain internal and are not formal communication.
- 14** External correspondence should be registered to preserve the complete record.
- 15** Completed processes should be closed out to keep reporting accurate.
- 16** Saved Searches and mail statuses support operational monitoring.
- 17** Permissions determine who can view, create, approve, close or administer mail.
- 18** The existing thread remains the authoritative communication history for the issue.

KEEP LEARNING

Explore the Mail topics on Aconex Support Central

Open Working with Mail ↗