

UNHCR • ACONEX TRAINING

Tasks & Your Personal Work Queue




August 2026



Action Dashboard



01

What the Tasks Page Is

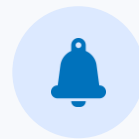
Tasks is not a business module — it is your dashboard

It automatically gathers everything that requires your action from across the system. It does **not** store documents or mail — it stores **pending actions**. Oracle describes it as your “to-do list” for the project.



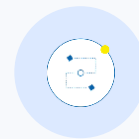
Documents

Where documents are managed.



Mail

Where communications are managed.



Workflows

Where approvals are managed.



Tasks

Where **everything that requires your attention** is collected.

THE CORE PRINCIPLE

You cannot delete a task— it disappears only when the required action is completed.

There is no dismiss, no archive and no tidy-up. If a task is still visible, the work is genuinely still outstanding.

What can generate a task



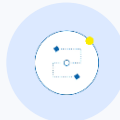
Mail

- Unread mail
- Outstanding mail
- Overdue mail
- Mail awaiting approval



Documents

- Document review
- Document approval
- Document workflow
- Unread transmittal
- Outstanding transmittal



Workflows

- Approve
- Reject
- Review
- Endorse
- Comment



Supplier Documents

- Submission required
- Submitted documents awaiting review



Other modules

- Depending on project configuration:
- Field · Packages · Forms
 - Cost · Models
 - Custom processes

The Tasks page aggregates all of these into one location — a single prioritised view of pending work across Aconex. [Aconex Support Library](#)

What a task is — and is not

A TASK IS NOT

- ✗ a document
- ✗ a mail
- ✗ a workflow
- ✗ a transmittal

A TASK IS

an action that still needs to be performed.

Once the action is completed, **the task disappears**. The underlying record always stays in its own module.

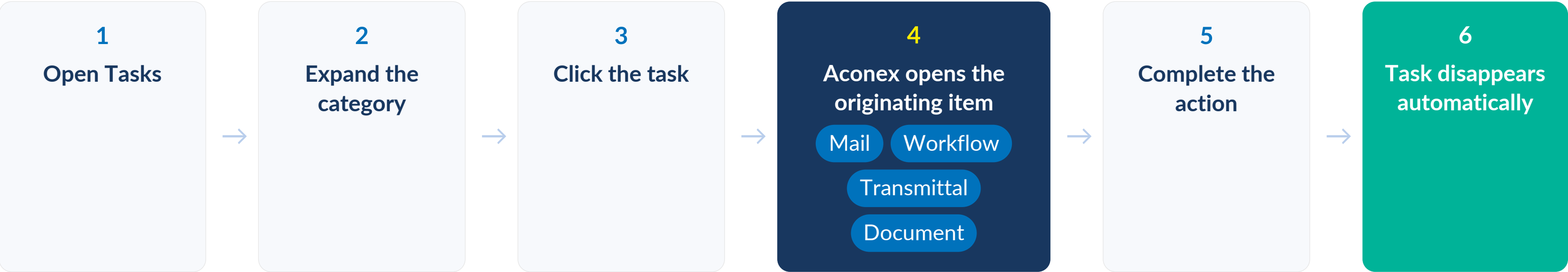
02

Working with Tasks

Opening · clearing · outstanding vs overdue · priority.

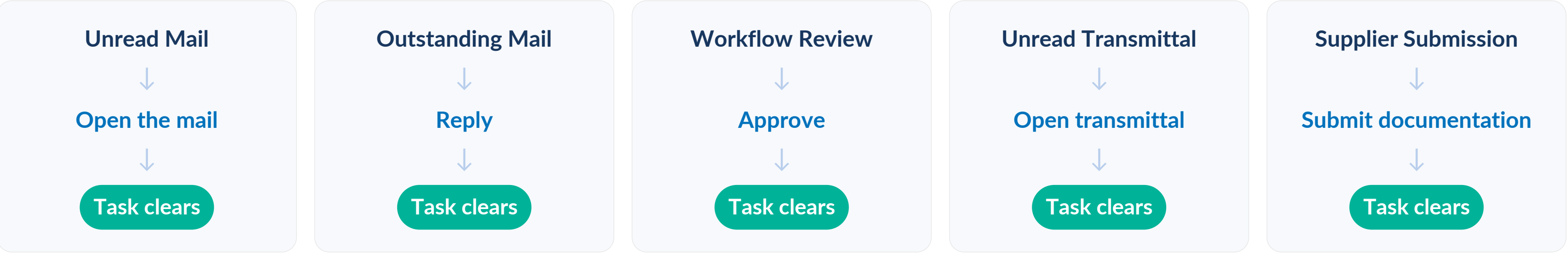


Opening a task & clearing a task



The Tasks page is a launcher, not a store. It always takes you into the module that owns the record – and the record stays there when the task clears.

You **cannot** manually delete a task. Tasks disappear only after the required action is completed.



Outstanding vs Overdue – and why tasks persist

Outstanding

A response is required. The deadline has not been reached.

Overdue

A response is required. The deadline has passed.

Why a task sometimes doesn't disappear

Wrong reply

The reply was sent to the wrong organisation.

Wrong mail type

The response is not recognised by the process.

Workflow incomplete

Only comments were entered – the approval is still pending.

Another approval needed

It is a multi-step workflow.

Wrong user

The task belongs to another approver.

Waiting for another organisation

Only a partial response has been received.

Nothing else changes. The business process is still open in both cases – only the deadline status differs.

Priority • Notifications • Searching

13 • Task priority

- 1

Overdue
- 2

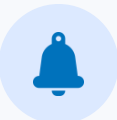
Outstanding
- 3

Approvals
- 4

Workflow Reviews
- 5

Unread Transmittals
- 6

Unread Mail



14 • Notifications

Tasks themselves **do not send reminders** .
Reminders come from Mail, Workflow and email notifications.

Automatic email notifications for **overdue tasks** can be enabled in user preferences or project settings.



15 • Searching tasks

Tasks are **not a historical repository** . When completed, they disappear from the page.
Historical information remains in **Mail, Documents and Workflows** .

The Tasks page only ever shows **active work**.

03

Common Mistakes to Avoid

The mistakes that let work slip

Ignoring the Tasks page Working only from Mail or Documents means approvals are missed entirely.	Treating Tasks as an archive It is a live work queue, not a history of completed actions.	Trying to delete tasks Tasks cannot be manually removed — they clear only when the action is completed.	Assuming opening completes it Opening a workflow is not enough — the approval, review or response must be completed.
Confusing Unread with Outstanding Unread = read the item. Outstanding = respond or take action.	Ignoring Overdue tasks These represent missed commitments and should normally be the highest priority.	Working from email only Notifications are reminders. The authoritative record and task status remain in Aconex.	Nearly every mistake traces back to one habit: open Tasks first, and finish the action — not just the reading.

The ten core principles of the Tasks page

- 1 Tasks are generated by other Aconex modules — they are not independent records.
- 2 Each task represents an action that still requires attention.
- 3 Tasks disappear only when the required action is completed.
- 4 The Tasks page is a live operational dashboard, not a historical archive.
- 5 Overdue tasks indicate missed deadlines and should be prioritised.
- 6 Outstanding tasks require a response before their due date.
- 7 Unread tasks require awareness; they do not necessarily require action.
- 8 Workflow, Mail, Document and Transmittal tasks are consolidated into one work queue.
- 9 Permissions determine which tasks a user can see and complete.
- 10 It should be the **first screen you check each working day** — one prioritised view of all pending work.

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Open Using Aconex ↗