Standalone Documents - Why does SFC only allow the creator to send a document?

Documents and more specifically the Standalone/Referring documents don't have a workflow and without transaction between MS nodes, because this is more flexible and more convenient for users and best reflects how document transmission in most organizations work.

The only type of status is sent or not sent, so a creator cannot indicate that he finished editing the document, that he uploaded all the necessary files, and that the document is ready to be sent. If we would allow someone other than the creator to send, this person could send incomplete documents.

A user gets a task to upload a document to the Commission or to the Member State. There's no need for someone else to verify his job, because only documents previously approved by the organization will be requested to be submitted. The sending of Standalone/Referring documents is considered a purely administrative task, like putting a letter into an envelope and bringing it to the mailbox. That's why for Standalone/Referring documents only, it is also foreseen that the Send Document permission is included for Update users (MSMA Update, MSAA Update, ...). Like that the creator can create, update and send the document having only the Update Roles and not the Send Roles. Having the Send Role would allow such administrative user to send also workflow Objects (such as the Programme, Payment Applications etc), which are much more sensitive, and which definitely need to be verified before being sent.

Another restriction of the Standalone/Referring documents is that the system cannot always determine which Funds are involved. Since Roles are attributed per Fund, this would mean that a user with MSMA Send for AMIF could send a document dealing with only ERDF. Especially for sensitive audit documents this needs to be avoided.

Our current implementation is a tradeoff taking into account flexibility and security, and therefore will not always suit all organisations/users, but we think it is the best compromise. If certain organizations require an extra validation/approval step before sending, they can always implement that in their internal workflow system, before

giving a user the task to create and submit that document.

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