Vigilo documentation

Every feature, screen by screen, and the setup step by step

English

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1. Setup best practices

In this order, nothing reaches your third parties before you have checked it: the defaults first, then your data, then sending. The dashboard follows the same steps (“Setting up Vigilo”).

1.1. Account's main contact

The owner of the account: receives the subscription and security information and confirms important requests.

> Choose someone who reads their email every day: the subscription and security notices go to them. Also name a trusted administrator: they run the account day to day when the owner is away.

Where: Settings › Members

1.2. Check your organization

What your third parties see in your emails: sender name, address that receives their replies, language. Vigilo also checks their registration number at the official register.

> Use a reply address that someone reads every day: that is where your third parties answer the requests.

Where: Settings › Organization › Branding and sender

1.3. Check the reminder calendar

When the request and the reminders are sent, and how many at most.

> Keep the default calendar to start; a type that needs another pace is set on its own page.

Where: Reminders › Reminder calendar

1.4. Check the email sent to third parties

The first request, as your third parties receive it.

> Send yourself the test email: you read exactly what your third parties will receive.

Where: Reminders › Message preview › Send me a test

1.5. Add your sites

Buildings, shops or premises you monitor. Not needed if you only track suppliers.

> Give each site a code: it lets you reload the file later without creating duplicates. Beyond twenty or so sites, import them from an Excel file.

Who: Owner, Administrator, or Manager

1. Portfolios › New portfolio — Optional: group your sites by client, region or mandate.
2. Sites › New site — Name, code, address and country of the site, and its portfolio if it has one. Not needed if you only follow suppliers.
3. Equipment › New equipment — Optional: on the site's record, add the equipment to inspect (lifts, extinguishers…) and, in the next tab, the leased units.

1.6. Add third parties and their contact

Suppliers, contractors or tenants, with the email address that receives the requests.

> Each third party needs a contact with an email address: without a recipient, no request is sent. Then link the third party to its sites: assignment rules rely on these relationships.

Who: Owner, Administrator, or Manager

1. Third parties › New third party — Company name, role (supplier, tenant, service provider…), country and registration number: a duplicate is stopped as you type.
2. Contacts › New contact — On the third party's record, add the person who receives the document requests, with their email and language.
3. Relationships › New relationship — Link the third party to the site or unit concerned (lease, contract), with its dates: a site's requirements follow these relationships.

1.7. Activate compliance types

Pick the obligations to track from the library.

> Start with two or three essential documents, then widen once the first uploads have arrived: each type you add multiplies the requests sent.

Who: Owner or Administrator

1. Compliance types › Browse the library — Filter by country and category: insurance, certificates, periodic inspections, certifications.
2. Activate — The template becomes a compliance type of your account, with its fields, validity period and deadlines.
3. Edit before putting it into service — To change a deadline or a field before the first request, customize it before publishing.

1.8. Create the requirements

An assignment rule applies a type to the right sites or third parties; a requirement can also be created by hand.

> Prefer a rule to creating requirements by hand: it also creates those of the sites and third parties added later. Read its preview (items targeted and left out) before activating it.

Who: Owner or Administrator

1. Assignment rules › New rule — Choose the compliance type, then whom it applies to: third-party role, relationship type, portfolio, sites, site or equipment types, tags, country, custom fields (risk level, activity, amount).
2. Before activation, the preview counts the requirements the rule will create.
3. Once active, the rule also creates the requirements of sites and third parties added later.

1.9. Activate the reminders

Requests go out by email on the type's schedule, then the reminders.

> Turn reminders on once the preview and the test email are right; in the first week, watch for rejected emails and requirements without a recipient.

Where: Settings › Organization › Automatic reminders

1.10. Invite your team

Colleagues who follow or approve the documents, each with a role and a scope.

> Invite your colleagues once the settings are stable; give each the narrowest role that is enough and, if needed, a scope of sites.

Who: Owner or Administrator

1. Settings › Members › Invite — Enter each person's email, role and scope: the whole organization, or portfolios and sites. They receive an invitation link.
2. Pending invitations › Resend — If the link did not arrive, resend the invitation; revoke it if it is no longer needed.
3. For many people, fill in the Team sheet of the import file.

Then, every week

Dashboard
Compliance rate, priorities and the sites furthest behind.

To review
Decide on the uploaded documents before the review time limit is exceeded.

Requirements
Overdue requirements or requirements without a recipient: remind, fix the contact or waive.

Account health
What stops a sending or a follow-up: rejected emails, missing contacts, untracked checks.

2. How to

The main tasks, step by step. To start an account, follow the first group in order.

Set up, in this order

Create your sites

Who: Owner, Administrator, or Manager

1. Portfolios › New portfolio — Optional: group your sites by client, region or mandate.
2. Sites › New site — Name, code, address and country of the site, and its portfolio if it has one. Not needed if you only follow suppliers.
3. Equipment › New equipment — Optional: on the site's record, add the equipment to inspect (lifts, extinguishers…) and, in the next tab, the leased units.

Add a third party and its contact

Who: Owner, Administrator, or Manager

1. Third parties › New third party — Company name, role (supplier, tenant, service provider…), country and registration number: a duplicate is stopped as you type.
2. Contacts › New contact — On the third party's record, add the person who receives the document requests, with their email and language.
3. Relationships › New relationship — Link the third party to the site or unit concerned (lease, contract), with its dates: a site's requirements follow these relationships.

Choose the documents and inspections to follow

Who: Owner or Administrator

1. Compliance types › Browse the library — Filter by country and category: insurance, certificates, periodic inspections, certifications.
2. Activate — The template becomes a compliance type of your account, with its fields, validity period and deadlines.
3. Edit before putting it into service — To change a deadline or a field before the first request, customize it before publishing.

Create requirements with a rule

Who: Owner or Administrator

1. Assignment rules › New rule — Choose the compliance type, then whom it applies to: third-party role, relationship type, portfolio, sites, site or equipment types, tags, country, custom fields (risk level, activity, amount).
2. Before activation, the preview counts the requirements the rule will create.
3. Once active, the rule also creates the requirements of sites and third parties added later.

Start the requests and reminders

Who: Owner or Administrator

1. Settings › Organization › Branding and sender — Logo, color, sender name and reply-to address of the emails sent to third parties.
2. Reminders › Reminder calendar — Steps before and after the due date. The proposed schedule suits most cases.
3. Message preview › Send me a test — Read the email in each language and receive it yourself.
4. Settings › Organization › Automatic reminders — Keep automatic reminders on: each third party receives its first request, then reminders until it submits.

Invite your team

Who: Owner or Administrator

1. Settings › Members › Invite — Enter each person's email, role and scope: the whole organization, or portfolios and sites. They receive an invitation link.
2. Pending invitations › Resend — If the link did not arrive, resend the invitation; revoke it if it is no longer needed.
3. For many people, fill in the Team sheet of the import file.

Load everything from an Excel file

Who: Owner or Administrator

1. Sites › Import › Complete file — Download the template, blank or with an example: one sheet per type of data, in import order.
2. Fill in the sheets you need (portfolios, sites, units, third parties, equipment, requirements, team), then upload the file.
3. Each error is given with its sheet, row and column; nothing is created while one remains.

Day to day

Review a submitted document

Who: Owner, Administrator, or Manager

1. To review — Submitted documents wait here, oldest first. Opening one reserves it for you.
2. Checkpoints — Compare the document with the dates and amounts entered, and tick each checkpoint.
3. Approve — The requirement becomes compliant until the document's validity ends.
4. Reject — Or reject with a reason: the third party reads it on its submission page and can send another document.

Assign a document to a colleague

Who: Owner, Administrator, or Manager

1. To review › Assign to — Open the document, choose the colleague and write what you expect (second opinion, amount to check). They are notified.
2. Documents › For me — The colleague finds the document under “For me”. Any member who can review can still decide.

Submit a document received by email or on paper

Who: Owner, Administrator, or Manager

1. Requirements — Open the requirement: search by third party, site or type.
2. Submit on the third party's behalf — Attach the file, say how and when you received it, then enter its dates. It goes to review; if your role allows it, you do it right away.

Send the submission link or remind a third party

Who: Owner, Administrator, or Manager

1. Requirements › Upload link for the third party › Copy the link — On the requirement, copy the submission link to send it yourself. The third party needs no account.
2. Remind now — Or send the reminder email right away, without waiting for the schedule.
3. Third parties › Upload link (all their requests) — For a third party with several requests, one link from its record.

Waive or exclude a requirement

Who: Owner, Administrator, or Manager

1. Requirements › Waive — On the requirement: waived until a date or with no end date, it no longer counts as missing.
2. Exclude — When it does not concern this third party or site: it is closed.
3. Request a waiver — If your organization requires a second approval, the waiver becomes a request that another administrator approves or rejects.

Change several requirements at once

Who: Owner, Administrator, or Manager

1. Requirements — Filter the list (status, type, site, owner...), then tick rows, or select all the results of the filter (500 at most).
2. Actions › Change the due date — Choose the action: due date, owner, reminder, waiver...
3. The report gives the number processed and, by reason, the number refused.

Follow a finding until it is fixed

Who: Owner, Administrator, or Manager

1. Requirements › Add a finding — On the requirement, describe what the check found (inspection report, visit), its severity, who fixes it and by when.
2. Findings — Follow all open findings and the overdue ones.
3. Attach proof of the fix, then close the finding. Depending on the type, an open finding prevents compliance.

Add a requirement by hand

Who: Owner, Administrator, or Manager

1. Requirements › New requirement — Choose the type, what it applies to (third party, site, unit, equipment or the organization) and the due date.
2. For a third party, choose whether the request goes out right away. To create many, use an assignment rule.

Monitor and prove

See where you stand

1. Dashboard — Compliance rate, counts by status and priorities: each figure opens the matching list.
2. Account health — For administrators: what stops reminders or exports from going out, with the fix.

Get a report in Excel, CSV or PDF

Who: Owner, Administrator, or Manager

1. Reports — Choose the view, the filters (site, type, period…) and the columns.
2. Export — Excel, CSV or PDF. A very large file is prepared in the background: you are told by a notification and by email.
3. My exports — Prepared files stay there for 7 days.

Receive a report every week

Who: Owner or Administrator

1. Reports › Schedule this report — From the view and filters you want: frequency (day, week, month), format and recipients.
2. Scheduled reports — Edit, pause or delete the sendings.

Prove compliance on a past date

1. Third parties › At a date — On a third party's or a site's record, choose the date: the status of each requirement on that day, with the document that covered it.
2. Download the table as CSV for the auditor.

Hand over the documents of a period to an auditor

Who: Owner, Administrator, or Manager

1. Reports › Download evidence — Choose the period and the filters: a ZIP of the approved documents, sorted by third party, with their register and fingerprints.
2. Files not included (infected, erased, being scanned) are listed in the ZIP.
3. On Windows, extract the ZIP close to the root of the drive (for example C:\Vigilo) or with 7-Zip: File Explorer refuses paths that are too long.

Download the evidence of a third party or of a selection

Who: Owner, Administrator, or Manager

1. Requirements › Actions › Download evidence — Tick the requirements first: the latest evidence of each, all of it, or that of a period, in a ZIP.
2. Third parties › Download evidence — On the third party's page, Requirements tab: all its evidence in a ZIP.
3. On Windows, extract the ZIP close to the root of the drive (for example C:\Vigilo) or with 7-Zip: File Explorer refuses paths that are too long.

Find the documents of a year and download them

Who: Owner, Administrator, or Manager

1. Documents › Valid in — Choose the year (and the quarter), then open the folder of the compliance type or of the third party.
2. Download (ZIP) — “Download (ZIP)”: every file of the folder shown, filed like the screen.
3. On Windows, extract the ZIP close to the root of the drive (for example C:\Vigilo) or with 7-Zip: File Explorer refuses paths that are too long.

Administer

Handle a member's departure

Who: Owner or Administrator

1. Settings › Members › Actions › Remove — Their access is cut at once.
2. Choose whom to hand over their open requirements, sites, portfolios and findings to, within that person's scope.
3. Hand over responsibilities — For a change of job, hand over their responsibilities without removing their access.

Name a deputy during an absence

1. Notifications › See all › Plan an absence — First and last day, and the deputy who covers your scope.
2. During the absence, your work notifications are copied to them and internal reminders go to them.
3. Settings › Members › Absence — An administrator can also declare a member's absence.

Connect another software

Who: Owner or Administrator

1. Settings › API › New key — Name the key and give it only the rights it needs. It is shown only once: copy it.
2. Add an endpoint — For your software to be told of submissions and status changes: its address and the events you want.
3. The developer guide describes each API call.

Undo an import

Who: Owner or Administrator

1. Sites › Import › Recent imports › Undo this import — Within 30 days, once: what the import created is archived.
2. Fix the file and import it again: the codes are freed.

Dashboard

Your organization's compliance at a glance: the rate, the counters and what to handle first. Every figure opens the matching list.

Compliance rate

Share of compliant requirements (including those expiring soon) among those that apply. An overdue, expired or blocked requirement counts as non-compliant; a closed requirement is not counted. Waivers count as compliant or are left out of the rate, depending on Settings › Dashboard, where the green and orange thresholds are also set.

“Getting started”: no due date has passed yet. If you also supply documents to your customers, a second rate, for the documents you provide, is shown separately, never mixed. A member limited to some sites sees the rate of their sites. Under the rate, the number of active third parties without any requirement counted; a click lists them.

Fields and buttons

Getting started
Shown until a first due date has passed: the rate would not mean anything yet. The first due date is given.

Rate: documents to provide
The documents you provide to your customers or landlords, counted apart from the rate of documents to receive.

Other labels of this section

Below the N% threshold · Compliance rate · Compliance rate of your sites · Rate: documents to receive · Target met (≥ N%) · To watch (≥ N%)

Counters

Non-compliant, Expiring soon, In progress (document to request, requested or rejected before the due date; submitted or in review, even after it), Compliant, Waived and Sites. “Expiring soon” is included in “Compliant”, and so is “Waived” when Settings › Dashboard counts waived requirements as compliant. “Requirements without a recipient”: the third party has no reachable contact. “Reminders used up”: every reminder has been sent and nothing was submitted. A click opens the filtered requirements list. “Overdue findings” appears when a finding is past its date. A card counts the “This does not concern me” answers of third parties that await your decision.

Fields and buttons

Non-compliant
Overdue, expired, or blocked by a finding.

Expiring soon
Compliant, but the evidence expires within the type's alert period (30 days by default).

In progress
Evidence to request, requested or rejected before the due date; submitted or under review, even after it.

Compliant
Approved and valid evidence, including what expires soon.

Waived
Waived requirements; counted as compliant or left out of the rate, as set in Settings › Dashboard.

Sites
Active sites in your scope.

Requirements without a recipient
The third party has no reachable contact: no reminder can go out. Add a contact who receives requests.

Reminders used up
Every planned reminder has gone out and nothing was submitted: call the third party or remind them by hand.

Overdue findings
Findings past their correction date; a click opens the list of overdue findings.

Other labels of this section

“This does not concern me” answers

Priorities, sites to watch, trend

“To handle first” lists the requirements that call for an action (overdue, documents to provide or to check, due soon), not the compliant ones; “See the schedule” opens the schedule filtered on “To act on only”. “Sites to watch” shows at most five sites under the target or with a non-compliant requirement, lowest rate first; requirements without a site come apart, last. The curve shows the rate over 12 months, with the target; “Show monthly values” shows it as a table.

Other labels of this section
Compliance rate trend (12 months) · End of month · No site · out of · · Rate · See the schedule · Show monthly values · Sites to watch · Summary by site · Target N% · To handle first · Today

Setting up Vigilo

The steps that take a new account to its first reminder. First three checks, before the first email leaves: the organization (sender name, address that receives the replies, language), the reminder calendar (when the request and the reminders are sent, how many at most) and the first request email; each shows the settings in force, “That's right” confirms it, “Change” opens the setting. Then the data, in the order things are created: sites, third parties and their contact, compliance types, requirements, active reminders. Each open step links to its action according to your role; if the reminders do not leave, the step says why, requirement by requirement, with a link to lift the block. Once everything is done, “Setup complete” and “Do not show this help again” (owners and admins); it is turned back on in Settings. A lot of data? Import it from Excel or CSV. An account opened online starts with its main contact: the owner confirms it is them, or makes another person they invited the owner.

Other labels of this section
(you) · Account's main contact · Activate compliance types · Activate the reminders · Add a site · Add a third party · Add the due dates · Add the recipients · Add third parties and their contact · Add your sites · Browse types · Change · Change the calendar · Change the main contact · Check the email sent to third parties · Check the reminder calendar · Check your organization · Compressed copy of the files · Create a requirement · Create a rule · Create the requirements · Do not show this help again · Done · Hide this help · Import from Excel or CSV · Invite a member · Invite your team · No, files kept as submitted · of · Optional · Resume the reminders · See and remind · See the requirements · See the types · See third parties · Setting up Vigilo · Setup complete · Subject · That's me · That's right · The owner of each requirement (no confirmed address) · Turn the reminders on · View and change the email

Account administration

For owners and administrators, below the compliance part. “To review by your team”: documents waiting for your decision, with how long the oldest has waited (amber from 7 days). “Account health”: settings to fix, blocking ones first. “Team”: members, sign-ins in the last 30 days, pending or expired invitations, members without two-factor authentication or passkey (marked in Settings › Members), temporary accesses ending. “Last 30 days”: documents received, approved, rejected (a click opens the filtered audit log), emails to third parties sent or failed. “Integrations”: API keys, webhooks, last import. “Support”: your open requests. “Subscription”: plan, service and number of tracked items.

Other labels of this section
Account administration · Integrations · Last 30 days · Subscription · Team · To review by your team

Other labels of this screen
A question about your plan · Account health · Active · Closed · Dashboard · Excluded · First due date · in progress · Last import on · Last import on by · No applicable requirement yet · No import yet · Nothing to fix · of without a requirement · Open · Open the list · out of · Plan · See the types your team reviews · See third-party status · Self-service: your team calls and reviews · Support · Suspended · Trial · Trial until

Requirements

A requirement is a document or check expected from a third party, a site, a unit or a piece of equipment, according to a compliance type. This list shows them all, with their status and due date.

Statuses

Not requested, Requested, Submitted, In review, Rejected: the document is expected or being checked. Compliant: a valid document was approved. Expiring soon: still valid, but its end of validity falls within N days (the type's “expiring soon” alert, 30 by default); the reminder calendar is set separately. Overdue: the due date passed without a document. Expired: the document's end date passed (after the type's grace period, if any). Waived: you waived it, with or without an end date. Closed: it no longer applies (relationship ended, type deactivated…). “Blocked” is added when an open finding prevents compliance (depending on the type's “Open findings” setting: a critical finding, or any open finding).

Fields and buttons

Due date
Date by which the document or inspection is expected, or its renewal. Once passed without an approved document, the requirement is “Overdue”.

Days left
Days before the due date; in red, the days overdue. Empty for a closed requirement.

Valid until
End of validity of the last approved document. Once passed (after the type's grace period), the requirement is “Expired”.

Other labels of this section

Closed · Compliant · Coverage from · Expired · Expiring soon · In review · New evidence to review · Not closed · Not requested · Overdue · Rejected · Requested · Status · Submitted · Waived

Filters, views and columns

Filter by status, type, site, owner, due date, reminders, rule or custom field; the search covers the third party, the site and the type. Closed requirements are hidden unless you show them. Save the filters as a view, for yourself or shared with the whole organization (owners, administrators and managers; viewers use the shared views); a shared view is deleted by its author or an administrator. The columns (Columns menu: show, hide, reorder; the CSV export uses the ones shown) and the default view belong to your account. With the assisted service, the “Calls and review” filter separates what Vigilo follows from what your team follows; the “Followed by Vigilo” badge marks the rows our team follows.

Fields and buttons

Compliance
Statuses grouped as on the dashboard: compliant, non-compliant, pending, excluded.

Status
One status. By default, closed requirements are hidden.

Compliance type
The requirements of one compliance type.

Site
The requirements of a site and of what belongs to it (units, equipment, leases and contracts).

Owner
Yours, a member's, or those without an owner.

Due date
Due date passed, in the next 30 days, later, or no date.

Rule coverage
“Out of rule only”: requirements a rule created but no longer covers (criteria changed, item changed, rule deactivated). They stay tracked until you exclude them.

Waiver
“To approve”: waiver requests waiting for another administrator's approval.

Reminders
No recipient (no reachable contact), reminders used up (every reminder has been sent), paused, or third party without a current relationship.

Rule
The requirements created by an assignment rule.

Direction
To receive: the document is provided to you (by a third party, a body or your team). To provide: you provide it to a customer or a landlord.

Calls and review
With the assisted service: what the Vigilo team follows, or what your team follows.

Views
Saves the filters and sorting, for you or shared with the organization; a view can open by default.

Columns
Show, hide and reorder the columns, for your account only. The CSV export uses the columns shown.

Third party providing the document
Optional column: the third party an inspection of a site or equipment is entrusted to.

External reference
Optional column: the third party's reference in your software (ERP, accounting).

Other labels of this section
"This does not concern me" answer · All · Cancel · Default columns · Delete · Delete the view · Followed by Vigilo · Later · Move down · Move up · My views · Name · Next 30 days · Next page · No date · No recipient · Open by default · Out of rule only · Past · Paused · Previous page · Reminders used up · Rows per page · Save · Save this view · Share with the whole organization · Shared views · Show and reorder · Show closed · Stop opening by default · Third party without a current relationship · To provide · To receive

Acting on several requirements

Tick rows (or "Select all N results" for the whole filter, 500 at most), then Actions: remind now, pause or resume reminders, change the due date, assign an owner, entrust to a third party, waive, "Exclude" (does not apply). With the assisted service, an owner or an administrator also chooses "Calls and review" (Vigilo, your team or as the type). The report gives the number done and, per reason, the number refused; it stays shown even if the rows leave the filter.

"Export as CSV" downloads the selection (5,000 rows at most).

"Download evidence…" gathers the approved evidence of the ticked rows in a ZIP: the latest for each requirement, all of it, or that valid during a period. The same button is in a third party's Requirements tab.

Fields and buttons

Select all results
Extends the selection to every result of the filter, 500 requirements at most.

Remind now
One email per recipient, grouping their requirements; those already reminded today are skipped.

Pause reminders
No reminder at all until the chosen date.

Resume reminders
Reminders start again on the schedule.

Change the due date
The same new due date for all; a past date makes them overdue.

Assign owner
A member who sees these requirements; those they do not see are skipped, with the reason.

Entrust to a third party
The third party who must provide the inspection of a site or equipment; they receive the request and the reminders.

Waive
No more reminders or overdue status: reason required, optional end date (5 years at most).

Request a waiver
When the organization requires a second approval: nothing changes until another administrator approves.

Approve the waivers
Approves the waiver requests made by other members.

Exclude
Closes, with a reason, requirements that do not apply; they can be reinstated from their page.

Reinstate
Reopens, with a reason, the excluded requirements selected, and a third party's own requirements closed with its last relationship. Shown when closed requirements are listed.

Calls and review
Assisted service, owners and administrators: Vigilo, your team, or as the type.

Export as CSV
Downloads the selection with the columns shown, 5,000 rows at most.

Other labels of this section
Actions · Approve · Assign · Clear selection · Close · Confirm · Done · Download evidence · Entrust · New due date · Pause · Paused until · Resume · Save · Select all · Select all rows · Select this row · Send · Send the requests · Waiver end (optional) · Working out the recipients

Creating a requirement by hand

“New requirement”: choose the type, what it applies to (third party, site, unit, equipment or the organization, depending on the type) and the due date, then, for a third party, whether the request goes out now. To create requirements in bulk, prefer an assignment rule (Assignment rules menu): it creates and keeps up to date the requirements of every item concerned.

Fields and buttons

New requirement
One requirement by hand. For every item concerned, prefer an assignment rule: it creates them and keeps them up to date.

Compliance type
What is requested; the type sets what the requirement can apply to, the frequency and the information to enter.

Applies to
The third party, site, unit, equipment or organization, depending on the type.

Relationship with the site
For a third party: one of its relationships (lease, contract), or the third party in general.

To be provided by
Due date of the first document; a past date makes the requirement overdue at once.

Send the request now
The third party receives the request and its upload link without waiting for the reminder schedule.

Other labels of this section
Choose a type

Other labels of this screen
All owners · All reminders · All rules · All sites · All types · Any date · As the type · Browse the library · Company documents of this site's third parties · Message sent · No open requirement · No owner · No requirement for this third party · No requirement within your scope · No requirements on this site · No requirements yet · None (the third party in general) · Open in the requirements list · Open the existing requirement · Open the requirement · Organization · Out of rule · Recipient · Requirements · Search · Site code · To approve · To be sent to · Waiver requested · Write to the third party

Requirement page

Everything about a requirement: its state, documents, findings, reminders, exchanges with the third party and history.

Header

The status, the type (with its version), the item concerned, the relationship with the site and the site, the validity period of the last approved document, the due date, the owner and the origin (assignment rule, manual creation, import or API). A banner flags a waiver, a closure or a legal hold.

Fields and buttons

Validity
Period covered by the last approved document.

Relationship with the site
The third party's lease, contract or service at the site the document is requested for.

Owner
The member in charge of the requirement; they receive a copy of the reminders when the schedule provides for it.

Origin
How the requirement was created: assignment rule, by hand, import or API.

Rule
The assignment rule that created it and keeps it up to date.

Third party providing the document
For an inspection of a site or equipment: the third party who must provide it and receives the reminders.

Calls and review
Assisted service: who calls the third party and checks its documents for this requirement (Vigilo or your team); overrides the type's choice.

Other labels of this section

API · Assignment rule · Created manually · Custom fields · Import

Actions

Change the due date, reassign the owner (a member who can see this requirement), waive (reason required; end date optional, 5 years at most; if your organization requires it, another administrator approves or refuses the request from this page, and the status changes only once approved), “Exclude” (the requirement does not apply) or reinstate. An owner or administrator can place a legal hold (dispute, inspection). With the assisted service, the “Calls and review” line says who calls the third party and checks its documents for this requirement: as its type, Vigilo or your team. Every action is recorded in the history.

Fields and buttons

Change due date
New date for the document; reminders follow the new date.

Reassign owner
A member who sees this requirement.

Waive
No more reminders or overdue status: reason required, optional end date (5 years at most).

Request a waiver
When the organization requires a second approval: nothing changes until another administrator approves.

Edit waiver
Changes the reason or the end date of the waiver.

Lift waiver
The requirement gets back its real status and its reminders.

Exclude
Closes the requirement with a reason: it does not apply.

Reinstate
Reopens an excluded requirement (“does not apply”); its status is computed again.

Place a retention hold
Owners and administrators: its documents and history can no longer be erased (dispute, inspection) until the hold is lifted.

Other labels of this section
As the type · Calls and review · Calls and review by Vigilo · Calls and review by your team · New due date · Vigilo · Waiver end (optional) · Your team

Evidence

Submitted documents, newest first, with their state. You can submit on the third party's behalf, or send them the upload link. A document to review opens in the review to be approved or rejected. “Apply to other requirements” uses the same document for other requirements of the same third party and type. Without a third party (a site or equipment check), “Entrust to a third party” names who must supply it.

Fields and buttons

Submit on the third party's behalf
Upload a document received by email or on paper; it is checked like an upload by the third party.

Upload link for the third party
Secure link to copy or share: the third party uploads without creating an account. Creating a new one disables the old one.

Review
Opens the pending document in the review, to approve or reject it.

Open
The document, the information entered and the review decision.

Apply to other requirements
The same document for other requirements of the same third party and type; each receives a copy to check.

Entrust to a third party
Without a third party (inspection of a site or equipment): names the third party who must provide the document; they receive the request and the reminders.

Other labels of this section
Approve · Download · Evidence · Reject

Findings

Issues found during an inspection, with their severity, assignee and correction date. “Start”, then “Mark resolved” attaching the proof; someone else clicks “Verify” or “Send back”; “Won't fix” closes it with a reason. Depending on the type's “Open findings” setting, a critical finding, or any open finding, can block compliance.

Fields and buttons

Add a finding
A defect found during the inspection, with its severity, who fixes it and by when.

Severity
Critical, major, minor or observation. Depending on the type, a critical finding (or any open finding) prevents compliance.

Assigned to
The member who fixes it.

Fix by
Once passed, the finding counts as overdue on the dashboard.

Start
The fix is under way.

Mark resolved
The fix is done; attach the proof.

Attach proof
Photo, invoice or report showing the fix.

Verify
Someone else confirms the fix: the finding is closed.

Send back
The fix is not enough: the finding goes back to be fixed.

Won't fix
Closes the finding without a fix, with a reason.

Other labels of this section
Critical · Findings · In progress · Major · Minor · Observation · Open · Resolved · Verified

Reminders and messages

Reminders sent to the third party (date, recipient, result) and the next one planned. “Remind now” sends at once; reminders can be paused until a date. If no contact can be reached, the block says what to fix. Messages exchanged with the third party are listed below the reminders. If the third party answers “This does not concern me”, a banner gives its reason and the reminders stay paused until you decide: “Resume reminders”, “Waive” or “Exclude”. A submission, or the requirement entrusted to another third party, also restarts them. “Record a reminder” keeps a reminder made outside Vigilo (call, registered letter with its number and acknowledgment of receipt, letter, email from your mailbox, visit): it goes into the history without changing the automatic reminders; its author, an owner or an admin can delete it with a reason.

Fields and buttons

Next reminder
Date of the next automatic reminder, from the schedule and the due date. If the recipient's email cap is reached, the date shown is the deferred one, with the reason.

Remind now
Sends a reminder right away. A confirmation is asked when one already left today or when the third party received as many as the 7-day cap; at twice the cap, a reason.

Pause
No reminder at all until the chosen date.

Resume reminders
Reminders start again on the schedule.

Messages sent
Each email sent for this requirement, with its recipient and result.

Letter (PDF)
The reminder as a PDF letter to print and send: for a third party without email, or as a registered letter.

Reminder proof (PDF)
The reminders sent, with dates and recipients, to show in a dispute.

Messages with the third party
The messages exchanged with the third party from its upload page.

Other labels of this section
Acknowledged on · Date · Email outside Vigilo · Internal note · Letter · Method · Name of the person · Not specified · Other · Pause reminders · Person reached · Phone call · Record a reminder · Reference · Registered letter · Registered letter number · Reminders · Requirements concerned · Someone else · Visit or hand delivery

History

Every dated event with its author: creation, status changes, submissions, review decisions and their comments, changes of due date, owner or waiver. The history cannot be edited.

Other labels of this section
Assigned to · Attached files · Comment · Details · Due date · Event · Finding · Finding status · Fix by · History · Next reminder · Optional step · Owner · Reason · Review assigned to · Severity · Shared with the third party · Status · Third party · Third party providing the document · Version · Waiver end

Other labels of this screen
(new tab) · a former member · Add files or a photo · added · All · All requirements · an API key · answered “This does not concern me” on · API key · Approved by · Archived · by · Change · Change the due date · Change the third party · Clear filters · Concerns · Confirm · Contact · Created · Created on · does not apply · Edit · Edit the waiver · Email · Entrust · Entrust to · Equipment · Exclude this requirement: it does not apply · Expired on · Files · Former member · From · from to · In person · Including · Keep the request · Lift the waiver · Loading history · Manager · no end date · No end date · None · not added · Note (optional) · Organization · Portfolio · Post · Privacy · Read from the document, to be checked · reading the document · Reassign the owner · Received by · Received on · Reference time zone · Refuse · Refuse the waiver · Reinstate the requirement · Relationship · relationship ended · Reminders resumed · Remove · Remove this third party · Request a change to the waiver · Request not sent · Request received on · Requirement closed · Restored · Save · Search a third party by name or identifier · Send again · Send the request · Show more · Site · Still needed · Submit

· Submit evidence · Submit evidence on the third party's behalf · System · The third party answered “This does not concern me” on · Ticked on · To · tracked item archived · type deactivated · Unit · until · Until · Updated · Uploading… N% · Valid until · via support · Vigilo support · Waive the requirement · Waiver requested by on · Withdraw the request

To review

The queue of submitted documents awaiting a decision, and the review screen of a document.

Review queue

Documents to review, oldest first (a requirement marked critical by one of your connected tools comes first). “Review …h late” flags a document waiting longer than the review delay. Opening a document reserves it in your name to avoid double handling; an owner or administrator can “Take over” a reservation. Requirements a third party says do not concern it are counted in the menu and announced at the top of the page: the decision is taken on the requirement.

Fields and buttons

Reserved by you
You opened this document: it is reserved in your name, so that no one handles it twice.

Take over
Owners and administrators: take a document reserved by someone else.

Calls and review
Assisted service: the documents the Vigilo team checks, or those your team checks.

Next
The next document in the queue, without going back to the list.

Back to the review list
Back to the list of pending documents.

Other labels of this section

Review h late · To review · Under review

Document

The file is shown next to the form. Image: zoom and rotation. PDF: the browser's viewer; without a built-in viewer (phone), “Open the document” opens it in a new tab. HEIC photo: no preview, download the file. “Download” keeps the original.

Fields and buttons

Zoom in
Image: enlarge.

Zoom out
Image: reduce.

Rotate
Image: turn a quarter turn (photo taken sideways).

Download
The stored file: as uploaded, or its compressed copy (photo as WebP, PDF optimized).

Open the document
Opens the PDF in a new tab when the browser does not display it (phone).

Checks

Check the dates and numbers entered. Vigilo reads the document (PDF text, photo or scan) and, if a required field remains unreadable, hands it to an AI (“read by AI”): “Matches the document”, “Read on the document, check it” or “The document says …” when the entry differs; “Use this value” takes the value read. Health documents and those carrying a code to enter never go to an AI; those naming employees, only if your organization chose so (Settings › Statuses and steps). Follow the type's checklist; “Check on …” opens the official verification website and “Copy the verification code” copies the code to enter there.

Fields and buttons

Document reading
What Vigilo read in the document, to compare with the information entered.

Matches the document
The information entered is the one read on the document.

Read on the document, check it
Filled in from the document: check it before approving.

Use this value
Replaces the information entered with the one read on the document.

Checkpoints
The type's checks; as long as a blocking item is not ticked, “Approve” stays unavailable.

Copy the verification code
Copies the document's verification code, to paste on the official website.

Other labels of this section
Performed on · read by AI · Valid from · Valid until

Decision

Approve, or reject with a reason: the third party is notified and can submit again. With double approval, a second person approves after you. Whoever submitted a document cannot approve it if the organization forbids it. “Same document for” applies the decision to other requirements of the same third party and type. An approval can be revoked with a reason; everything appears in the requirement's history.

Fields and buttons

Approve
The document covers the requirement until its end of validity, unless a blocking finding is still open.

First approval (step 1 of 2)
Double approval: a second person approves next.

Comment (optional)
Written to the requirement's history; required to approve a document that has already expired.

Same document for
The ticked requirements, of the same third party and type, are approved with this one.

Reject
The third party is told the reason and can upload again.

Reason
Shown to the third party; “Other reason” needs a comment.

Comment sent to the third party
What the third party must correct, 1,000 characters at most.

Internal note
For your team, never shown to the third party.

Revoke approval
Cancels an approval, with a reason; the requirement gets back its status without this document.

Withdraw
For a document not decided yet (wrong file, sent twice): it no longer counts and the requirement returns to its previous state; the history keeps it. “Also erase the file” deletes a file holding someone else's data. The third party is not told: to ask for another document, reject it.

Erase the file
For a document withdrawn earlier whose file holds someone else's data: deletes the file for good; its name and fingerprint stay in the history.

Other labels of this section
Choose a reason · Final approval (step 2 of 2) · Reject the evidence

Assign a document

“Assign to…” asks a colleague to review the document: a second opinion, an amount to check, a file they know. The message is read by your colleagues, never by the third party. The colleague is notified and finds the document under “For me”, together with the documents of the requirements they own. A document assigned to someone else leaves your counter and “Next”, but any member allowed to review can still open it and decide. “Back to the shared list” returns it to everyone. When a member leaves, their documents go to their replacement.

Fields and buttons

Assign to
Asks a colleague to review the document, with a message; they are notified.

Message
What you expect from them. Never shown to the third party.

For me
The documents assigned to you and those of the requirements you own.

Back to the shared list
Puts the document back in the shared list: every member who can review finds it.

Other labels of this section
Assign the review

Other labels of this screen
(no longer in the list) · a former member · Active content · All · Already received, waiting for review · Also erase the file · API · Apply this document to other requirements · Approve and raise · Approved · Approved by · Assign · Assign to someone else · assigned this document to you · Assigned to · Assigned to by · Awaiting another member · Back in the shared list · Being reviewed by · Check on · Choose · Choose a colleague · Colleague · Comment · Compressed copy — submitted file · Copy the compressed copy's fingerprint · Copy the SHA-256 fingerprint · Currency · damaged file · Decision · deleted user · Documents · Double approval: , then · Duplicate · Entrust to a third party · Erase for good · Erase the file of this withdrawn document · Evidence review · Expired · Expired document · file erased · file too large to read (over 20 MB or too much content) · For you · format not read (HEIC) · Future start date · image too large · Import · In progress · Inbound email · Insufficient coverage · Missing pages · No document to review · no field to read · No site or contract · no text found · Not read · Not scanned · Nothing to review: all up to date · Open · Operator · Organization · Other reason · Other third party · over 20 pages · password-protected PDF · PDF text · Photo or scan read (OCR) · Portal · Portal (via a third party) · Raise the finding · Read by AI (Claude) · Read by AI (Gemini) · reading error · reading took too long · Rejected · reused on · Review again · Revoke · Revoke the approval · Same document as · Same site · Select all · SHA-256 fingerprint · SHA-256 fingerprint of the compressed copy · SHA-256 fingerprint of the deposited file · Stated period: from to · Stated period: until · Step of 2 · Submit evidence · Submitted by your team · Submitted on · · Submitted on by · · Superseded · The document says · the Vigilo team · To check · Unreadable document · Unusual validity · Valid from to · Verification code copied · View the requests · Viewer · Withdraw this document · Withdrawn · Wrong document · Wrong holder

Findings

Issues noted during an inspection (fire door, extinguisher, electrical installation…) and how they are fixed, from entry to verification.

Finding list

Three views with their number: “Open” (overdue ones first, then by correction date), “Overdue” and “To verify” (resolved by a member, or “Answered by the third party” when the third party answered from its upload page). The site, third party and severity filters apply to all three. Each line: severity, state, title, type, site and third party, date, assignee; a click opens the requirement's findings. “Export” opens the same findings in the “Findings” report (Excel, CSV, PDF, scheduled send). On the dashboard, “Overdue findings” counts the overdue ones. Without a chosen view, the page opens on the findings to verify when nothing is open and an answer is waiting. “Assigned to” › “Me” keeps only the findings assigned to you: the daily email of overdue findings leads there, and “Export” is then not offered.

Fields and buttons

Open
The open findings within your scope, overdue ones first, then by correction date.

Overdue
Only those whose correction date has passed; the dashboard counts the same ones.

Other labels of this section

Assigned to · Export · Findings · Me · Overdue findings

Entering and following a finding

On the requirement page, as long as it is not closed (usually after the inspection report): “Add a finding” with its details, severity (critical, major, minor, observation), assignee and date. The finding's assignee moves it to “In progress” with “Start”, then “Mark resolved”, saying what was done and attaching the proof; without an assignee, any member except a viewer can do it, and an administrator always can. Someone other than the person who resolved it clicks “Verify”; “Send back” puts it in progress again. “Won't fix” (owner or administrator) closes it with a reason. While it is open, “Edit” changes its title, severity, assignee or date; lowering the severity is for an owner or administrator. If nobody else can verify it, an owner or administrator verifies their own resolution, with a reason.

Fields and buttons

Add a finding
On the requirement's record, as long as it is not closed.

Severity
Critical, major, minor or observation; depending on the type, a critical finding can prevent compliance.

Assigned to
The person who corrects the finding and moves it forward.

Fix by
Once it has passed, the finding is overdue in the list and on the dashboard.

Start
Records that the correction has started; the due date stays the same.

Mark resolved
Say what was done and attach the proof: photo, invoice or report.

Verify
By someone other than the person who resolved it (if nobody else can: by that person, with a reason); the finding is closed.

Send back
The correction is not enough: the finding goes back to in progress.

Won't fix
Closes the finding without a correction, with a reason of at least 10 characters recorded in the requirement's history.

Other labels of this section

Attach proof · Critical · Edit · Major · Minor · Observation · Reason · Reason given to the third party · Reopen · Share with the third party · What was done · What you checked · Why it is reopened · Why it is sent back

Findings and compliance

The “Open findings” setting of each type decides: they do not prevent compliance (default), a critical finding prevents it, or any open finding prevents it. A requirement blocked this way shows “Blocked” until the finding is resolved, verified or closed.

Fields and buttons

Open findings
Setting of each type: open findings do not prevent compliance (default), a critical finding prevents it, or any open finding prevents it.

Other labels of this section
A critical finding prevents compliance · Any open finding prevents compliance · Do not prevent compliance

Findings of the report and the third party's answer

When a report is approved, each line of its findings field (or of the defects found) is proposed as a finding: uncheck those to ignore, correct the title, severity and date, then approve. Checked by default, the sharing box shows the findings to the third party: it sees them on its upload page, receives an email and answers how each one was resolved, with a photo or an invoice. Its answer waits for your check: “Verify” closes the finding, “Send back” reopens it with a reason the third party reads on its upload page and by email. A finding raised by hand can be shared later too, with “Share with the third party”. Beside the requirement's status, the number of open findings recalls those left, even when they do not prevent compliance. Once its answer is verified, the third party receives a “finding closed” email, with the link to its upload page while other findings remain to be resolved.

Other labels of this section
Reason given to the third party · Reported resolved by on · Share with the third party · Shared with the third party · Shown to on their upload page, with an email

Other labels of this screen
Add · Answered by the third party · Cancel · Details · Due · Filter findings · Finding · No due date · Open the requirements · Overdue since · Previous resolution · Reset filters · Resolved · Save · Sent back · Show more · To verify · Unassigned

Reminders

What Vigilo sends to your third parties on your behalf: the sending state, the reminder calendar, the next sends, the latest messages and their text.

State and counters

The banner says whether automatic reminders are on, the sending days and time (each recipient's time, within 30 minutes). When off, no reminder, rejection notice or acknowledgement is sent. “Settings” (owners and administrators) opens Settings › Automatic reminders. The counters: due within 7 days, sent and failed over 30 days, requirements with no recipient (no reachable contact) and reminders used up (every reminder has gone out, nothing was submitted); a click opens the matching list.

Fields and buttons

Settings
Owners and administrators: turn reminders on, sending days and time.

Due within 7 days
Automatic reminders planned in the next 7 days.

Sent (30 days)
Reminder emails sent over the last 30 days.

Failed (30 days)
Emails refused by the recipient's mail server (wrong address, full mailbox): correct the contact.

No recipient
Requirements with no reachable contact: nothing goes out.

Reminders used up
Every planned reminder went out without an upload: call the third party.

Other labels of this section

“This does not concern me” answer

Reminder calendar

Two calendars: documents (certificates, insurance…) and periodic inspections, applied to each requirement addressed to a third party. A recipient gets at most one email a day, grouping all their requests. Firmness: Gentle, Standard or Firm. Before the due date, the first reminder asks for the document, the next ones remind; optionally on the due day; after the due date, one reminder every N days while nothing is submitted, up to the maximum, then the requirement is listed under “Reminders used up”. Each step has its message and, if chosen, the owner in copy. Owners and administrators edit the calendar (“Back to default” restores it); a type can have its own (type page, “Reminder firmness”).

Fields and buttons

Documents (certificates, insurance…)
The schedule for documents third parties provide.

Periodic inspections
The schedule for inspections of a site or equipment entrusted to a third party.

Firmness
Gentle: few emails, two overdue reminders. Standard: the default. Firm: earlier, reminders closer together, owner in copy, final notice.

Before the due date
Days before the due date when reminders go out; the first asks for the document, the next ones remind.

Also remind on the due date
One more reminder on the due date itself.

After the due date
Overdue reminders, as long as nothing is uploaded.

Overdue: repeat every (days)
Interval between two overdue reminders.

Max overdue reminders
Once this number is reached, nothing more is sent: the requirement is listed under “Reminders used up”.

Message and copy for each step
For each step, the message sent and the copy to the owner.

Copy to the owner
The requirement's owner receives this step's email in copy.

Back to default
Restores Vigilo's schedule for this category.

Other labels of this section
Firm · Gentle · Reminder calendar · Standard

Next reminders and latest messages

“Next reminders” lists the next 30 automatic sends, in order. “Latest messages” shows the last 50 emails sent to third parties, with their state (queued, sent, failed); the proof of sending is kept. A click opens the requirement, where you pause or resume its reminders and remind right away; the bulk action of the requirements list does the same for several.

Fields and buttons

Next reminders
The next 30 automatic sendings; a click opens the requirement.

Latest messages
The last 50 emails sent to third parties, with their state (queued, sent, failed).

Message preview

See each message as the third party receives it, in each language and for each compliance type; “Send me a test” sends it to your address. Owners and administrators adapt the subject and the introduction (empty: Vigilo text; variables listed under the field); each save creates a version, “Restore the Vigilo text” goes back to the original. Not shown to viewers.

Fields and buttons

Compliance type
The message with the documents requested for this type.

Language
The message in a third party's language.

Message
The step to show: first request, reminder, overdue, final notice...

Send me a test
Sends the message to your address, as the third party will receive it.

Subject
Owners and administrators: your subject; empty, Vigilo's text. The variables are listed under the field.

Introduction
Your first paragraph; each save creates a version.

Restore the Vigilo text
Back to Vigilo's original text.

Other labels of this section
Message preview · Your wording

Other labels of this screen
acknowledged on · Add · Add a contact · Add a step · after · All sent emails · All types · at the next send · automatic · before the due date · Call made · Called on by a Vigilo adviser · Calls by Vigilo · Change the cap · Close or keep reminding · Content erased on (the organization's retention period) · copy to the owner · Create the contact now · customized · Days · Days from the due date · Delete · Delete this recorded reminder · document promised for · Document promised for · due today · Emails sent · Entrust to a third party · Evidence dossier · failed · final notice · finding closed · findings to resolve · first request · Fix the contact · forwarded request · Internal note (optional) · Link opened on · Loading · Loading reminders · manual · message left, new attempt planned · message notice · No answer · no answer, new attempt planned · No reminders for this third party · None · Note · number incorrect, contact details to check · On the due date · Open · Open reminder settings · Open the third party · Other · overdue reminder · Pause · Pause reminders until · Preview of the email · Promise · queued · Reached · Reason · Reassign owner · receipt · Record · Record a reminder · Recorded by on · Recorded reminders · refusal notice · Refused · reminder before the due date · Reminders · Remove · Remove this step · Result

of the call · Save · Send another one now · sent · Show more · spoke with the third party · submission promised for · system · Third party reminded · updated document sent · validation notice · Version · Voicemail · within minutes · Wrong number

Third parties

The companies and people whose documents you follow: service providers, suppliers, tenants, workers. The list and each third party's page.

List and compliance

Each third party has a compliance badge: non-compliant, pending, compliant or no requirement, with the number of compliant requirements. The “Compliance” filter isolates those that are not compliant. The “Manager” filter shows yours (“My third parties”), those of a member or those without one. Search by name, email, registration number, VAT number or full external reference; archived third parties are shown on request. The “Tag”, “Site” (third parties working there today), “Role”, “Country” and “Language” filters combine with the search, which also reads the tags.

Fields and buttons

Compliance
Badge and filter: non-compliant, pending, compliant or no requirement.

Type
Company or individual.

Role(s)
What the third party does for you (tenant, service provider, contractor...); assignment rules target these roles.

Manager
The member who follows the third party, or no one.

My third parties
The third parties you are in charge of.

Tags
Free words to group and filter.

Show archived
Also shows archived third parties, to view or restore them.

Supplier guide
A PDF in your organization's name that explains how to send the documents, in the supplier's language: attach it to a launch letter or an invitation to tender.

Other labels of this section

All third parties · Company · Compliant · Country · Email · In progress · Individual · Language · No requirement · Non-compliant · Phone · Role · Site · Tag · Third parties

Actions on several third parties

Tick third parties, or “Select all rows”, then:

“Remind now”: one email per contact, with all the pending requests of these third parties; those already reminded today are skipped;

“Add tags...”;

“Assign a manager...”: their new requirements go to that member; existing ones keep their owner; a third party the member does not see is skipped, with the reason;

“Archive...”: contacts, relationships and requirements are archived with them, and can be restored.

Once the whole page is ticked, “Select all N results” extends the action to every third party matching the filters (500 at most). “Export as CSV” downloads the ticked rows or all the results.

Fields and buttons

Select all rows
Ticks every row shown.

Add tags
Adds tags to the ticked third parties; their current tags stay.

Assign a manager
Owner of the new requirements of the ticked third parties; existing requirements keep theirs.

Archive
Archives the third parties with their contacts, relationships and requirements; they can be restored.

Restore
Reopens the ticked archived third parties (with “Show archived”).

Other labels of this section
Change portfolio · Export as CSV · Remind now · Select all results · Tags to add

Creating a third party

Company or individual, name, identifiers (registration, VAT, your ERP reference), roles, email language (automatic from the country otherwise). Same registration number as an existing third party: creation stops, “Use the existing one” or “Create anyway” with a reason written to the audit log. Same email: a warning. Similar name at the same postal code: information only. In France, a SIRET of a company already there (same SIREN): a “Same company” warning. Attach the third party to a site so that assignment rules request its documents. The manager (a buyer, a property manager) is the default owner of its new requirements and is told of its submissions and messages; only the members who see the third party are offered. If your organization requires it (Settings › Third parties), a company number is mandatory and an invalid number is refused.

Fields and buttons

New third party
One third party per company or person; a company identifier already on file stops the creation.

Type
Individual: a main contact is created with their details.

Company name
The name shown everywhere in Vigilo and in the emails.

Legal name
The official name, if different.

Company number
Checked according to the country. A number already held by another third party stops the creation.

VAT number
Checked according to the country.

External reference
The third party's code in your software (ERP, accounting); it links imports and the API.

Role(s)
Sets the requirements the assignment rules give it.

Language
Language of its emails and upload page. “Based on the country”: French or English for the countries of these languages, otherwise your organization's.

Status
Inactive: no automatic reminder at all. Its requirements still count in the compliance rate: archive the third party to take them out.

Employer
For an individual: the company they work for; the company's page lists its workers.

Manager
Default owner of its new requirements; receives its uploads and messages.

Link this third party to a site
Creates its relationship with a site (lease, contract) at the same time: the rules give it its requirements.

Use the existing one
Same number as an existing third party: opens it instead of creating a second one. Otherwise, “Create anyway” with a reason written to the log.

Other labels of this section
Create anyway · Create anyway (separate branch, namesake…) · Reason

Tabs of the page

Info: identity, a worker's employer, a company's workers.

Contacts: who receives requests and reminders; below, the active upload links (sent by whom, opened or not; “Revoke” stops a link forwarded by mistake). An address whose domain has accents is shown in its xn--... form, the one mail servers use.

Relationships: sites, units or equipment where it works, with dates. Without a current relationship, reminders for its open requirements are paused; you can keep them going or close these requirements.

Requirements: what is requested and its state; tick rows for the actions of the requirements list (remind, due date, owner, waiver...).

Reminders: next reminders, emails sent with their status and “Link opened on ...”, calls by Vigilo; useful in a dispute.

History: every change with its author.

Fields and buttons

Info
Identity, address, language, owner and tags.

Contacts
Who receives the requests and reminders; below, the active upload links, which can be revoked.

Relationships
Sites, units or equipment where it works, with start and end dates.

Requirements
What is requested from it and the status.

Reminders
Next reminders, emails sent, upload link opened, and calls.

History
Each change to the record, with its author.

Other labels of this section

Assignment · Contract · Employer · Employment · Lease · Maintenance · Notes · Other · Workers

Third-party data

Owners and administrators only. “Evidence dossier”: a ZIP with a PDF summary and, for each requirement, its documents, reminder proof and history, with SHA-256 fingerprints. “Export data”: everything Vigilo holds about the third party (GDPR right of access). “Place a retention hold” prevents its data from being erased (dispute, inspection).

Fields and buttons

Upload link (all their requests)
One link for all its open requests, to send to a contact.

Evidence dossier
ZIP: PDF summary and, for each requirement, its documents, its reminder proof and its history, with SHA-256 fingerprints.

Export data
Everything Vigilo holds on the third party, as a ZIP (GDPR right of access).

Place a retention hold
Prevents the erasure of its data (dispute, inspection) until the hold is lifted.

Merge a duplicate
The duplicate's contacts, relationships and requirements move to this third party; the duplicate is archived. Cannot be undone.

Erase personal data
Identity, contacts, documents, entered text and messages are deleted for good. Records that were merged into this third party are erased too. Cannot be undone.

Archive
Removes the third party from the lists with its contacts, relationships and requirements; “Restore” reopens it.

Other labels of this section

Closure undone right after (wrong click) · Keep reminding · Suspend reminders

Compliance at a date

“At a date”, under the compliance badge of a third party or a site, shows the state at a past date (claim, inspection, audit): for each requirement followed that day, its status from the history and since when, the approved document that covered the date and today's status. A document approved later but valid on that date is flagged “Approved after this date, on …”. Without a time, the state is the one at the end of the day. Requirements created after the date are not counted; the history goes back 5 years. “Download (CSV)” gives the same rows.

Fields and buttons

At a date
The status of its requirements on a past date, from the history, with the document that covered it; CSV export.

Other labels of this section
Approved after the date · Approved after this date, on · Approved on · Code · Compliance at a date · Concerns · Date · Document approved on · Document covering the date · Document received on · Document valid from · Document valid until · Download (CSV) · No · No validity dates · On · On at · Requirement · Show · since · Since · Status on the date · Status that day · Status today · Time (optional) · Today · Valid from · Valid from to · Valid until · Yes

Corrections suggested by the third party

A company's contact can suggest from the portal (“Your company”) a correction of its legal name, registration number, VAT number, phone or address. Nothing changes without you: a banner shows on the third party's page and whoever follows the third party gets a notification. “Review” shows the current and suggested value of each field: untick what you don't keep, then “Apply” (same checks as the form: registration number already held by another third party, rules applied again if the country changes) or “Reject the correction”. The third party sees the decision on the portal; a new suggestion replaces the previous one.

Other labels of this section
(empty) · Correction suggested by the third party · Current · Reject the correction · Review · Suggested

Internal notes

“Notes” tab of the page: what you learn about a third party outside Vigilo (certificate promised, new contact person, purchasing instruction). Each note shows its author and date; “Pin” shows it at the top of the page. The third party never sees the notes, but they are given to it if it requests its data (GDPR): write facts. A note is not edited: delete it, then write it again (its author, an owner or an administrator; not possible under a legal hold). Viewers read them without writing any.

Other labels of this section
Add note · Cancel · Delete · Delete this note · New note · Note added · Note deleted · Notes · Pin · Pin to the top of the page · Pinned · Pinned notes · See notes · Unpin

Official register (Sirene, VAT)

Third party's page › Info › “Check the register”: Vigilo asks Sirene about the SIREN or SIRET of a French company, and VIES (European Commission) about an EU VAT number. The answer stays on the page with its date: active or closed (with the closing date), VAT number valid or not confirmed, and the name published in the register, to compare with the page's. A closed company shows in red at the top of the page. A VAT number not confirmed or a number not in Sirene shows in amber: VIES only confirms numbers registered for trade within the EU, and Sirene does not publish companies that opted out of publication. A closed establishment of an active company shows in amber on its line: update the SIRET. Only the number and the country are sent; neither address nor officers are stored. If a register does not answer, the previous answer is kept: try again later. Viewers see the answer but cannot check. Periodic check (Settings › Third parties, every 6 months by default): active companies in a running relationship are checked again at night; a company found closed, or a VAT number no longer confirmed, notifies the third party's manager.

Other labels of this section
Active · Check the register · checked on · Checking · Closed · Closed in the register · Closed on · Establishment closed · Establishment closed on · Never checked · Not confirmed · Not in Sirene · Not in the register · Official register · Sirene · Valid · VAT (VIES) · VAT number not confirmed by VIES

Other labels of this screen
Active third parties with no requirement · Active upload links · Add a contact · Add a relationship · Address, phone, language, tags · All its open requests · All languages · All roles · All sites · All tags · and more · API · As a fallback (another contact receives them) · Based on the country · Broker · Change · Choose a site · Choose the employer · Close · Company outside your scope · Contact · Contact details · Contractor · Copy the link · Copy the reply · Create a new link (the old one will stop working) · Create the first third party · Date of the request · Duplicate · Duplicate to merge · Edit contact · Edit relationship · Edit third party · Employee · End · End the relationship · Ended · English · Erase · Erase permanently · Erased · Erased third party · Erasure request · Expires · First name · Fix the contacts · Forwarded by · French · From the record's email · from to · Hold on their employer · Holds involved · Identity · in progress

· Inactive · Initial link · Inspection body · Job title · Last name · Last opened · Lift a hold · Merge · Merge a duplicate into · Missing · More information · Name · Never opened · New contact · New relationship · No contact · No relationships · No third parties · No third party you manage · Official register alert · Owner · PDF in the supplier's language · Primary · Receives requests · Record the request and copy the reply · Reference · Relationship type · Reminder email · Remove · Reply to send to the person · Requests · requirements of · Revoke · Revoke this link · Search a third party (name, identifier) · Secure upload link · Sent · Service provider · Settings · Share · Since , to review on · Site / unit · Start · Start date · Subcontractor · Supplier · Tenant · The third party's · Third party · Type to confirm · Undo this change · Unit · Upcoming · Upload link · VAT, address, phone, language, tags · Whole site

Sites

Buildings, establishments and places subject to obligations: the list, then each site's record with its units, equipment, third parties and requirements.

Site list

Each site has a compliance badge that opens its requirements. Filter by compliance, manager (“My sites”: those you are responsible for; “No manager”), portfolio or country, search by name, code or city; “Show archived” also lists archived sites. “New site” creates a site; “Import” (owners and administrators) loads an Excel or CSV file.

Fields and buttons

Compliance
Badge and filter: the compliance of the site's requirements.

My sites
The sites you are in charge of.

Portfolio
A group of sites (mandate, region, fund).

Country
The site's country.

Show archived
Also shows archived sites, to view or restore them.

New site
One site per building, shop or premises you follow, with its address and country.

Import
Owners and administrators: load sites, third parties and the rest from an Excel or CSV file.

Other labels of this section

All sites · City / country · Commercial · Industrial · Mixed use · Offices · Other · Public access building · Residential · Site type · Sites · Tags · Warehouse

Actions on several sites

Tick sites, or “Select all rows”, then:

“Add tags…”: existing tags are kept;

“Change portfolio…”: their requirements follow the new portfolio;

“Assign a manager…”: their new requirements go to that member; a site the member does not see is skipped;

“Archive…”: units, equipment and requirements are archived with them, and can be restored.

Right after an archive, “Undo” reverses it; later, tick “Show archived”, then the archived sites and “Restore…”.

Fields and buttons

Add tags
Adds tags to the ticked sites; their current tags stay.

Change portfolio
The ticked sites and their requirements move to the chosen portfolio.

Assign a manager
Owner of the new requirements of the ticked sites; a site they do not see is skipped.

Archive
Archives the sites with their units, equipment and requirements; they can be restored.

Undo
Right after an archiving: undoes it.

Other labels of this section

Export as CSV · Portfolio · Remind now · Restore · Select all rows · Tags to add

Create or edit a site

Name, code, site type, portfolio, manager (the requirements created on the site are assigned to them; only members who can see the site are offered), address, country, region and time zone. When the country has several time zones, choose the site's: its due dates and reminders are counted in its local time. Coordinates and tags are optional; your custom fields are added to the form.

Fields and buttons

Name
The site's name, shown everywhere and in the emails to third parties.

Code
Your internal code, unique; it links imports and the API.

Site type
Residential, offices, commercial, warehouse…; an assignment rule can target a site type.

Portfolio
The group the site belongs to.

Manager
The requirements created on the site are entrusted to them; only members who see the site are offered.

Country
The country's obligations and the time zone depend on it.

Region
State, province or region, when an obligation depends on it.

Time zone
Country with several time zones: the site's due dates and reminders are counted at its time.

Latitude
Optional, with the longitude; included in the exports and the API.

Tags
Free words to group and filter, separated by commas (20 at most).

Other labels of this section

Address · Address line 1 · Address line 2 · City · Coordinates · Edit site · New site · Postal code

Record tabs

Info (identity and address), Units, Equipment, Third parties & relationships (tenants, service providers and workers of the site, with their dates), Requirements (what is asked for the site, its units, its equipment and the companies working there) and History (every change with its author). In Requirements, tick rows for the actions of the requirements list (remind, due date, owner, waiver…).

Fields and buttons

Units
Apartments, premises, offices, parking spaces of the site.

Equipment
Lifts, extinguishers, boilers… and their inspections.

Third parties & relationships
Tenants, service providers and workers of the site, with their dates.

Requirements
What is requested for the site, its units, its equipment and the third parties working there.

History
Each change, with its author.

Other labels of this section

Info · Sites

Units and equipment

A unit is a flat, premises, office or space of the site; its occupancy (occupied, vacant) follows the active leases. A piece of equipment (lift, extinguisher, boiler…) belongs to the whole site or to a unit; one line can count several identical items (“Quantity”). Assignment rules create their periodic inspections.

Fields and buttons

New unit
Adds a unit to the site.

Reference
The unit's code, unique within the site.

Unit type
Apartment, house, shop, office, parking…

Occupancy
Computed from the active leases: occupied, vacant or unknown.

New equipment
Adds equipment to the site or to a unit.

Equipment type
Sets the periodic inspections the rules give it.

Unit
Empty: the equipment serves the whole site.

Quantity
Number of identical pieces of equipment followed on this row (12 extinguishers, for example).

Serial number
Optional; helps recognize the device during the inspection.

Other labels of this section

Apartment · Area (m^2) · Floor · House · Installation date · Location · Manufacturer · Model · Occupied · Office · Other · Parking · Retail unit · Storage · Unknown · Vacant · Warehouse

Compliance dossier and archiving

“Compliance dossier” downloads a ZIP: a PDF register (the requirements, then the findings and how they were resolved), the approved evidence, the proof of resolution of the findings and their SHA-256 fingerprints. “Archive” first shows what will be archived with the site (units, equipment, closed requirements); “Restore” reopens the requirements closed by that archiving and recomputes their status. Each line of the register carries the data entered with the document: date of a check and the body that carried it out, result, certificate number, checklist.

Fields and buttons

Compliance dossier
ZIP: PDF register, approved documents and their SHA-256 fingerprints.

Archive
First shows what will be archived with the site (units, equipment, closed requirements).

Restore
Reopens the requirements closed by the archiving and computes their status again.

Other labels of this section

Also archive the active child elements

Compliance at a date

“At a date”, under the compliance badge of a third party or a site, shows the state at a past date (claim, inspection, audit): for each requirement followed that day, its status from the history and since when, the approved document that covered the date and today's status. A document approved later but valid on that date is flagged “Approved after this date, on …”. Without a time, the state is the one at the end of the day. Requirements created after the date are not counted; the history goes back 5 years. “Download (CSV)” gives the same rows.

Fields and buttons

At a date
The status of the site's requirements on a past date, from the history, with the document that covered it; CSV export.

Other labels of this section

Approved after the date · Approved after this date, on · Approved on · Code · Compliance at a date · Concerns · Date · Document approved on · Document covering the date · Document received on · Document valid from · Document valid until · Download (CSV)

· No · No validity dates · On · On at · Requirement · Show · since · Since · Status on the date · Status that day · Status today · Time (optional) · Today · Valid from · Valid from to · Valid until · Yes

Other labels of this screen
(no access) · All countries · All managers · All portfolios · Choose a region · Choose a time zone · Computing the impact · Create the first site · Create the first unit · Edit unit · Longitude · No manager · No portfolio · No sites · No units · None

Portfolios

A portfolio groups sites by client, region or mandate. It is used by filters, reports and the scope of members.

Portfolio list

Each portfolio shows its number of sites and the compliance of their requirements. “New portfolio” asks for a name, and optionally a code, a description and a manager (the requirements of its sites without a manager are assigned to them).

Fields and buttons

New portfolio
A name is enough; the code, description, manager and tags are optional.

Code
Your internal code, unique; it links the import workbook and the API.

Manager
Requirements of its sites that have no manager are assigned to this person.

Tags
Free words to group and filter.

Other labels of this section
Description · Name · Portfolios · Sites

Portfolio record

The Sites tab lists its sites; the History tab, its changes. A site changes portfolio from its record or with the bulk action of the site list. Archiving a portfolio that holds active sites archives those sites too.

Fields and buttons

Sites
Its sites and their compliance. A site moves to another portfolio from its record or with the bulk action of the sites list.

History
Each change to the portfolio, with its author and date.

Archive
Also archives the portfolio's active sites.

Other labels of this section
Portfolios

Other labels of this screen
Create the first portfolio · Edit portfolio · No portfolios · requirements of the sites of

Equipment

All the equipment of your sites (lifts, extinguishers, boilers...) and their requirements, in a single list.

Equipment list

Search by equipment, site or unit, filter by type; “Show archived” also lists archived equipment. Each line gives the type, the site, the unit (or “Whole site”), the reference or serial number, the tags, the quantity and the requirements tracked. To add or edit equipment, open its site's record (Equipment tab); “Import” (owners and administrators) loads a file. Choose the number of rows per page at the bottom of the list. With equipment on several sites, the “Site” and “Country” filters narrow the list to one site or one country.

Fields and buttons

Type
Lift, fire extinguisher, boiler...: assignment rules give it its inspections from this type.

Unit
The unit it is in, or “Whole site” for shared equipment.

Reference · serial number
Your reference and the manufacturer's serial number.

Quantity
Number of identical items on the line (10 extinguishers, for example); maximum set in Settings › Equipment.

Followed requirements
Inspections and documents tracked for this equipment.

Show archived
Also shows archived equipment, to view or restore it.

Open the sites
To add or edit equipment, open its site's record, Equipment tab.

Other labels of this section

Air conditioning / heat pump · All types · Automatic door / gate · Boiler · Chimney flue · Cooling tower · Country · Defibrillator (AED) · Dry riser · Electrical installation · Emergency lighting · Equipment · Escalator · Fire alarm system · Fire door · Fire extinguisher · Fire hose reel · Forklift truck · Gas installation · Generator · Lift · Lifting equipment · Lightning protection · Loading dock (door, leveller) · Other · Playground · Portable electrical appliance · Pressure equipment · Site · Smoke extraction · Solar installation · Sports equipment (goals, baskets) · Sprinkler · Storage racking · Storage tank · Swimming pool · Vehicle · Ventilation · Water system · Whole site · Work equipment

Actions on several items of equipment

Tick equipment, or “Select all rows” of the page, then:

“Add tags...”: existing tags are kept; rules that target these tags apply;

“Archive...”: their requirements are closed; restoring reopens them.

Right after, “Undo” restores what was just archived; later, tick “Show archived”, then the archived rows and “Restore...”.

Fields and buttons

Select all rows
Ticks every row of the page.

Add tags
Adds tags to the ticked equipment; their current tags stay, and the rules that target these tags apply.

Archive
Archives the ticked equipment and closes its requirements; can be restored.

Undo
Right after archiving: undoes it.

Restore
With “Show archived”: restores the ticked equipment and reopens its requirements.

Other labels of this section

Assign a manager · Change portfolio · Export as CSV · Remind now · Tags to add

Equipment record

Identity (site, unit, reference, serial number, make and model, installation date, location), requirements tracked with their status and due date, then the history of inspections and findings. “Edit on the site page” opens its form.

Fields and buttons

Edit on the site page
Opens the equipment's form on its site's record.

Followed requirements
Each requirement of the equipment, with its status and due date.

History
Past inspections and findings, most recent first.

Other labels of this section

Identity · Installed on · Location · Make and model · Serial number

Other labels of this screen

Add the first equipment item · Edit equipment · Name · New equipment · No equipment · No equipment matches the search · No tracked equipment · None (whole site) · Reference · Reference / serial

Compliance types

A compliance type describes an expected document or check: fields to enter, validity, delays, review and reminders. Requirements are created from these types.

List

Each type has a status (active, inactive, draft), an origin (library or custom) and its number of current requirements. “Update available” means a new version of the library template exists; the comparison shows the differences, and your delays, review and reminders are kept.

Fields and buttons

Status
Active: usable by hand and by rules. Inactive: no new requirement. Draft: never put into service.

Origin
Library: created from a Vigilo template, which can receive updates. Custom: created by your organization.

Update
“Update available”: the types whose library template has changed.

Calls and review
With the assisted service: who calls unresponsive third parties and checks the documents of this type's requirements, the Vigilo team or yours.

Category
Insurance, certificates, periodic inspections, certifications…: to find a type.

Applies to
What the requirements are about: third party, site, unit, equipment or organization.

Active requirements
Current requirements of this type (neither closed nor archived).

Other labels of this section

Active · Compliance types · Create a custom type · Custom · Draft · Inactive · Library · Update available · Updated · Version

Library

“Browse the library” offers ready-made templates per country (insurance, certificates, periodic checks, certifications). Activating a template creates a type in your organization, which you can customize before publishing it. You can also create a type from scratch.

Fields and buttons

Browse the library
Ready-made templates by country: expected evidence, frequency, fields, recommended reminders and legal basis.

Create a custom type
A type from scratch, when the library has no template: you set it up, then put it into service.

Obligation
Mandatory: required by law or regulation. Recommended: good practice.

To verify
Template from a less certain source: check it before use.

Activate
Creates the type in your organization, ready to use.

Activate a copy
The template already has a type: creates a second one, to set differently (other delay, other review).

Edit before putting it into service
The type is created as a draft, opened in the editor: it applies only once put into service.

Your activity
Choose your activity and answer the questions: the useful templates are ticked and activated at once; those already activated are not copied again. Offered according to the organization's country.

Other labels of this section

Category · Fields to fill in · Library · Source

Calls and review: Vigilo or your team

With the assisted service, the “Calls and document review” block at the top of the type's page says who calls unresponsive third parties and checks their documents: “Vigilo” (our team) or “Your team”. Automatic reminders go out in both cases. A requirement can depart from its type on its page. Owner and administrators only; the “Calls and review” column and filter show it in the list.

Fields and buttons

Calls and review
“Vigilo”: our team calls third parties who do not respond and checks their evidence. “Your team”: you do it yourselves. Automatic reminders go out either way.

Other labels of this section
Calls and document review · Calls and review by Vigilo · Calls and review by your team · Vigilo · Your team

Editing a type: versions

Editing a type opens a draft (one at a time). A published version never changes. On publishing, choose which existing requirements move to the new version: none, those without a current approved document (default) or all; their status is recalculated, documents already submitted keep their version. With the default choice, the others move to the new version when their renewal opens, before the third party is asked (never with a document awaiting review or during a waiver). The “Change history” tab lists the versions and their differences.

Fields and buttons

Edit
Opens a draft of the type's rules; nothing changes for requirements until it is published.

Resume the changes
Reopens the current draft (one at a time).

Change history
The published versions, their date, their summary and how many requirements follow each one.

Requirements
Requirements judged by this version; documents already submitted keep theirs.

Other labels of this section
Delays · Draft · Files · Published · Retired

Delays and review

Delays set the initial due date, the “expiring soon” alert (N days before the end of validity, 30 by default) and the grace period after the due date; the reminder calendar is set separately (Reminders page and the type's reminders). The review decides how a document becomes compliant: automatic approval, single approval or double approval by two different people. The checklist guides the reviewer.

Fields and buttons

Expected evidence
Document, inspection report, form or declaration.

Provided by
Who provides the evidence: the third party, the tracked item's manager, an inspection body, the owner or your organization.

Recurrence
When a new document is expected: fixed interval, on expiry, once, or on an event.

Delays
Initial due date, “Expiring soon” alert and grace period before “Overdue”.

Review
Automatic approval, single approval, or double approval by two different members.

Files
Minimum number of files, maximum size and accepted formats.

Checklist
Points the reviewer ticks before approving; an unticked blocking point prevents approval.

Legal basis
The text that imposes the obligation, with its link when there is one.

Other labels of this section
Automatic approval · Details · Double approval · Single approval

Reminders of the type

Turn the automatic reminders of this type's requirements on or off, and choose their firmness: “Organization calendar” (the one set in Reminders), “Gentle” (few emails, two overdue reminders), “Standard” (Vigilo's default calendar) or “Firm” (earlier, reminders closer together, owner in copy). “Apply”, next to the recommended firmness, sets it for this type. When reminders are off for the whole organization, nothing is sent.

Fields and buttons

Automatic reminders
Turns the automatic reminders of this type's requirements off or back on, at once.

Reminder firmness
Organization calendar (Reminders page), Gentle, Standard or Firm (earlier, reminders closer together, owner in copy).

Apply
Takes the firmness recommended for this type.

Other labels of this section
Firm · Gentle · Off for this type · On · calendar for this type · Organization calendar · Settings · Standard

Requirements, rules and deactivation

The Requirements tab lists the type's requirements; the Rules tab, the assignment rules that use it (“Create a rule” adds one). Deactivating a type stops any new requirement: you choose to keep following the current requirements or to close them; reactivating reopens them.

Fields and buttons

Requirements
The requirements of this type; “See the requirements of this type” opens the filtered list.

Rules
The assignment rules that create requirements of this type, with their state and their out-of-rule requirements.

Create a rule
Opens the rule editor with this type already chosen.

Out of rule
Requirements the rule created but no longer covers; they are still tracked.

Deactivate
No new requirement of this type; you choose to keep tracking the current requirements or to close them.

Keep following them
On deactivation: the current requirements are still tracked and reminded.

Reactivate
The type can be used again; the requirements closed by the deactivation are reopened.

Other labels of this screen
Activate selection · Activity · Add · All · All categories · All countries · All items · All origins · All statuses · All types · Amount in · An inspection body · Announced changes · ask only for the fields you need · Back to the type · Being set up · Blocking · Browse the global library · Cancel · Cancel the pending changes · Checkpoint · Choice · Choose a category · Choose by activity · Close · common practice, adjust it to your maintenance plan · Construction: project owner, developer, general contractor · Country · Create the type · Currency chosen by the submitter · Current · Depending on your situation · Description · Do contractors work on your industrial or high-risk sites · Do foreign companies or foreign employees work for you · Do road hauliers deliver or collect your goods · Do you award or carry out public works contracts · Do you have a gas installation · Do you have a mandatory fire alarm system · Do you have air conditioning or a heat pump · Do you have buildings built before 1 July 1997 · Do you have buildings built before 2001 · Do you have buildings in England · Do you have buildings in Flanders · Do you have collective heating (boiler, flues) · Do you have construction or renovation works carried out · Do you have cooling towers · Do you have forklift trucks (stackers included) · Do you have lifting equipment or pressure equipment · Do you have lifts, escalators or automatic doors · Do you have new housing built · Do you have non-domestic buildings built before 2000 · Do you have swimming pools or playgrounds open to users · Do you have

vehicles subject to roadworthiness tests · Do you have work done on gas or electrical installations · Do you let houses in multiple occupation (HMO) · Do you let housing · Do you let housing built before 1949 · Do you receive the public in your buildings (ERP) · Do you store goods in a covered warehouse, on racking · Do you use temporary work agencies · Do your contractors work on your premises or sites · Does a contractor maintain your firefighting equipment · Does a private security or guarding company work for you · Does your group employ at least 1,000 people in Germany · Either · Field · Flagged for review · Global library · Health data · Help · Hide · Identifies a person: never asked of the AI · Industry, logistics and maintenance · International · Is one of your activities subject to fire service inspection · Is your turnover £36m or more (modern slavery statement) · Label · Labels shown · Legal basis checked on · Library · · Manager of your organization · Mandatory · Move down · Move up · Name · Named workers · New compliance type · No compliance types · No longer valid after this date · Notes · Offices, public buildings and facility management · On an event · One-time · Organization language · over ago · Personal data · Platform operator · Point · Proposed templates · Published on · Recommended · Recommended reminders · Remove · Required · Residential letting and co-ownership · Retail and multi-site networks · Reviewer · Rule · See the requirements of this type · Select · Select all · set by a standard · set by law or regulation · set by the contract · Suggested · Summary (optional) · Suppliers and subcontractors (vigilance documents) · Template · Template details · the document carries its end date · The owner · Third parties in other languages · Translate into · Translating · Translation · Type · Unsaved changes · Valid for at most after this date · View details · When the document expires · Your organization

Editing a compliance type

The editor of a type: general information, fields to enter, checklist, recurrence and delays, evidence and review. Owner and administrators only. The name, category and general information apply when saved; fields, recurrence and review, when published.

General

Code (cannot be changed afterwards), name and description in the organization's language, category. “Applies to” says what the requirement is about: third party, site, unit, equipment or organization; it no longer changes after the first publication. The third-party roles and equipment types concerned narrow the assignment rules (nothing ticked: all). Rules take over the type's country and region: their preview flags the items located elsewhere. “Where the third party is established” limits the type to third parties whose head office is in this country, or outside it. “Personal data” marks a document that names employees or carries health data: ask only for the fields you need.

Fields and buttons

Code
Short identifier of the type (e.g. RC_PRO), used by imports and the API; cannot be changed afterwards.

Name
Name shown everywhere, third parties included, in the organization's language.

Category
Family of the type, to find it in lists and reports.

Applies to
Third party, site, unit, equipment or organization; no longer changes after the first time in service.

Third-party roles concerned
The third-party roles rules can target with this type; none ticked: all.

Equipment kinds concerned
The equipment rules can target; empty: all.

Country
Country where the obligation applies: the rules' preview flags items located elsewhere.

Region
State, province or region, when the obligation is local.

Where the third party is established
Filters on the country of the third party's head office instead of the country where it works.

Personal data
The document names employees or holds health data: ask only for the fields you need.

Legal basis
The text that imposes the obligation, shown on the type's page.

Source (https://...)
Link to the official text.

Other labels of this section

Anywhere · Equipment · Established in the type's country · Established outside the type's country · General · Health data · Named workers (cards, qualifications, lists) · None · Organization · Site · Third party · Unit

Fields to enter

Information entered by the submitter with the proof, 30 at most: text, long text, number, amount, date, checkbox, list, multiple list, email, phone or link. “Valid from”, “Valid until” and “Performed on” compute the due dates: add them with their buttons. For a number or an amount, a minimum and a maximum: out of range, the value is blocking or only flagged. For a list, the “Answers flagged for review” prevent any automatic approval. For a date, “Valid for at most” ends the validity N months after that date. An amount has its currency, fixed or chosen by the submitter.

Fields and buttons

Add a field
Information entered with the evidence, 30 fields at most. “Valid from”, “Valid until” and “Performed on” have their own buttons: they compute the due dates.

Key
Technical name of the field (lower case, digits, _): the value entered carries this name in the API.

Type
Text, long text, number, amount, date, checkbox, list, multiple list, email, phone or link.

Label
What the submitter sees.

Required
The submission is refused while the field is empty.

Help
A hint shown under the field for the submitter.

Choices (one per line)
The possible answers of a list, one per line.

Answers flagged for review
The answers that prevent automatic approval: a member checks the evidence.

Minimum
Minimum and maximum of a number or an amount; see “Out-of-range value”.

Out-of-range value
Blocking: the submission is refused out of range. Warning: flagged to the reviewer, no automatic approval.

Whole number (no decimals)
Refuses decimals (number of employees, for example).

Valid for at most (months after this date)
For a date: validity ends at the latest N months after it.

Currency
Currency of the amount, fixed or chosen by the submitter.

Identifies a person (never asked of the AI)
A person's name or certificate number: the AI that reads hard-to-read documents is never asked for it. It is read on Vigilo's servers or entered by the submitter.

Other labels of this section
Amount · Blocking · Checkbox · Chosen by the submitter · Date · Email · Fields · List · Long text · Maximum · Multiple list · Number · Performed on · Phone · Text · Valid from · Valid until · Warning · Web link

Checklist

Points the reviewer ticks before approving a document, 15 at most, each with its label. A “Blocking” point left unchecked prevents approval; the others guide the review.

Fields and buttons

Add a point
A point the reviewer ticks before approving, 15 at most.

Blocking
Unticked, it prevents approval; otherwise it guides the review.

Other labels of this section
Checklist

Languages

The name, the description, the fields (label, choices, help) and the checkpoints are typed in the organization language, then translated here: “Translate” for a language of the list (those of your third parties with their number, and English, read by third parties of other languages), “Other language” for another one. “Suggest a translation” fills the empty texts by machine translation: review them before saving. A type already published is translated in a new version (“Edit”): the name and the description change when saved, the fields and the checkpoints when published.

Other labels of this section
Edit · Languages · Other language · Suggest a translation · Translate

Recurrence and delays

“Fixed interval”: a new document every N months after the date performed (when the law allows a longer interval, a validity up to that limit raises no alert). “When the document expires”: renewed at the end of its validity; the default validity applies when the document carries none. “One-time” and “Event-based”: no renewal planned, unless the document carries an end of validity. The initial due date (days to provide the first proof), the “expiring soon” alert and the grace period before “Overdue” apply to the requirements of this type.

Fields and buttons

Recurrence
Fixed interval, on the document's expiry, one-time or on an event.

Interval (months)
Fixed interval: a new document N months after the completion date.

Longest admitted interval (months)
Optional: when the law allows a longer interval, a validity up to this limit raises no alert.

Default validity (months)
Used when the evidence has no end of validity (1 to 240 months).

Initial due date (days)
Days given to provide the first evidence (0 to 365).

“Expiring soon” alert (days before)
Days before the end of validity when the requirement turns “Expiring soon” (0 to 180).

Grace period (days)
Grace period: days after the due date before “Overdue” (0 to 90).

Other labels of this section

Event-based · Fixed interval · One-time · Recurrence and delays · When the document expires

Evidence and review

Expected evidence (document, inspection report, form, declaration) and who provides it. Review: automatic approval, single approval or double approval by two different members. Minimum number of files, size and accepted formats. “Open findings” says whether a finding of a report prevents compliance. For a sensitive document (bank details, identity document), the third party's link opens only with a code received by email. “A different document for each request” forbids reusing a document already sent.

Fields and buttons

Expected evidence
Document, inspection report, form or declaration.

Provided by
Who submits the evidence; they receive the requests and reminders.

Review
Automatic approval (flagged evidence waits for a member), single approval, or double approval by two different members.

Minimum files
Minimum number of files to attach.

Max. size per file (MB)
A heavier file is refused when submitted.

Accepted formats
PDF, JPEG, PNG, WebP or HEIC: other formats are refused when submitted.

Open findings
Whether an open finding of a report prevents compliance: never, a critical finding, or any finding.

A different document for each request
The third party cannot reuse a document already sent for another request of this type.

Other labels of this section
A critical finding prevents compliance · Any open finding prevents compliance · Automatic approval · Declaration · Do not prevent compliance · Document · Double approval · Evidence and review · Form · Inspection report · Sensitive document: code by email to open the portal · Single approval

Saving and publishing

“Save” keeps the draft: nothing changes for the requirements. “Apply the changes” (“Put into service” for a new type) publishes the version, with an optional summary; choose which requirements already tracked move to the new rules: none, those without current approved evidence (recommended) or all. An error to fix blocks publication and is shown on its field. “Cancel the changes” deletes the draft; the type stays as it is.

Fields and buttons

To complete before publishing
An error remains to be fixed; it is flagged on its field.

Save
Keeps the draft; nothing changes for requirements.

Cancel the changes
Deletes the draft; the type stays as it is.

Summary of the change
Optional: what changes, shown in the change history.

Requirements already tracked with this type
On publication: none, those without current approved evidence (recommended: the others follow when their renewal opens), or all move to the new rules; their status is recomputed.

Other labels of this section
All · Draft · None: they keep the former rules · Those without current approved evidence

Library update

When the library template changes, “Compare with the library” shows your version against the new one: fields, checklist and settings added, removed or changed. Your delays, review and reminders are kept, and so are the texts you changed. “Prepare the update” creates a draft to check and then publish; “Ignore this version” hides the notice until the next version.

Fields and buttons

Compare with the library
Compares your version with the template's new version: fields, checkpoints and settings.

Prepare the update
Creates a draft with the update; your delays, review, reminders and edited texts are kept.

Ignore this version
Hides the notice until the template's next version.

Other labels of this section
Added · Library update · Modified · Removed

Other labels of this screen
Back to the type · blocking · choices · currency · flagged answers · help text · identifies a person · label · Link to the official text · Longest interval (months) · maximum · maximum validity after the date · minimum · No · option labels · required · Settings · severity · type · Version → of the library · whole number · Yes

Assignment rules

A rule applies a compliance type to every site, piece of equipment or third party that matches its criteria: it creates their requirements, then those of items added or changed later. Owners and administrators only.

Rule list

Each row gives the compliance type, the state (active or inactive), the number of requirements created and when it was last applied. Filter by type, item concerned or state. The switch activates or deactivates the rule; “Duplicate” starts from a copy. An active rule is applied again on its own when a site, a piece of equipment, a third party or a relationship changes; “Apply now” and “Apply all active rules” run it on demand.

Fields and buttons

New rule
A rule creates the requirements of a type for each site, unit, equipment or third party that meets its criteria, and keeps them up to date when they change.

Applies to
Filters on what the type tracks: third party, site, unit, equipment or organization.

State
Active: creates and keeps its requirements up to date. Inactive: creates nothing more; the row's switch changes the state.

Requirements
Requirements created by the rule, and how many are out of rule.

Last applied
Last time the rule compared its criteria with the data.

Duplicate
Opens a new rule copied from this one, to adjust.

Apply now
Compares the rule with the data right away and creates the missing requirements.

Apply all active rules
The same for every active rule; otherwise they are applied again on their own at each change.

Other labels of this section

Active · Assignment rules · Compliance type · Inactive

Creating or editing a rule

1. What to track: the compliance type (active types with a published version), which cannot change after creation. 2. Which items: third-party roles, relationship types, portfolios, sites, site, unit or equipment types, tags, countries or regions, custom fields of the third party or the site (choice, number, amount, yes / no: for example a high risk level or an annual amount of at least 500,000). Empty: every item; several conditions: all must be met; several values: one is enough. For a third party, one requirement per relationship (lease, contract), or a single one per third party. 3. First due date: from creation, the start of the relationship or a fixed date, with an offset of −365 to +365 days; a date already past is replaced by the type's delay.

Conditions are chosen in “Add a condition”, the item's own first (equipment type, unit type, third-party role); × removes one. Example, lifting equipment only: “Add a condition”, “Equipment types”, “Lifting equipment”.

Fields and buttons

1. What to track
The compliance type to track; it no longer changes after creation.

Name
Name of the rule in lists (2 to 120 characters).

2. Which items
The items targeted: empty, all; several conditions, all must be met; several values, one is enough. For a third party, a box creates one requirement per third party instead of one per relationship (lease, contract).

Third-party roles
Contractor, tenant, subcontractor...: the third parties targeted.

Relationship types
Lease, contract, maintenance…: the third party's relationship with a site or a unit.

Tags (at least one)
An item carrying at least one of these tags.

Countries or regions
Countries or regions of the sites targeted; for a third party, those where it works.

Custom fields
Up to 5 conditions on a custom field of the third party (third-party rule) or of the site (site, unit, equipment), all met: a choice field (single or multiple) and one or more of its values, a number or an amount with a minimum or a maximum (included), a yes / no field at “Yes” or “No”. A field never filled in counts as “No” and matches no other condition.

3. First due date
The first due date of the requirements created.

Counted from
From the requirement's creation, the start of the relationship or a fixed date.

Delay (days)
From −365 to +365 days; empty: the type's initial delay from creation, 0 otherwise. A past date is replaced by the type's delay.

Other labels of this section
A fixed date · Choose a compliance type · Equipment types · Portfolios · Site types · Sites · The creation of the requirement · The start of the relationship · Unit types

Preview and activation

“What this rule will do” is computed at each change, without creating anything: matching items, requirements to create, already existing or excluded by hand, a sample, and the items left out with their reason (other country, role not covered by the type…). It also says how many third parties will receive a first request, and when. “Save and activate” creates the missing requirements; “Save without activating” keeps a draft. “Don't write to third parties for now” creates the requirements with their reminders paused: to send the requests, open the rule's requirements, then “Resume reminders”.

Fields and buttons

What this rule will do
Computed at each change, without creating anything: requirements to create, already there or excluded, items set aside with the reason, third parties who will receive a first request.

Don't write to third parties for now
Creates the requirements with their reminders paused; to write to the third parties, resume the reminders from the requirements list.

Save and activate
Saves the rule and creates the missing requirements right away.

Save without activating
Keeps the rule inactive; nothing is created.

Other labels of this section
Already exist · Excluded by hand · Matching items · To create

Out-of-rule requirements

When a rule is deactivated, or an item no longer matches its criteria, nothing is deleted: its requirements stay tracked and are marked “Out of rule”. The banner counts them; “View requirements” opens them. “Exclude…” closes them (they do not apply) with your reason: they stay viewable and are never created again by a rule; each one can be reinstated from its page. If the item matches again, the requirement is covered by the rule again. A requirement another active rule of the same type also targets moves to that rule and is not marked.

Fields and buttons

View requirements
Opens the out-of-rule requirements in the requirements list.

Exclude
Closes these requirements with a reason: they do not apply. A rule never recreates them; each can be reinstated from its page.

Deactivate the rule
The rule creates nothing more; its requirements are still tracked, marked “Out of rule”.

Other labels of this section
Out of rule only

Other labels of this screen
(archived) · Activate or deactivate the rule · Active and inactive · Add a condition · Add another field · All types · Already exists · at least · at most · Browse the library · Choose · Choose a field · Computing the preview · Condition · Copy of · Create a field · Date · Deactivate · Equipment type not covered by the type · Established in the type's country · Established outside the type's country · Field · is one of · Never applied · New assignment rule · No · No assignment rule · No result · Number · Open · Other country · Other region · Region not filled in · Remove · Remove the condition · Role not covered by the type · Save · Save (inactive) · Search · Site's custom fields · Tags in use · Third party's custom fields · Type's delay · Values · View · Yes

Reports

Compliance views on screen, Excel, CSV and PDF exports, reports sent by email on a schedule, and the monthly activity.

Views and filters

Nine views: “Requirement detail”, “Upcoming deadlines”, “Summary by site”, “Summary by type”, “Summary by third party”, “Rollout”, “Waivers”, “Findings” and “Sent emails”. The filters (portfolio, site, compliance type, compliance, due date, status, third party…) apply to the view and to its export. “Findings” lists one finding per line, with two filters of its own: “Severity” and “Finding state”.

Fields and buttons

Requirement detail
One row per requirement, with all its details.

Upcoming deadlines
The due dates within the chosen horizon, without waived and closed requirements.

Summary by site
Compliance rate and counts per site.

Summary by type
Compliance rate and counts per compliance type.

Summary by third party
Compliance rate and counts per third party.

Horizon
Schedule: 30, 60, 90, 180 or 365 days.

Overdue
Requirements of the schedule whose due date has passed.

Within 30 days
Requirements due within 30 days, overdue ones included; click to list them. Same at 60 and 90 days.

Compliance
Compliant, non-compliant, pending or excluded, as on the dashboard.

Search
Searches the type, the item concerned, the site and the third party.

Only requirements blocked by a finding
The requirements an open finding keeps from being compliant.

To act on only
The requirements to act on: all except compliant, waived or closed ones; “Expiring soon” is included, and so is a compliant requirement that a finding blocks.

Origin
How the requirement was created: by hand, by a rule, by an import or through the API.

Include closed
Adds the closed requirements, hidden by default.

More filters
Owner, site country, category, validity, origin…

Other labels of this section

Address or subject · Category · Compliance dossier · Compliance type · Delivery status · Direction · Documents · Due from · Due to · Email type · Evidence dossier · Finding state · Findings · Group by · Include closed findings · Item type · Out of rule only · Owner · Portfolio · Reports · Reset filters · Rollout · Sent emails · Sent from · Sent until · Severity · Site · Site country · Status · Third party · Valid until: from · Valid until: up to · View · Waivers

Rollout and waivers

“Rollout” follows how third parties come on board: by week of first request, or by portfolio with “Group by”, how many were asked, opened their link, sent a document and are compliant. A third party in several portfolios counts in each; the tiles count it once. “Not asked yet” gathers those never asked. A third party who emails its documents, uploaded by you,

counts as having submitted without having opened its link. Schedule it weekly during a rollout. “Waivers” lists waived requirements, nearest end first, with the reason and who granted it; those without an end date come last.

Fields and buttons

Rollout
How third parties come on board after their first request: requested, link opened, submitted, compliant.

Group by
By week of first request or by portfolio.

Asked
Third parties who received a request or a reminder by email, or a link handed over by a member.

Opened the link
Third parties who opened their submission link.

Submitted
Third parties who submitted at least one piece of evidence, through their link or through you.

Compliant
Third parties whose counted requirements are all compliant.

Not asked yet
Third parties never asked.

Waivers
The waived requirements, from the nearest end to the furthest, with reason and author.

Ending within 30 days
Waivers ending within 30 days: the requirement becomes due again.

Other labels of this section

Automatic · Awaiting the third party · Critical, open · Failed · Manual · No end date · No portfolio · Open · Overdue · Portfolio · Sent · Third parties concerned · Third parties reached · To verify · Week · Within 30 days · Within 60 days · Within 90 days

Export

“Export” produces an Excel, CSV or PDF file with exactly the filters shown. A file that takes a few seconds is prepared under the buttons with its progress in %, then downloaded.

Beyond 30 s, or 2,000 rows in PDF (the button then shows a clock), the file is prepared in the background: a notification and an email tell you when it is ready, and “My exports” keeps it for 7 days, for you only and while your rights stay the same (“Run again” reopens the report with its filters). Beyond 100,000 rows (2,000–5,000 in PDF), the export is refused with its number of rows: narrow the filters.

“Columns” (above the table) chooses and orders the view's columns: the table, the three files and a schedule created afterwards use them, and the choice is kept for you; “Default columns” forgets it. Without a choice, Excel and CSV add the identifiers (site code, registration and VAT numbers, external reference), your custom fields and, when it is on, the day of your reminder step.

Viewers can export only if an owner or an administrator allows it (Settings › Sign-in security).

“Download evidence” produces a ZIP of the approved evidence, sorted by third party then by date, with a register and the SHA-256 fingerprints, for an inspection or an insurer: the evidence valid during a period, the latest for each requirement, or all of it. It keeps the report's filters on the type, site, third party or portfolio, not those on the status or the dates.

Fields and buttons

Export
Excel, CSV or PDF with the filters and columns shown; a large file is prepared in the background. A CSV's name gives its number of rows; the journal keeps each file's filters, number of rows and SHA-256 fingerprint.

Columns
Chooses and orders the view's columns, for you; the table, the files and a schedule created afterwards use them.

Default columns
Goes back to the view's standard columns.

My exports
The files prepared in the background, kept 7 days, for you only.

Download evidence
ZIP of the approved evidence (of a period, the latest for each requirement, or all), sorted by third party, with a register and their SHA-256 fingerprints.

Other labels of this section
CSV · Excel · PDF

Scheduled reports

“Schedule this report” sends the view and its filters by email at a set time: daily, weekly or monthly, in the chosen format and language. Recipients: the organization's owners or addresses (one per line, no Vigilo account needed). “Scheduled reports” lists them with their next and last sending. A sending holds up to 100,000 rows (5,000 in PDF), in an attached file of 10 MB at most.

Fields and buttons

Schedule this report
Sends this view and its filters by email at a set time.

Scheduled reports
The scheduled sends, with their next and last send.

Frequency
Daily, weekly (chosen day) or monthly (chosen day of the month).

Time
Local time of the organization.

Format
PDF, Excel or CSV, attached.

Language
Language of the report and the email.

Recipients
One address per line; recipients need no Vigilo account.

Send to the owners of the organization
Adds the organization's owners to the recipients.

Active
Unticked: the send is kept but no longer goes out.

Other labels of this section
Daily · Last send · Monthly · New schedule · Next send · Weekly

Monthly activity

What was done in the month: reminders, calls, documents checked, submissions received, and the compliance rate at the start and end of the month. The current month gives the figures to date; “PDF” downloads the summary.

Fields and buttons

Previous month
The review of a past month; the current month gives the figures to date.

PDF
Downloads the month's review as a PDF.

Start of month
Compliance rate on the first day of the month, to compare with the end of the month.

Promises to send
Calls where the third party promised to submit its evidence.

Submitted after a reminder
Number of third parties reminded in the month who sent a document on a reminded requirement before the month ended, and their share (in %) of the third parties reminded.

Request to approval
Median, for the documents approved in the month, of the time from the first request to the third party (email or link handed over) to the approval. An organization figure, never per third party.

Submission to decision
Median, for the documents a member approved or rejected in the month, of the time from the submission to the decision. Automatic approvals do not count.

Other labels of this section
Calls · Compliance rate · End of month · Evidence reviewed · Monthly activity · Next month · Reminders · Submissions · Turnaround times (median)

Sent emails

“Sent emails” lists every email Vigilo sent to third parties on your behalf: requests, reminders, receipts, refusals, validations, findings to resolve. One line per email, newest first: date and time, email type, delivery status, recipient, third party, requirements concerned and origin (automatic, manual or system). Filters: sending period, email type, delivery status, origin, third party, and the portfolio, site or compliance type of the requirements; the search covers the address, the copies and the subject. Clicking the email type opens the email as it left, with the third party's personal link masked. A limited member sees the emails that concern their scope; a temporary access sees neither the addresses nor the text of the messages. Emails sent to your team (notices, weekly summary) are not included. A failed email says why in the optional “Failure reason” column and on its page: mail server error, temporary mail server failure (the address is not in question), not tried (server unavailable) or sending interrupted; in the last case, the email may have left.

Other labels of this section
Automatic · Due today · Failed · Failure reason · Final notice · Finding closed · Findings to resolve · First request · Forwarded request · Mail server error · Manual · Message notice · Not tried: mail server unavailable · Overdue reminder · Queued · Receipt · Refusal notice · Reminder before the due date · Sending interrupted: the email may have left · Sent · Sent email · Sent emails · System · Temporary mail server failure · Updated document sent · Validation notice

Other labels of this screen
00-summary · About · Actions · Active retention holds · All · another third party · API · API key · Appendix — timestamp token · Applies to · Approved · Approved by · Approved on · archived · Assigned to · Automatic rule · Back to reports · Being checked · Being prepared · By · By (forwarded link) · Calls placed · Cancel · Change · Checklist · City · Close · Closed · Closed on · Company documents of this site's third parties · Complete data · Concerns · Confidential document — — generated by Vigilo · Contact · Content erased on (the organization's retention period) · Context · Continue in the background · Copies · Copy · Date · Date of the evidence · Day · Day of the month · days · Days left · Default · Delete · Delete this schedule · Description · Details · Document data · document promised for · Download (ZIP) · Download reserved for the member · Due date · Due on · Edit schedule · Email · Emails · Equipment · Event · Every at · Every day at · Evidence · Evidence files · Evidence of · Excluded · Expired · Expiring soon · External reference · Failed sends · Fewer filters · File · Files · Filters applied · Finding · Former member · From · Generated on · history · Identifier · Import · In progress · Include the health data files · Last sends · Letter wording · Message · No answer · No approved evidence · No contact · No prepared export · No reports · No scheduled report · No site · No third party · Non-compliant · Not applied (they describe the requirements today) · On day of each month at · Only in JSON Lines (too large for a spreadsheet) · Open findings · Organization · Other · overdue · Owners · Page / · Part of · Paused · Personal data erased (GDPR) on · Preparing the dossier · Preparing the file · Progress · Promise · Proof fingerprint (SHA-256) · Proof of resolution · Raised on · Reached · Ready · Reason · Receipt produced by Vigilo for · Received on · Recipient · Reference · Refused · Rejected · Reminder proof · reminder-proof · Reminders sent · Replaced by a newer submission · Report · Report filters applied · Report view · Requested on · Requirement · Requirements · Resolution · Resolution note · Resolved by · Resolved on · Resume updating · Rows · Run again · Save · Sent by · Sent on · SHA-256 fingerprint of the email as sent, link included · Shared with · Show more · Site / contract · Site code · Sites · State · Stop updating · Subject · Submission receipt · Submissions received · Submitted by to · Submitted on · The latest for each requirement · the third party's answer · Third parties · Third parties reminded · Third party archived on · Third party involved: its evidence and emails only · Through the portal · To · to · To provide · To receive · Unit · until · Until · Valid during a period · Valid from · Valid until · Validity · Verified on · Vigilo · Voicemail · Waiting · Waiting for another export · Waived by · Waiver ends · Week of first request · Which evidence · Withdrawn · Wrong number · Yes · ZIP

Documents

The approved evidence of your scope, filed in folders like a file explorer, to view or to download as a ZIP.

Folders

“Group by” chooses the filing: “Compliance type” (one folder per type, then one per third party, site, unit, piece of equipment or for the organization, then the evidence) or “Third party” (the third party that supplied the evidence, then the type). Each folder shows its number of files and the date of its latest evidence; a click opens it, the trail above and the back link go up one level. Only the approved evidence of requirements not archived is listed (closed requirements included), within your scope. The evidence of archived requirements stays in “Reports”, button “Download evidence”.

Other labels of this section
Compliance type · Documents · Group by · Third party

Filters

“Valid in” keeps the evidence valid at some point of the year chosen (a certificate valid from 1 December 2025 to 31 May 2026 counts for 2025 and for 2026); “Quarter” narrows it to three months. “Site” keeps the evidence of that site's requirements. The search applies to the names of the folders shown. The filters stay applied when you open a folder, and in the ZIP.

Other labels of this section
All years · Clear filters · Quarter · Site · Valid in · Whole year

Evidence and files

In the last folder, each piece of evidence shows its date (start of validity, else the date received), its end of validity and its files, to download one by one; “Open the requirement” leads to its history. The 100 most recent pieces are listed; the ZIP holds the whole folder. A file being scanned for viruses, or blocked, cannot be downloaded.

Other labels of this section
No end date · No file attached · Open the requirement

Download (ZIP)

The button downloads exactly the folder shown, with its filters, filed like the screen (folder, sub-folder, then the date and the file name), with the register of the evidence (CSV), the SHA-256 fingerprints and the list of files left out. It is for members who may export reports. Up to 5,000 files and 2 GB, the ZIP downloads at once; beyond, up to 50,000 files and 10 GB, it is prepared in the background as archives of at most 2 GB, to extract in the same place: a notice and an e-mail tell you when they are ready. Larger still: choose a year or open a sub-folder. The files of health-data types stay out of the ZIP: download them one by one. Every download is recorded in the audit log.

Other labels of this section
Download (ZIP)

Other labels of this screen
(virus scan in progress or file blocked) · All sites · Folder path · Latest evidence · Open the requirements · SFTP access · Valid until

Import

Create your portfolios, sites, units, third parties and their contacts, equipment, requirements and invitations from Excel or CSV. Owners and administrators only, opened from the “Import” button of the lists or from “Setting up Vigilo”.

Complete file

To start a base. 1. Download the template, empty or with an example: one sheet per kind of data in import order (portfolios, sites, units, third parties, equipment, requirements, team, third-party contacts), plus “Read me” and “Lists”. Fill in the sheets you need; columns marked * are required; do not rename sheets or headers; a row can refer to a row of a previous sheet (a site to its portfolio, by its code). Grey example rows are refused if you leave them. 2. Choose the file: it is checked, each error is listed with its sheet, row, column and value, and nothing is saved while one remains; a row that names a row refused above points to that row: correct it first. 3. Import: everything is created at once, or nothing.

Fields and buttons

Empty template
The Excel starter file: one sheet per kind of data, in import order.

Template with example
The same, with grey example rows to replace (left in, they are refused).

Read me
Sheet of the file that explains each sheet and each column.

Lists
Sheet of the accepted values (roles, types, countries…); the cells concerned offer the list.

Choose the file
Checks the file: each error is listed with its sheet, row and column; nothing is saved while one remains.

Choose the corrected file
Loads the file again once corrected.

Other labels of this section

Complete file · Import

Team sheet and “Calls and review” column

“Team” sheet: one person to invite per row, with their email, role, portfolios and sites (codes or names; empty: the whole organization), access end date (viewer) and invitation language. Invitations go out by email after the import; those that fail can be resent from Settings › Members. An address that is already a member or invited changes nothing, so the file can be imported again. Administrator: only if you are an owner. With the assisted service, the “Calls and review” column of requirements accepts “Calls and review by Vigilo”, “Calls and review by your team” or “As the type” (a file filled with the former “Handled by…” values is still read); empty: unchanged; it also applies to a requirement that already exists.

Fields and buttons

Team
One person to invite per row: email, role, scope, end of access, language. The invitations go out after the import.

Third-party contacts

A third party may have several contacts (insurance, health and safety, accounts). “Third-party contacts” tab (or sheet 8 of the complete file): one row per contact, with the third party (name, registration number or reference), the first or last name, the email or phone, the job title, “Receives requests” and “Primary contact” (yes / no), the language. Same rules as on the third party's page: one primary contact per third party, phone in the format of the third party's country. A known contact (same email for that third party, or same name without email) is not created again: its differences are listed and applied with “Update the items already known”. The contact made from the third party's email takes the file's name and job title. An individual's primary contact follows their record: change their name, email or phone in the Third parties sheet.

Fields and buttons

Primary contact
Only one per third party: the contact shown first.

Receives document requests
Yes: they receive the third party's requests and reminders.

Other labels of this section
Third-party contacts

Importing one kind of data

The Portfolios, Sites, Units, Third parties, Equipment, Requirements and Third-party contacts tabs import an Excel or CSV file (2,000 rows, 10 MB, column names on the first row; “Download a template” gives one). 1. File. 2. Columns: map each field to a column, or “Ignore”; for third parties, a default role. “Check” creates nothing. 3. Result: created, already known (same registration number, same name or code, same reference: never duplicated), in error. Rows in error are not imported: fix the file or import the others. A third party already known is not changed: the differing values are listed. “Download the report” keeps the result.

Fields and buttons

Download a template
A template file with the columns expected for this kind of data.

Choose a file
Excel or CSV, 2,000 rows and 10 MB at most, column names in the first row.

Ignore
The file's column is not read for this field.

Role when the column is empty
Third parties: the role given when the Role column is empty.

Check
Checks each row without creating anything.

Download the report
The row-by-row report, to keep or to fix.

Other labels of this section
Equipment · Portfolios · Requirements · Sites · Third parties · Units

CSV files, encoding and columns

A CSV that Excel did not save in UTF-8 is recognized (Windows-1250 for Polish, Czech, Hungarian or Romanian, Windows-1252 for Western Europe…): the encoding read is shown under the file, with the first word that looks misread if one is left. If accented letters look wrong in the preview, choose the original encoding in “File encoding”: the file is read again at once and the matched columns stay. Columns are matched by their name in any of Vigilo's 20 languages, singular or plural; the file's columns that no field uses are listed under the table. A file of third parties corrected and then loaded again whole does not create the third parties already imported again: a row that carries the name and email, or the name and VAT number, of an existing third party is recognized as that third party; a registration number other than its own makes a new third party.

Other labels of this section
File encoding

Loading a file again or updating by file

A file can be imported again: a known portfolio (same name or code), site (same code), unit (same site and reference) or equipment (same site and reference) is neither duplicated nor refused; the report lists the values that differ (“in the file”, “in Vigilo”) and changes nothing. Tick “Update the items already known” before checking to apply them: only filled cells replace values, an empty cell keeps the value (to clear one, use the record). Each change is written to the audit log under your name and assignment rules are evaluated again (a new site type can create requirements). A code held by an archived site or unit is refused: restore it first. Third parties are never changed by a file: correct their record. A relationship a known third party already has (same site and type, same unit when the row names one; with a lease or contract reference, the one carrying it, or one without reference unless the file gives another start) is not created again; any other is added. Equipment without a reference or Vigilo id is found by its site, unit, type and name, and is not changed. Without a start date, a relationship starts on the day of the import.

Fields and buttons

Update the items already known
Applies the differing values to the rows already known; an empty cell keeps the value. Without this box, the differences are only listed.

Correct your data in Excel

“With your data” downloads the complete file filled with your portfolios, sites, units, third parties (one row per running relationship), equipment, third-party contacts and members, in your language. Correct cells or add rows, then import it with “Update the items already known”: only the changed rows change. The “Vigilo ID” column links each row to its record: do not change it and leave it empty on a new row. Thanks to it, a site without code or equipment without a reference is found again, and a code or a reference can change. Third parties, members and invitations are not changed by the file. Beyond 2,000 rows per sheet or 5,000 in all, spread the rows over several files. Each download is recorded in the audit log.

Fields and buttons

With your data
The full file filled with your data, to correct in Excel then import again with “Update the items already known”.

Vigilo ID
Column that links the row to its item: do not change it, leave it empty on a new row.

Other labels of this section
Update the items already known

First requests to third parties

If active rules create requirements for the imported data, the report says how many third parties will receive a first request by email, and when. To send nothing yet, turn off automatic reminders (Settings › Automatic reminders) before importing.

Undo an import

“Recent imports” card under the import: the last 10 imports, with their author and result. “Undo this import” (also on the report, right after the import) archives what the import created, as an archive by hand does: requirements closed, reminders stopped, portal links revoked, elements restorable one by one from the “Show archived” filter. Codes and references are released (suffix “~”): the corrected file loads right away. Not undone: updated rows (previous values in each record's history), third parties that already existed (only their relationships created by the import are archived), “Team” sheet invitations and emails already sent. Each import can be undone once, within 30 days.

Fields and buttons

Recent imports
The last 10 imports, with their author and their result.

Undo this import
Archives what the import created (each can be restored); possible once, within 30 days. Updated rows and emails sent are not undone.

Keep the import
Closes the window without undoing anything.

Other labels of this screen
12 River Street · Access until · Address · Address line 2 · API key · Arabic (Windows-1256) · Area (m²) · Baltic (Windows-1257) · Bristol · By · Calls and review · Central European (Windows-1250) · Checking · Checking the file · Chinese (GB18030) · City · Code · Column · Compliance type (code or name) · Computing the impact · Country · Cyrillic (Windows-1251) · Date · Description · Due date · Email · Employer (name, registration number or reference) · Empty · End of the relationship · Equipment (name or reference) · Equipment kind · External reference · Field · File · File column · First name · Floor · Former member · Greek (Windows-1253) · Head office · Health and safety manager · Ignored columns (not in the template) · Import undone · Importing · Installed on · Invitation language · Japanese (Shift_JIS) · Job title · Language · Last name · Latitude · Lea · Lease or contract reference · Legal name · Lift A · Location · Longitude · Manager (email) · Manufacturer · Martin Lifts · Model · Moreau · Most frequent errors · Name · Name / company name · New import · None · North portfolio · Note · Occupancy · Open the record · Open the sites · Owner (email) · Phone · Portfolio · Postal code · Preview · Primary contact (yes / no) · Problem · Quantity · Reading the file · Receives requests (yes / no) · Reference · Region · Registration number · Relationship start · Relationship type · required · Result · Riverside Residence · Role · Roles · Row · Row;Name;Status;Note · Sam · Serial number · Sheet · Sheet;Line;Column;Value;Message · Sheets · Site (code or name) · Site type · Tags · Taylor · Third party (name, registration number or reference) · Time zone · Turkish (Windows-1254) · Two-room flat · Type (company or individual) · Undoing · Undone on · Unit (reference) · Unit reference · Unit type · UTF-8 · Value · VAT number · View the list · Vigilo starter file · Vigilo support · Western European (Windows-1252)

Organization settings

Settings that apply to the whole organization. Owners and administrators change them (the full export and the closure: owners only); every change is recorded in the audit log.

Organization

Organization name and default language (the language of emails to third parties and contacts who have not chosen theirs). Country, time zone and currency are set at creation: write to support to change them. The service level says who handles third parties who do not answer: a Vigilo adviser (assisted) or you (self-service).

Fields and buttons

Organization name
Shown to third parties in the portal and in emails.

Default language
Language of the emails to third parties and to contacts who have not chosen theirs.

Country
Set at creation; write to support to change it.

Time zone
The organization's reference time (due dates, scheduled sends), except for a site with its own time zone. Set at creation.

Currency
Default currency of amounts. Set at creation.

Offer
Self-service: you are told when a third party does not respond. Assisted: a Vigilo adviser calls them. Enterprise: the same, plus single sign-on.

Have Vigilo make the calls
Asks support to switch to the assisted service.

Group
The group the organization is a subsidiary of: it sees your rates and requirement counts, never your documents, third parties or contacts.

Other labels of this section

Organization · Subsidiaries

Branding and sender

Logo (portal, emails and PDFs), main button colour, sender name, reply-to address (confirmed by email) and footer of the emails sent to your third parties.

Fields and buttons

Logo
Shown in the third-party portal, emails and PDFs.

Brand colour
Colour of the buttons in emails and the portal; empty: Vigilo's.

Use Vigilo colours
Goes back to Vigilo's colours.

Sender name
The name third parties see in their mailbox; empty: the organization's name.

Reply address
Third parties' replies arrive there once the address is confirmed by the link sent; until then, they go to the requirement's owner.

Email footer
Text added at the bottom of emails to third parties; Vigilo's legal notices always follow.

Other labels of this section

Branding and sender

Setup help

The dashboard steps that guide a new account: check the organization, the reminder calendar and the email sent to third parties, then add sites, third parties, types and requirements up to the first reminder. Hidden by “Do not show this help again” or “Hide this help”, it is turned back on here and starts again at the beginning: the defaults are to be confirmed again. Owners and admins.

Fields and buttons

Turn the help back on
Puts the help back on the dashboard at the first step: the defaults are to be confirmed again; what already exists stays ticked.

Other labels of this section

Setup help · Start again from the beginning

Automatic reminders

Main switch (off: no email is sent to third parties, no reminder, rejection notice or acknowledgement), sending days and time (each recipient's local time, between 06:00 and 16:30) and maximum number of reminders per contact over 7 days. The firmness of each type is set on its record.

Fields and buttons

Automatic emails to third parties
Main switch: off, no email goes to third parties (reminders, receipts, rejection and validation notices).

Sending days
Days when reminders go out. A contact receives one email a day at most, and no more reminders over 7 days than the maximum set here: beyond it, the send waits.

Sending time
Local time of each recipient, between 06:00 and 16:30.

Approval email to the third party
Off: the sender only sees the validation on the portal; receipts and rejection notices are unchanged.

See the calendar and the messages sent
Opens the Reminders page: schedule, next sends and messages sent.

Other labels of this section

Automatic reminders · Maximum reminders per contact over 7 days

Weekly digest

Day the digest is sent to owners, administrators and managers who see the whole organization (documents to check, requirements overdue or close to their due date), or “Not sent”. Nothing is sent when there is nothing to report. Each member can also turn it off in their notifications.

Fields and buttons

Day sent
Day of the summary to members who see the whole organization; nothing goes out when there is nothing to report.

Not sent
No weekly summary.

Other labels of this section

Weekly summary

Dashboard

Green and orange thresholds of the compliance rate, and how waivers count: as compliant, or left out of the rate.

Fields and buttons

Green threshold (%)
From this rate up, the dashboard is green.

Orange threshold (%)
Between this threshold and green: orange; below: red.

Waived requirements count as compliant
Ticked: waivers count as compliant; otherwise they are left out of the rate.

Other labels of this section
Dashboard

Statuses and steps

Status names: rename the statuses shown to your team; screens and on-screen reports show your names, exported files, the API and indicators keep the standard names.

Optional step: a reminder step to tick on each requirement.

Separation of duties: whoever submits for a third party does not approve; a waiver takes effect once another administrator approves it.

Reading of the documents: choose whether an AI reads hard-to-read documents, including those that name employees.

Deposited files: keep files exactly as deposited, or let Vigilo replace them with a compressed copy 30 days after the decision.

Fields and buttons

Status names
Your names for the statuses, on screen; exports, the API and indicators keep the standard names. Empty: standard name.

Optional step
A checkbox on each requirement, a reminder for your team; nothing runs. Its date appears in exports and the API.

Step name
The name of this checkbox (e.g. “Entered in the ERP”).

Separation of duties
Whoever submits evidence for a third party does not approve it; as an option, a waiver takes effect only after another administrator agrees. Needs at least two members who can do it.

Reading of the documents
A required field that cannot be read locally (scan, blurred photo) is read by an AI, without training its models; never for a type with a code or health data. A second box adds the documents that name employees (professional cards, residence permits). You always confirm.

Other labels of this section
Add a step to tick on each requirement · Also read documents that name employees · Let an AI read the difficult documents · Statuses and steps · Submitted for a third party: another member approves

Lists and delays

Add your own site types and equipment kinds: they join the delivered values in the forms, the import, the compliance types and the criteria of the rules. A value an active site or equipment item, a rule or a type carries cannot be removed: change them first. The three delays (first document, “Expiring soon”, grace period) are suggested to each new compliance type.

Fields and buttons

Added site types
Your site types, added to the values provided in forms, imports, types and rules.

Added equipment types
Your kinds of equipment, added in the same way.

Time limits of a new compliance type
First evidence, “Expiring soon” and grace period offered for each new compliance type.

Other labels of this section
“Expiring soon”: days before the end of validity · Grace period (days) · Lists and delays · Time to provide the first document (days)

Third parties

Two checks, off by default, applied on screens, at import and through the API. “Company number required”: a company can neither be created without a number nor lose its number; individuals are exempt. “Refuse an invalid company or VAT number”: the number is refused instead of flagged. Only what changes is checked: a third party already recorded can still be edited. “Show them” opens the list of companies without a number.

Fields and buttons

Company number required
A company without a number is refused at creation; a number can no longer be erased. Individuals are exempt.

Refuse an invalid company or VAT number
SIREN, SIRET, RNA (France), company number (United Kingdom) and EU VAT checked; elsewhere, any number is accepted.

Periodic check at the official registers
How often Vigilo re-checks the companies at the registers (Sirene, VIES) on its own; “Never” leaves the check to the button on the third party's page.

Other labels of this section

Third parties

Equipment

Maximum quantity per equipment line. Lowering it does not change the quantities already entered.

Fields and buttons

Maximum quantity per line
Maximum quantity of an equipment line; lowering it does not change the quantities entered.

Other labels of this section

Equipment

Sign-in security

Require two-factor authentication for every member, allow or not sign-in with a password (otherwise with a link or a code received by email), allow viewers to export reports, choose the maximum session length (8 hours to 30 days). “Vigilo team access to your documents” (off by default) lets the team open your approved evidence to help you, except health data; each visit is listed in the log. Assisted service: the documents the Vigilo team checks open to it without this access or a reason.

Fields and buttons

Require two-factor authentication
Members without two-factor authentication turn it on at their next sign-in; their current sessions are closed.

Allow sign-in with a password
Off: sign-in only with a link or a code received by email, a passkey or SSO.

Allow readers to export reports
Off: viewers see reports without being able to export them.

Maximum session length
After this time since signing in, each member signs in again (8 hours: one working day; 30 days at most). A shorter length counts from the save for the sessions already open: nobody is signed out on the spot. A longer one applies from the next sign-in.

Other labels of this section

Sign-in security · Vigilo team access to your documents

Data retention

Number of months after the end of the relationship before Vigilo offers to anonymize a third party you no longer work with, and how long the emails sent to third parties stay readable: past it, their content is erased, with the internal note and person reached of recorded reminders. A shorter period applies after 7 days; the other owners are told and can put the previous one back.

Fields and buttons

Months after the end of the relationship
From 12 to 120 months after the relationship ends, Vigilo offers to anonymize the third party; nothing is erased without an owner's confirmation.

Months sent emails stay readable
From 12 to 120 months after an email is sent, Vigilo erases its address, subject and text each night; its date, kind, status and fingerprint stay. Emails of a third party under a legal hold are kept. The internal note and person reached of older recorded reminders are erased too. A shorter period applies after 7 days; the other owners are told.

See the third parties concerned
Lists the third parties to anonymise today and those due within the next 12 months, with the date of their last activity; a delay typed and not saved is applied to the list. Third parties under a legal hold are only counted.

Other labels of this section
Data retention

Legal holds

The holds in force, on a third party, a requirement or the whole organization: while a hold is active, the data concerned can be neither erased nor anonymized. Each hold has a reason and a “Review on” date; account health lists the ones to review.

Fields and buttons

Lift the hold
Ends the hold, with a reason: the data can be erased again under the retention rules.

Other labels of this section
Retention holds · Review on

Export all your data

Owners only. A ZIP file of all your data and the files received, prepared in the background: an email tells you when it is ready, then the link expires.

Fields and buttons

Export all the organization's data
ZIP of all your data and files, prepared in the background; an email tells you when it is ready. Owners only.

Other labels of this section
Download

Close the organization

Owners only. The account becomes read-only and reminders stop. You can cancel for 30 days; after that the organization is closed and its data deleted 90 days later. Export your data first.

Fields and buttons

Close the organization
Owners only: the account turns read-only and reminders stop; data deleted 90 days after closure.

Cancel the closure
Cancels the closure, possible for 30 days.

Restoration of your data

Owners only. When the Vigilo team offers to put your data back to a date of the last 7 days (after a wrong import, for example), the request appears here with its reason and what would change. “Confirm the restoration” or “Refuse”; without an answer within 72 hours, nothing changes. Members, access, the log, the e-mails sent and the recorded reminders do not change.

Other labels of this section
Confirm the restoration · Refuse · Restoration of your data

Other labels of this screen
(default) · A waiver takes effect once another administrator approves it · Active · Add · API · Assignment rules · Button preview · Change the review date · Changes · Choose a logo · Client's written request of · Compliance tracking · Compliance types · Confirm the reply address · Confirm this address · Contacts · Current logo · Custom fields · days at most · Deposited files · Dispute settled on · Dispute with..., inspection of · E-mail templates · Element · Erased from · Erased next night · Evidence dossier · Export the organization's data · Files · Findings · General · Grounds · Hexadecimal code of the brand colour · Hide the third parties concerned · Hold the whole organization · Imports · Keep · Keep files exactly as deposited · Kept by a legal hold · Last activity on · proposed on · Last activity on · proposed since · Lift the client's holds · Lift the holds · Lift the holds placed by the client · Lift the retention hold · Lifted · Lifted on · Lifted on by · Loading · Manage · Members · Never · None · On · Open the dashboard · Place a retention hold · Place the hold · Placed on · Placed on by · Portfolios · Reason · Reason for lifting · Refresh · Refuse the restoration · Relationships · Reminders and emails · Remove · Replace · Requirement messages · Requirements · Retention hold since · Retention hold since , placed by · Review dates passed, no answer from the client · Save · Scheduled reports · Security and data · See the request · Send a new confirmation link · Settings · Shorten the reading period · Show them · Sites · SSO · Submissions · Tasks · the Vigilo team · Third-party notes · To

anonymise · Today · Type to confirm · Units · Upload · Whole organization · With months (not saved) · Within the next 12 months · Written request from the client · Your password

Custom fields

Your own information on sites, third parties and requirements: contract number, cost centre, internal contact… Owner and administrators only.

Creating and managing a field

“Add a field” under Sites, Third parties or Requirements: name, identifier (lowercase letters, digits and _, cannot be changed afterwards), type (short text, long text, number, amount, date, yes / no, single or multiple choice, email, phone, link) and, for a choice, the list of values. A “Required” field is asked for the next time an item is edited; until then, an item without a value carries the “Incomplete” badge. 50 active fields at most per kind of item. “Archive” hides the field and keeps its values; “Restore” brings it back. A temporary access does not see email and phone values, but reads the other types: do not put personal contact details in them.

Fields and buttons

Add a field
One more field for sites, third parties or requirements, depending on the tab; at most 50 active fields per tab.

Name
Shown in the forms and on the records; it is also the name of its column in imports.

Technical name
The field's name in the API: a letter, then lowercase letters, digits or _ (2 to 40 characters). It cannot change afterwards.

Type
Entries are checked according to the type: number, amount, date, email, phone, link…

Choices
For a single or multiple choice: one choice per line.

Required
Required the next time each item is edited; until then, an item without a value is flagged incomplete.

Archive
Hides the field everywhere and keeps its values; it is restored with them.

Other labels of this section

Amount · Archived · Custom fields · Date · Email · Incomplete · Link · Long text · Multiple choice · Number · Phone · Requirements · Restore · Short text · Single choice · Sites · Third parties · Yes / no

Changing the type of a field

Edit › Change type converts the values already entered, for example text into a date or a list. The preview shows converted values and those that cannot be, with the reason; tick “Empty” to clear them, otherwise the conversion is refused. Each item keeps its former value in its history.

Fields and buttons

Change type
Converts the values already entered to the new type, for example text to date.

Update the preview
Shows converted values and those that cannot be converted, with the reason.

Convert
Refused while some values cannot be converted, unless you choose to clear them. The former value stays in each record's history.

Where to find them

Sites and third parties: in their form, on their page, in the import (a column named after the field) and in the API. Requirements: on the requirement page, editable by managers, in the list (Columns menu), filters, exports and the API. Every change is written to the item's history.

Fields and buttons

Custom fields
The block on site, third-party and requirement records. Requirement fields also serve as columns, filters and in exports.

Other labels of this screen

Actions · Add · and more · Cancel · Change the type — · Choose a type · Edit · Edit field · Empty (the former value stays in the item's history) · Field · New field — · Reading the values · Save

Members

The people who access your organization, their role and their scope, and the pending invitations. Owners and administrators only.

Members and roles

Four roles:

Owner: everything, including closing the organization.

Administrator: everything but ownership, always on the whole organization.

Manager: works on their scope (third parties, sites, equipment, requirements, reminders).

Viewer: reads their scope without changing anything.

An owner manages administrators; an administrator, managers and viewers.

Actions menu:

“Change access”: role, scope, access end date.

“Absence”: dates and deputy during a leave, shown under their name. Their notifications and internal reminders also go to the deputy; their responsibilities do not change.

“Hand over responsibilities”: new job. Their open requirements, sites, portfolios and findings go to another member, within that member's scope; they keep their access.

“Remove”: access cut at once. “Hand over to” gives their responsibilities to another member; the rest has no owner.

“Make owner”: owner only, with your password; you become an administrator.

“Reset two-factor authentication”: owner only, when a member lost their phone and backup codes; their sessions are closed and an e-mail tells them.

“Sign-in history” opens the sign-in log.

Fields and buttons

Role
Owner, administrator, manager or viewer.

Scope
The whole organization, or the chosen portfolios and sites. An administrator always sees everything.

Last sign-in
Date of the last sign-in; “Never” for an account never used.

No authenticator app or passkey
The member signs in without an authentication app, a passkey or SSO.

Change access
Changes the role, the scope and the end of access.

Absence
Dates and deputy during leave: their notices and internal reminders also go to the deputy.

Hand over responsibilities
Change of position: their open requirements, sites, portfolios and findings go to another member; they keep their access.

Close their sessions
Signs the member out of all their devices and organizations, for example after a lost phone: two-factor authentication is asked again and an e-mail tells them. They can sign in again; to prevent it, remove them.

Remove
Cuts access at once; what they followed can be handed to another member.

Make owner
Owner only, with your password: they become owner, you become administrator.

Sign-in history
The members' sign-in log.

Other labels of this section

Actions · Administrator · Email · Expires on · Invited by · Manager · Member · Members · Owner · Resend · Reset two-factor authentication · Revoke · Viewer

Changing the access of several members

Tick members, then “Change access”: choose a role or “Keep each one's role”, and a scope (the whole organization, or the ticked portfolios and sites added to each one's scope, put in its place or removed from it). Each member is changed as from their own row, with one line in the journal; you, the owner and, for an administrator, the other administrators cannot be ticked. A member who cannot be changed is left as is, with the reason. Up to 100 at a time.

Other labels of this section

Add the ticked portfolios and sites · Change access · Keep each one's role · Keep each one's scope · Remove the ticked portfolios and sites · Replace with the ticked portfolios and sites · Whole organization

Inviting

“Invite”: email address, role, invitation language, scope (the whole organization or selected portfolios and sites) and, for a viewer (auditor, temporary colleague), an access end date. The link is valid 7 days, never past the end of access; 100 pending invitations at most. “Resend” sends a new link, “Revoke” cancels it. An address whose domain has accents (müller.de) is shown with its accents; it is saved and sent in its international form (xn--...), the one mail servers read. Several addresses pasted in the box (separated by commas or line breaks, 50 at most) receive the same invitation; those refused stay in the box, with the reason. For a team with different accesses: Team sheet of the complete file (Import).

Fields and buttons

Invite
Sends an invitation link valid 7 days.

Email address
Address of the person invited.

Role
What they will be able to do; only an owner invites an administrator.

Invitation language
Language of the invitation email.

Scope
The whole organization, or chosen portfolios and sites (manager, viewer).

Pending invitations
Invitations not yet accepted, with their expiry date.

Resend
Sends a new link, valid 7 days.

Revoke
Cancels the invitation; the link no longer works.

Other labels of this section

Filter · Portfolios · Selected portfolios and sites · Sites · Whole organization

End of access and security

A temporary access ends after its last day, shown under the member's name. The invitation of an administrator who left the organization is no longer accepted: resend it. Suspended organization: you can still remove a member and revoke an invitation or an API key. Two-factor authentication can be required for everyone (Settings › Sign-in security). “Close their sessions” signs a member out of all their devices. Role and scope changes, removals and closed sessions are written to the audit log.

Fields and buttons

Access until (optional)
Temporary access (an auditor, for example): access ends after this day.

Expired
The link is past its 7 days: resend the invitation.

Other labels of this section

Require two-factor authentication

Other labels of this screen

Absence ended · Absence saved · Access of · Access until · Away from to · Cancel · Change · Choose a member · Clear selection · Close sessions · Close the sessions of · Deputy · Deputy: none · End the absence · First day · Former member · Hand over · Hand over 's responsibilities · Hand over to · Ignored, no address · Ignored, no address: and · Invite a member · Last day · Make the owner · Never · Nobody: no owner · Plan an absence · Reset · Reset the two-factor authentication of · Revoke the invitation of · Save · Select · Select all · Send invitation · Transfer ownership · Vigilo team · You · Your password

API keys and webhooks

Connect your own tools (ERP, accounting, Power Automate…): keys to read or write your data, webhooks to be told about each event. Owners and administrators only.

Creating and managing a key

“New key”: a name (the tool that uses it), its accesses, its validity. A key that writes or exports expires within a year at most. The key is shown only once: copy it; if lost, revoke it and create another. The full export is for owners only, with your password, and the other owners are notified. A key that manages members invites in your name, only managers and viewers, and stops if you are no longer an owner or administrator. A key that approves and rejects documents decides in your name, within your scope, counts as you when a second approval is required, never on health data, and stops once you can no longer review documents. The list shows the accesses, last use, expiry, “No end date: replace it” and “Creator no longer has access” (its creator left or no longer manages keys: it still works, except to manage members, and to approve or reject when its creator can no longer review documents; replace it with a key you create). “Revoke” cuts the key at once.

Fields and buttons

New key
One key per tool: revoking one tool's key does not stop the others. At most 20 active keys per organization.

Name
The tool that uses it; this name appears in the audit log for each action of the key.

Permissions
What the key may read or do: tick only what the tool needs. “Export all data and documents” asks for your password.

Validity
A key that writes or exports expires within a year at most; a key that only reads may stay “No expiry”.

Copy the key
The key is shown only once: paste it into your tool before closing. Lost, revoke it and create another one.

Last used
Day of the last call made with this key; “Never”: the key has never been used.

Expires
After this date, the tool's calls are refused. A notice warns you 14 days before: create the next key and put it in the tool.

No end date: replace it
A key without an end date that writes or exports, created before the one-year limit: replace it with a dated key, then revoke it.

Expires soon
Less than 14 days before the end date; a notice and an email tell you. Replace the key before that date.

Creator no longer has access
Its creator left or no longer manages keys. It still works, except to manage members: replace it with a key you create, then revoke it. A key that approves documents also stops once they can no longer review them.

Revoke
Stops the key at once, for good; the webhooks it subscribed are paused.

Other labels of this section

1 year · 30 days · 90 days · Actions · API keys · Change the settings (lists, delays, custom fields, rules) · Create and edit portfolios, sites, units and equipment · Create and revoke third parties' upload links · Create and update requirements and their findings · Create its own webhooks (Power Automate, Zapier...) · Export all data and documents · Import the starter file and undo an import · Invite, change and remove managers and viewers · No expiry · Read documents sent and download their files · Read portfolios, sites, units and equipment · Read reminders, messages and third parties' upload links · Read requirements, their findings and compliance types · Read the audit journal · Read the calendar of deadlines · Read the members and pending invitations · Read the settings (lists, delays, custom fields, rules) · Remind third parties and write to them · Send documents (upload their files)

Allowed addresses and test

“IP addresses” limits a key to your servers' addresses: one address or range per line, IPv4 or IPv6; empty, every address. A call from another address is refused. “Test a key” checks a key from your browser (sent to the API, never stored) and says whether the address is refused. Each action of a key is written to the audit log with its IP address, erased after 12 months.

Fields and buttons

Limit to some IP addresses
In “New key”: the IP addresses of your servers, set at creation. One address or range per line, IPv4 or IPv6.

IP addresses
Changes the allowed addresses of an existing key; empty: any address. A call from another address is refused and written to the audit log.

Test a key
Checks from your browser that a key is accepted, without keeping it; reports a key refused for the address of the call.

Calendar address
With the “Read the calendar of deadlines” permission: the address to paste into Google Calendar, Outlook or Apple Calendar. It contains the key: do not share it.

Other labels of this section

Allowed IP addresses · Test connection

Webhooks

“Add an endpoint”: your tool's address, a name and the events you want (requirement created or status changed, document received or reviewed, finding, third-party compliance…). Vigilo sends a signed request there at each event; the details are read through the API. The signing secret is shown only once. “Renew the signing secret” creates a new one; the previous one stays valid for 24 h (each send then carries both signatures), unless you untick the box because it leaked. “Test” sends a test event, “History” shows the latest sends and their state; an endpoint can be paused or deleted. The “Developer guide” gives examples to copy and the OpenAPI specification.

Fields and buttons

Add an endpoint
An address of your tool that will receive the events; at most 25 endpoints per organization, including those subscribed by an API key.

Address
A public https address: a private address is refused and redirects are not followed. Your tool must answer within 10 seconds.

Events
Those that trigger a delivery. “Requirement created” is unticked by default: an assignment rule creates hundreds at once.

Test
Sends a “Test” event to check the address and the signature; the result shows in “History”.

History
The last 50 deliveries, with your tool's answer and the duration. A failed delivery is retried 8 times over about 24 hours; “Replay” sends it again.

Renew the signing secret
Creates a new signing secret, shown once. The old one still signs for 24 hours, unless you untick the box because it was disclosed.

Remove the previous secret now
Removes the old secret before the 24 hours are over, once your tool uses the new one.

Pause
No more deliveries until “Resume”. Vigilo pauses on its own an endpoint whose last 5 deliveries failed, and tells you.

Resume
Restarts deliveries for the next events; those that happened during the pause are not sent. Not possible if the API key that subscribed it is revoked or expired.

Delete
Deletes the endpoint and its delivery history. To stop for a while, use “Pause” instead.

Other labels of this section

Actions · Finding raised · Finding status change · Last delivery · Message from the third party · Organization's data restored to a date · Relationship status change · Requirement created · Requirement status change · Submission approved or rejected · Submission received · Third parties merged · Third party compliance change · Webhooks

SFTP access

“Create an access”: a name (the tool or partner that uses it), an SSH public key (recommended for an automated tool) or a generated password, shown only once, an expiry and, if needed, the allowed IP addresses; your password confirms the creation. The access reads, read only, every approved document of the organization, filed as in “Documents”: type of document, then third party, site, unit or equipment, then the files preceded by their date. Health data is never there. At the first connection, compare the fingerprint your client shows with the one on the page. Each connection and each file read is in the audit log. After 10 wrong attempts, the login and the address are blocked for 15 minutes. “Revoke” cuts the access at once. 10 active accesses at most.

Other labels of this section

Actions · Create an access · Documents · Expires · Last connection · Name · Public key · Revoke · Server fingerprint · SFTP access · Sign-in

Other labels of this screen

a former member · Access revoked · Add · Allowed addresses · Allowed addresses — · API key · Attempt ; next on · Cancel · Close · Connection command · Copied · Copy · Copy the secret · Copy the signing secret now · Copy your key now · Create key · Create the access · Created by on · Created by the API key · Created by the API key , revoked or expired · Date · Delete this endpoint · Delivered · Deliveries · Done · Event · Expired · Expiry · Failed · Generated password · Keep the previous secret valid for 24 h · Login · Never · New API key · New endpoint · New SFTP access · No delivery · Not available on this server · owners only · Password · Paused · Pending · Port · Previous secret valid until · Refresh · Renew · Replay · Response · Response time · Revoke access · Revoked · Save · Server · SFTP access created · SSH key · SSH public key · Status · Stop · Stop the previous secret · Your password

Single sign-on (SSO)

Your members sign in with their company account (Microsoft Entra ID, Okta, Google Workspace, Keycloak...) through OpenID Connect. Set up by an owner; an administrator reads the settings, turns single sign-on off and removes a domain. Included in the Enterprise offer.

Proving your domains

Add each email domain of your company (example.com), then publish the TXT record shown in the DNS of that domain and click “Check”. A DNS change can take up to 48 hours. Public mailbox domains (gmail.com...) are refused, and a domain is proved by one Vigilo organization only. Removing the last verified domain turns SSO off.

Fields and buttons

Add the domain
An email domain of your company (example.com). Public mail providers (gmail.com...) are refused, and a domain is proven by one organization only.

Check
Looks for the TXT record shown in the domain's DNS. A DNS change can take up to 48 hours: try again later.

To verify
The TXT record has not been found yet: the addresses of this domain do not go through SSO yet.

Remove
The addresses of this domain no longer go through SSO; removing the last verified domain turns SSO off.

Other labels of this section

Domains · Single sign-on (SSO)

Connecting your identity provider

In your provider, register Vigilo as a web application and declare the redirect URI shown on the screen. Then copy the issuer address, the client ID and the client secret. Saving reads the provider's configuration: a wrong address is refused at once. The secret is stored encrypted and never shown again; leave the field empty to keep it.

Fields and buttons

Redirect URI
To declare at your provider, in the web application created for Vigilo; “Copy” copies it without typos.

Issuer
The issuer address given by your provider; Vigilo reads its configuration when saving and refuses a wrong address.

Client ID
The identifier of the application created for Vigilo at your provider.

Client secret
Stored encrypted, never shown again; leave empty to keep the current one. Enter the new one when your provider expires it.

Other labels of this section

Identity provider (OpenID Connect)

Options, required SSO and diagnosis

“Single sign-on on” shows “Continue with SSO” on the sign-in page for addresses on your verified domains. “Create accounts at first sign-in” gives an unknown address the Viewer role on every site; an invited address joins with the invited role and scope, even when this option is off. An existing account that is not a member of your organization is never taken over. “Require single sign-on” closes the other ways in for your members on these domains and their current sessions; owners keep their password, link and passkey as a backup. Two-factor authentication is handled by your identity provider. The “Sign-ins” card shows the last SSO sign-in and the reason of the last refusal; every refusal is also in the Journal.

Fields and buttons

Single sign-on on
“Continue with SSO” appears at sign-in for the addresses of your verified domains; the other ways to sign in stay open.

Create accounts at first sign-in
An unknown address of a verified domain joins with the “Viewer” role on all sites. Off: only members and invitees sign in.

Require single sign-on
Your members on these domains sign in only through your provider; their other sessions are closed. An “Owner” keeps their other ways, as a fallback.

Sign-ins
The last SSO sign-in and, for the last refusal, its reason and the provider's answer. Each refusal is also written to the audit log.

Other labels of this section
Continue with SSO

Other labels of this screen
Cancel · Confirm removal · Contact us · Copy · example.com · Included in the Enterprise offer · Last refused sign-in · Last SSO sign-in · Options · Save · Save the options · Stored · Verified on

Audit log

Who did what, and when, in your organization: every creation, change and decision is recorded with its author. Read by owners and administrators, exported by owners.

Reading the log

Filter by category, author, action, object type and period. “Sign-ins” shows your members' successful and failed sign-ins and locks, with the IP address. “Details” shows the values before and after. An action done by the Vigilo team at your request reads “via Vigilo support”. IP addresses are erased after 12 months.

Fields and buttons

Author
Who acted. An automatic action appears under Vigilo's name; a third party's, under its portal.

Sign-ins
Successful and failed sign-ins and lockouts of your members, with the IP address, erased after 12 months.

Details
The values before and after the change.

via Vigilo support
Action taken by the Vigilo team at your request.

Other labels of this section

Action · All · Audit journal · Category · Filter · From · Journal · Object type · Older events · Reset · To

Exporting the log

“Export (Excel)” keeps the filters shown. Columns: date (UTC), category, action, action code, object type, object, author, “via Vigilo support”, IP address (when there is one) and changes. Owners only, never during a support session; 366 days and 5,000 rows at most per export: shorten the period beyond that.

Fields and buttons

Export (Excel)
Uses the filters shown; at most 366 days and 5,000 rows per file: shorten the period beyond that.

Other labels of this screen

“Calls and review” changed · Absence ended · Absence planned · Access end date changed · Account deleted · Account locked (too many attempts) · Account unlocked · Administration · AI provider key changed · All sessions closed · API key · API key allowed addresses changed · API key created · API key revoked · API key used · Approval revoked · Assignment · Assignment rule · Assignment rule applied · Assignment rule created · Assignment rule updated · Attachment opened by support · Automatic approval blocked · Backup or restore drill requested · Beta copy erased · Call logged · Call outcome logged · Call refused: address not allowed · Changes · Checked in the official register · Client assignments transferred · Closure cancelled · Closure requested · Code · Compliance · Compliance dossier exported · Compliance status changed · Compliance type · Compliance type activated · Compliance type created · Compliance type deactivated · Compliance type reactivated · Compliance type updated · Contact · Contact archived · Contact created · Contact email change requested · Contact email change undone · Contact restored · Contact updated · Copy to the beta failed · Copy to the beta requested · Cross-client search performed · Custom field · Custom field archived · Custom field created · Custom field restored · Custom field type converted · Custom field updated · Custom fields changed · Customer page opened by the staff · Data export requested · Data exported · Data restored to a date · Date (UTC) · Demo reset requested · Document approved · Document back in the shared list · Document back to review · Document review assigned · Documents opened by the Vigilo team (reason) · Documents viewed by the Vigilo team · Double approval: final approval given · Double approval: first approval given · Due date changed · Duplicate third party merged · Equipment · Equipment archived · Equipment created · Equipment restored · Equipment updated · Erasure request received under a hold · Evidence dossier exported · Evidence downloaded (ZIP) · Evidence read automatically · File · File blocked (virus detected) · File compressed · File downloaded · Files of a withdrawn document erased · Finding created · Finding updated · First approval given · Former member · Forward to a third party cancelled · Group changed by Vigilo · Hold review date changed · Identity provider saved · Import completed · Import undone · Internal note added · Internal note added to the ticket · Internal note deleted · Internal note of the ticket hidden · Internal note pinned · Internal note unpinned · Invitation · Invitation accepted · Invitation cancelled · Invitation resent · Invitation sent · IP address · Journal exported · Left the organization · Library update dismissed · Library update prepared · Member · Member added · Member removed · Message posted · Multi-customer report exported · New features: rollout changed by Vigilo · New version published · Not signed in · Object · Old emails' content erased (retention period) · Operator assigned to client · Operator removed from client · Organization · Organization closed · Organization created · Organization hold review date changed · Organization retention hold lifted · Organization suspended · Other event · Owner changed · Ownership transferred · Password confirmation failed · Permanent deletion scheduled · Person in charge of the ticket changed · Personal data exported · Photos combined into one PDF · Platform · Platform settings updated · Portal code blocked after too many attempts · Portal code confirmed · Portal code sent · Portfolio · Portfolio archived · Portfolio created · Portfolio restored · Portfolio updated · Previous webhook secret stopped · Production copied to the beta · Record correction suggested by

the third party · Recorded reminder deleted · Relationship · Relationship archived · Relationship created · Relationship restored · Relationship status changed · Relationship updated · Reminder deferred (email cap reached) · Reminder letter exported · Reminder level changed · Reminder not sent (sending failed) · Reminder proof exported · Reminder recorded · Reminder sent · Reminder template updated · Reminder text changed · Reminder text restored to the Vigilo model · Reminders · Reminders paused · Reminders resumed · Reminders suspended (no current relationship) · Reply-to address verified · Report exported · Request forwarded to a third party · Requirement · Requirement created · Requirement excluded · Requirement matches a rule again · Requirement no longer matches an active rule · Requirement reinstated · Requirement status changed · Requirement taken over by another rule · Responsibilities handed over · Restoration confirmed · Restoration failed · Restoration ready: awaiting confirmation · Restoration refused · Restoration request cancelled · Restoration request expired · Restoration to a date requested by the Vigilo team · Retention hold lifted · Retention hold placed · Retention hold placed on the organization · Review · Review assigned to a colleague · Review taken over by another member · Role changed · Scheduled report · Scheduled report created · Scheduled report deleted · Scheduled report updated · Scope changed · Security · Session closed · Sessions closed · Settings updated · SFTP access · SFTP access created · SFTP access revoked · SFTP connection · SFTP connection refused: address not allowed · Sign-in failed · Signed in · Signed out · Signed up · Single sign-on · Site · Site archived · Site created · Site restored · Site updated · Sites, equipment and third parties · SQL query run by the staff · SSO domain · SSO domain added · SSO domain removed · SSO domain verified · SSO options changed · Staff invitation · Staff invitation cancelled · Staff invitation resent · Staff invitation sent · Staff member added · Staff member banned · Staff member unbanned · Staff role changed · Step changed · Submission · Submission approved · Submission received · Submission rejected · Submission withdrawn · Subscription amount changed by Vigilo · Subsidiary added by Vigilo · Subsidiary removed by Vigilo · Support take-over ended · Support take-over started · Task · Task closed · Task created · Technical job · Technical job retried · Template library imported · Terms of use accepted · Third parties merged · Third party · Third party (portal) · Third party archived · Third party created · Third party data exported · Third party erased (GDPR) · Third party merged into another · Third party providing the document changed · Third party reported the request as not theirs · Third party restored · Third party updated · Third party's correction applied · Third party's correction declined · Ticket · Ticket answered · Ticket answered and closed · Ticket closed · Ticket message hidden by the support · Ticket subject changed by the support · Translation suggested · Two-factor authentication reset · Type version changed · Unit · Unit archived · Unit created · Unit restored · Unit updated · Upload link · Upload link created · Upload link forwarded to a third party · Upload link opened · Upload link revoked · Upload refused (antivirus unavailable) · User · Version draft created · Version draft discarded · Version retired · Via support · Vigilo (automatic) · Vigilo adviser changed · Vigilo support · Waiver approved · Waiver ended · Waiver granted · Waiver refused · Waiver request withdrawn · Waiver requested · Webhook · Webhook created · Webhook deleted · Webhook disabled · Webhook enabled · Webhook replayed · Webhook secret renewed · Yes

Account health

Setup problems that block reminders, exports or follow-up, each with its fix. When everything is fine, the page says so.

Problems and fixes

For example: third parties without a recipient, addresses that rejected an email, third parties without a current relationship but with open requirements, equipment inspections not tracked, active rules that target nothing, types checked by your team without enough members able to approve, legal holds to review, erasure requests pending. Each line opens the list concerned, or fixes it in one click when possible.

Other labels of this section
Account health · Active rules that target nothing · Active third parties with no requirement · Addresses that rejected an email in 30 days · and more · Antivirus unavailable: document uploads are refused · Create the rule · Documents nobody can approve any more · Equipment checks not followed · Exclude · Exclude for : this check does not apply · Exports failed this week · Findings resolved over two weeks ago and never verified · Invite a member · Open API settings · Open exports · Open the rule · Other types · Pending erasure requests · pending since · Requirements outside the country or region of their type · Retention holds past their review date · See findings to verify · See reminders · See requirements · See rules · See the holds · See third parties · Third parties with no recipient and open requirements · Uploads refused in 24 h, antivirus unavailable · View service status · Webhooks disabled

Other labels of this screen
Blocking · Important

Group

The compliance of each subsidiary of a group, as figures only: documents, third parties and contacts stay in each organization. For the group's owners and administrators who see all its sites.

Reading the table

One row per subsidiary, one for the group itself, then the total. Each organization is counted with its own rules: compliance rate (colour from the group's thresholds) and change over 30 days, applicable requirements, non-compliant, expiring soon, number of sites. “Open” switches to a subsidiary you are also a member of. The Vigilo team links a subsidiary to its group, at the group's request.

Other labels of this section
Actions · Applicable · Closed · Compliance · Expiring soon · Group · Group total · Non-compliant · Open · Organization · Sites

Other labels of this screen
(this organization) · pts over 30 days

Support

Your requests to the Vigilo team: questions, problems, suggestions. The team answers here and by email.

Your requests

Each request has a status: “Open” (waiting for the team), “Answered” or “Closed”. Owners and administrators see every request of the organization, other members their own. “Check the help first” opens the help center.

Other labels of this section
Answered · Check the help first · Closed · New request · Open · Subject · Support · Updated

Your adviser

For an assisted organization, the “Your adviser” card names the Vigilo adviser(s) who follow your account. Your requests reach them through “New request”; the team always replies here and by email. A temporary access does not see this card.

Other labels of this section
Your adviser

New request

Choose the type (question, problem, suggestion), then write the subject and the message. Help articles related to the subject appear as you type. The page you came from and the browser are attached automatically: describe what you were doing and the message shown.

Other labels of this section
Maybe answered in the help · Message · Problem · Question · Subject · Suggestion · Type

Talking with the team

Messages are shown in order. Reply in “Your reply”. “Close ticket” closes the request once the matter is settled; a new message reopens it. Each answer from the team is also sent to you by email.

Other labels of this section
All requests · Close ticket · Your reply

Screenshots and attached files

“Attach a screenshot or PDF” adds up to 5 files of 10 MB to your message (PNG, JPEG, WebP, PDF). On a computer, paste a screenshot straight into the message (Ctrl+V). Images are made lighter after sending; only the people who see the request and the Vigilo team can open the files.

Other labels of this section
Attach a screenshot or PDF

Other labels of this screen
All · Author · by · Cancel · Contact support · Customer · Edit subject · Help · Hide · Hide for good · Hide this message · Hide this note · Mine · No requests · Open in a new tab · Open ticket · Remove the customer filter · Save · Send · Status · You · Your advisers

Your account

Password, two-factor authentication, passkeys, sessions and preferences: these settings concern you only. Open them from the menu under your name: “Account security” or “Preferences”.

Password

“Change password” asks for the current password; your other sessions are closed and an email tells you. Password lost: “Forgot password?” on the sign-in page. Without a password, sign in with a link or a code received by email, a passkey or your organization's single sign-on.

Fields and buttons

Change password
Asks for the current password; your other sessions are closed and an email tells you.

New password
Refused when too short, too common or taken from your name, your email or your organization.

Forgot password
On the sign-in page: a reset link received by email.

Other labels of this section

Account security · Current password · Password

Passkeys

A passkey signs you in with Face ID, Touch ID, Windows Hello or a security key, with no password and no code; it counts as two-factor authentication. Add one per device and name it (“Office PC”); “Remove” deletes it.

Fields and buttons

Add a passkey
One per device (computer, phone, security key): your browser asks for Face ID, Touch ID, Windows Hello or the device's code.

Name
To recognize the device in the list and in “Recent activity”.

Remove
This device no longer signs you in with a passkey: for a device lost, sold or handed back.

Other labels of this section

Passkeys

Two-factor authentication

“Set up two-factor authentication”: scan the QR code with an authenticator app, then enter the 6-digit code. Keep the 10 backup codes, shown only once: each one lets you sign in once if you lose your phone; “Generate new codes” replaces the old ones. When your organization requires it, it cannot be turned off. A trusted device does not ask for the code again for 30 days; “Ask for the code again” cancels that. Phone and backup codes lost: the owner of your organization resets your two-factor authentication (Members); otherwise, write to support.

Fields and buttons

Set up two-factor authentication
Scan the QR code with an authenticator app, then enter the 6-digit code it shows.

Your backup codes
10 codes shown only once: download them or write them down. Each one replaces the app's code once if you lose your phone.

Generate new codes
Replaces the 10 backup codes; the old ones no longer work.

Turn off two-factor authentication
Asks for a code from the app, and your password if you have one. Not possible when your organization requires it.

Ask for the code again
Your trusted devices ask for the code again at the next sign-in, instead of after 30 days.

Other labels of this section
Two-factor authentication with an app

Sessions and activity

“Open sessions” lists the devices signed in to your account: “Sign out” signs one out, “Sign out all other devices” keeps only this one. “Recent activity” shows your sign-ins, refused attempts, lockouts and security changes. An unknown device: close its session and change your password.

Fields and buttons

Sign out
Signs this device out at once.

Sign out all other devices
Keeps only the device you are on: after losing a device, on a shared computer or at the slightest doubt.

Recent activity
Sign-ins, refused attempts, lockouts and security changes of the last 90 days. An unknown line: close the session and change your password.

Other labels of this section
Open sessions

Preferences

Language of the application and of your emails, time zone of the dates and times shown, table density (comfortable or compact). Notifications received by email are set on the Notifications page.

Fields and buttons

Language
Language of the application and of the emails you receive.

Time zone
Dates and times show in this time zone, whatever your device's.

Table density
“Compact” shows more rows on screen in tables.

Other labels of this section
Comfortable · Compact · Preferences

Your data, leaving, deleting

“Download my data (JSON)”: profile, memberships, sessions and security events about you. “Leave the organization” (Account security) ends your access; your account is kept. “Delete my account” removes your sign-in, sessions and memberships; actions you took stay in the history as “Former member”. Sole owner of an organization: transfer ownership or close it first (read-only: Vigilo closes it on request); an organization already closed is left with the account. The export also lists the actions recorded with your IP address (the 10,000 most recent; the file says when there are more). Deleting the account erases that address from your sign-ins and actions, except on the entry that proves the deletion (12 months) and during a retention hold decided by an organization.

Fields and buttons

Download my data (JSON)
A JSON file: profile, memberships, sessions and security events about you.

Delete my account
Irreversible: erases your sign-in, your sessions and your memberships; your actions stay in the history as “Former member”. Not possible while you are the only “Owner” of an organization.

Leave the organization
Ends your access to the organization; your account is kept. The requirements you are responsible for no longer have anyone responsible.

Other labels of this section
My personal data

Other labels of this screen

Account locked after repeated failures · Add · Back to the application · Backup codes · Cancel · Code from the app · Confirm · Current password, for new codes · Current password, to turn off · Delete permanently · Delete your account · Dismiss · Download (.txt) · I have saved my codes · Last active · Leave · My account · New backup codes generated · Off · On · Or type this key in the app · Organization · Passkey · Passkey added · Passkey removed · QR code adding Vigilo to your authentication app · Save · Sign in again · Signed out · Switch organization · Switch to this organization · Theme · This device · Turn off · Two-factor authentication reset by · Two-factor authentication turned off · Two-factor authentication turned on · Unknown device · Vigilo backup codes for

4. Frequent questions

How do I get started?

In order: create your sites (not needed if you only track suppliers), add the third parties (tenants, suppliers, insurers) with the contact who receives the requests, activate types from the library, then create the requirements with an assignment rule. The requests then go out by email, followed by the reminders. The “Setting up Vigilo” block on the dashboard tracks these steps, with a link to each one.

Setting up an account

1. The account owner accepts their invitation, then invites their team in Settings › Members, with each person's role and scope (or through the Team sheet of the complete file).

2. Compliance types › Browse the library: activate the types to follow (insurance, certificates, inspections…).

3. Import › Complete file: download the template, empty or with an example. One sheet per kind of data, in import order: portfolios, sites, units, third parties, equipment, requirements, team. Fill in the sheets you need.

4. Import the file: each error is shown with its sheet, row and column; nothing is created while one remains.

5. Assignment rules: check the rules, they create the requirements of sites and third parties.

6. Reminders: leave them on, third parties receive their first request.

The Vigilo team can do these steps with you during setup.

How do I import my existing sites and third parties?

Open Import (the “Import” button of the site, third-party or equipment lists, or the “Import from Excel or CSV” link of the “Setting up Vigilo” block). To start a base, download the complete file (one sheet per type of data, with an example and the lists of values), fill it in and choose it: every error is listed with its sheet, row and column, and nothing is saved while one remains. To add one type of data, use its tab: drop an Excel or CSV file, map the columns and check the preview. If active rules create requirements, the report says how many third parties will get a first request. An “Employer” column links each worker to their company.

What is an assignment rule?

A rule states which third parties owe which document, for which sites. Each match creates a requirement. Use the preview to see the result before activating. A national type starts with its country; for a third party, that is the country where it works (its sites). Some types only cover third parties established in their country (social security certificates) or outside it (posting declarations). The preview names the items it leaves out and why. It also says how many third parties will receive a first request, and when; tick “Don't write to third parties for now” to create the requirements without sending anything.

How do reminders work?

Third parties receive an email with a secure link before and after the due date. The schedule is set on the Reminders page, for documents and for periodic checks. Sending can be paused per requirement. With the assisted service, calls to third parties who do not answer and document review are done, type by type, by Vigilo or by your team (“Calls and review”); a requirement may differ from its type.

How do I check a submitted document?

Open “To review”, check the file and the dates entered, then approve, or reject with a reason. The third party is notified of a rejection and can submit again. With double approval, another member approves after you. Each approval and its comment appear in the requirement history. One document covering several requirements (same type, same third party): check them under “Same document for” before approving, or use “Apply to other requirements” on the requirement page. Vigilo also reads the dates and numbers of the document (PDF, photo); when a required field stays unreadable, an AI reads it (“read by AI”, can be switched off in Settings › Statuses and steps). “The document says …” flags a difference with what was entered, “Use this value” takes the value read. The decision stays yours.

What does “Expiring soon” mean?

The document is still valid but its end of validity falls within the N days set by the type (30 by default). It becomes “expired” after its end date and the type's grace period, if any. Reminders follow their own calendar (Reminders page).

What do third parties see?

A simple page opened from their email, with no account: the documents requested, an upload form that works on a phone, and the status of each request. A document already sent for another request of the same type can be sent again in one tap.

How do I invite colleagues?

Open Settings, then Members, and “Invite”: address, role, scope (the whole organization or some portfolios and sites) and, for an external viewer such as an auditor, an end date of access. The link stays valid 7 days, never past the end of the access; “Resend” sends a new link. The invitation of an admin who left the organization is no longer accepted: resend it. Suspended organization: you can still remove a member and revoke an invitation or an API key. Two-factor authentication can be required for everyone.

Why is an action refused?

The “Access denied” page, or a message saying you do not have permission, means your role does not allow this action. An administrator of your organization can change your access: Settings, then Members, Actions menu, “Change access”; they extend an access past its end date the same way.

What each role allows: a viewer reads without changing anything; a manager works within their scope (portfolios and sites), and an item outside it reads as not found; settings, members and invitations are kept for administrators and the owner; approving a document needs the review role set by its compliance type, and the second approval someone other than the first.

What is a finding?

A finding is an issue noted during a check, with its severity, the person who fixes it and a date. Depending on the type's “Open findings” setting, a critical finding (or any open finding) can prevent compliance until it is resolved; by default, findings are tracked without changing the status. The proof is attached when marking it resolved; someone else verifies it.

How do I fix a mistake and see who changed what?

You undo almost any action yourself, without asking the support, and the history stays.

A document sent by mistake and not decided yet: on the document's review screen, “Withdraw” (the third party withdraws its own from its portal).

A document rejected by mistake: “Review again”, while no newer document was sent.

An approval given by mistake: “Revoke approval” (owner or admin), then “Review again”.

A finding verified or accepted without correction: “Reopen”, with a reason.

A requirement excluded, or closed with the third party's last relationship: “Reinstate”, on its page or in bulk.

A waiver: “Lift waiver”.

A site, unit, equipment, third party, contact or relationship archived: “Show archived”, then “Restore”; what was archived with it comes back and its requirements reopen.

A wrong file imported: Import, “Recent imports”, “Undo this import” (30 days, owner or admin).

A date, an owner or a field: change it again, the previous value stays in the history.

Not undone: the erasure of personal data, the merge of two third parties, the revocation of an API key, an email already sent (pause the next reminders) and the deletion of a note, a saved view, a scheduled send or a webhook (with its delivery history).

Who did what: “History” on the record or the requirement, and Settings › “Journal” for the whole organization.

Most of these ways back also exist through the API (see the API documentation).

Can I add my own fields to requirements?

Yes. Open Settings, then Custom fields, and choose Requirement. The fields appear on the requirement page, in the list (Columns menu), in filters, in exports and in the API. A field created with the wrong type (text instead of a date, for example) is converted from its Edit window › Change type: a preview shows the values converted and those that cannot be; each item keeps its former value in its history.

How do I keep my filters and columns?

On the requirements list, save the current filters as a view, for yourself or shared with the whole organization, and choose a default one. The Columns menu shows, hides and reorders columns; columns and the default view stay specific to your account.

Which notifications do I receive?

The bell lists events that concern you. On the Notifications page, choose which types also reach you by email (grouped, without content) and turn the weekly digest on or off; its weekday is chosen by an administrator in Settings. Away for a few days? “Absence” card: your dates and a deputy (an owner, admin or manager whose access covers yours). Meanwhile your notifications also reach them, preceded by “For” and your name, and so do the internal reminders of the documents you provide; your responsibilities do not change.

Can I connect another tool?

Yes. Settings, then API keys, creates read or write keys and signed webhooks for your events. “IP addresses” limits a key to the addresses of your servers. The Developers guide gives examples to copy and the OpenAPI file.

How long is data kept, and how do I stop it being deleted?

Settings › Data retention sets when former third parties are proposed for anonymisation; nothing is erased without an owner's confirmation. For a dispute, an inspection or an inquiry, open the third party or the requirement, menu ..., Place a retention hold: while it is active, nothing it covers can be erased, anonymised or purged. Give a reason and a review date; holds are listed in Settings and shown in Account health once their review date has passed. If someone asks for their data to be erased during a hold: menu ..., Erase personal data, then record the request and copy the reply, to send them within one month. To take out a third party's whole file (documents, reminders, history): menu ..., Evidence dossier. “Export all the organization's data” (Settings) holds all your data, including the activity log.

5. Index of labels

Every label of the interface, with the page that explains it.

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