



CUSTOMER SUCCESS

Libryo Assess User Guide

For Admin Roles

Learn how to use the Libryo Assess platform to its full potential

Last updated: [3 Aug, 2026](#)

Sustainability is our business

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Who uses Libryo Assess?

- Organizational & System Administrators
- Assessment & Audit Users
- Site & Operational Contributors
- Corrective Action & Task Owners
- Compliance, Risk & ESG Oversight
- Third-Party Certifiers & Verifiers
- Supply Chain Stakeholders

Why use Libryo Assess?

- Centralised platform for compliance and assurance
- Role-based access for internal and external users
- Standardised assessment and audit workflows
- Improved visibility through dashboards and reporting
- Collaborative assurance across organizations and supply chains
- Supports continuous improvement through action tracking



Understanding User Roles

There are 4 different types of user access:

This user guide applies to
Admin roles



ADMIN

Admins manage the entire platform, including creating entities, portfolios, and assessments, as well as controlling user access and configuration settings. This role suits people managing operations and compliance programs.



MEMBER

Members can perform assessments, record observations, upload documents, and manage action items within assigned entities and portfolios. This role suits operational staff or team leads responsible for executing assessment tasks.



CONTRIBUTOR

Contributors primarily add files and photos to assessments without broader editing or management rights. This role is best for field personnel or contractors who provide supporting evidence during assessments.



CERTIFIER

Certifiers validate and confirm compliance outcomes by reviewing completed assessments and ensuring standards are met. This role is ideal for auditors or external reviewers tasked with certification and verification.

Login

Click the invitation link in your email. Enter your email address and password.

If you have lost or forgotten your password, click on [Forgot Password](#) to reset it.



Login to continue

Email address

Continue

By continuing, you agree to our [Terms of Service](#) and have read our [Privacy Policy](#)

[Forgot Password?](#)

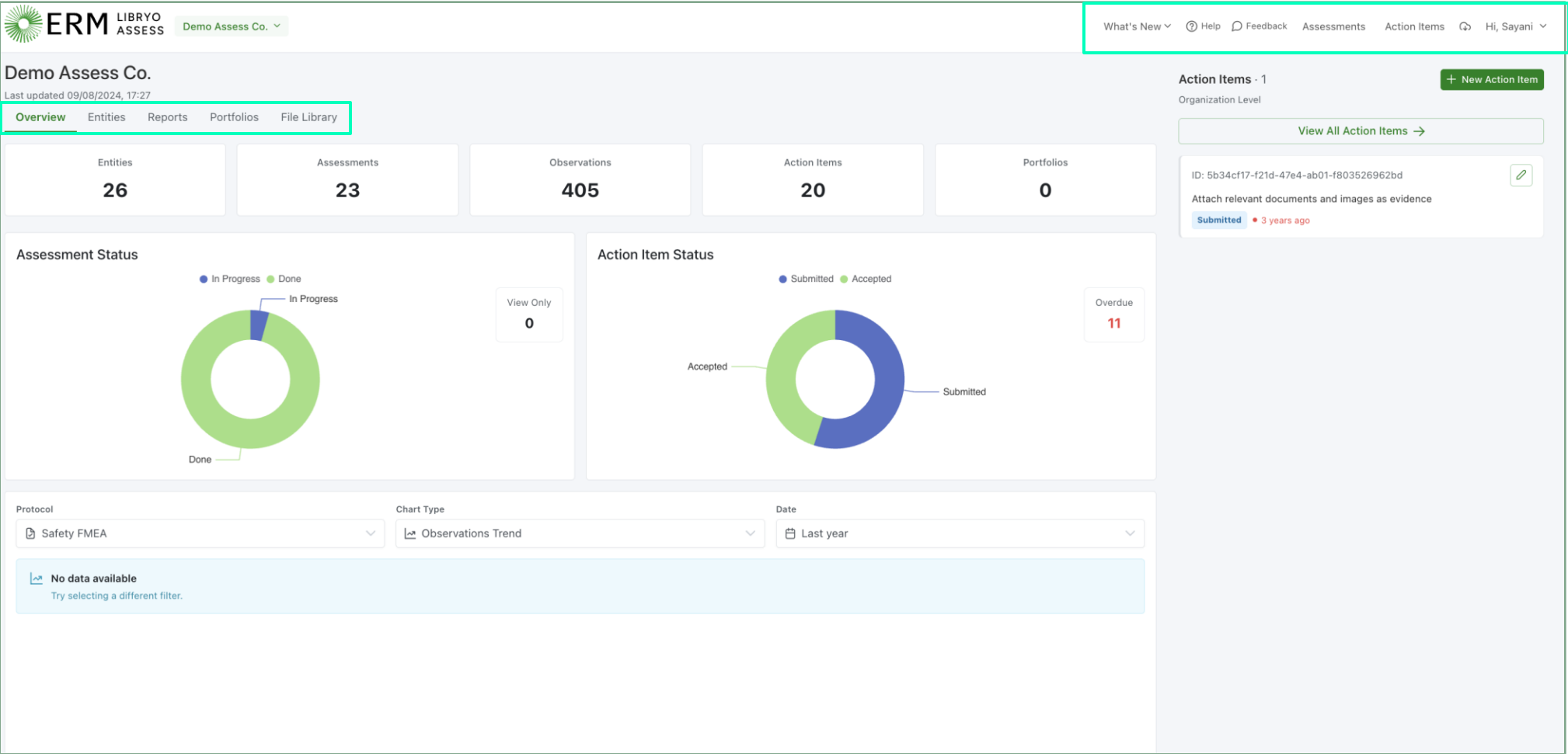
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v 0.5.1

Dashboard

The **Dashboard** gives you a complete view of all Entities and Assessments within your organization.

At the top of the screen, the navigation bar allows you to move to different areas of the account (for example: **Assessments**, **Action Items**).

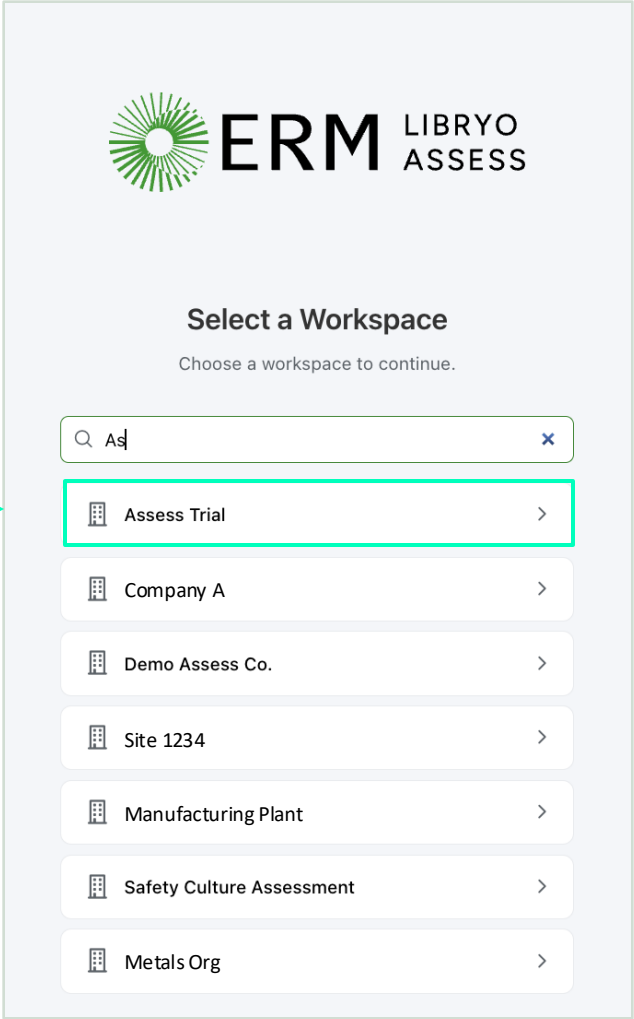
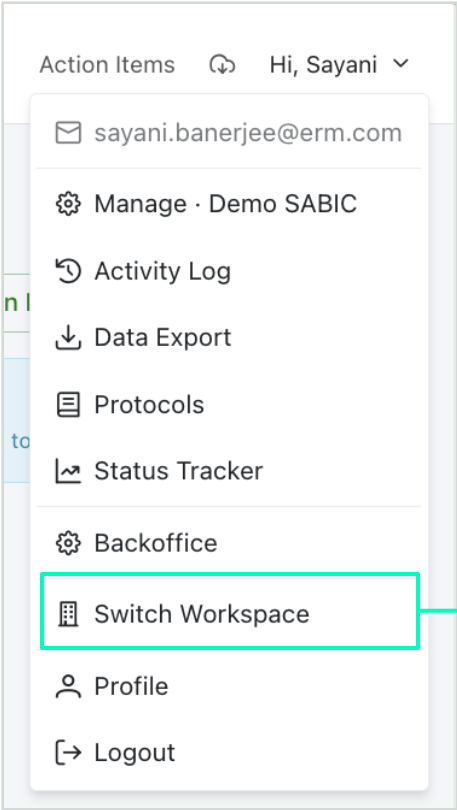


Below the navigation bar, you can easily access your list of **Entities**, **Reports**, **Portfolios**, and the **File Library**.

Dashboard

To access a different **Organization** within the same workspace, click on the drop-down arrow beside the **ERM Libryo Assess** logo.

To switch to a different workspace, click on the drop-down arrow beside your **Username**. Next, select **Switch Workspace**, then search and choose the Workspace you want to access.



Manage Your Entity

Search, create, delete and export

Entities are used to group users, sites, or standards within an account. They can represent auditing groups, locations, or specific standards. Users are assigned access at the entity level.

You can view and manage Entities from the Entities tab on the Organization Dashboard. Use the **Search by Entity name** or the **Date Range** filters to find it quickly.

To create a new Entity, click **+New Entity** and enter the relevant details. Click **Create** to save.

To delete an Entity, first you must delete all associated Assessments/Action Items. Then click **Delete**, and confirm deletion.

You can also **Export** the information from the top-right of the screen.

 **ERM** LIBRYO ASSESS

Demo Assess Co. ▾

What's New ▾

Demo Assess Co.

Last updated 09/08/2024 17:27

Overview **Entities** Reports Portfolios File Library

Search by Entity name

Select date range

⬇ Export ▾

+ New Entity

Name ↑↓	Address ↑↓	Assessments	Action Items	Updated ↑↓	Action
Rotterdam Logistics Hub Supply Chain & Distribution Mobility Systems Surface Technologies	199 Maasport Tradeplein, 3195 XP Rotterdam, Netherlands	5	0	11/06/2026	
Lyon Specialty Chemicals Facility Manufacturing	88 Rue de la Manufacture, 69007 Ly				
Sydney ESG Data & Analytics Center ESG Data & Analytics Corporate R&D & ESG	45 Harbourview Tech Lane, Sydney				
Chicago Manufacturing Plant Advanced Materials Manufacturing	4821 W. Kinzie Industrial Rd., Chicag				
Houston Components Facility Manufacturing Power Systems	19007 Northport Logistics Dr., Hous				

Add Entity

General Information

Location & Contact Info

Advanced Information

Name *

Address

Select Tags

Select tags...

Entity ID / Custom ID

Description

Cancel

Create

Manage Your Entity

Entity Tags

Tags helps categorize and organize Entities consistently across the platform.

Entity tags can be viewed across organizations under the same client by navigating to your **Profile**, opening the **Organizations** tab. Expand a specific organization to review the Entity List.

You can manage **Entity Tags**, from the **Account Manager** dashboard.

Use the **Entity Tags** tab under **Manage**, to create new tags, view all existing tags, update tag names or colours or delete tags. To create a tag click on **Add Label**, add a **Name** and choose a **Color** (description optional), then click on **Create** to save.

To edit an Entity Tag, click the **Edit (Pencil) icon**, then select **Update** to save your changes.

Deleted tags can be restored later through the Activity Log, ensuring changes are reversible if needed.

The screenshot displays the ERM LIBRYO ASSESS interface. The top navigation bar shows the user's profile and email. The left sidebar contains various management options, with 'Manage - Demo Assess Co.' highlighted. The main content area shows the 'Organizations' tab, listing several organizations, with 'Demo Assess Co.' expanded to show a list of entities. The bottom navigation bar includes 'Entity tags', which is highlighted. A red box also highlights the 'Add Label' button in the bottom right corner.

Entity Name	Labels
Atlanta Recycling & Packaging Facility	Manufacturing
Tokyo Advanced Robotics Center	R&D / Innovation
Birmingham Fabrication Works	Manufacturing

Label	Description	Actions
Assembly & Testing		
Surface Technologies		
Medical Devices		
Mobility Systems		
ESG Data & Analytics		
Power Systems		
Advanced Materials		
Manufacturing		
Supply Chain & Distribution		
R&D / Innovation		
Corporate R&D & ESG		
Electronics Systems		

Manage Your Assessment

Access, create and view your Assessments

Assessments are used to evaluate compliance or performance against a selected protocol, created within an entity and accessible, updatable, exportable, and archivable as needed.

You can access Assessments from multiple locations: **Assessments** on the top navigation bar or the **Entities** tab on the Organization dashboard.

Create a new assessment from **Assessments** on the navigation bar or from the **Entity** tab. Click on **+New Assessment**, select an **Entity** and **Protocol**, enter a name (*optional description and due date*), and click **Create**.

To view assessments, go to **Assessments** in the navigation bar or open an **Entity** and scroll to the **Assessments** section to select an assessment (*use filters if required*).

This screenshot shows the 'New Assessment' form within the 'Rotterdam Logistics Hub' dashboard. The form is titled 'New Assessment' and includes the following fields: 'Name' (text input), 'Entity' (dropdown menu with 'Rotterdam Logistics Hub' selected), 'Protocol' (dropdown menu with 'Safety FMEA' selected), 'Group Assignment (Optional)' (text input with a note 'An assessment can only be assigned to 1 group'), 'Description' (text area), and 'Due Date' (calendar icon). At the bottom, there are 'Cancel' and 'Create Assessment' buttons. A red box highlights the '+ New Assessment' button in the top right corner of the dashboard, and another red box highlights the 'Create Assessment' button at the bottom of the form.

This screenshot shows the 'New Assessment' form within the 'Assessments' navigation bar. The form is titled 'New Assessment' and includes the following fields: 'Name' (text input), 'Entity' (dropdown menu with 'Select an entity' selected), 'Protocol' (dropdown menu with 'Select a protocol' selected), 'Description' (text area), 'Tags' (dropdown menu with 'Select tags...' selected), and 'Due Date' (calendar icon). At the bottom, there are 'Cancel' and 'Create Assessment' buttons. A red box highlights the '+ New Assessment' button in the top right corner of the navigation bar, and another red box highlights the 'Create Assessment' button at the bottom of the form.

Manage your Assessment

Access, create and view your Assessments

You can review assessment history from the **History** (🕒) icon.

To **export assessment** data from the Entity or the Assessments page. Click on the **Export** button beside the assessment name.

To download an assessment list via Assessments page or from the Entity click on the **Export Button** beside **New Assessment**.

You can view the **Summary** and access related documents in the **File Library** within the **Assessment**.

The assessment status can be updated from **Manage Assessment** under **Settings**. You can mark an assessment as **Not Applicable**, **Confidential**, **Archive** (to restrict access), or make it **View-Only**.

An assessment can be deleted from the **Delete (trash bin) icon** from the **Entity**. Deleted assessments can be restored from **Activity Log**.

Assessments

Assessment Groups →

Export

New Assessment

Search

Filter by protocol

Filter by group

Filter by date range

Filter by due date range

Updated

Reset Filters

Name ↑↓	Protocol	Group	Updated ↑↓	Actions
Occupational Safety Assessment	OSHA Protocol (Abridged, AI)	-	11/06/2026, 17:24	   
Construction Safety Assessment	Construction Safety protocol	-	07/05/2026, 19:01	   

What's New

Help

Feedback

Assessments

Action Items

Hi, Sayani

Summary

File Library

AI Generator

Assessment Team

Settings

Mark As Done

Manage Assessment

Edit Assessment

Delete Assessment

New Assessment

Edit Assessment

NameOccupational Safety Assessment

ProtocolOSHA Protocol (Abridged, AI)

TagsSelect tags...

DescriptionOptional description

Group Assignment (Optional)
An assessment can only be assigned to 1 group
Select or create a group

Due DateSelect due date

Cancel

Save Changes

To update an assessment, open it from the Entity, make your changes, and click **Save Changes**.

Manage your Assessment

Assessment Tags

Assessment tags help you classify and organize your assessments, making them easier to filter, report on, and manage. Within the Tags section, you can create new tags, update existing ones, apply them to assessments, or delete tags that are no longer required.

You can create and manage assessment tags from the drop-down arrow beside your user name **Manage** under **Assessment Tags**.

To create an assessment tag, click on **+Add Tag**, enter a name, choose a color (*description optional*), then click on **Create** to save.

To edit an existing tag, click the **Edit** icon, update required details, then click **Update Tag**.

Tags can be added while creating/updating an assessment.

To delete an assessment tag, click **Trash** icon next to it, and click **Delete**. *Deleted tags cannot be recovered.*

Account Management

Account management and member permissioning dashboard.

Members

Entity tags

Action Item tags

Assessment Tags

Organization Credentials

Status Tracking

6 tags

Name	Color	Description	Updated	Action
FY 2025	#C57742		30/03/2026, 16:47	
FY 2027 (Planned)	#014E20		30/03/2026, 16:48	
FY 2026	#D5B050		30/03/2026, 16:48	

+ Add Tag

Action Items

Hi, Sayani

sayani.banerjee@erm.com

Manage · Demo Assess Co.

Activity Log

Data Export

Protocols

Status Tracker

Backoffice

Switch Workspace

Profile

Logout

Create Assessment Tag

Name *

Color

Description

Cancel

Create

Manage your Assessment

Assessment Teams

Assessment teams allow you to define and manage the collaborators involved in an assessment. You can view and manage the assessment team directly within the assessment.

To view the assessment team, open an assessment and click on **Assessment Team** from the navigation bar.

To add a new assessment team member, click on **Assessment Team**, then click **Add Member**, select users from the list, and confirm. *(Only users with access to the entity can be added).*

You can remove an assessment team member, by clicking on the **Delete (Bin)** icon next to the user, confirm and click Delete.

You can also assign members to individual questions.

Team Summary File Library **Assessment Team** Settings

Assessment Team

Name ↑↓	Email ↑↓	Added ↑↓	Action
Kelvin Phiri	kelvin.phiri@erm.com	-	
Pranab Mo	pranab.moto@gmail.com	-	

+ Add Member

Q1 4.6.5.2,38.2 1 of 4 in "Protected Area Mitigation and Management"

Has the operation ensured that they are compliant with national and local guidelines?

IRMA RJC

Assigned to No one yet

Select team members...

☐ Kelvin Phiri

☐ Dillon Panizzolo

☐ Vicky Illingworth

☐ Ximena Murua

☐ Sam Cloete

Add Member

Assessment Name * Mining audit

Members *

Kelvin Phiri

☐ Sam Cloete

☐ Dillon Panizzolo

☒ Ximena Murua

☐ Sayani Banerjee

Cancel

+ Add Members

Manage your Assessment

Assessment Groups

Assessment groups allow you to organize and group related assessments within an entity, making it easier to manage and navigate them. Groups are managed at the entity level.

Assessments

Assessment Groups →

Export

New Assessment

Search

Filter by protocol

Filter by date range

Reset Filters

Filter by group

Updated

Name ↑↓	Protocol	Group	Updated ↑↓	Actions
EHS compliance - July 2026 ✓ Done	EHS Compliance Audit Protocol	Compliance	03/07/2026, 19:26	  
Battery Recycler Audit - June 2025 ✓ Done	Battery Recycler ESG Audit	Battery Recycling Unit	03/07/2026, 19:26	  
Battery Recycler Audit - Dec 2025	Battery Recycler ESG Audit	Battery Recycling Unit	03/07/2026, 19:26	   

Assessment Groups

+ New Group

Name ↑↓	Description	Updated ↑↓	Actions
Battery Recycling Unit	-	03/07/2026	 
Compliance	-		

New Assessment Group

Name *

Enter group name

Description

Optional description

Cancel

Create

To create a new assessment group, click on **Entity** from the Organization Dashboard, select the **Entity**, navigate to **Assessment List**. Click on Assessment Group. On the pop-up click on **New Group**. Enter a name (*description optional*), click **Create** to save.

Assessments can be assigned to a group, when creating/updating an assessment. under **Group Assignment**, select a group, then click **Create Assessment** or **Save Changes** to save.

Each assessment can belong to one group only, and grouping is optional.

Completing Assessments

To remove an unneeded observation, open the relevant question and click **Clear Observation**. When prompted to confirm, click **Clear Observation**.

To exclude a section that is not relevant, select it from the left panel and toggle on **Section not applicable to the assessment**.

Applicability screening determines which sections and questions apply to an assessment. To complete it, open the assessment, select **Applicability Screening**, answer **Yes/No** for each item, and click **Save**.

E-Waste Audit

In Progress

E - Waste Audit

Last Updated 1 hour ago

Applicability Screening

Assessment Report →

Filter by principle

General Information0/5

Section is not applicable to the assessment

1. Company Name 事業者名

2. Name of Business Site (Name of Facility) and Address of audit site 事業場名（施設名）及び現地訪問先住所

3. Site Representative (Title and Name) 対応者（役職及び氏名）

4. Date of Site Check 実地確認の実施年月日

5. Auditor's Name 監査人名

> Company Profile 会社概要0/1

> Employee Training 従業員教育0/1

> A. 1. Permission for disposal contractors 処理業者の許可状況0/1

A. 2. Document retention (For on-site confirmation after consignment contract is signed) 書面の保存状況（委託契約後の実地確認の場合）0/1

Q2

2 of 5 in "General Information"

Name of Business Site (Name of Facility) and Address of audit site 事業場名（施設名）及び現地訪問先住所

Question does not apply to this assessment

Response *

Lyon Speciality Chem - Colorado

31 Characters

File Library

Bulk DownloadUpload Files

No Files Found
Files will appear here once added
+ Upload Files

Clear ObservationSave

← Previous

2 of 5 in "General Information"

Next →

Updated 1 hour ago

Manage Your Portfolios

Create, View and Delete Your Portfolios

Portfolios group related entities by industry, such as manufacturing, chemical, mining, or other sectors. Access to each portfolio is controlled by the roles and permissions assigned to each user.

Portfolios are created from the **Organization Dashboard** under the **Portfolio** tab. Click **New**, add a name and description, select the relevant entities, and click **Create** to save.

To update an existing portfolio, click its name from the left-hand menu, then click **Edit Portfolio**. Under **Entities**, select the required entities (*use the search to refine results if needed*) Click **Update** to save. *Note that only existing entities can be added to a portfolio.*

To delete a portfolio, open it, click **Delete**, confirm by selecting the checkbox, and click **Delete**. *Note that this action is permanent and cannot be undone.*

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Last updated 09/08/2024, 17:27

Overview

Entities

Reports

Portfolios

File Library

+ New

Sort ↓

BU - Corporate R&D & ESG

5

BU - Power Systems

3

Region - Asia-Pacific

5

Region - Europe

10

Region - North America

10

USA

USA - Advanced Materials - Entities

Search

Select date range

Name	Address	Assessments	Action Items	Updated	Action
Chicago Manufacturing Plant	4821 W. Kinzie Industrial Rd., Chicago, IL 60644	4	7	01/04/2026, 10:26	
Los Angeles Aero Industrial Blvd., Los Angeles, CA 90059		1	0	23/03/2026, 12:07	

Showing 1 - 2 of 2

Edit Portfolio

Delete

Create Portfolio

Name *

Description

Entities

Select entities

Select entities to include in this portfolio

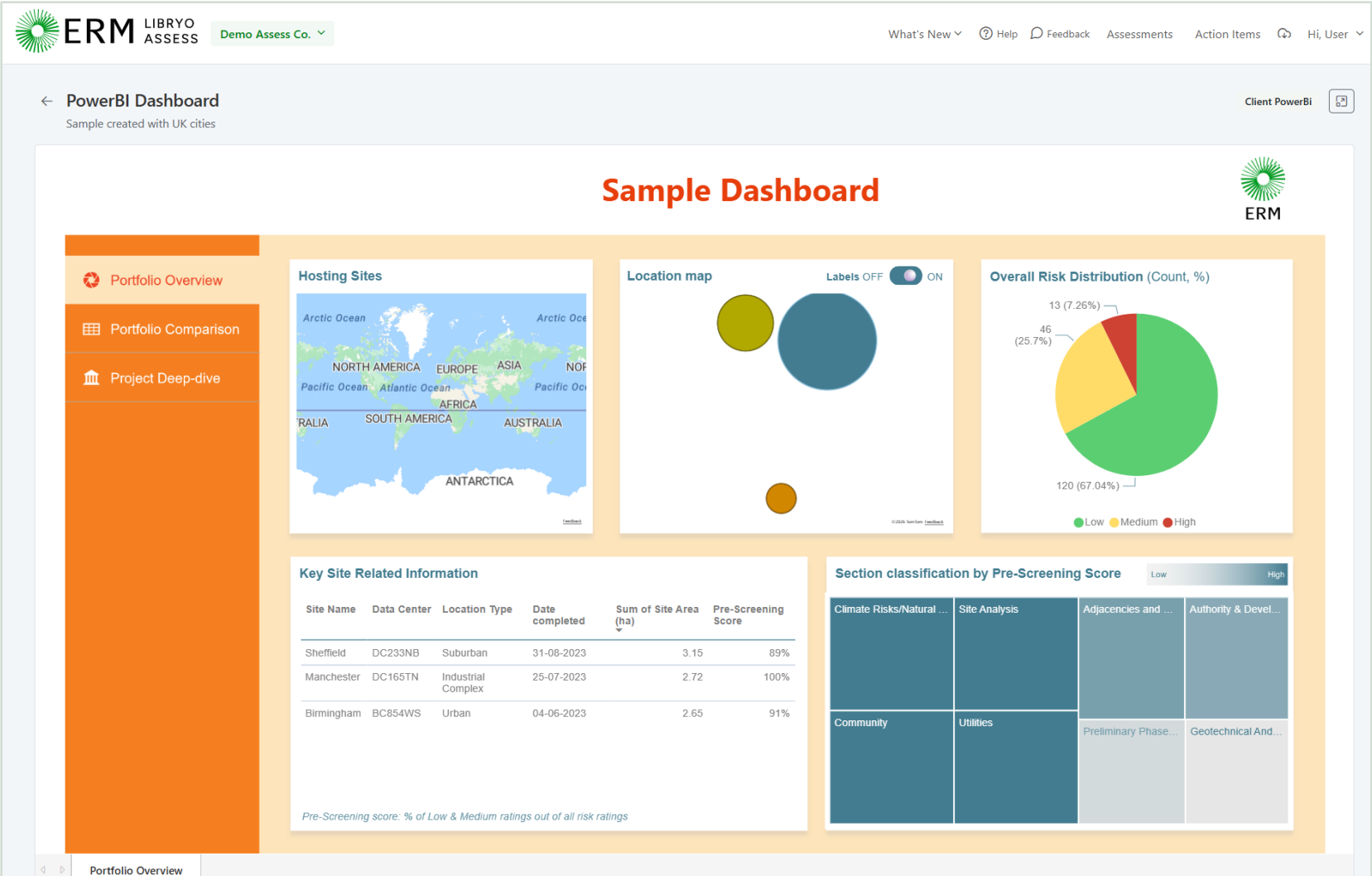
Cancel

Create

Manage Your Reports

View Reports

Libryo Assess supports custom reporting through external integrations. In addition to built-in visualisations, reports can be integrated with **Microsoft Power BI**, **ArcGIS**, and **Amazon QuickSight**.



Help Articles

Self-help resources

From the **Help** option on the navigation bar, users can access self-help resources, tutorial videos, and best-practice documents.

A search bar is also available within the **Help** section, allowing users to quickly find specific help articles.



Demo Assess Co. ▾

Demo Assess Co.

Last updated 09/08/2024, 17:27

Overview

Entities

Reports

Portfolios

File Library

Entities

26

Assessments

23

Assessment Status

In Progress

Done

In Progress

Done

Help Center

Articles for getting the most out of ERM Assess.

Search Help Center

Search

ERM Libryo Assess - Action Items Dashboard

ERM Libryo Assess - Protocol Builder

ERM Libryo Assess Overview Tutorial

ERM Libryo Assess Account Management Tutorial

Demolition - Exclusion Zone Management - Help Content

Demolition - Permit to Work - Help Content

ERM Assess User Profile Comparison

ERM Libryo Assess Admin User Guide

Controls Guidance - Haleon

Amplifier Guidance - Haleon

Reckitt - Audit Rating Methodology

Export Assessment

Export Corrective Actions

What's New ▾

Help

Action

Organiza

ID: 5b

Attach

Subm

Portfolios

0

Overdue

11

Manage Your Action Items

Create and View Action Items

The **Action Items** dashboard provides a central view of all action items for the selected organization. To access it, click **Action Items** in the top-right navigation bar.

Organization level action items can be created directly from this dashboard, while question-level action items are created within assessments. The view can be customized using **Show Column** to display only the information relevant to you.

Action items can be created at the organisation, entity, or assessment level. Click **+New Action Item**, enter the required details, choose an action item type, assign users (*tags optional*), and click **Create** to save.

To view an action item, click the **Expand** button beside the action item title to view details.

Action Items (4)

Search By ID, Title or Description

Assigned By

Assigned To

Filter By Entity

Filter By Assessment

Search

Select an assignor...

Sayani Banerjee

Select an entity...

Select an Assessment...

Status

Level

Action Item Tags

More Filters

All

All

OR

All

Clear Filters

Show Column

☐	Title ↑↓	Entity	Protocol	Type ↑↓	Assigned By	Assigned To
☐	> Safety harness f2009408-e8c5-42b3-82de-d5cf3b691a16	Chicago Manufacturing Plant	Mining Audit Protocol (TO BE DELETED)	Corrective	Pranab Banerjee	Sayani Banerjee, Pranab Banerjee
☐	▼ Sample Action Item d692ac46-3357-468a-a5e6-2a11b0791d9b	Regional sales office	South Africa Environmental Compliance	Corrective	Pranab Banerjee	Sayani Banerjee
Entity: Regional sales office Assessment: South Africa Environmental Compliance Question: Does your organisation have... DESCRIPTION Sample action item description Evidence Files - 0 No evidence files attached. Comments - 0 No comments yet.						
☐	> Test action 1 79571f3c-2d70-4471-8c81-cb77ba779145	Chicago Manufacturing Plant	-	Certification	Sayani Banerjee	Sayani Banerjee

+ New Action Item

Title *

Enter action item

Due Date *

Enter Due Date

General Information

Type *

Select type

Description

Normal Text

Enter Action Item Description

Assigned To *

Select users...

Tags

Select tags ...

Cancel

Create

Types

- **Administrative** – General organizational tasks
- **Corrective** – Fix assessment noncompliance
- **Certification** – Update audit protocols (citations, wording, answers)

Manage Your Action Items

Edit, Delete and Export Action Items

Action items can be exported using **Export Data** to download Excel files or generate data links. Trends and insights are available via the **Graph** icon, showing status distribution, overdue items, and trends. Use the available filters to refine your results. Manage email notifications under **Notification Settings**.

Action Items (4)

+ New Action Item

Notification Settings

Export

Search By ID, Title or Description

Assigned By

Assigned To

Filter By Entity

Filter By Assessment

Search

Select an assignor...

Sayani Banerjee

Assessment...

Status

Level

Action Item Tags

More Filters

All

All

OR

All

More Filters

	Title ↑↓	Entity	Protocol	Type ↑↓
☐	> Safety harness f2009408-e8c5-42b3-82de-d5cf3b691a16	Chicago Manufacturing Plant	Mining Audit Protocol (TO BE DELETED)	Corrective
☐	> Sample Action Item d692ac46-3357-468a-a5e6-2a11b0791d9b	Regional sales office	South Africa Environmental Compliance	Corrective
☐	> Test action 1 79571f3c-2d70-4471-8c81-cbf7ba779145	Chicago Manufacturing Plant	-	Certification

Action Item

Title *

Demo action Item

Status *

Accepted

Due Date *

12/26/2025

General Information

Evidence Files

Comments

Type *

Administrative

Description

Normal Text

B

I

U

Test/sample action item

Assigned To *

Pranab Banerjee

Tags

#energy

Verified

Delete Action Item

Cancel

Update

Updated ↑↓

Action

25, 2:00

20/04/2026

25, 2:00

11/05/2026

25, 2:00

26/09/2025

To edit an action item, click the **Edit** (pencil) icon next to the title. This opens the action item record, where you can update general information, attach evidence files, and add comments.

Only the assignor can delete an action item. To do so, select **Delete Action Item**, confirm, and click **Delete**. Note that all attached evidence files will be permanently removed.

Comments and evidence files can be added directly within an action item. Use the **Comments** tab to post updates, or upload documents under **Evidence Files**. To remove an uploaded file, click the trash bin icon.

Manage Your Action Items

Action Item Tags

Action item tags are used to organize and categorize action items for easier filtering and tracking. They can be created, viewed, updated, assigned, and deleted from the Account Management Dashboard.

To manage action item tags, go to **Manage** within your account and click **Action Item Tags**, where all existing tags are listed.

Action Items

Hi, Sayani

sayani.banerjee@erm.com

Manage · Demo Assess Co.

Activity Log

Data Export

Protocols

Status Tracker

Backoffice

Switch Workspace

Profile

Logout

Account Management

Account management and member permissioning dashboard.

MembersEntity tagsAction Item tagsAssessment TagsOrganization CredentialsStatus Tracking

4 labels

Label	Description	Actions
#o&g		
#northamerica		
#energy		
#uk		

+ Add Label

Create Label

Name *

Description

Color

CancelCreate

To create a new tag, click **+Add Label**, enter a name, choose a color (*description optional*), and click **Create** to save.

Existing tags can be updated or deleted by selecting **Update** or the **Trash** icon next to the relevant tag and confirming the action.

Tags can be assigned when creating or updating an action item. Assigned tags appear in the **Tags** column on the **Action Items** dashboard and can be used to filter action items via **Select Tags**.

Activity Log & Profile

Activity Log & Profile

The **Activity Log** records all actions taken across the platform. To access it, open the top-right menu, select **Activity Log**, apply filters if needed, and click **Review**.

Your **Profile** is also accessible from the top-right menu under **Hi, (username)**, where you can view your organisations, action items, and the **File Library**.

Action Items

Hi, Sayani

sayani.banerjee@erm.com

Manage · Demo Assess Co.

Activity Log

Data Export

Protocols

Status Tracker

Backoffice

Switch Workspace

Profile

Logout

Dashboard / Activity Log

Activity Log

Filter by Subject

Filter by Actor

Filter by Entity

Filter by Assessment

Filter by Action Item

Filter by Action

Filter by Time

Subject	Details	Action	Actor	Time	
Assessment	updated	UPDATED	Sayani Banerjee	24/06/2026, 3:47	Review
comments	created	CREATED	Sayani Banerjee	23/06/2026, 13:40	Review
Observation Question Response	created		Sayani Banerjee	23/06/2026, 12:38	Review

ERM LIBRYO ASSESS

Dashboard > Profile > Settings

Sayani Banerjee. sayani.banerjee@erm.com

Settings Organizations All Action Items

Display Name

Update your name as it appears in ERM Assess.

Language

Select your preferred language for the interface.

Timezone

Select your timezone for date and time display.

Save Preferences

Account Management

Account Management

Account Management is the central area for managing user accounts and permissions within your organisation. From here, you can create tags for entities, action items, and assessments, as well as add, update, or deactivate users, assign roles, and control access to organisations, entities, portfolios, and assessments.

Members

Entity tags

Action Item tags

Assessment Tags

Organization Credentials

Status Tracking

Search by name or email

Search

Export Members

Add Member

First Name	Last Name	Email	Role	Entities	Joined	Updated	Action
Dillon	Panizzolo	dill@n.com	Admin	1	12/11/2025, 12:31	05/12/2025, 13:10	
Sayani	Banerjee	sai@n.com	Owner	0	05/04/2023, 13:37	23/12/2025, 15:38	
Vicky	Illingworth	vic@m.com	Admin	0	12/05/2026, 14:03	12/05/2026, 14:03	
Sam	Cloete	sai@orm.com	Admin	0	16/04/2026, 18:18	16/04/2026, 18:18	
James	Descheneaux	jan@orm.com	Admin	0	18/04/2023, 21:17	19/04/2023, 15:40	
Pranab	Banerjee	pra@m.com	Admin	2	05/04/2023, 9:19	06/11/2025, 11:24	

User access can be refined at any time by editing a user and toggling **Entities Access** or **Portfolios Access**. Users can be searched by name or email, and roles and access levels updated as needed.

To remove a user, go to **Manage**, click **Delete User**, confirm the deletion, and click **Submit**. User data is retained and will be restored if the user is re-added.

To add a new user, select the drop-down arrow next to **Hi, Username**, click **Manage**, then click **Add Member**. Select a role (*Admins are granted full access by default*) indicate whether the user is new/existing, define their entity and portfolio access, and click **Submit**.

Add Member

Existing Client User

New User

Select User

Search by name or email

Member Role

Owner

Admin

Member

Certifier

Contributor

Cancel

Add Member

Add Member

Existing Client User

New User

First Name

Last Name

Member Email

user@example.com

Member Role

Owner

Admin

Member

Certifier

Contributor

Cancel

Add Member

Thank you

Our aim is to help you make the most of your Libryo Assess solution and we'd love to hear about your experiences using the email address below. For instant query resolution please email support.assess@erm.com.

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