ERM LIBRYO ASSESS

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

Contents

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.

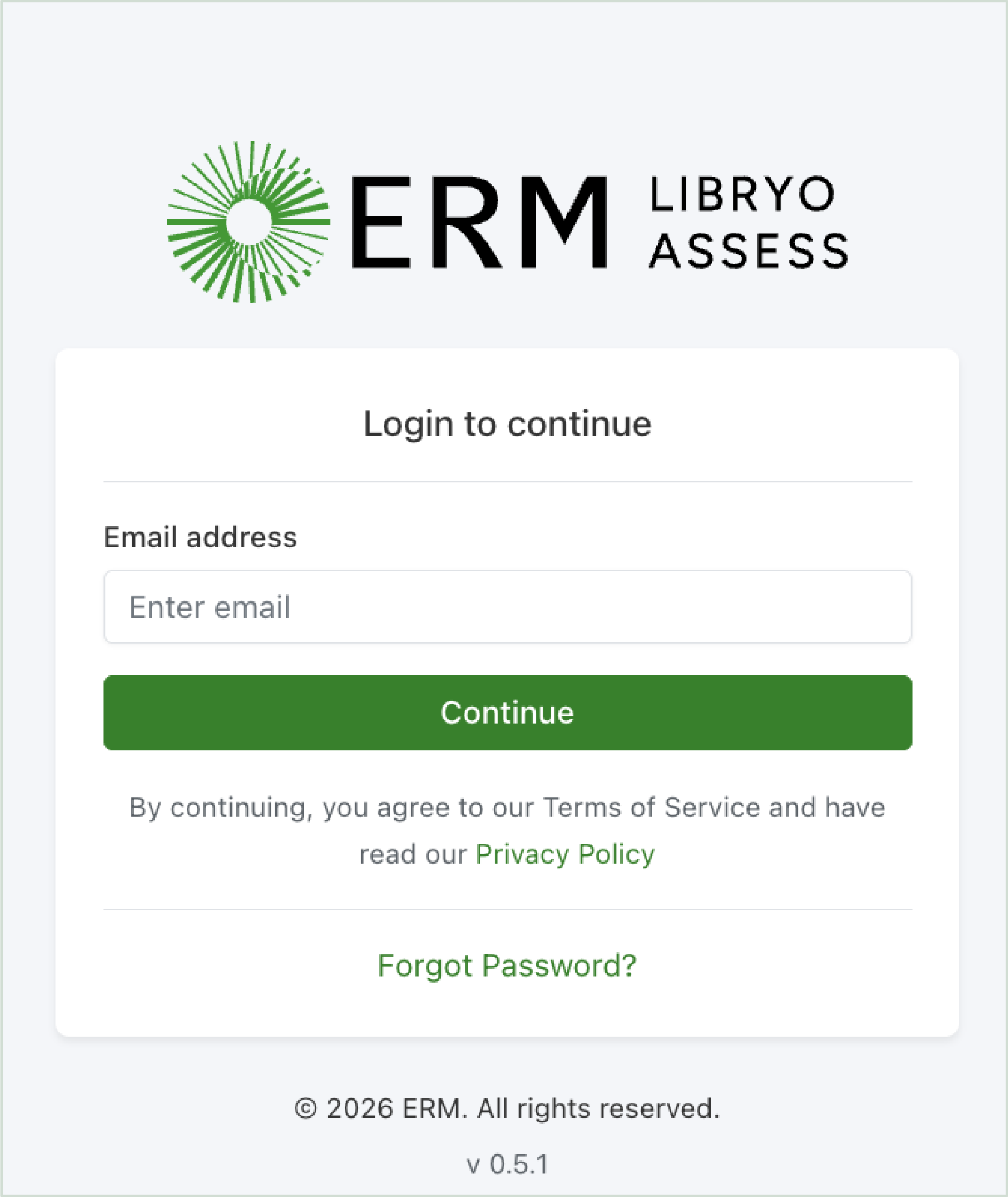
CERTIFIER

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.

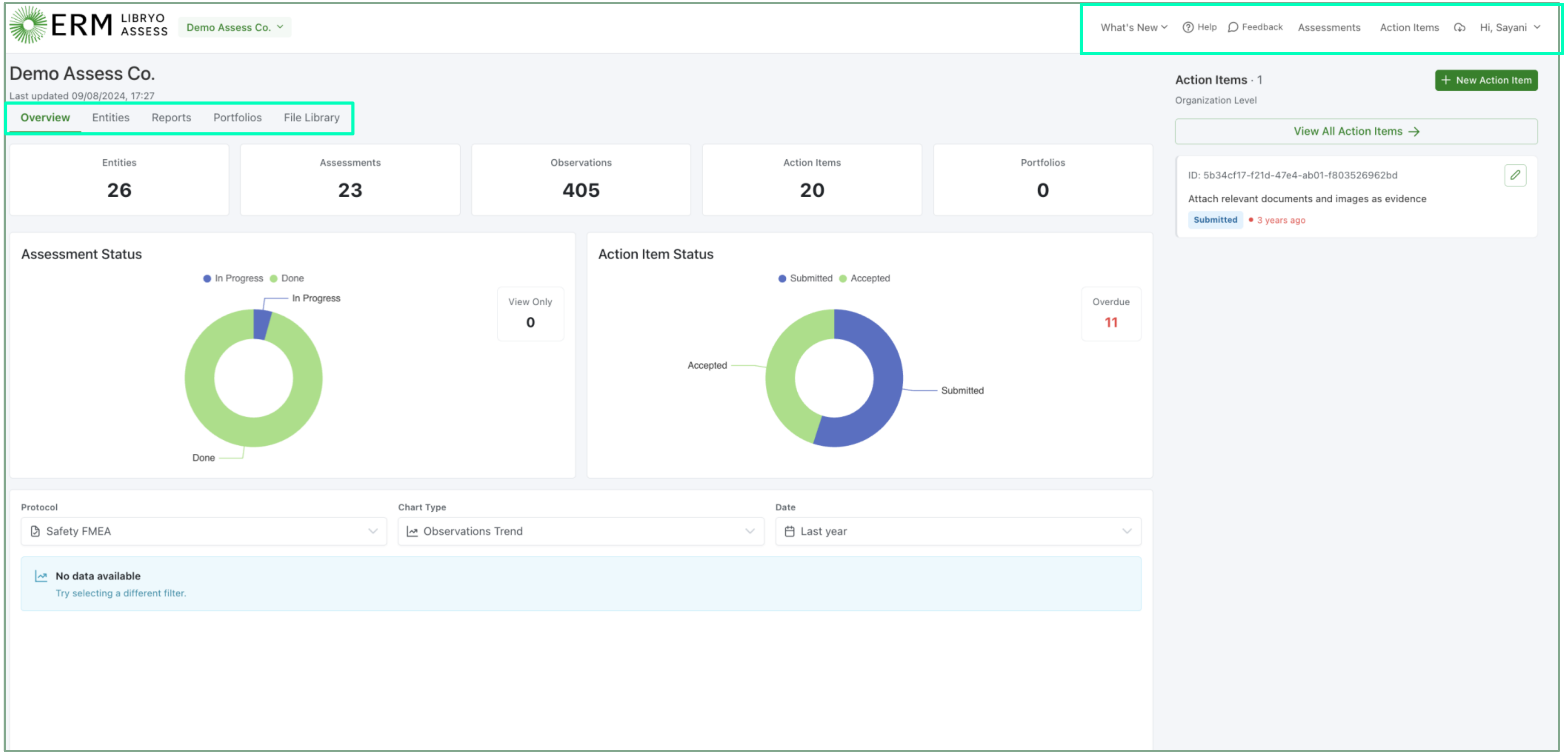
If you have lost or forgotten your password, click on Forgot Password to reset it.



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**).

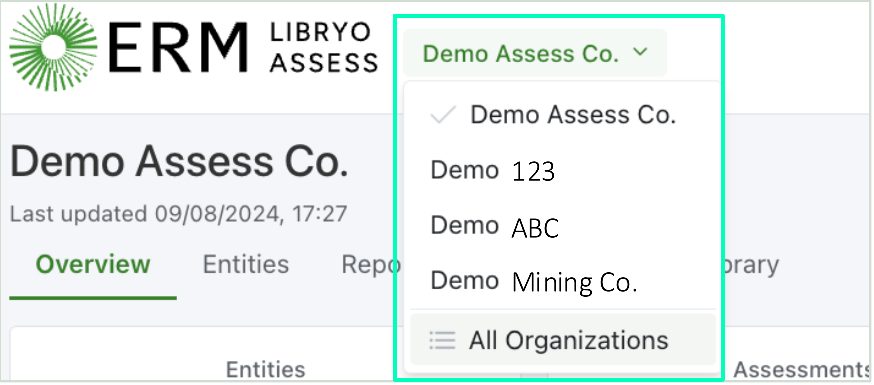


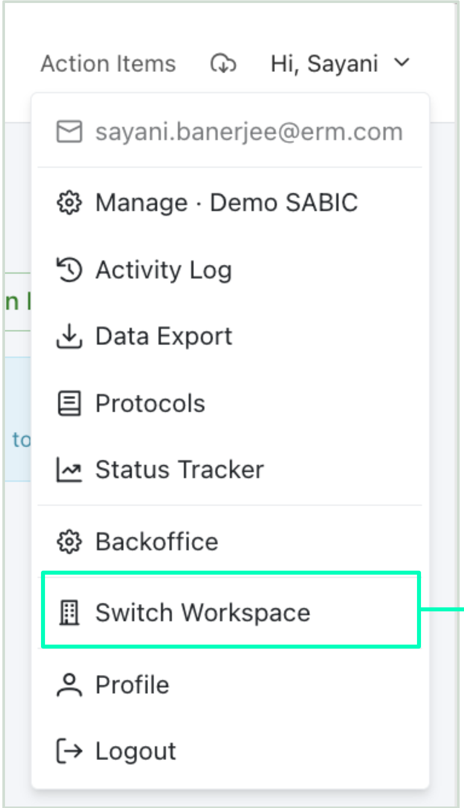
Below the navigation bar, you can easily access your list of **Entities, Reports, Portfolios,** and the **File Library**.

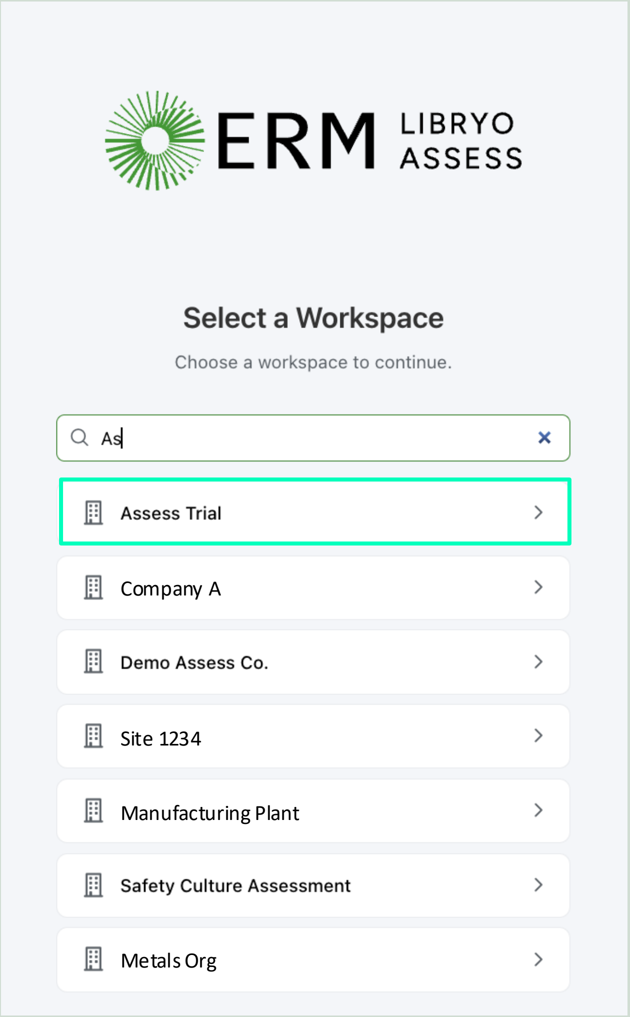
Dashboard

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

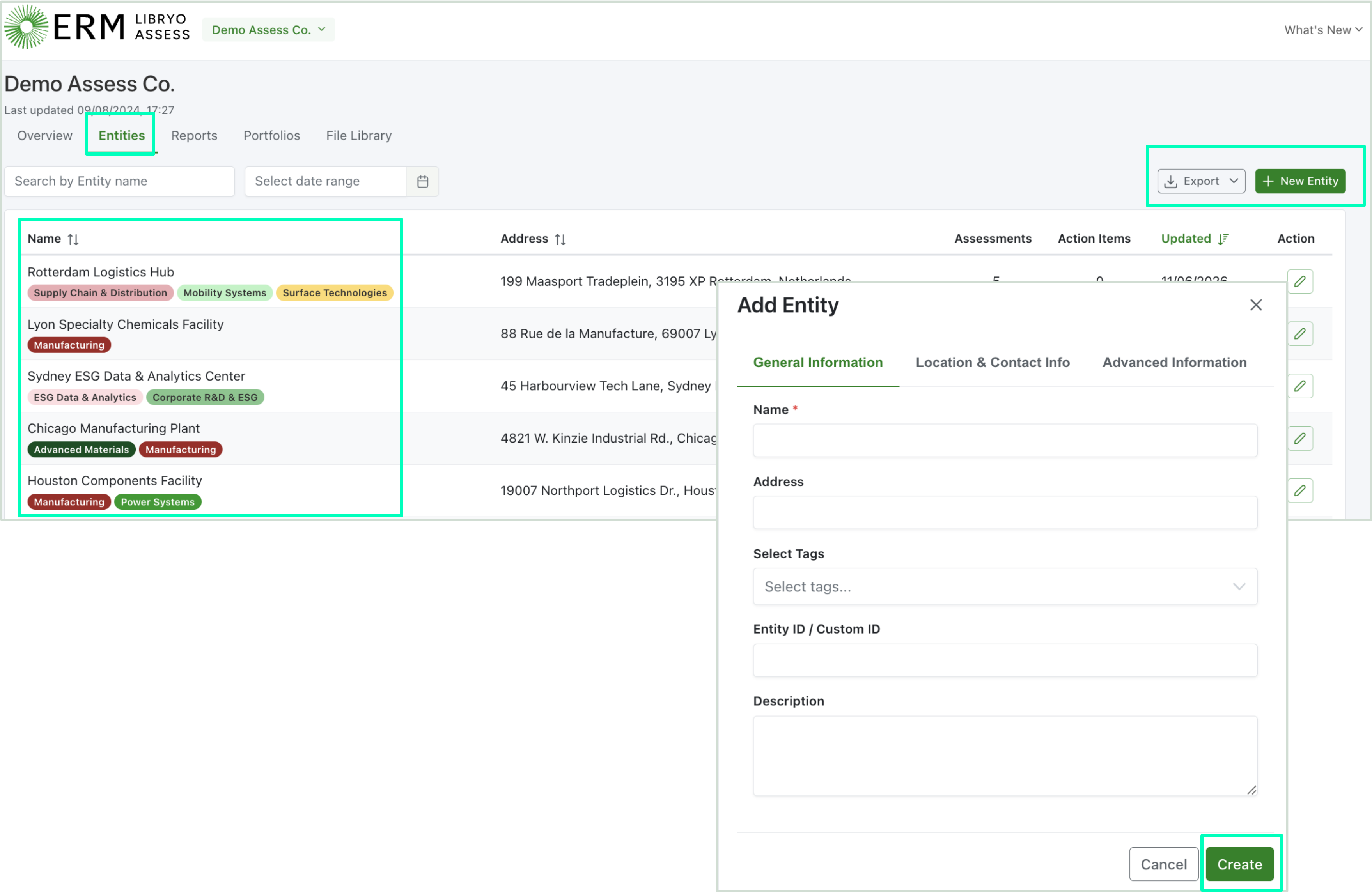
Entities are used to group users, sites, or standards within an account. They can represent auditing groups, locations, or specific standards. Users are assigned access at the entity level.

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.



Manage Your Entity

Entity Tags

Tags helps categorize and organize Entities consistently across the platform.

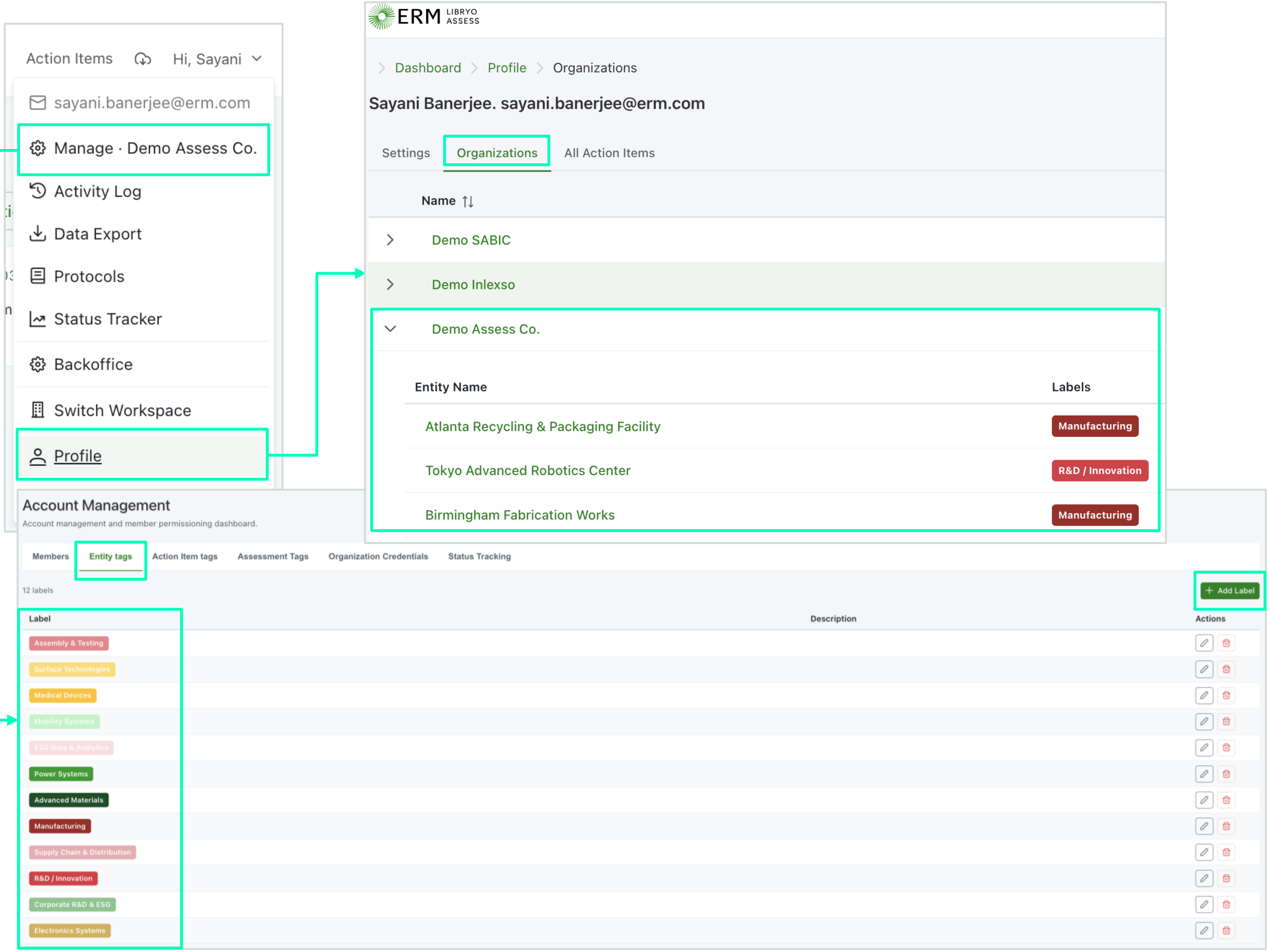
Entity tags can be viewed across organizations under the same client by navigating to your **Profile**, opening the **Organizations** tab. Expand a specific organization to review the Entity List.

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.



Manage Your Assessment

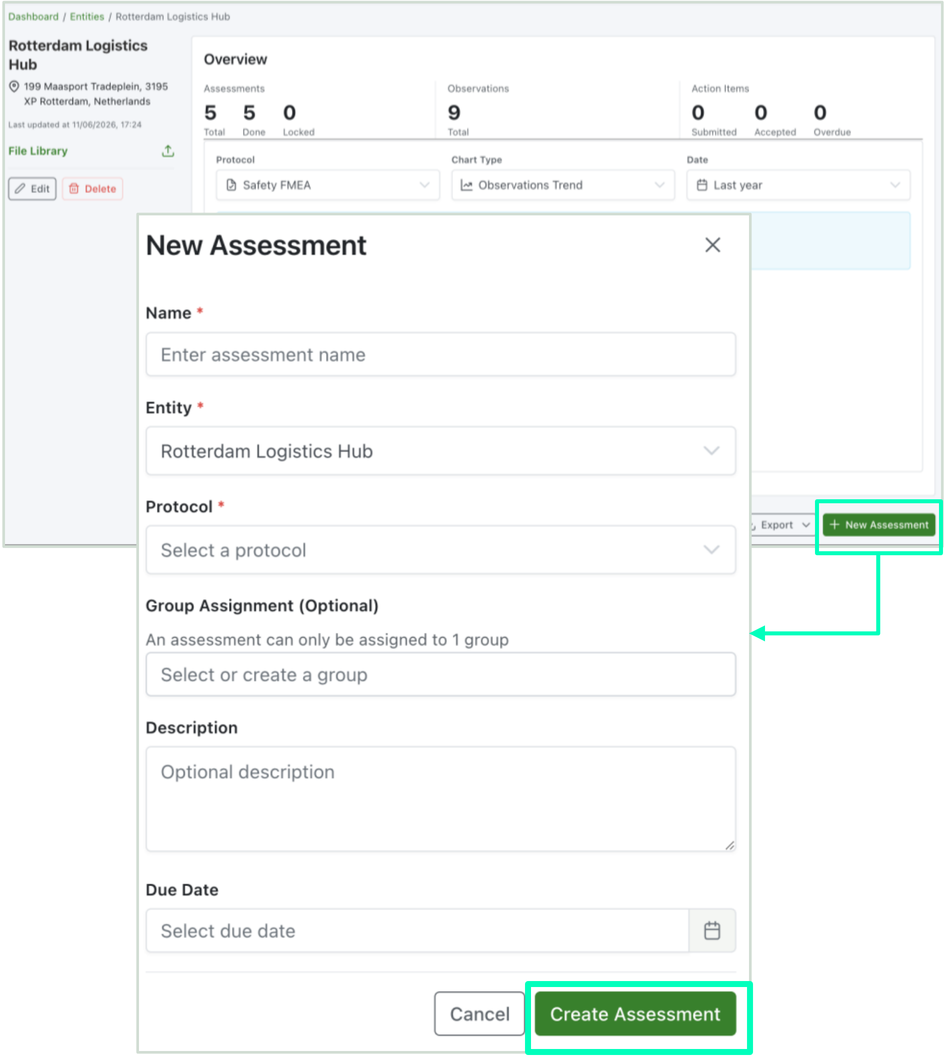
Access, create and view your Assessments

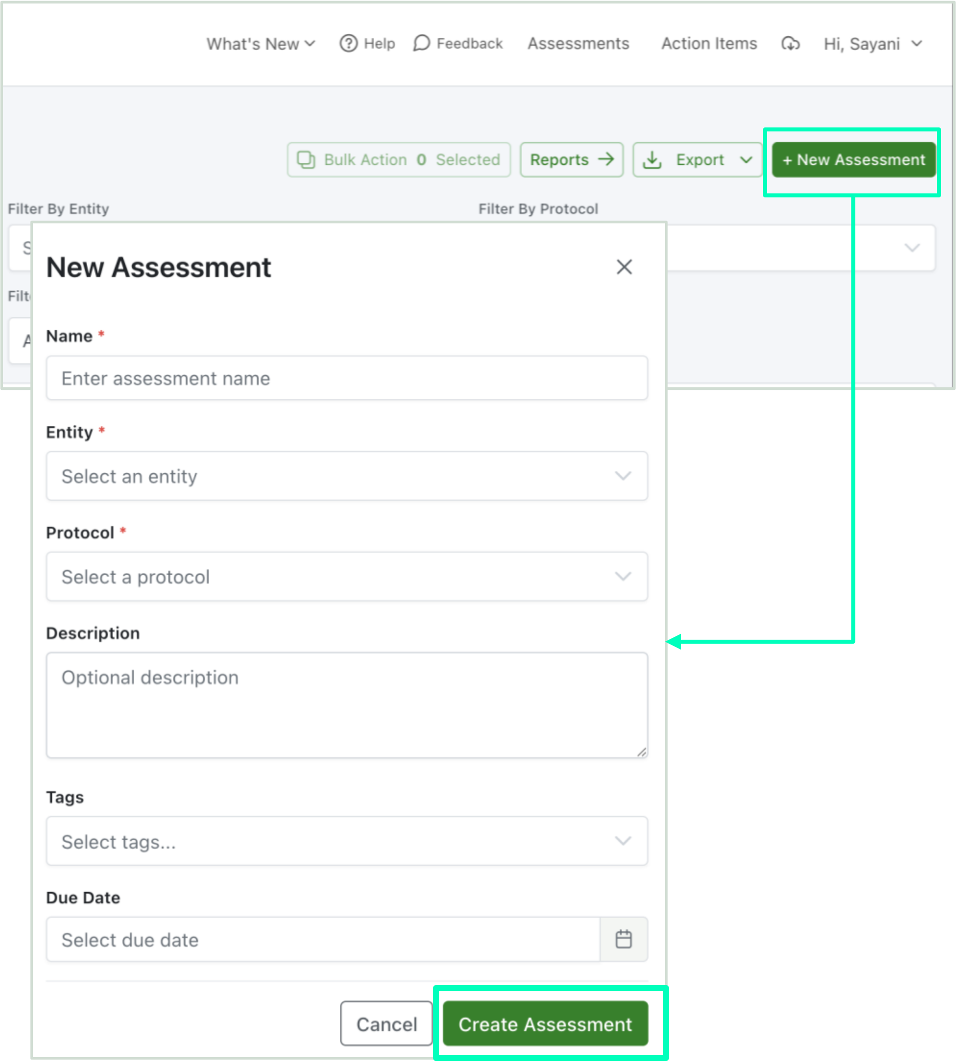
Assessments are used to evaluate compliance or performance against a selected protocol, created within an entity and accessible, updatable, exportable, and archivable as needed.

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*).





Manage your Assessment

Access, create and view your Assessments

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

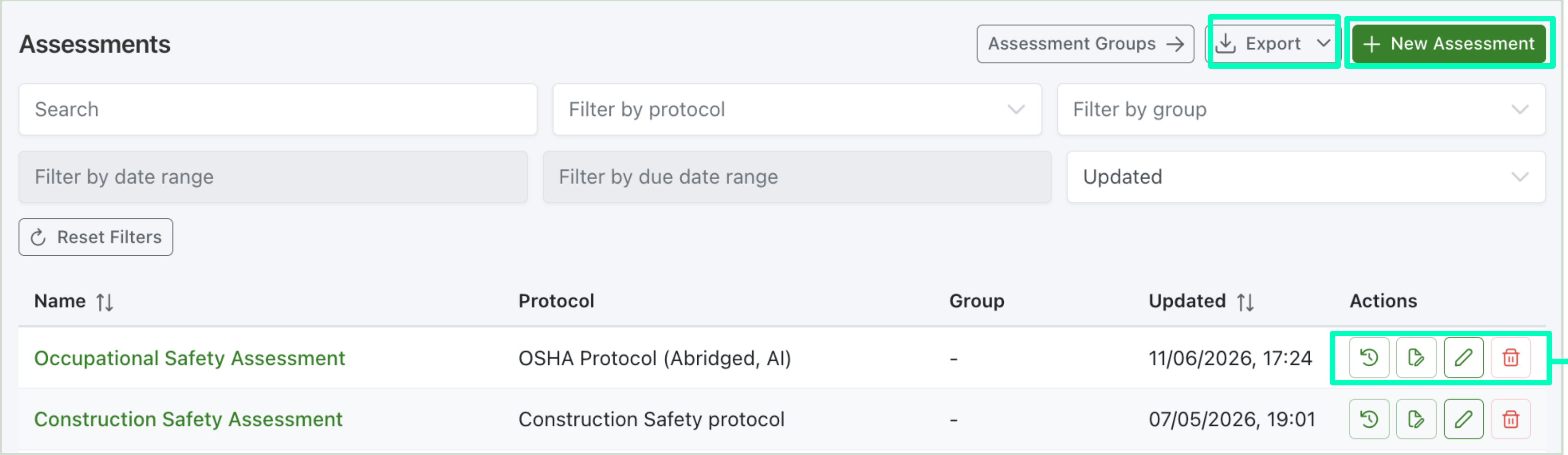
To **export assessment** data from the Entity or the Assessments page. Click on the **Export** button beside the assessment name.

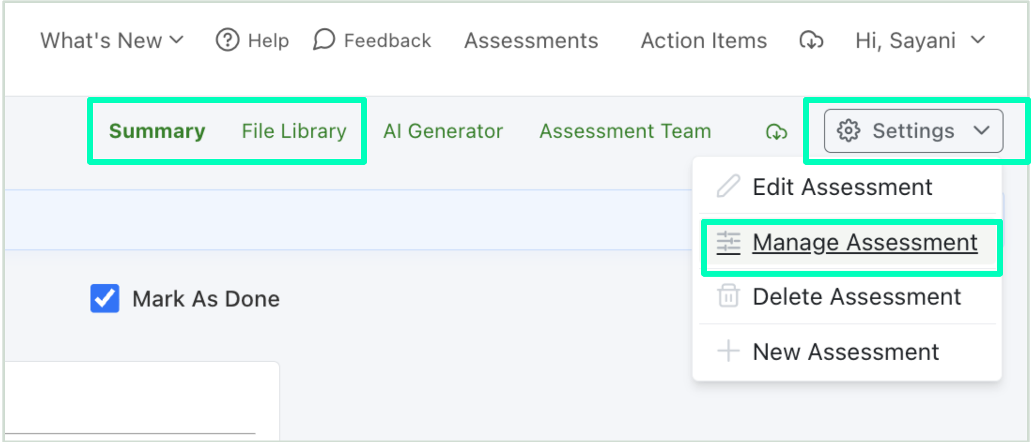
To download an assessment list via Assessments page or from the Entity click on the **Export Button** beside **New Assessment**.

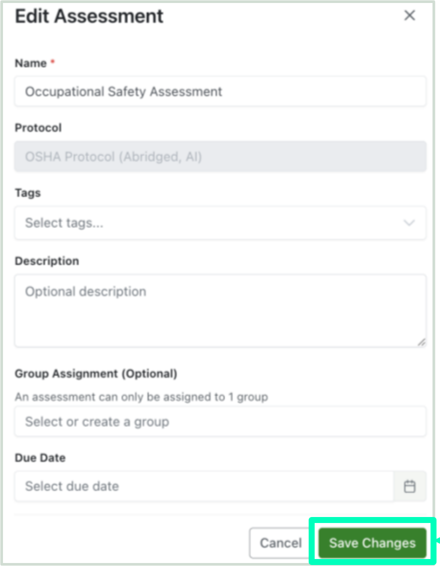
You can view the **Summary** and access related documents in the **File Library** within the **Assessment**.

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.*







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.

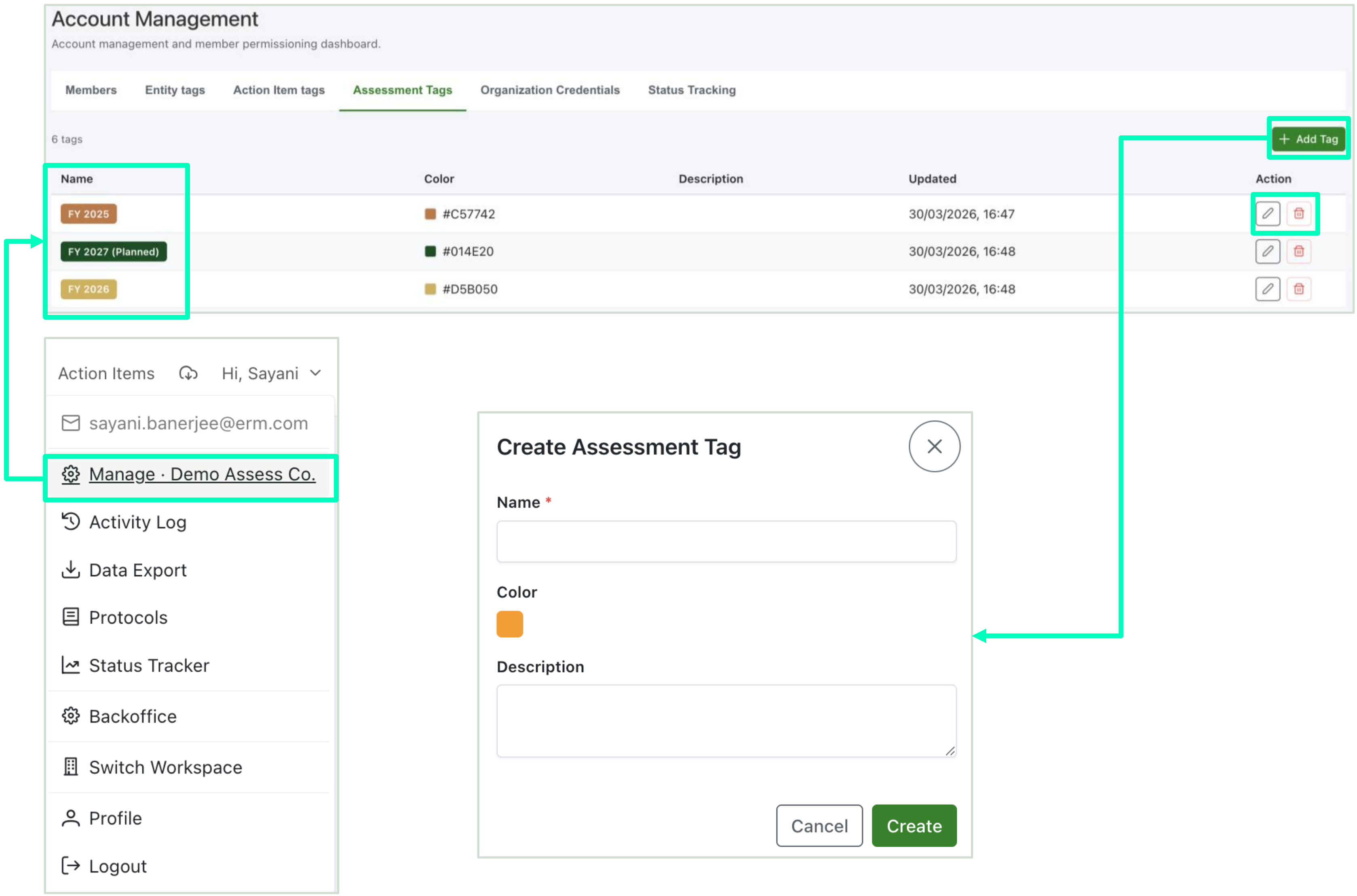
You can create and manage assessment tags from the drop-down arrow beside your user name **Manage** under **Assessment Tags**.

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.*



Manage your Assessment

Assessment Teams

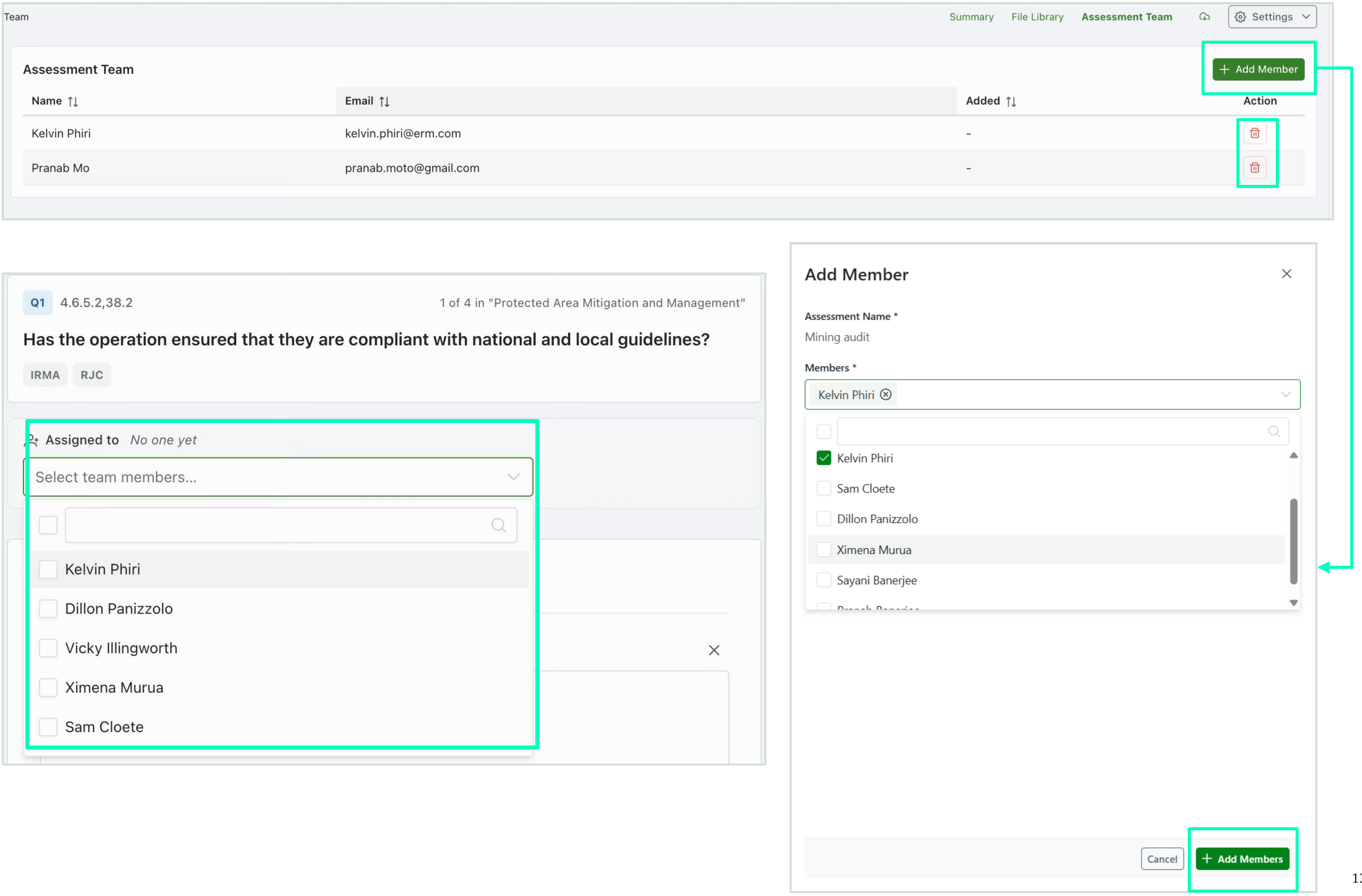
Assessment teams allow you to define and manage the collaborators involved in an assessment. You can view and manage the assessment team directly within the assessment.

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.

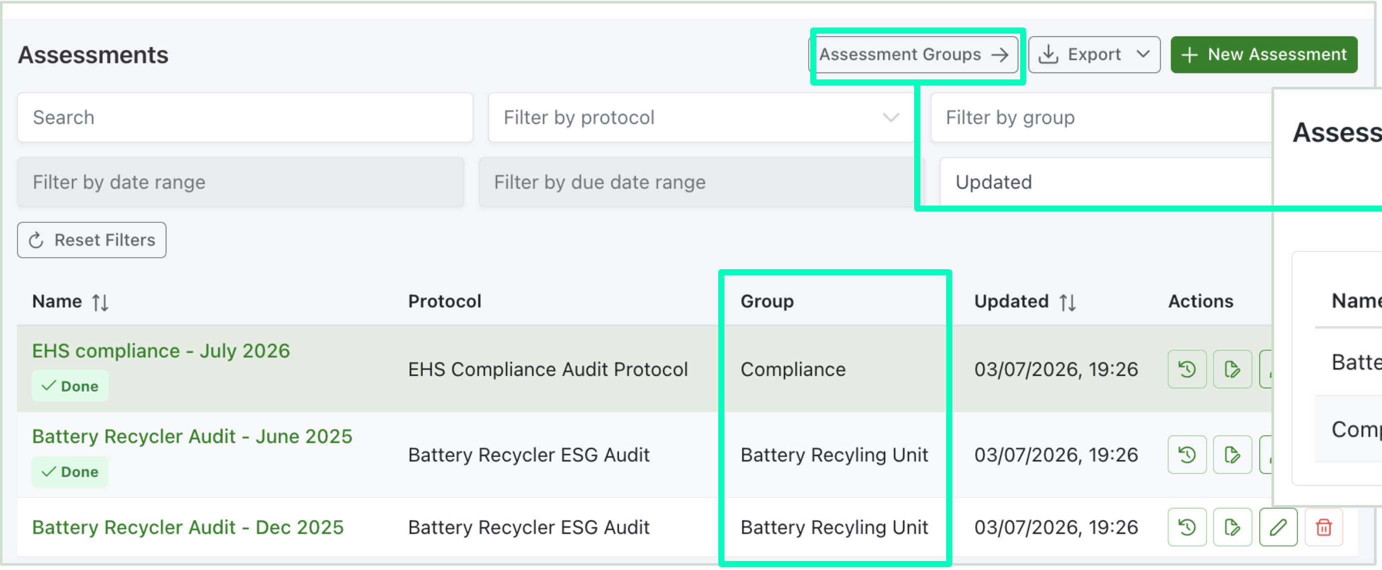
You can also assign members to individual questions.

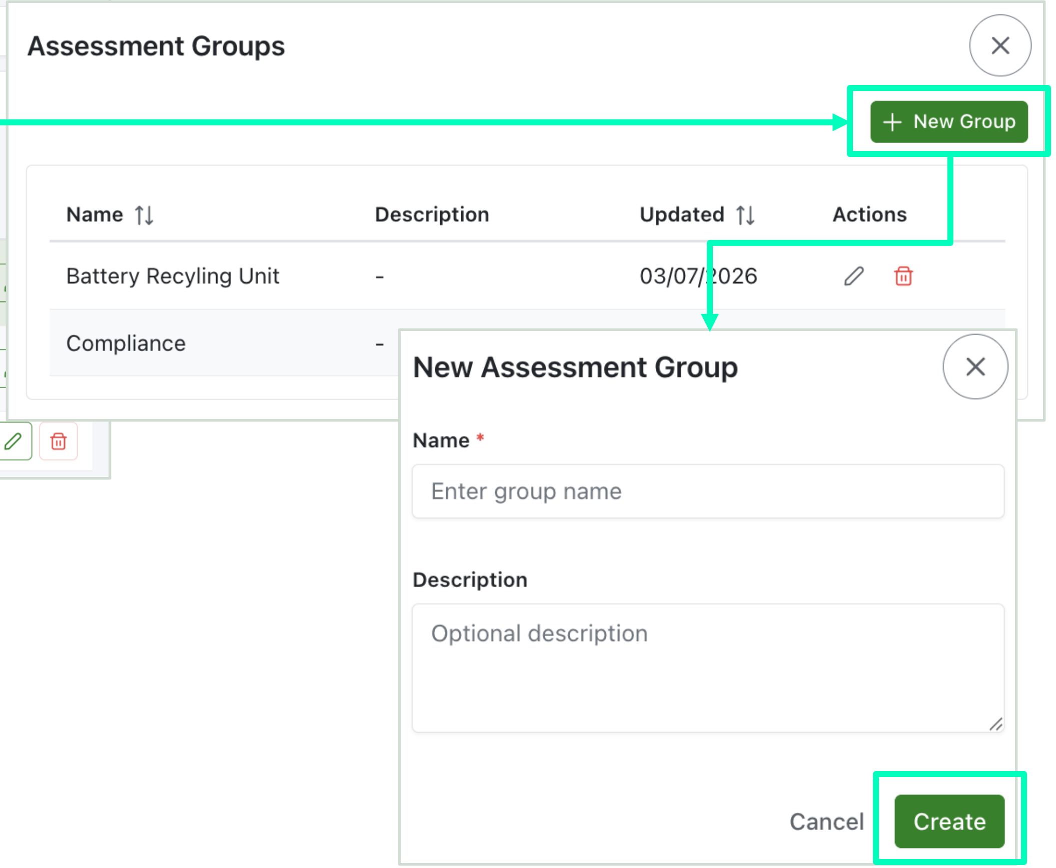


Manage your Assessment

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.





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.

Manage your Assessment

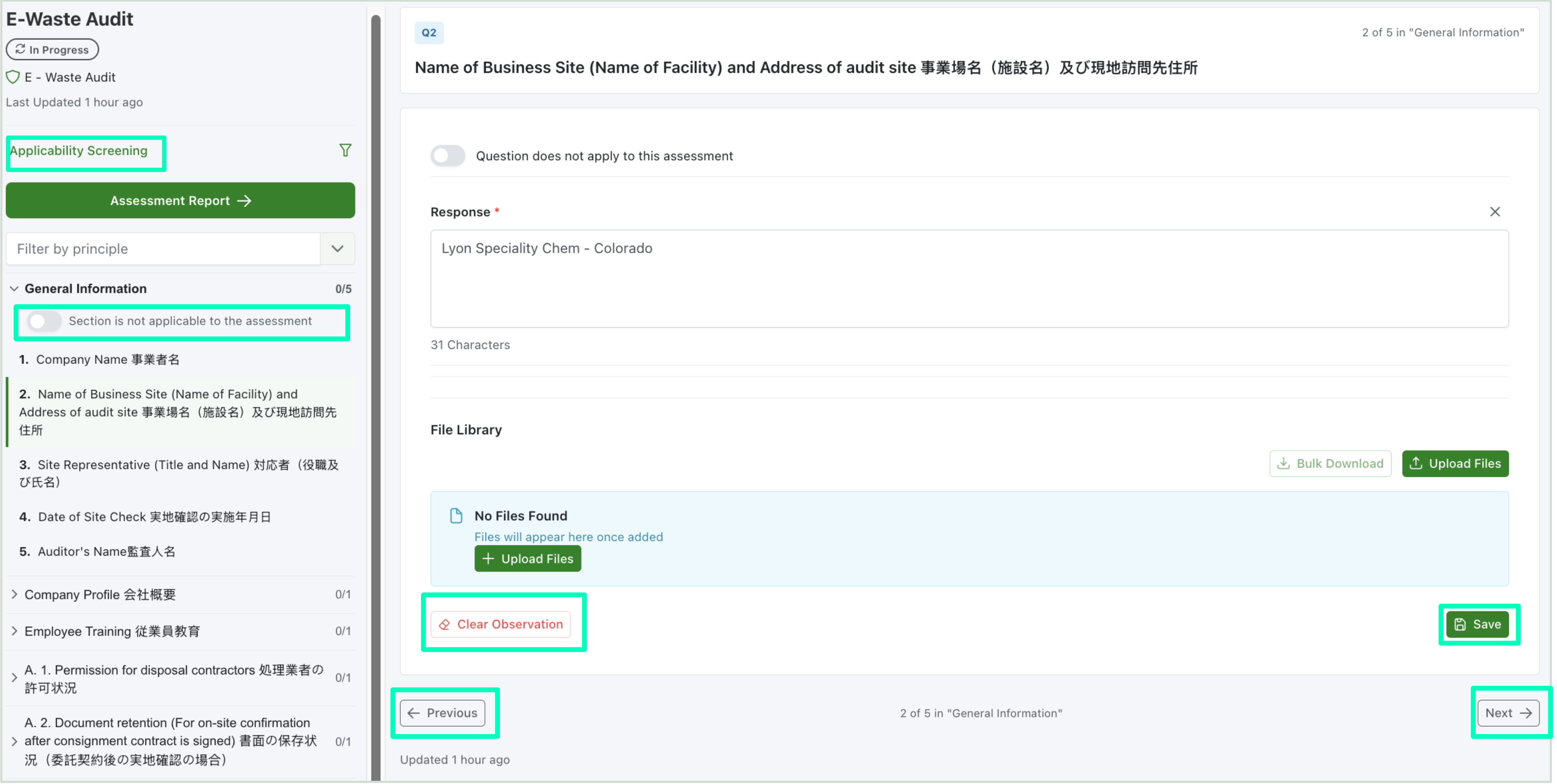
Completing Assessments

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**.

To complete assessment questions, open the relevant assessment, expand the section you want to work in, select a question, enter your response, and click **Save**. Click **Next** to move to the following question. Click **+Add Observation** to record multiple observations against a single question (if applicable).

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**.



Manage Your Portfolios

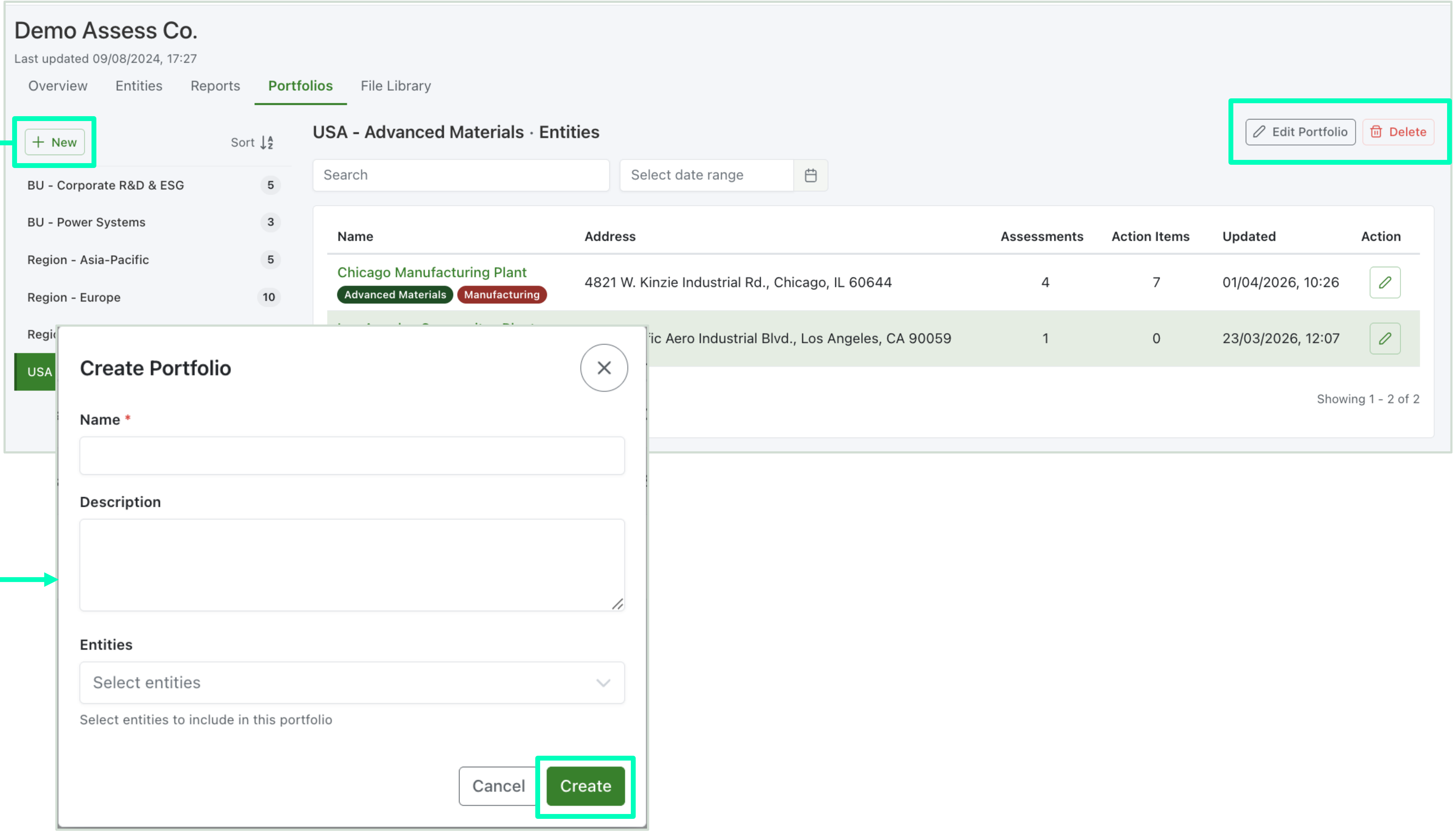
Create, View and Delete Your Portfolios

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.*

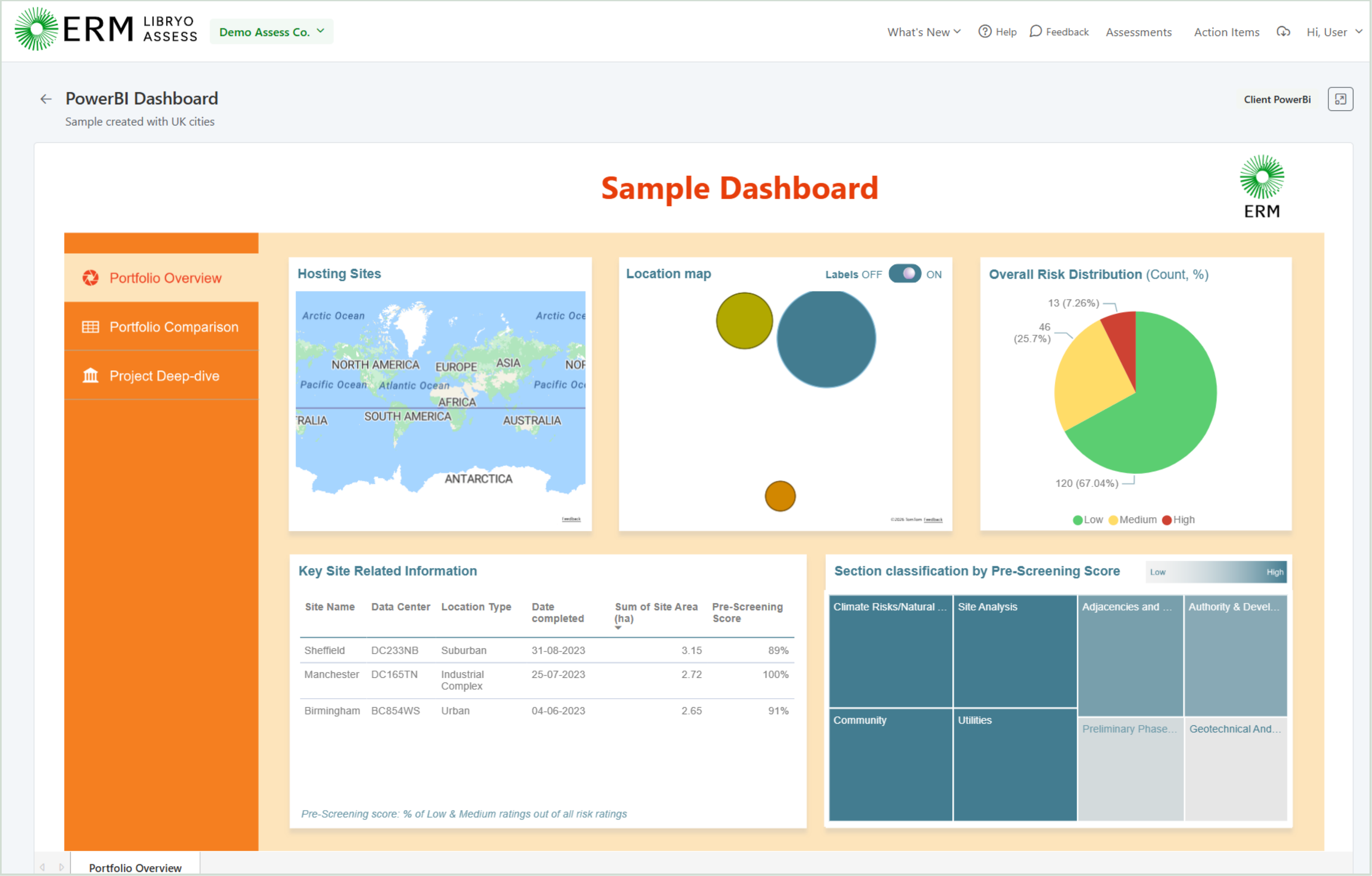
To delete a portfolio, open it, click **Delete**, confirm by selecting the checkbox, and click **Delete**. *Note that this action is permanent and cannot be undone.*



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.**

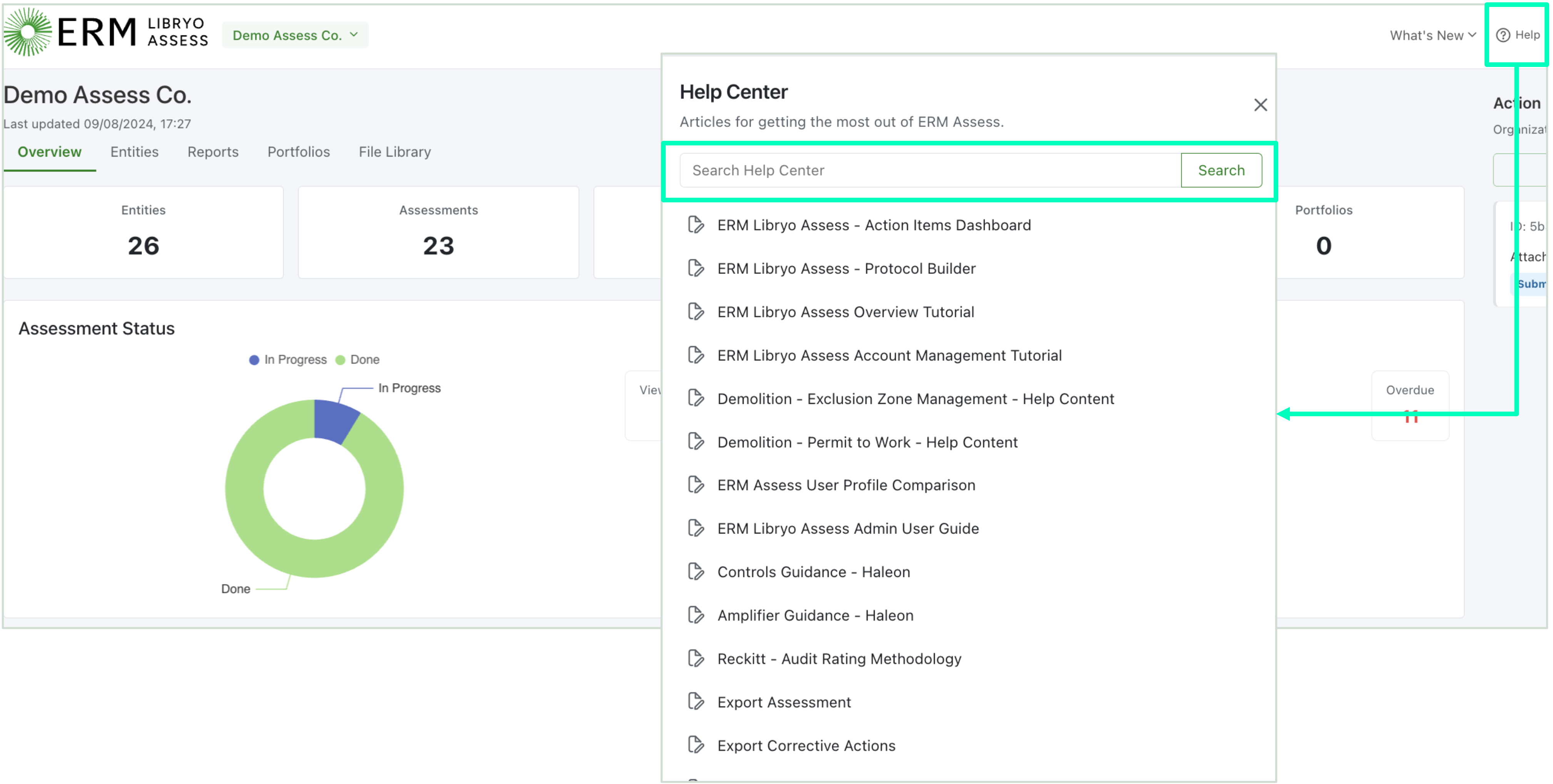


Help Articles

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.



Manage Your Action Items

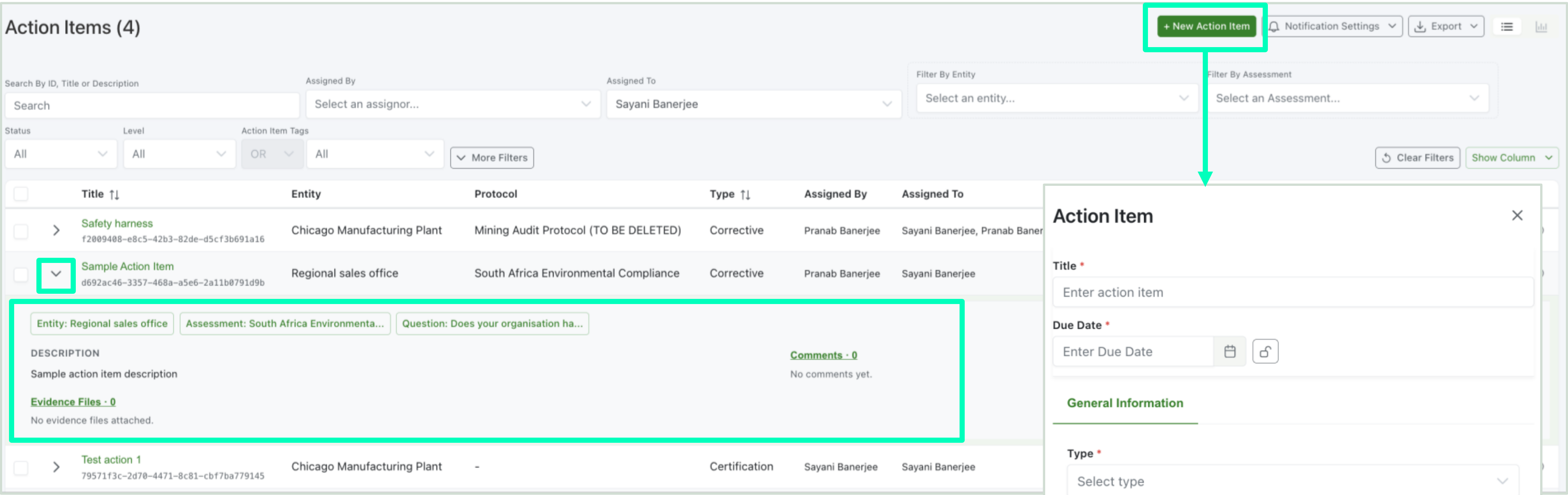
Create and View Action Items

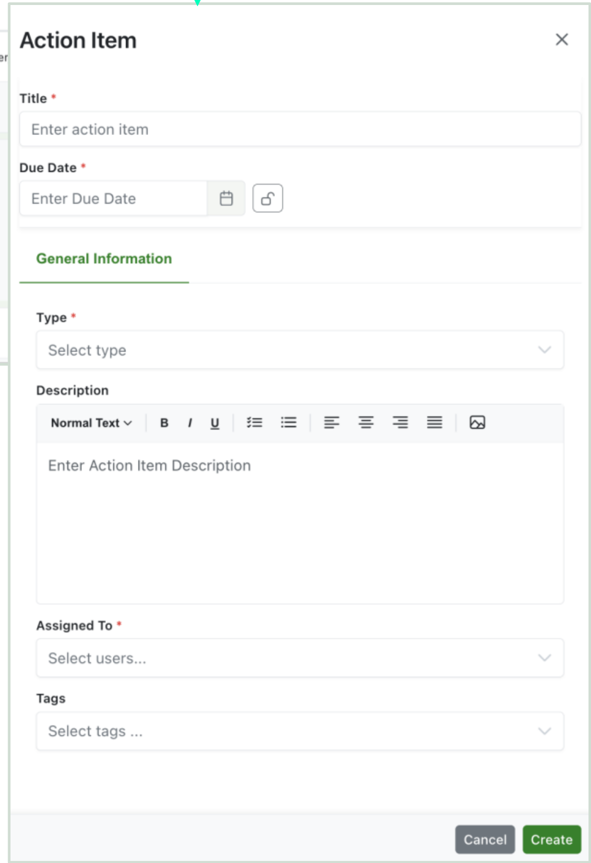
The **Action Items** dashboard provides a central view of all action items for the selected organization. To access it, click **Action Items** in the top-right navigation bar.

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.





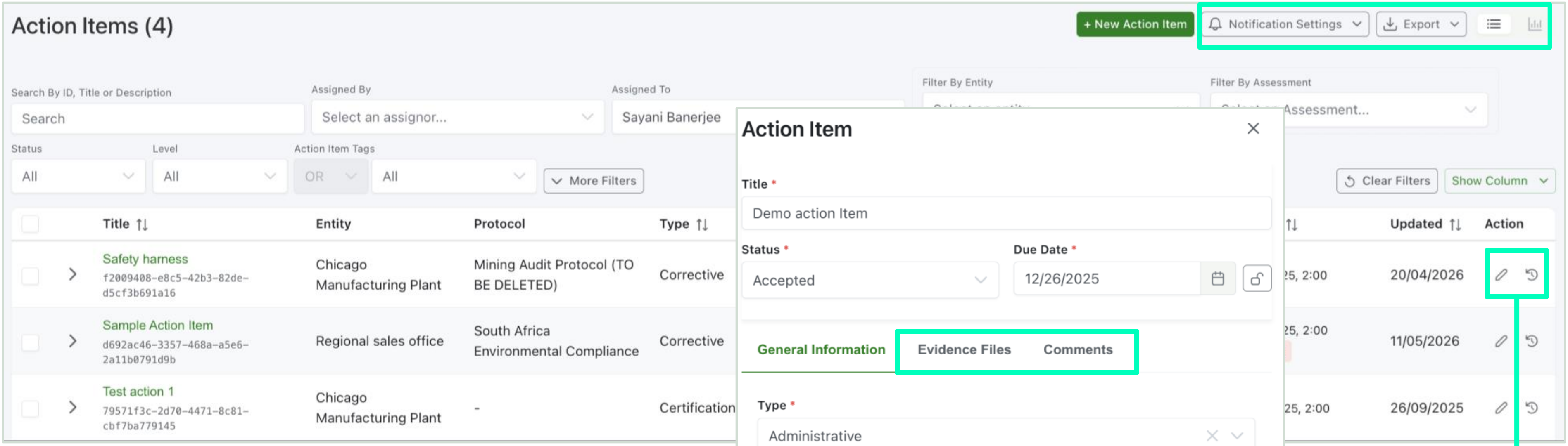
Types

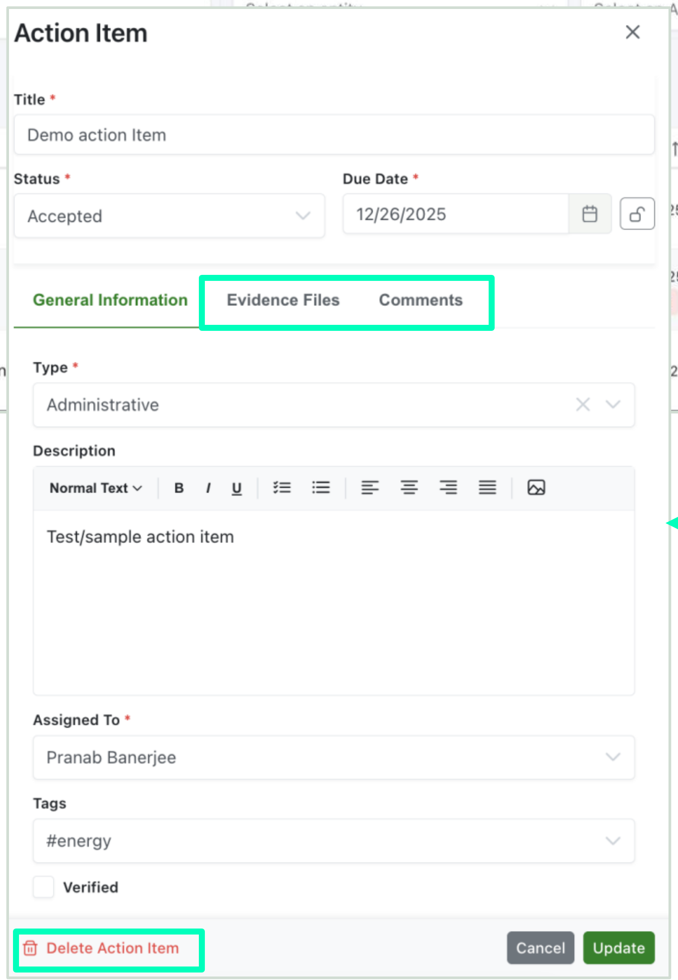
- **Administrative** – General organizational tasks
- **Corrective** – Fix assessment noncompliance
- **Certification** – Update audit protocols (citations, wording, answers)

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**.





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.

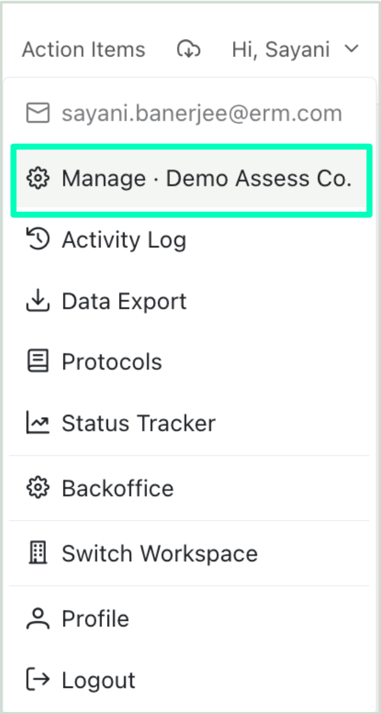
Comments and evidence files can be added directly within an action item. Use the **Comments** tab to post updates, or upload documents under **Evidence Files**. To remove an uploaded file, click the trash bin icon.

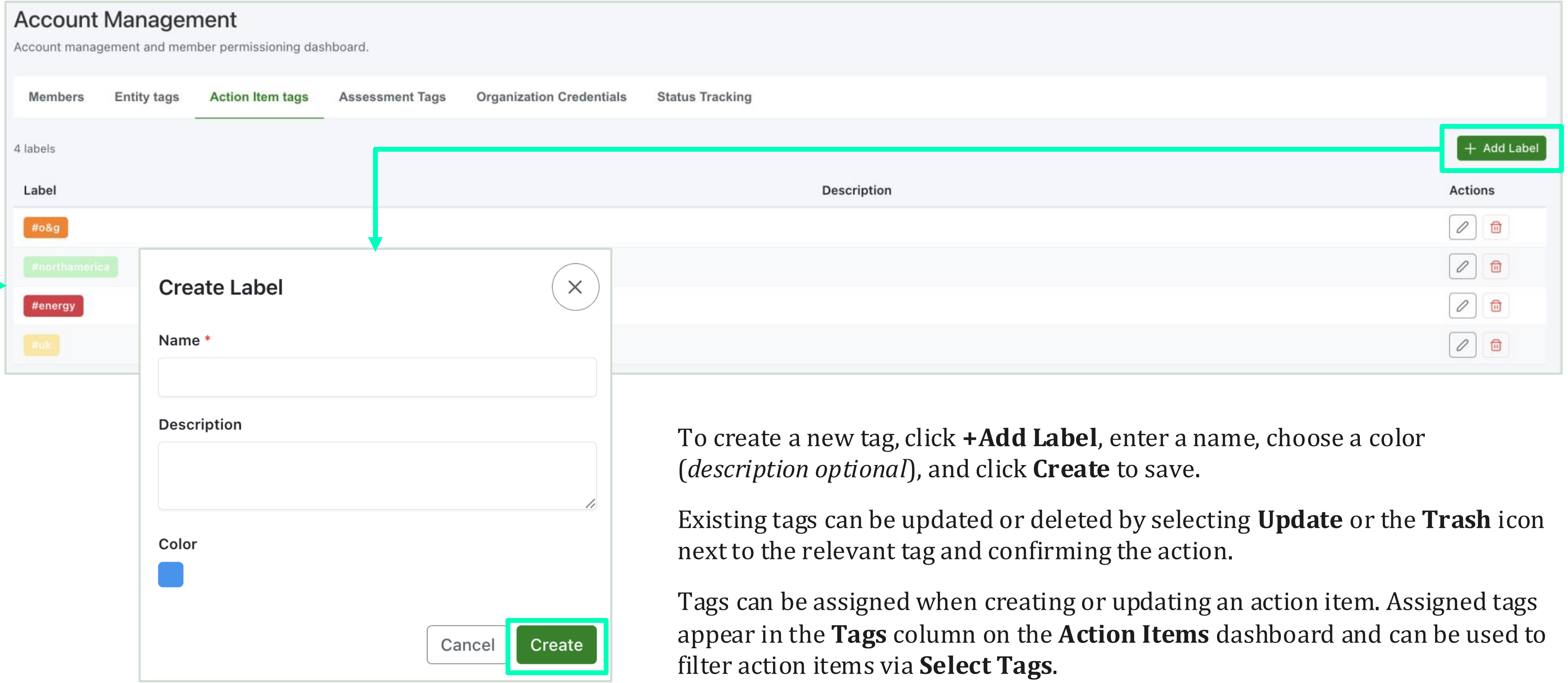
Manage Your Action Items

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.





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.

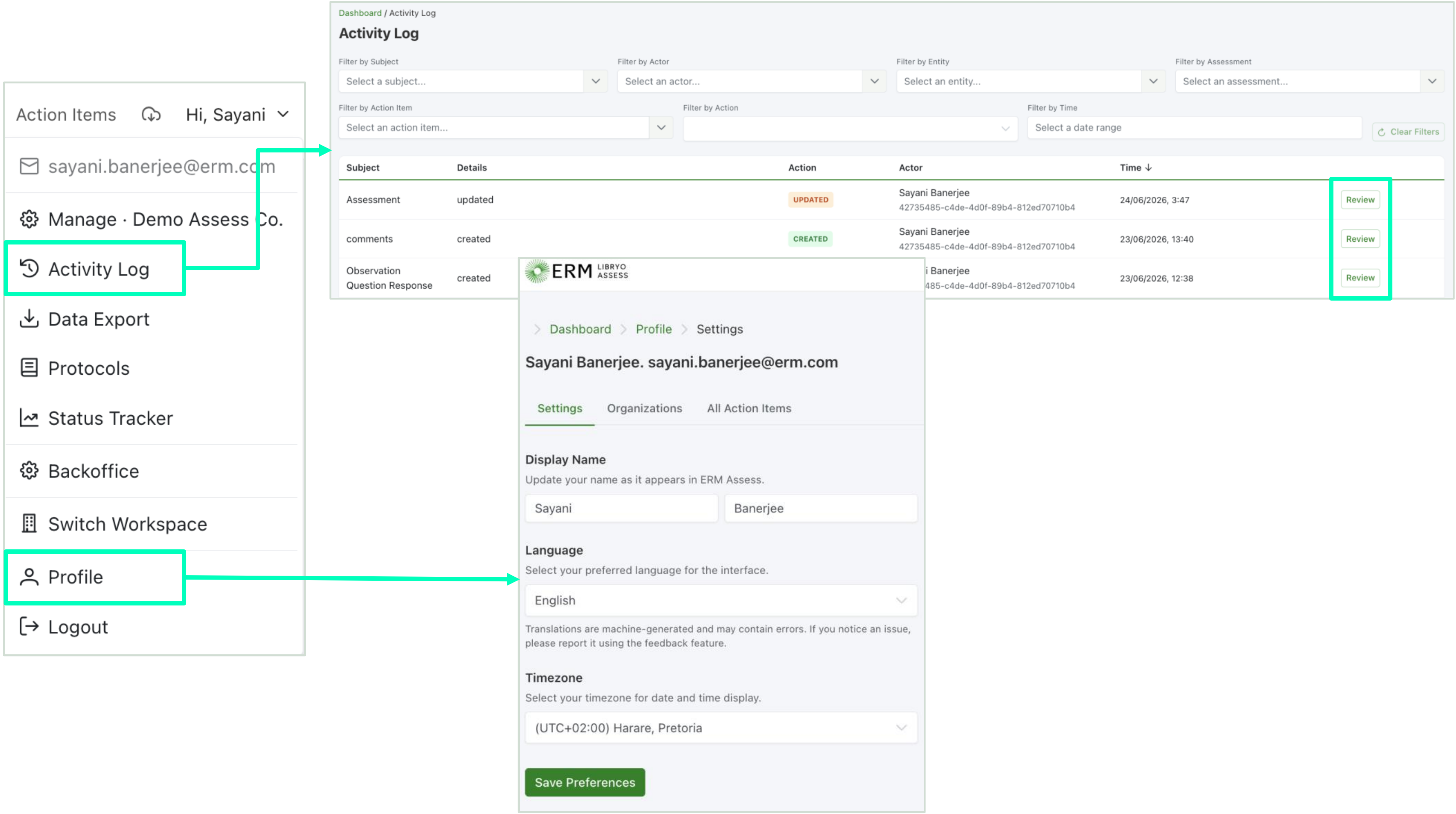
Tags can be assigned when creating or updating an action item. Assigned tags appear in the **Tags** column on the **Action Items** dashboard and can be used to filter action items via **Select Tags**.

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**.

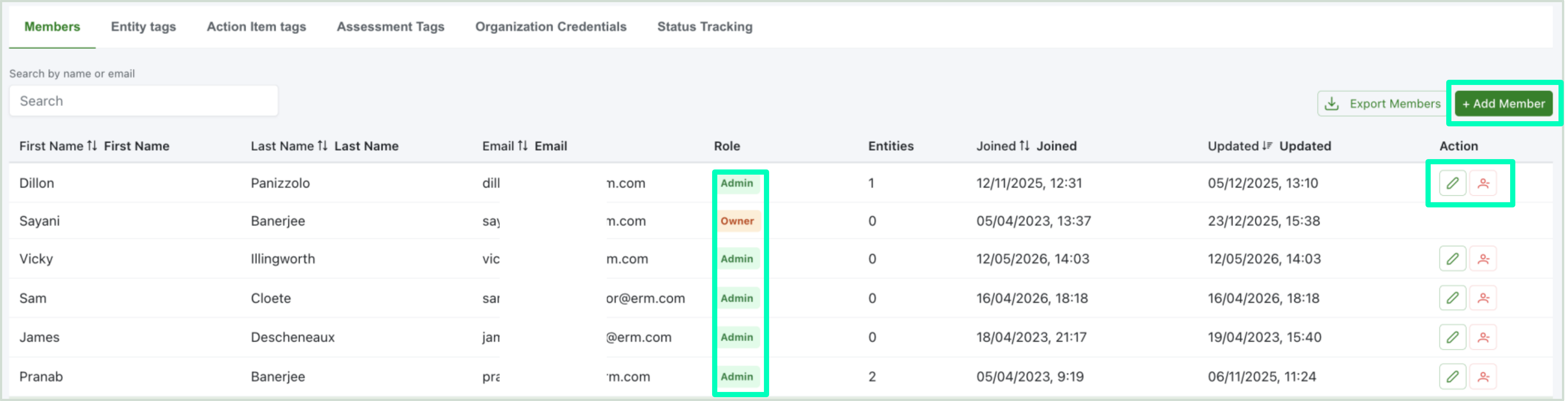
Your **Profile** is also accessible from the top-right menu under **Hi, (username)**, where you can view your organisations, action items, and the **File Library**.



Account Management

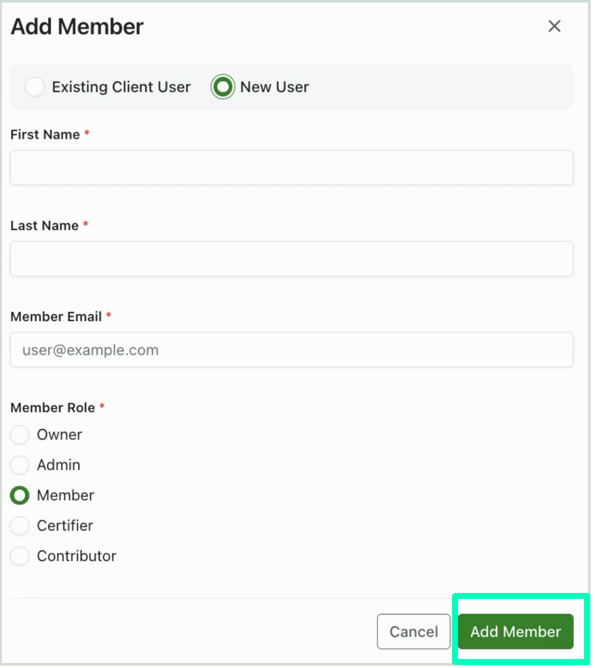
Account Management

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.



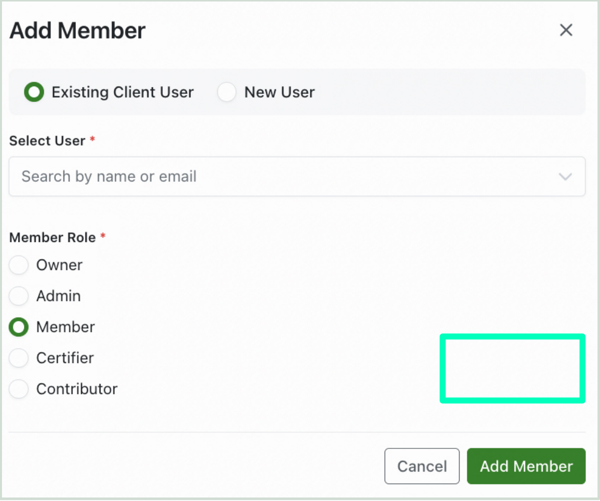
First Name	Last Name	Email		Role	Entities	Joined	Updated
Dillon	Panizzolo	dill	n.com	Admin	1	12/11/2025, 12:31	05/12/2025, 13:10
Sayani	Banerjee	say	n.com	Owner	0	05/04/2023, 13:37	23/12/2025, 15:38
Vicky	Illingworth	vic	m.com	Admin	0	12/05/2026, 14:03	12/05/2026, 14:03
Sam	Cloete	sai	or@erm.com	Admin	0	16/04/2026, 18:18	16/04/2026, 18:18
James	Descheneaux	jan	@erm.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

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**.



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.



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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