



CUSTOMER SUCCESS

Libryo Assess User Guide

For Non-Admin Roles

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

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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:



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.

This user guide applies to these roles

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

Assessment Dashboard

The **Assessment Dashboard** gives you a complete view of all 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: **Action Items**).



Demo Assess Co. ▾

What's New ▾

Help

Feedback

Assessments

Action Items

Hi, Sayani ▾

Dashboard > Assessments

Assessments

Bulk Action 0 Selected

Reports →

Export ▾

+ New Assessment

Filter by Updated Date

Filter by Due Date

Filter By Entity

Filter By Protocol

Filter by Status

Search By Title

Filter By View only

Reset

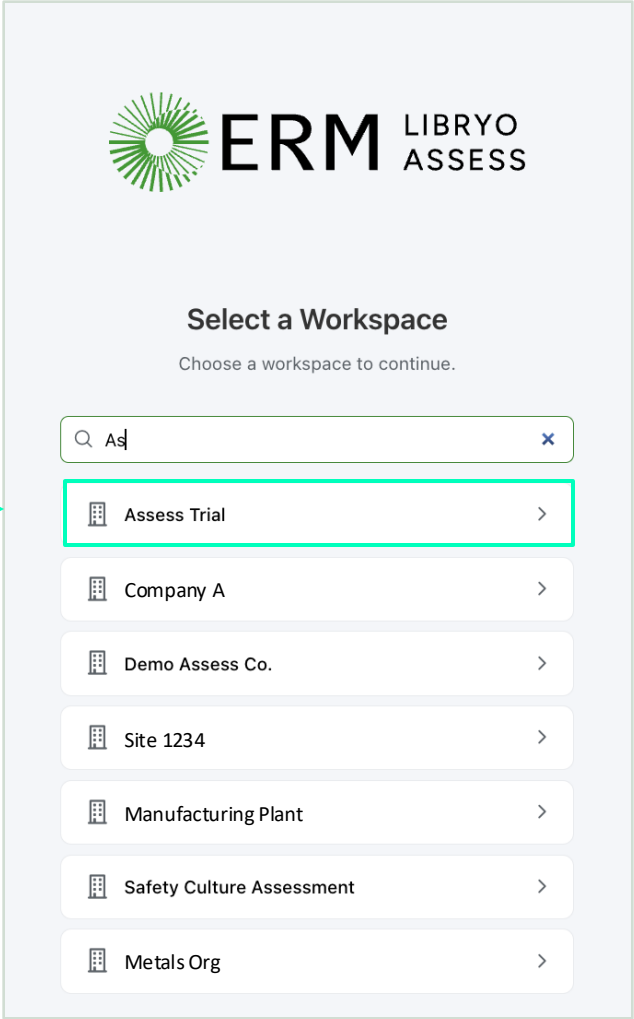
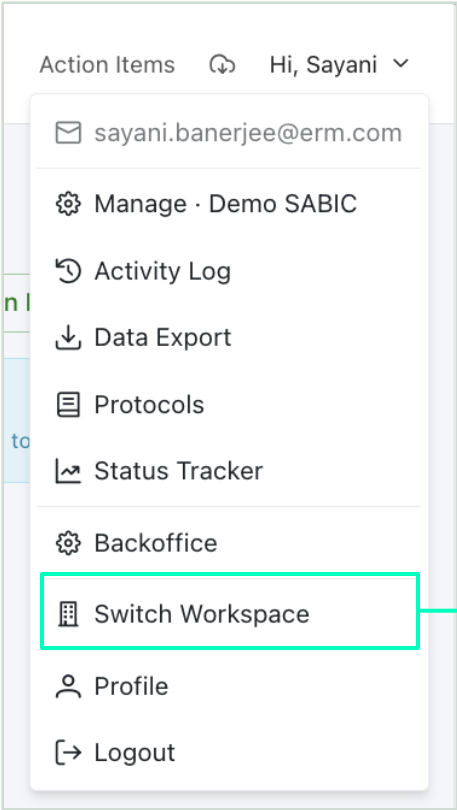
☐	Name Name	Entity	Protocol	Updated ☐ Updated	
☐	Sample Test	-	Assess Demo Protocol	28/07/2026, 12:23	
☐	App Functionality Demonstration FY 2026 ✓ Done	Houston Components Facility	Platform Functionality Overview Protocol	28/07/2026, 12:05	
☐	Mining audit FY 2025 FY 2026 FY 2024	Chicago Manufacturing Plant	Mining Audit Protocol (TO BE DELETED)	24/07/2026, 14:30	2
☐	PFO Assessment	Rotterdam Logistics Hub	Platform Functionality Overview Protocol	24/07/2026, 13:59	
☐	Construction Safety Report #1	Rotterdam Logistics Hub	Construction Safety Findings	23/07/2026, 23:57	
☐	EHS compliance - July 2026 ✓ Done	Hamburg Coatings Plant	EHS Compliance Audit Protocol	17/07/2026, 14:27	
☐	Occupational Safety Assessment	Rotterdam Logistics Hub	OSHA Protocol (Abridged, AI)	10/07/2026, 16:28	
☐	Battery waste contractor ESG audit FY 2025	Chicago Manufacturing Plant	Battery Recycler ESG Audit	09/07/2026, 16:41	
☐	Waste audits FY 2025 ✓ Done	Rotterdam Logistics Hub	E - Waste Audit	09/07/2026, 12:20	
☐	Assessment FY 2027 (Planned) FY 2023 ✓ Done	Raleigh R&D Center	Standard Demo Protocol (TO BE COMPLETED)	08/07/2026, 16:13	

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.

Please note: Some options in the drop-down menu may not be visible due to your user role restrictions.



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.

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

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

The screenshot displays the Libryo Assess Admin interface. At the top, a navigation bar includes links for 'What's New', 'Help', 'Feedback', 'Assessments' (highlighted with a red box), 'Action Items', and a user profile 'Hi, Sayani'. Below the navigation bar, a toolbar contains 'Bulk Action' (0 Selected), 'Reports', 'Export', and a '+ New Assessment' button (highlighted with a red box). A red arrow points from this button to the 'New Assessment' modal form. The modal form has a title 'New Assessment' and a close button. It contains several fields: 'Name' (text input), 'Entity' (dropdown), 'Protocol' (dropdown), 'Description' (text area), 'Tags' (dropdown), and 'Due Date' (date picker). At the bottom of the modal, there are 'Cancel' and 'Create Assessment' buttons (the latter is highlighted with a red box).

Manage your Assessment

Access, create and view your Assessments

To export an assessment’s data from the Assessments page. Click on the **Report icon** beside the assessment name.

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

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

You can mark an assessment as **Done** from the assessment summary page.

Assessments

Bulk Action 0 Selected

Reports →

Export

+ New Assessment

Filter by Updated Date

Filter by Due Date

Filter By Entity

Filter By Protocol

Filter By Status

Search By Title

Filter By View only

Reset

☐	Name	Entity	Protocol	Updated	
☐	Sample Test	-	Assess Demo Protocol	28/07/2026, 18:34	
☐	App Functionality Demonstration FY 2026 ✓ Done	Houston Components Facility	Platform Functionality Overview Protocol	28/07/2026, 12:05	
☐	Mining audit FY 2025 FY 2026 FY 2024	Chicago Manufacturing Plant	Mining Audit Protocol (TO BE DELETED)	24/07/2026, 14:30	

What's New

Help

Feedback

Assessments

Action Items

Hi, Sayani

Summary

File Library

Corrective Actions

Assessment Team

Settings

☒ Mark As Done

Helpful Information & Resources

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

Assessment Name *
Mining audit

Members *

Kelvin Phiri

☐

☒ Kelvin Phiri

☐ Sam Cloete

☐ Dillon Panizzolo

☐ Ximena Murua

☐ Sayani Banerjee

☐ Pranab Banerjee

Cancel **+ Add Members**

Manage your Assessment (Only applicable for users with the Member role)

Completing Assessments

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

To complete assessment questions, open the relevant assessment, expand a section, select a question, enter your response, and click **Save**. Click **Next** to move to the following question.

Click **+Add Observation** to record one or multiple observations against a single question (if applicable).

To remove an 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**.

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 Observation

Save

← Previous

2 of 5 in "General Information"

Next →

Updated 1 hour ago

Manage your Assessment (Only applicable for users with the Certifier role)

Commenting on Assessments

Certifiers are users that close the loop. Once an assessment is complete, they review the outcomes, confirm the relevant standards have been met, and validate the result.

To add a comment, expand **Certification & Verification Comments**. Add your findings in the **Add a comment** box and then click on **Post Comment** to save.

✓  **Certification & Verification Comments** · 0

No comments yet.

Comments are to be added here

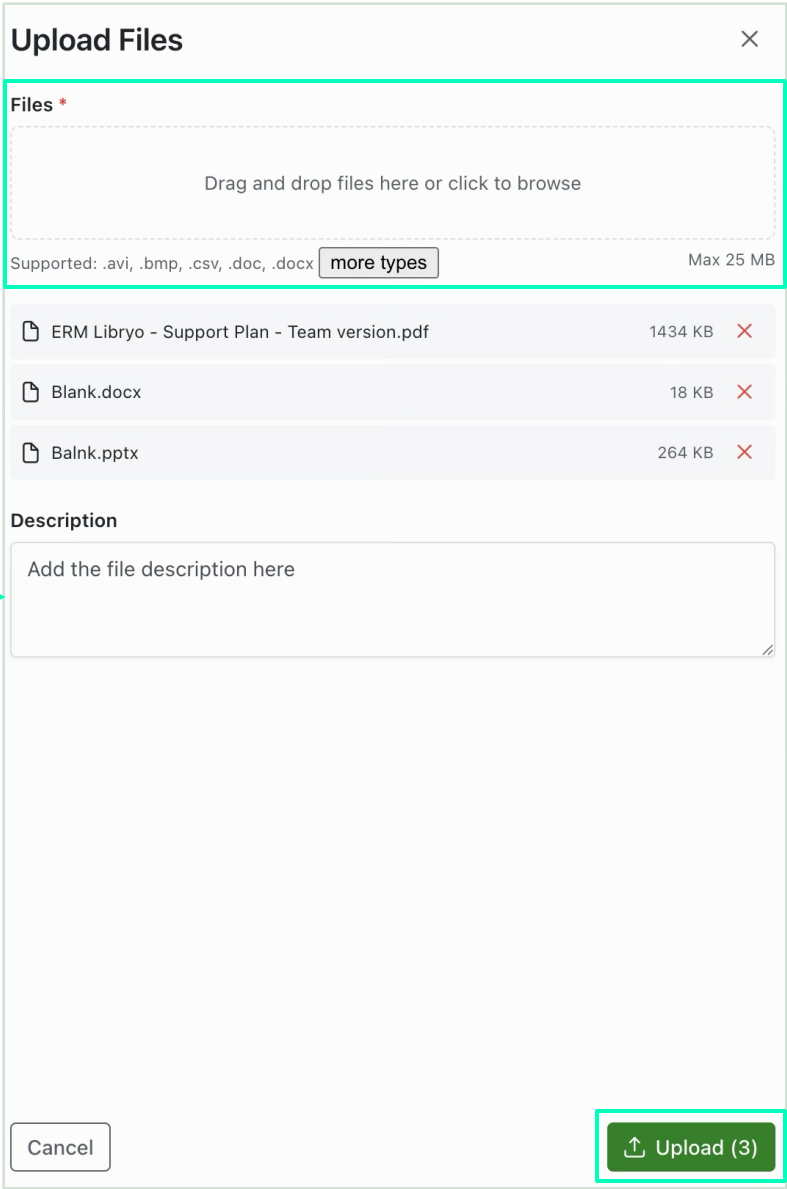
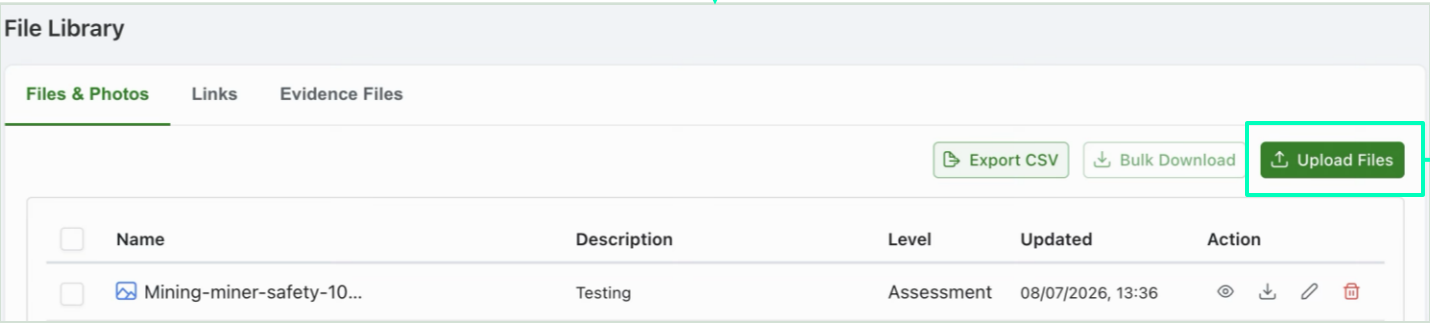
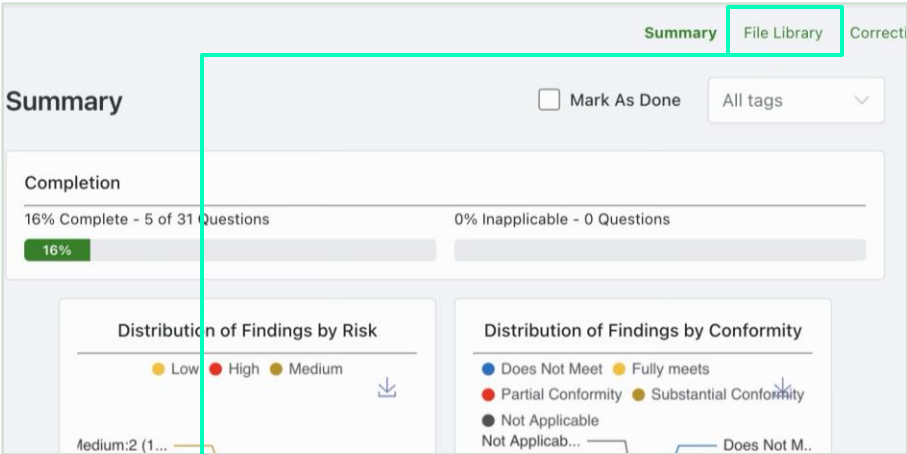
 **Post Comment**

Manage your Assessment (Only applicable for users with the Contributor role)

Adding Files to File Library within Assessment

Contributors keep the evidence flowing. They upload the files and photos that back up an assessment.

To add a file within an assessment, click on **File Library**. Click on **Upload Files**, select the files, add a description (optional). Click on **Upload** to save the files.



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 Center**, allowing users to type in keywords 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

What's New ▾

Help

Action

Organiza

ID: 5b

Attach

Subm

Overdue

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

 Libryo Assess Admin User Guide

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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 next to its title to view more 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

Notification Settings

Export

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, then 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.

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

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.

UK

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EC3A 8AA
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Rondebosch, Cape Town, 7700
Email:
Phone: +27 (0)21 681 5400