ERM LIBRYO

CUSTOMER SUCCESS

ERM Libryo User Guide

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

Last updated: December 2, 2025

Sustainability is our business
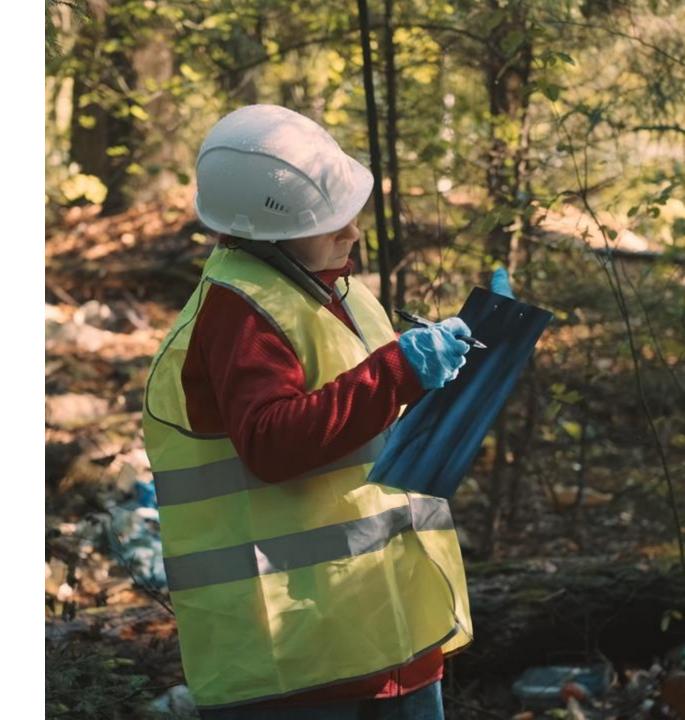
Contents

Who uses ERM Libryo?

ERM Libryo supports teams who need to stay on top of legal requirements, including:

- EHS, ESG & Sustainability Managers

- Legal, Compliance & Risk Teams

- Site & Operations Leads

Why use ERM Libryo?

- Manage legal and operational risk together - in one streamlined system.

- Quickly see which laws apply to each of your operations and stay up to date with legal changes.

- Understand what legal updates mean for your business - no legal background needed.

- Easily integrate with your GRC and management tools.

- Save time on legal research so you can focus on higher-value work.

Login and dashboard

Login

Enter your email address and password to login to the system.

If you have lost or forgotten your password, click on Help, I forgot my login details and then you will be able to reset it.
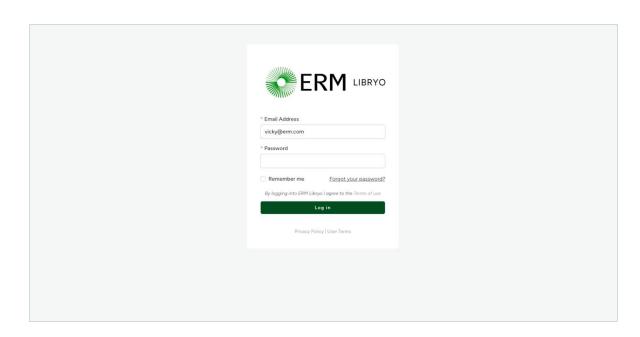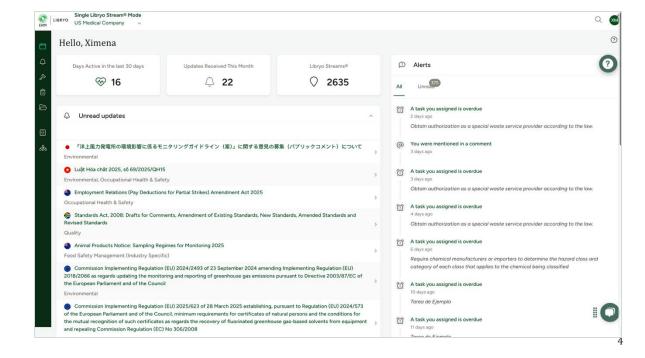

Your dashboard

Your dashboard is where you can navigate to any part of the Libryo platform within a few clicks. Here you can view the latest legal updates received, monthly activities and available Libryo Streams. You can also check your alerts and unread updates.

If you hover on the left-hand side icons, it will open up each of the menu items.
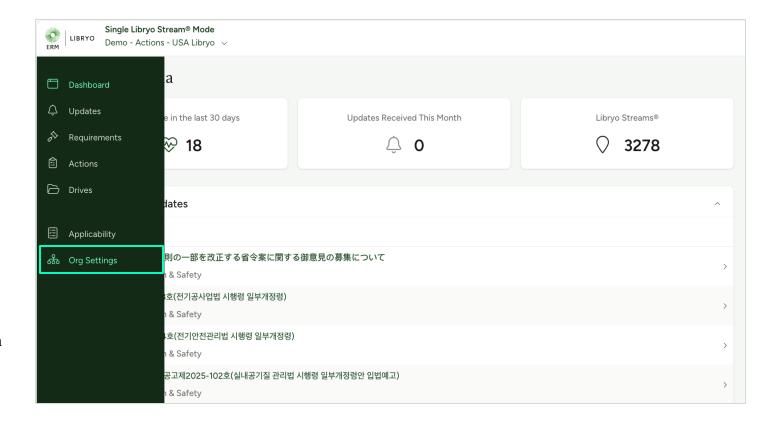
UNDERSTANDING YOUR DASHBOARD

User Types

General Users

These users have access to all standard Libryo features. This includes the Applicability module, where legal requirements for a site are determined, and the Requirements module, which serves as the site's legal register. They also receive legal updates, can create tasks, access Drives, and, if their organization is subscribed, use the Actions module for compliance management and reporting. While General Users can engage fully with Libryo's core tools, they do not have permissions to manage user access or system settings.

Admin Users

These are typically key personnel such as EHS compliance leads, site managers, directors, or senior SHEQ officers. In addition to everything available to General Users, Admins can add or remove users, track whether users have read legal updates, access Advanced Applicability options, and review the change history of applicability questions. Admin Users hold elevated permissions that allow them to manage user roles and key configuration settings across the platform.
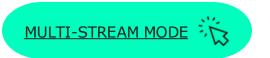

If you're unsure whether you're an Admin User, check your permissions in the **Org Settings** section. If you don't see this option, you're likely a General User.

In that case, please contact an Admin on your team to grant access - or reach out to Libryo Support if you're not sure who that is.
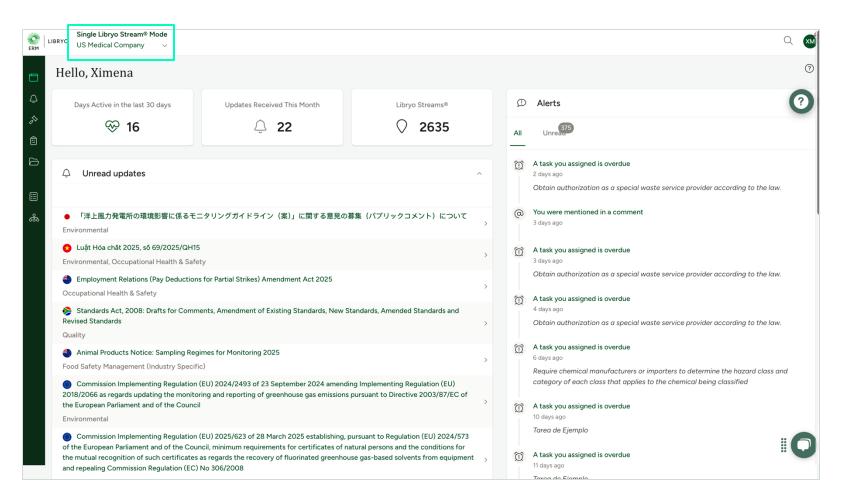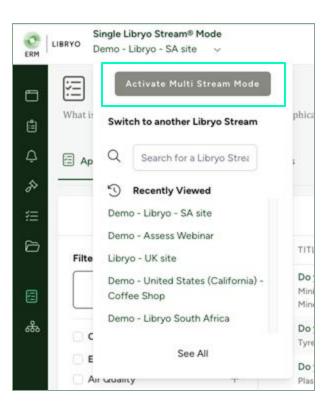
ERM LIBRYO USER TYPES

Multi-Stream Mode

Users with access to multiple sites can view information from all their Libryo Stream® at once in **Multi Stream Mode**.

You can activate or deactivate this mode from the top-left corner of your **Dashboard**.
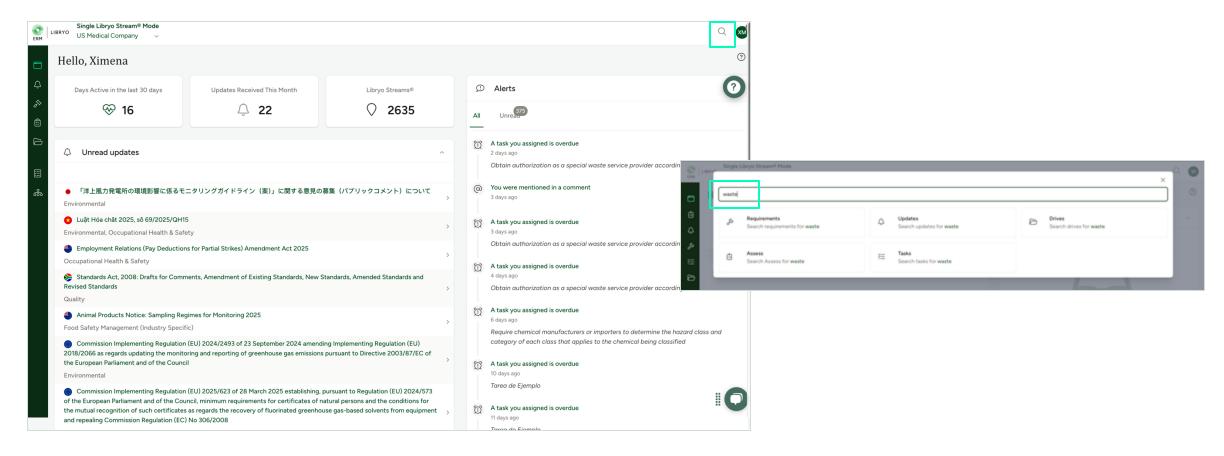
Global Search

Click in the top navigation bar to **Search** for specific keywords mentioned across all modules and content within the platform.

To open the Global **Search**, just click on the magnifying glass in the top right corner of your screen and start typing what you are looking for. Next, select which module you would like to search the keyword for.
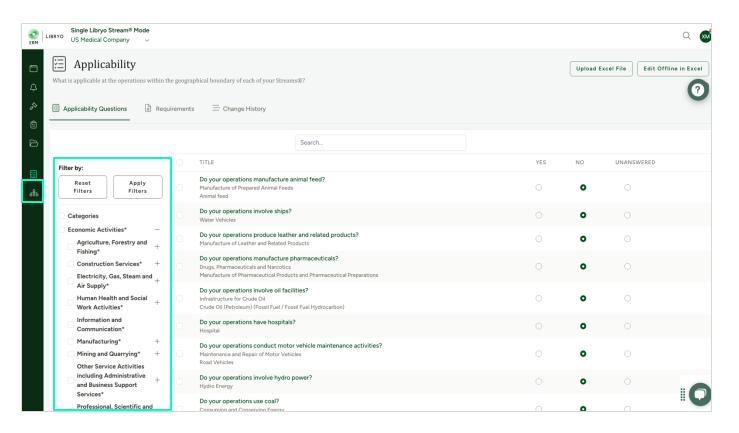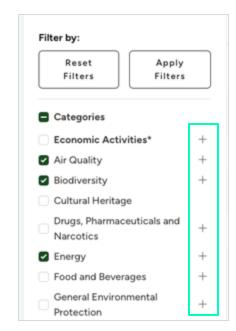
Applicability module

Identify the regulations that matter

From the menu on the left, click on the **Applicability** module to access and manage the regulations that apply to you. This module is designed to help you identify the specific legal requirements for your operational site, considering the geographical boundaries of each of your Libryo Streams. Answer categorized Yes or No questions about your operation to refine the legal framework and identify only the applicable law.

Start by answering all the sections of the **Economic Activities** category to filter out the irrelevant laws from your legal register.

Note that you can select multiple categories as needed and expand sub-categories by clicking the **+**.

Then click on **Apply Filters** to display the applicability Questions that match your selection.

To remove all filters and show all Applicability Questions again, click on **Reset Filters**.

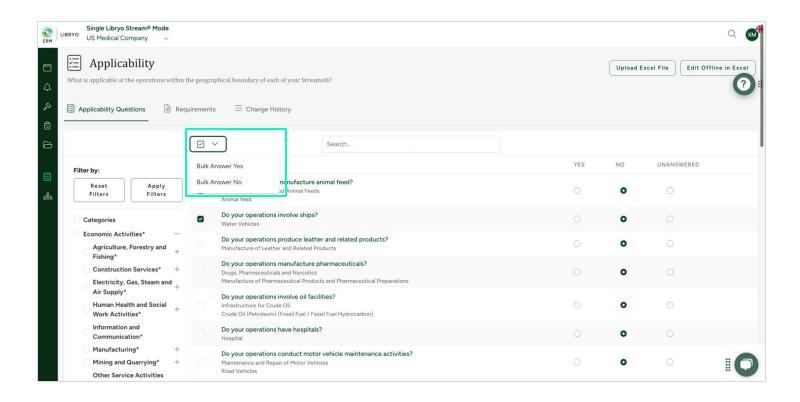# Applicability module

Bulk answer questions

Follow these steps to efficiently manage and respond to multiple Applicability Questions at the same time. Select the questions you want to bulk answer by checking the checkboxes beside each question. Then click on the down arrow located at the top left corner of the list to open the drop-down menu. Choose either **Bulk Answer Yes** or **Bulk Answer No**, depending on the response you want to apply to the selected questions.

To apply the same answer across all your organization's streams, access the main menu of the Applicability module. Mark the checkbox beside each question you want to answer. Click on the down arrow at the top left corner of the list of questions and select **Bulk Answer Yes** or **Bulk Answer No** from the drop-down menu. All the chosen questions will be answered accordingly for all streams in your organization

To quickly select all the questions across all streams at once, use the checkbox located above all the others to select all items, and then perform the bulk answer action.

Applicability module
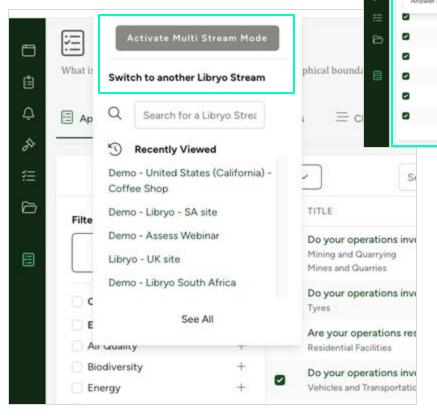
Multi-stream mode

You also have the option to answer applicability questions in **Multi-Stream Mode**, allowing you to address questions for all your organisation's sites simultaneously. In the top left corner of your screen, click on the down arrow and select **Activate Multi-Stream Mode** from the drop-down list, then go to the Applicability Module.

Click on the question you want to answer. Provide **Yes** or **No** responses for the required Libryo Streams. For bulk answering multiple streams simultaneously, click on the checkbox next to each stream you need to answer.

Click on the down arrow at the top left corner of the list of streams and choose **Answer as Yes** or **Answer as No** from the drop-down menu.

All selected streams will be answered with the chosen option.

Requirements module
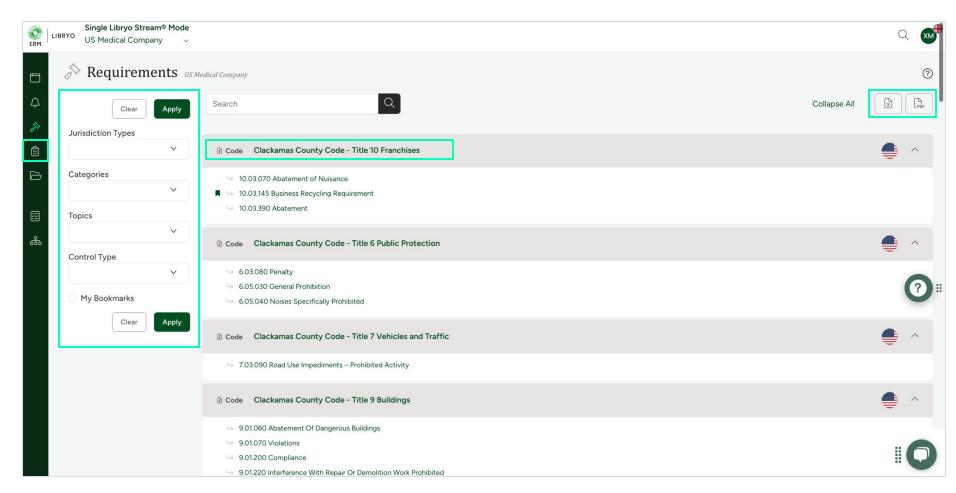
Your custom, digital legal register

When you select the **Requirements** module, you will be directed to a list of all your applicable legislation. You can filter it by **Jurisdiction Types**, **Categories**, **Topics** and **Control Types**. To expand any section of a regulation, simply click on the required section. Please note that only the sections applicable to your site will be displayed, however, if you want to see all the sections that make up the regulation, click on **View Requirements Document**.

All this data can be exported as an **Excel** spreadsheet or **PDF** Document.

Requirements module

Searching your requirements

To search your requirements, simply start typing what you require in the search bar.
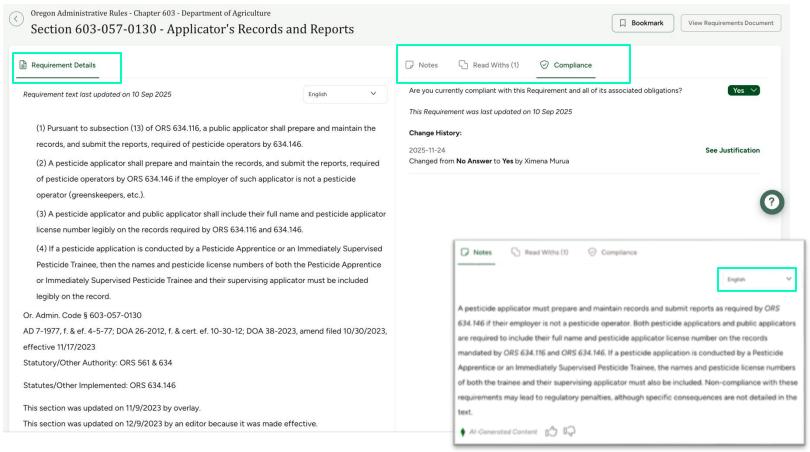
You can find results for a keyword search, requirement documents with title matching the search phrase or topics related with the word you are searching for.

Requirements module
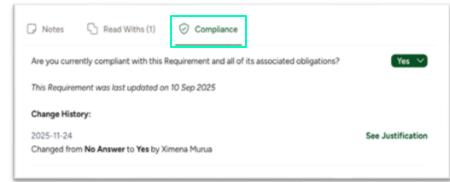
Understanding a specific section
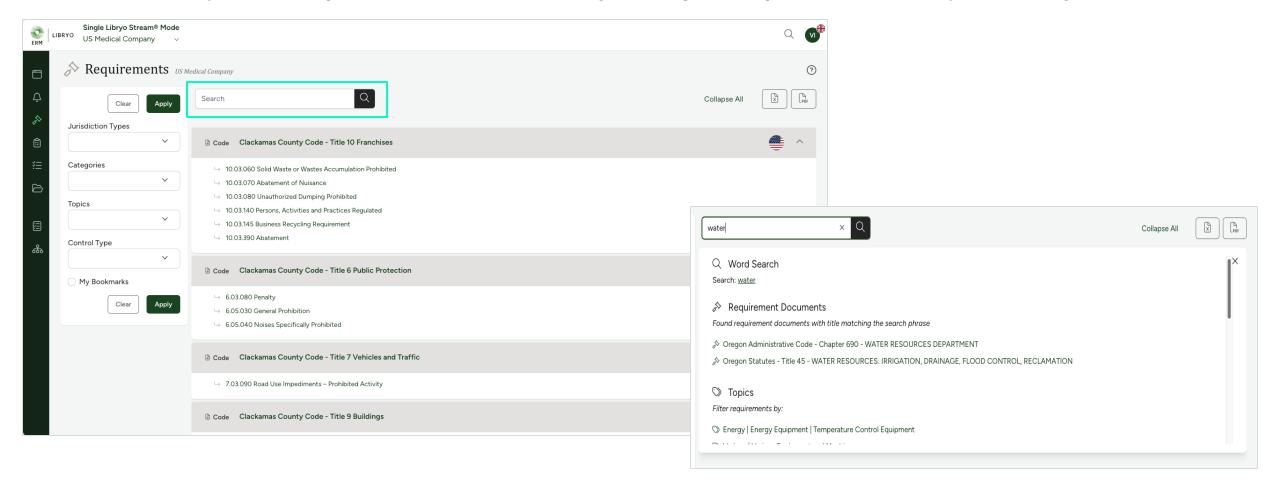
Under **Requirements** you will see a list of sections related to this legal requirement. Once you click to open one, it will show the **Requirement Details** to view the actual legal text of the requirement. **Notes** provide a plain language summary of the section. **Read Withs** show related citations, amendments, general information - and, when applicable, the consequences of non-compliance.

In the **Compliance** tab, you can update whether your operation is currently compliant with the Requirement and all associated obligations. You can also see the current response, the date it was last updated, and the full **Change History**, including who made each change and the justification provided.

You can translate the text into your preferred language using the right drop-down menu.

Requirements module

Understanding a specific section

Once you scroll to the bottom of the **Requirement Details**, you will see **Applicability** to understand why this requirement is in this Libryo Stream. Create **Tasks**, to manage your to-do list by adding tasks related to a specific section of the law. Add **Comments** by mentioning colleagues or to leave an audit trail.

If you wish to view the full legal content of the legislation, not just your requirements, click on **View Requirement Document**.
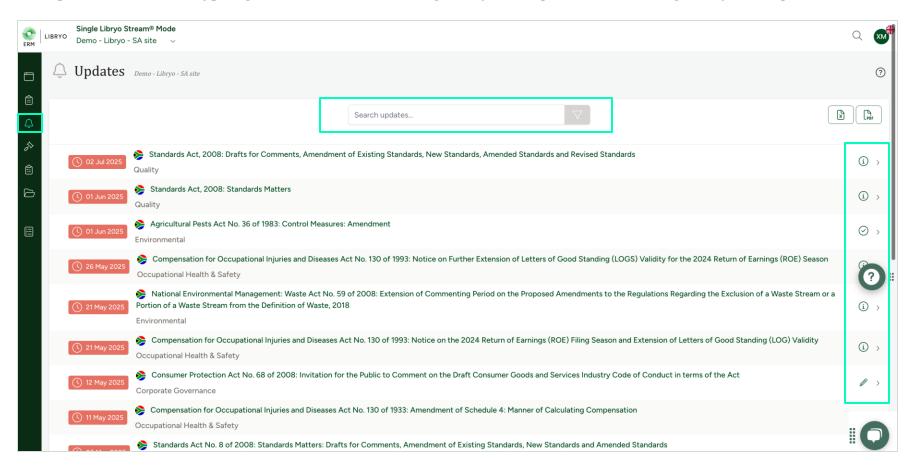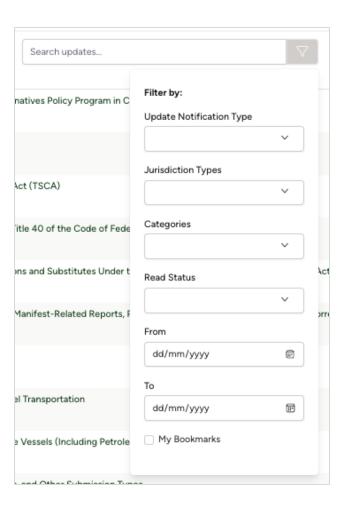
Updates module

Searching Legal Updates

You can find your legal updates by clicking on the **Updates** module on the left of your screen.

Save time by filtering your legal updates using the **Search** bar. On the right side of each Update you can scroll over the icon to see the **Update Notification Type** e.g. For Information, Draft Regulatory Development, Effective Regulatory Development.

Updates module
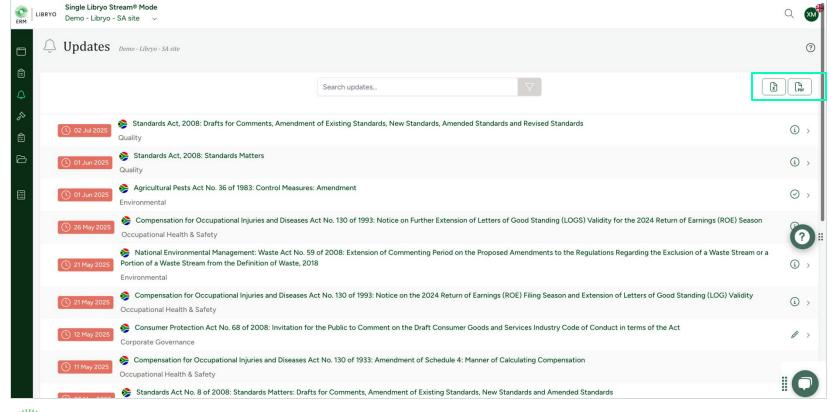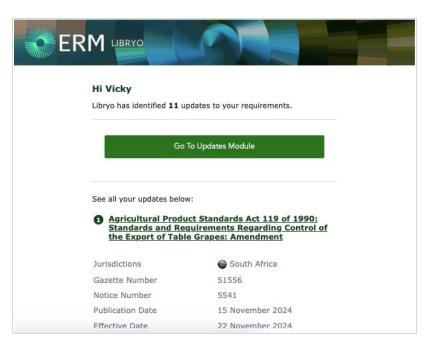
Legal Update Notifications

As a user, you will receive regular **Updates** emails from Libryo with the latest change(s) to laws that are applicable to your site. A list of legal updates for each month also appear in the application or when you click into your email notification. You can also export your notifications list in the top-left of the module.

Red - Not Read
Yellow – Read
Green - Read & Understood
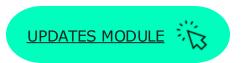
This email provides a broad outline of the legal update. We encourage all users to visit my.libryo to view a simplified summary of the content.

Click on the links in the email to view the full notification in my.libryo.

Updates module
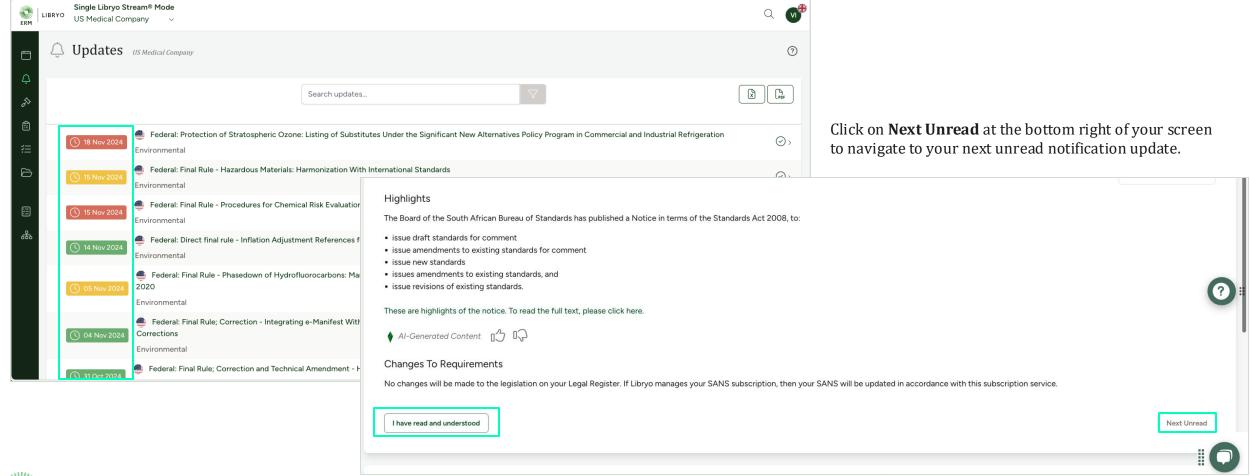
Read and Understood Legal Updates
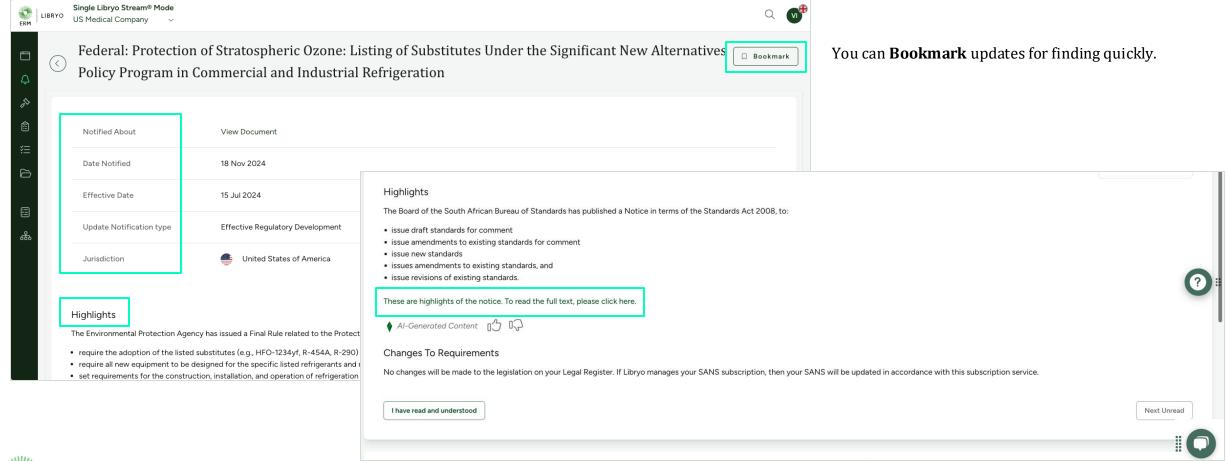
To demonstrate that you have read & understood a legislation change that is applicable to your site or organisation, click the option **I have read and understood**. The notification will then change from red to green. If you exit the notification without selecting **I have read and understood**, it will change from red to yellow, indicating that you have only read it without marking the option.

Click on **Next Unread** at the bottom right of your screen to navigate to your next unread notification update.

Updates module

Highlights and Read the Full Text
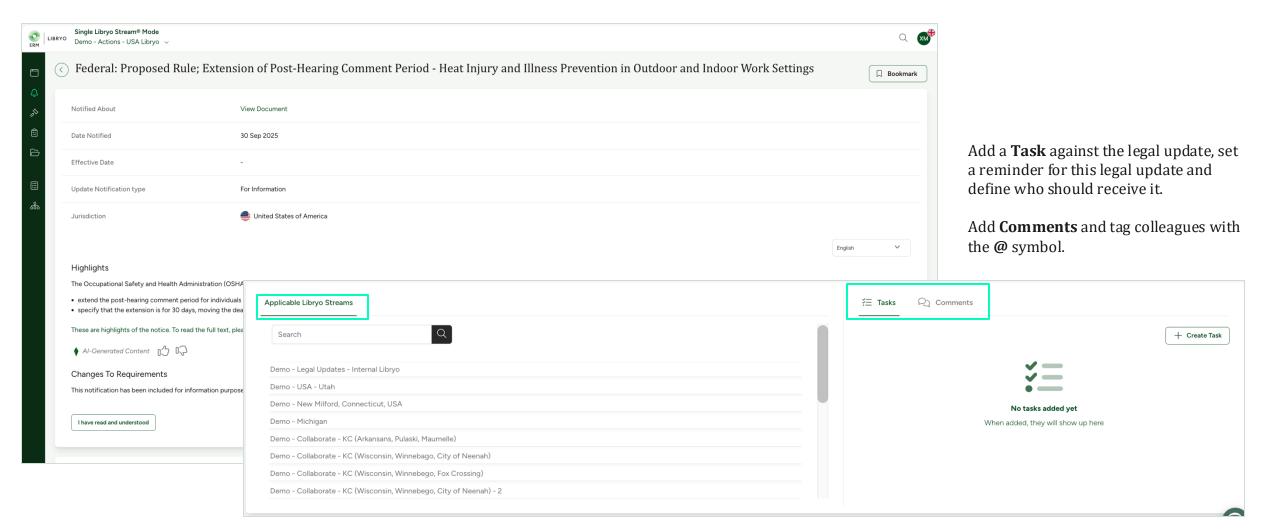
Once you click into one of your legal updates you will see the **Notified About** document, **Date Notified**, **Effective Date**, **Update Notification Type** and **Jurisdiction**. **Highlights** are provided to give you guidance on the changes and to provide information on any actions that you might need to take. If you would like to see a detailed report of the legal update you can click on **"To read the full text, please click here"** and download a PDF version of the regulatory change.

You can **Bookmark** updates for finding quickly.

Updates module

Applicable Streams, Tasks and Comments

If you scroll to the bottom of the Update you will see **Applicable Libryo Streams** that you have access to. Here you can see all the sites the legal update applies to.

Add a **Task** against the legal update, set a reminder for this legal update and define who should receive it.

Add **Comments** and tag colleagues with the @ symbol.

Drives module

Files
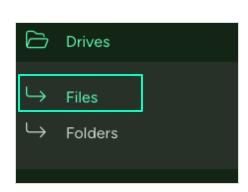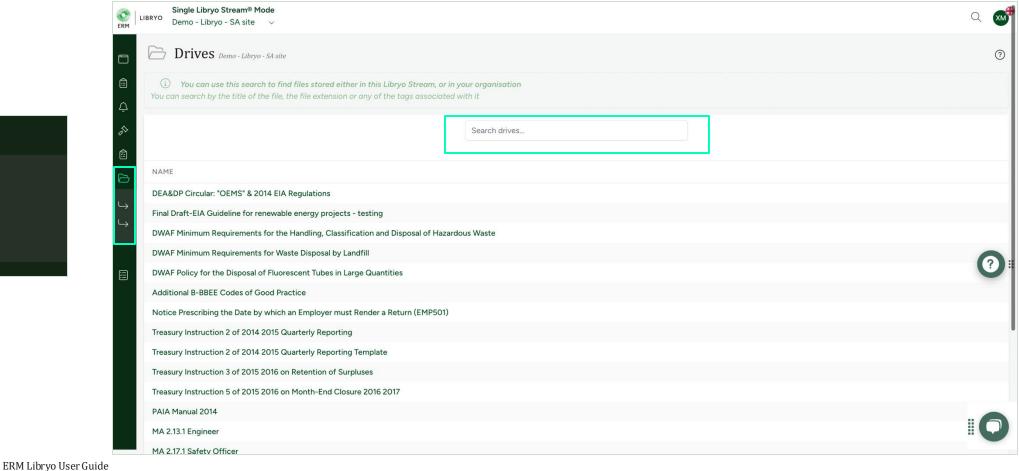
When you click on **Files** under your **Drives**, the platform opens a list of files which contain the documents relating to the law such as government gazettes, notices and schedules, codes of practice, guidelines, policies, protocols; and your Libryo specific content.

Use the Search bar to find the documents you need quickly with keywords.

Drives module
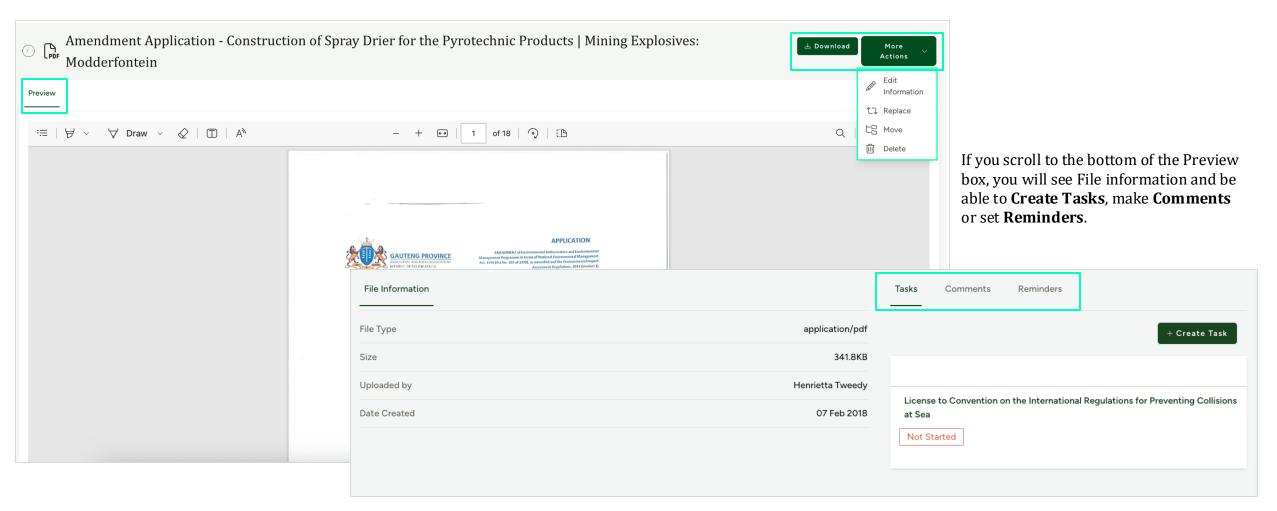
Files

When you click on a file, you can **Preview** the full document. On the right-hand side you can **Download** the file as a PDF or take **More Actions**.

Amendment Application - Construction of Spray Drier for the Pyrotechnic Products | Mining Explosives: Modderfontein

Download | More Actions

Edit Information
Replace
Move
Delete

Preview

Draw | 1 of 18

APPLICATION

GAUTENG PROVINCE
AGRICULTURE AND RURAL DEVELOPMENT
REPUBLIC OF SOUTH AFRICA

AMENDMENT of Environmental Authorisation and Environmental Management Programme in terms of National Environmental Management Act, 1998 (Act No. 107 of 1998), as amended and the Environmental Impact Assessment Regulations, 2014 (Version 3)

If you scroll to the bottom of the Preview box, you will see File information and be able to **Create Tasks**, make **Comments** or set **Reminders**.

File Information

Tasks | Comments | Reminders

File Type	application/pdf
Size	341.8KB
Uploaded by	Henrietta Tweedy
Date Created	07 Feb 2018

+ Create Task

License to Convention on the International Regulations for Preventing Collisions at Sea

Not Started

Drives module

Folders

When you click on **Folders** under your **Drives**, the platform opens a library of folders split into three categories to keep your documents properly structured.

This Libryo Stream's Drive: These folders are where site-specific documents can be stored and are only accessible by users with access to that Libryo stream.
Organisation: The folders in the organisation section, however, are documents that are applicable to, and can be accessed by, all users associated with that organisation.
Shared Documents: These are useful compliance documents and templates uploaded by ERM Libryo for your convenience.

Drives module
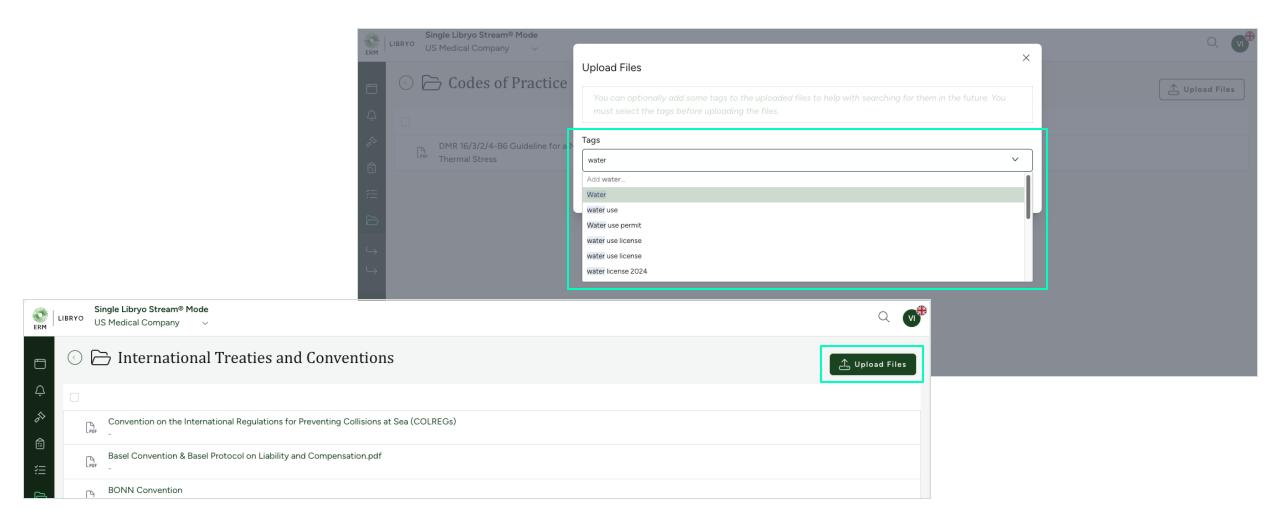
Upload a File

When you click on a folder, you can **Upload Files** and give them any additional **Tags** to help you search for the in the future.

Actions module

Please note this this module may not be available for your organization.

If you do not see this module in your Application menu, you will see **Task Manager** instead. Please skip to pages 35-44.
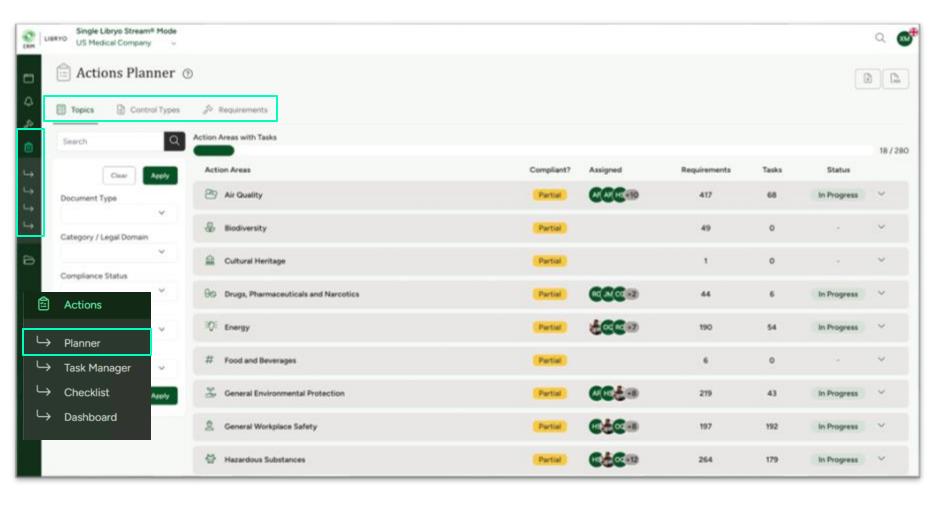
For more information about the Actions module, please speak to your Customer Success Manager.

ERM LIBRYO

Actions module
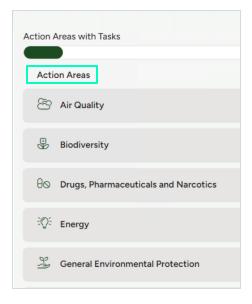
Actions Planner

The **Planner** is your tool for planning the actions necessary to ensure that your business is managing all of the applicable regulatory and other Requirements on the ERM Libryo Platform. Navigate to the menu on your left and click on **Actions Planner** under the Actions module.

You have three ordering options available: By **Topics**, **Control Types** or **Requirements**. The Actions Planner is primarily organised into distinct **Action Areas**, which are universal categories used to organise and categorise your Requirements. Here you can ensure that you know what needs to be done, plan for it, and verify completion per Action Area.

ERM Libryo User Guide

Actions module

Actions Planner - View by Topic or Control Type

You can view the **Assigned** team members for Tasks, the number of **Requirements** within each Action Area, the number of **Tasks** created, and the summary of the **Status** of all the actions being managed per Action Area.

You can utilise the search function to find the Action Area you're looking for more quickly or choose the desired filter options from the drop-down menu.

Actions module

Actions Planner - View ordered by Topics

Action Areas are ordered by **Topics** by default. Within each **Topic**, the list of related **Control Types** is displayed. The combination of a **Topic** and a **Control Type** ultimately forms an Action Area. Clicking on a specific Action Area allows you to discover further detail.

Actions module
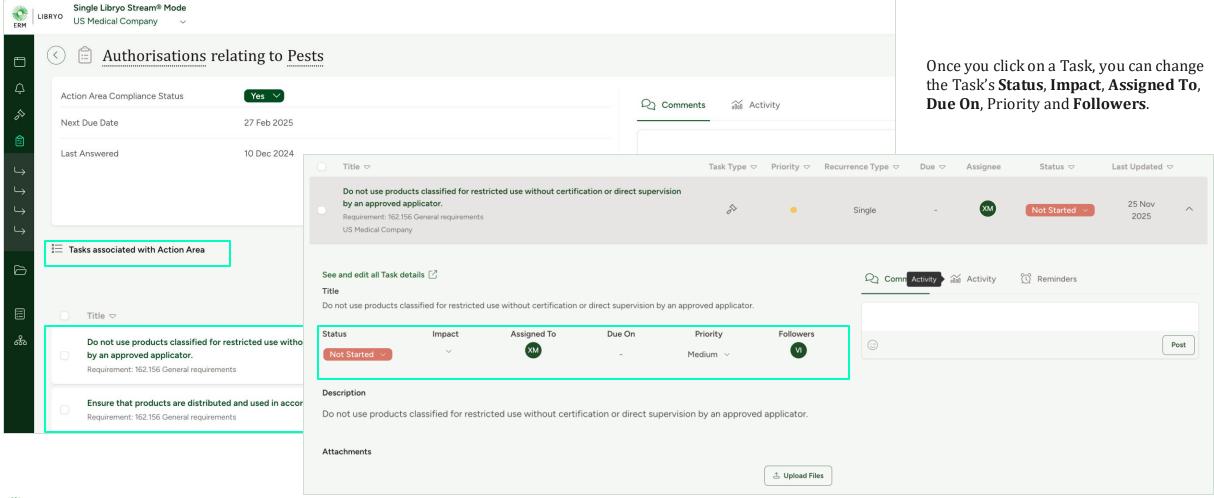
Actions Planner - View ordered by Topics

Once you have clicked on a specific **Action Area**, you can view the Tasks associated with the selected Action Area. You can edit each Task's details by clicking on a specific **Task**. To learn more about each Task's functionality, see the section **Tasks** below

Once you click on a Task, you can change the Task's **Status**, **Impact**, **Assigned To**, **Due On**, Priority and **Followers**.

Actions module

Actions Planner

Under each specific **Action Area**, you can see the associated **Requirements**. Click on a specific Requirement to view its details. Under the **Compliance** section, you can view the current compliance status for that Requirement and update the response whenever needed.

☰ **Tasks associated with Action Area**

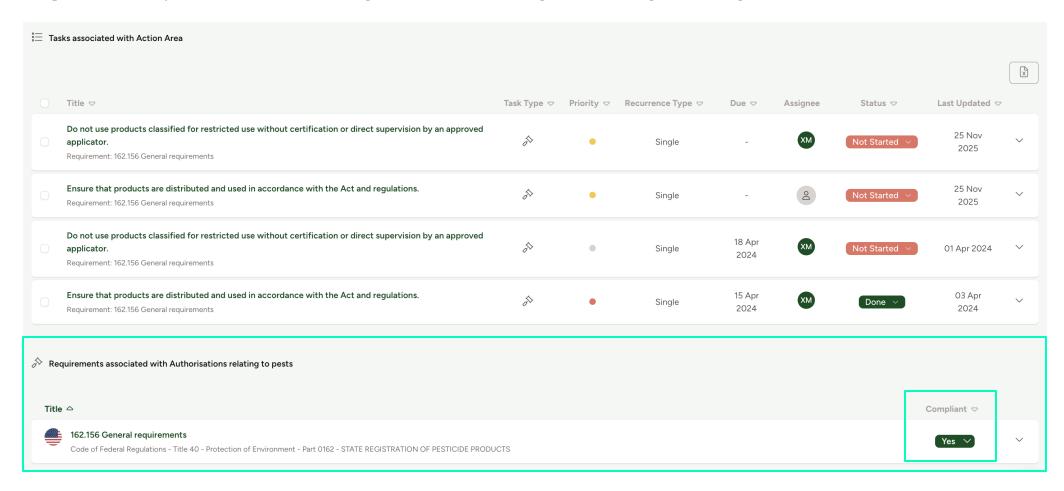|	Title ▽	Task Type ▽	Priority ▽	Recurrence Type ▽	Due ▽	Assignee	Status ▽	Last Updated ▽	
☐	Do not use products classified for restricted use without certification or direct supervision by an approved applicator. Requirement: 162.156 General requirements	⚒	🟡	Single	-	XM	Not Started ⌄	25 Nov 2025	⌄
☐	Ensure that products are distributed and used in accordance with the Act and regulations. Requirement: 162.156 General requirements	⚒	🟡	Single	-	👤	Not Started ⌄	25 Nov 2025	⌄
☐	Do not use products classified for restricted use without certification or direct supervision by an approved applicator. Requirement: 162.156 General requirements	⚒	⚪	Single	18 Apr 2024	XM	Not Started ⌄	01 Apr 2024	⌄
☐	Ensure that products are distributed and used in accordance with the Act and regulations. Requirement: 162.156 General requirements	⚒	🔴	Single	15 Apr 2024	XM	Done ⌄	03 Apr 2024	⌄

⚒ **Requirements associated with Authorisations relating to pests**

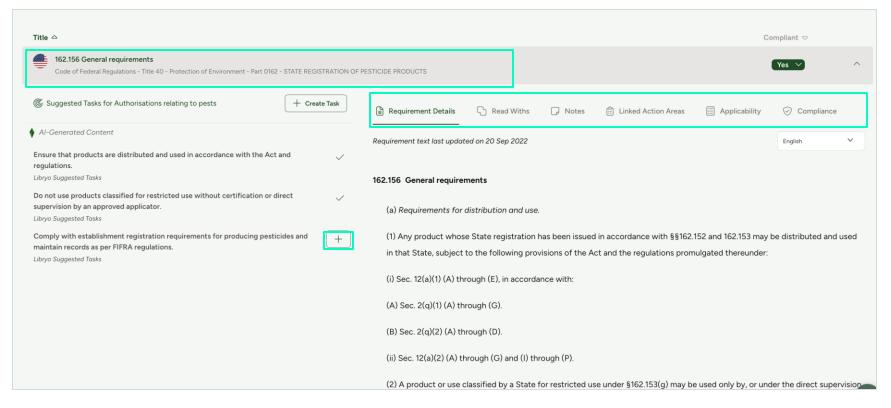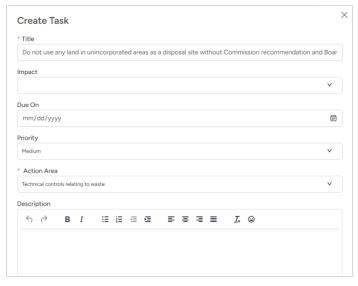| Title △	Compliant ▽	
🇺🇸 **162.156 General requirements** Code of Federal Regulations - Title 40 - Protection of Environment - Part 0162 - STATE REGISTRATION OF PESTICIDE PRODUCTS	Yes ⌄	⌄

Actions module

Actions Planner

On the right side, you can view the **Requirement Details**, any **Read Withs**, your **Notes**, the **Linked Action Areas**, and the **Applicability** for that requirement. You can also see the current **Compliance** status and the date it was last updated. On the left side, under **Suggested Tasks**, you'll find the tasks that Libryo's AI recommends to help you manage compliance for that specific requirement.

Please note: these are suggestions only - they may not be fully comprehensive or always necessary. Be sure to review and create the tasks that you consider appropriate for managing compliance within your company.

You can create your own Task by clicking on **Create Task**.

Click on the **+** symbol to adopt a **Suggested Task** for editing, before creating a new Task based off the Suggested Task. You can make any changes to the suggested text, and then click **Save** to create the Task.

Once all Tasks created against Requirements within an Action Area have been completed and marked **Done**, the Action Area Status will then reflect as **Done**.
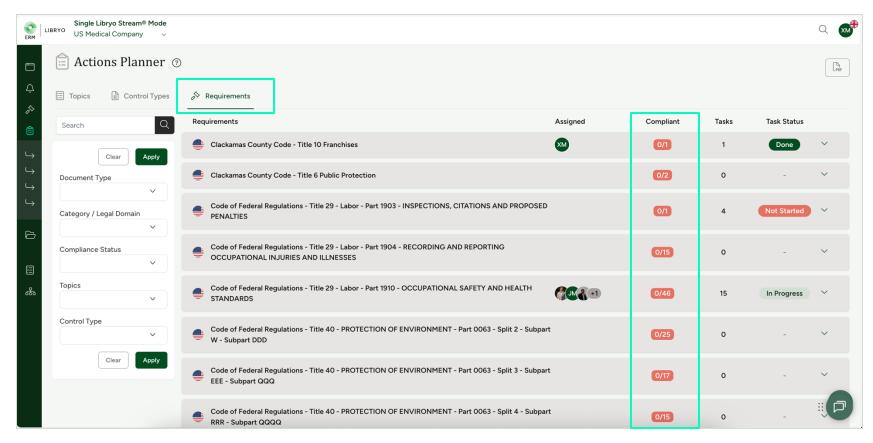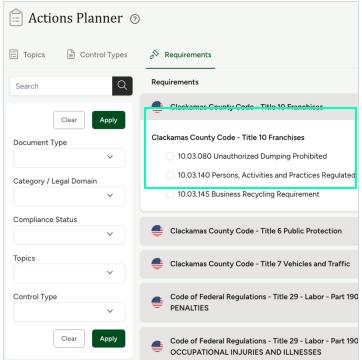
Actions module

Actions Planner – View ordered by Requirements

In this viewing mode, the Actions are ordered by **Requirements**. You can also check your **compliance status** for each requirement from your legal register.

When you click on a Requirement, you can expand all its sections and assess the compliance status for each one. You can also open it to view the full requirement details.
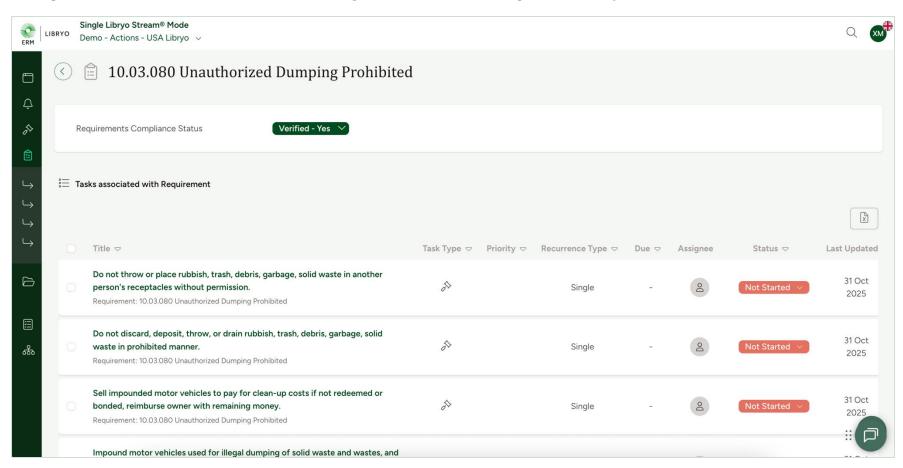
Actions module

Actions Planner - Requirements
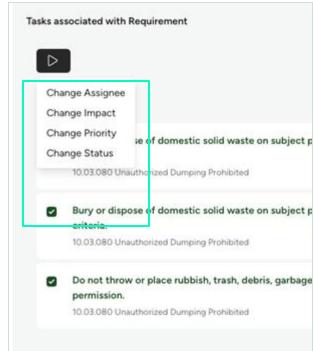
Once you click on a Requirement, you can view and update its Compliance Status. All linked Tasks are listed below - you can expand a Task to edit its details, while the Assignee and Status can be updated directly from the list view.

To change the status of multiple Tasks simultaneously, click on the checkbox on your left and select the required status for the selected Tasks.

Actions module
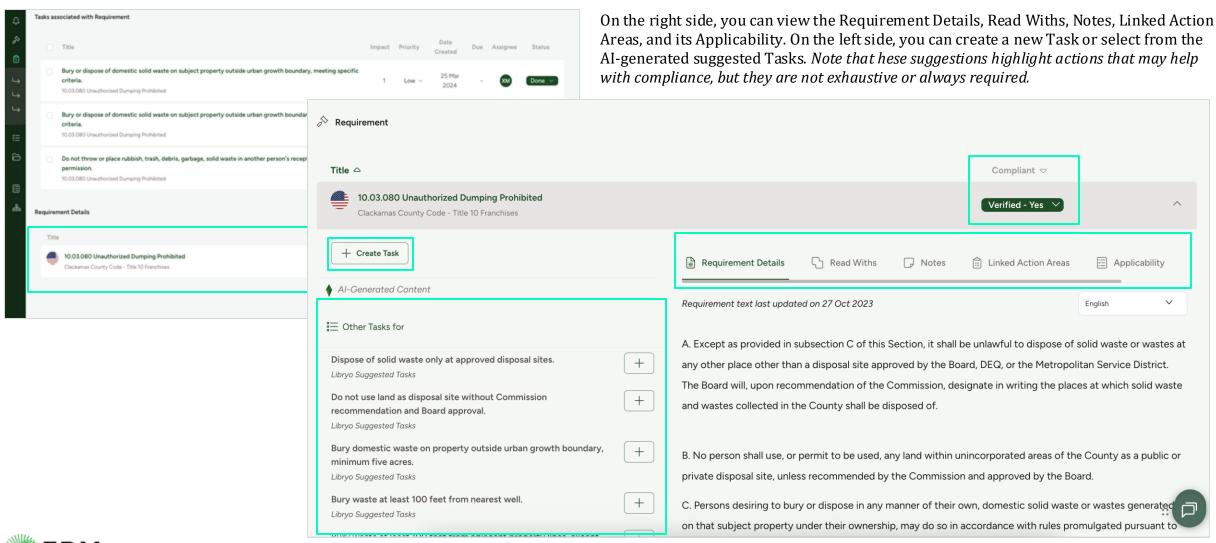
Actions Planner - Requirements
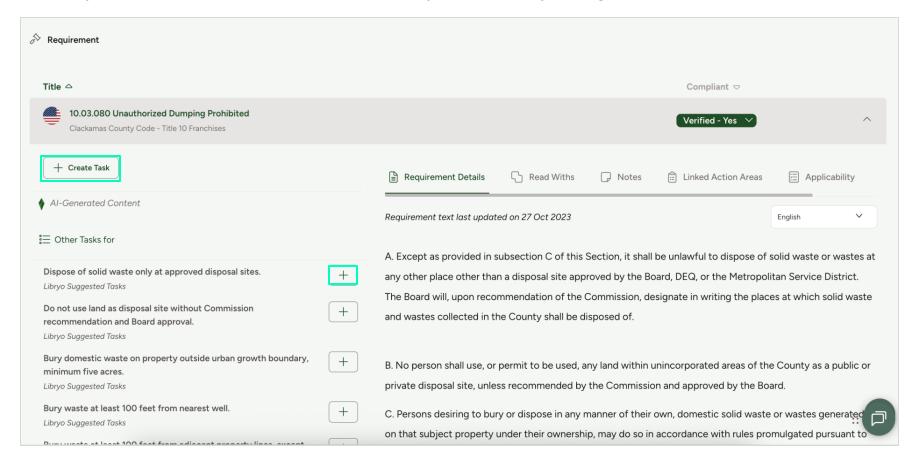
Below, you will see the details of the Requirement by clicking on it.

On the right side, you can view the Requirement Details, Read Withs, Notes, Linked Action Areas, and its Applicability. On the left side, you can create a new Task or select from the AI-generated suggested Tasks. *Note that hese suggestions highlight actions that may help with compliance, but they are not exhaustive or always required.*

Actions module

Actions Planner - Requirements

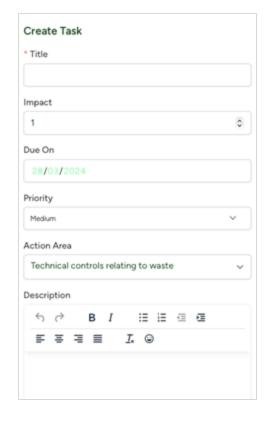Click the **+** symbol to adopt a **Suggested Task** for editing, before creating a new Task. You can make any changes to them if you wish, and then click **Save**. You can also create your own Task by clicking on **Create Task.**

Provide details such as the **Title, Description, Priority, Assignee,** and **Due On.**

Once all Tasks created against a **Requirement Detail** have been successfully completed and marked as **Done**, the Requirement **Status** will then be updated to **Done**.
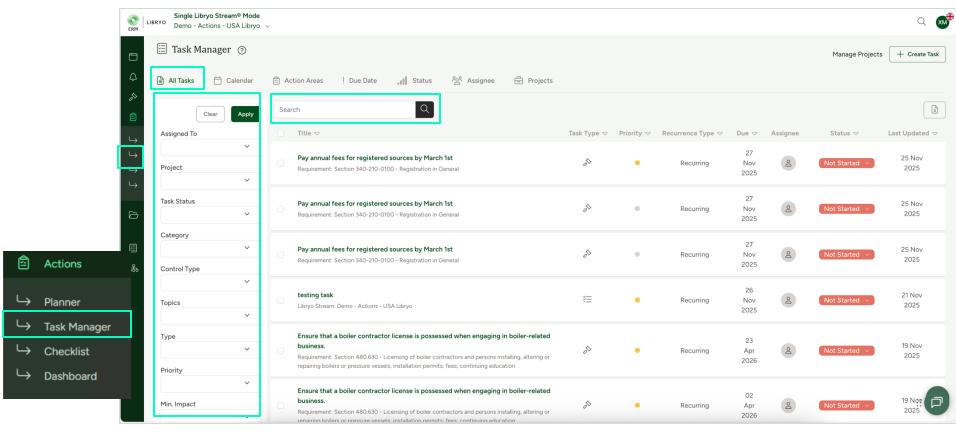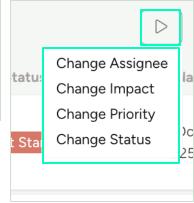
Actions module | Task Manager

Task Manager – All Tasks View

Task Manager provides a centralized space for creating, assigning, scheduling, and managing tasks, bridging the gap between planning and executing your compliance plan. Navigate to the menu on your left and click on **Task Manager** under the **Actions** module.

On the left, you can use filters to refine your Task search results, and next to this, you'll find the **Search** function. Further, you can order the results differently by clicking on the down arrow next to **Title, Task Type, Priority, Recurrence Type, Due Date, Status**, and **Last Updated.**

You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of multiple Tasks by selecting them using the checkboxes, then clicking the play icon in the top right corner and choosing the field you want to update from the dropdown menu.

Actions module | Task Manager
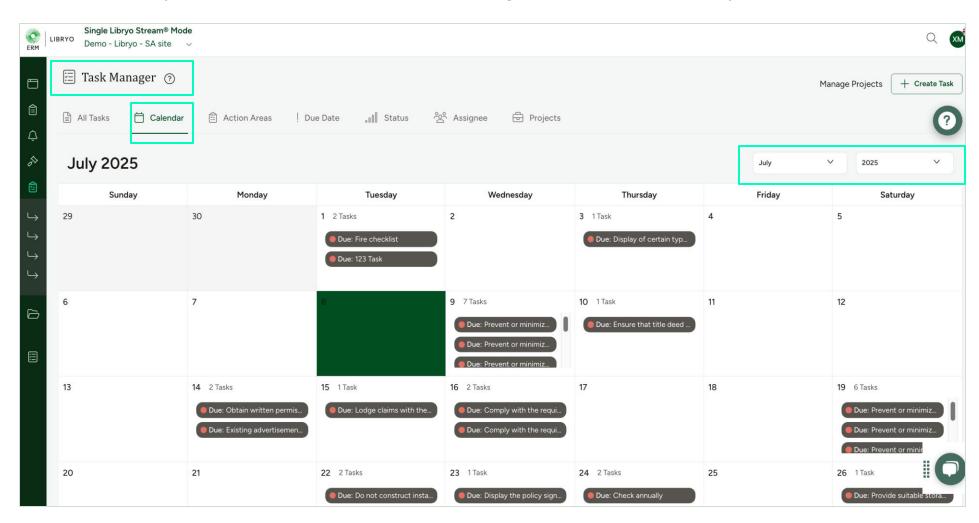
Task Manager - Calendar View

In the Calendar View, you have an overview of the entire month, showing the tasks scheduled for each day.

You can navigate through different dates by selecting the month and year from the dropdown menu on your left.

Actions module | Task Manager
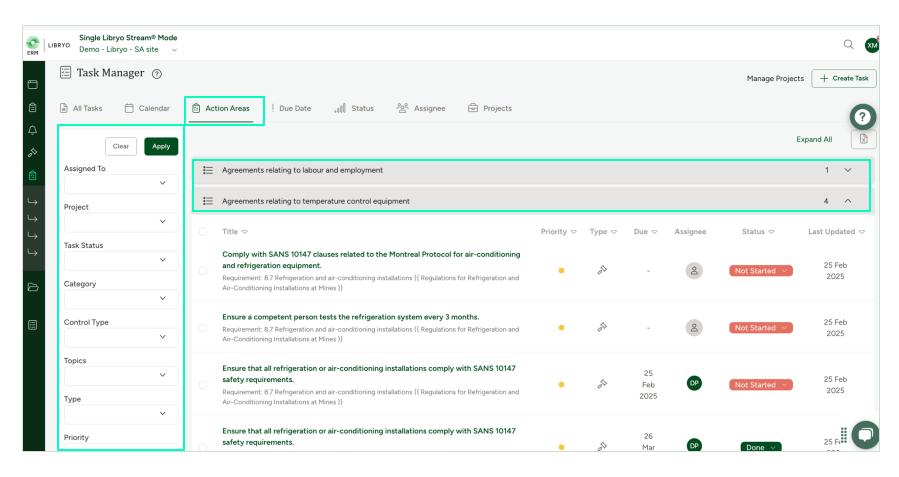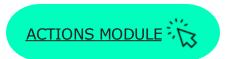
Task Manager – Action Areas

In the Action Areas view, you can see all Tasks grouped by **Action Area**. These are categorized according to the areas outlined in the Actions Planner.
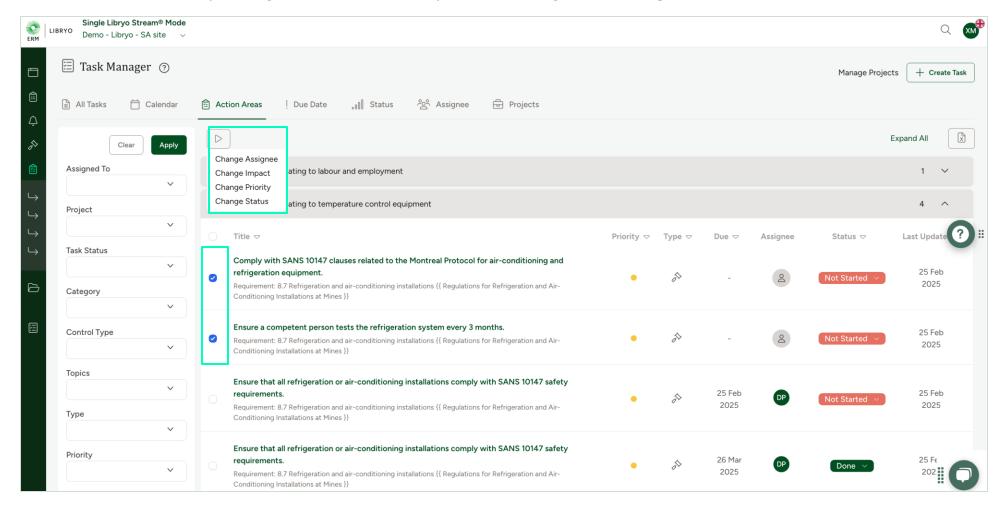
On the left, you can use filters to refine your Task search results.

Actions module | Task Manager
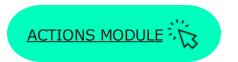
Task Manager – Action Areas

You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on to choose the item you wish to change from the dropdown list.

Actions module | Task Manager
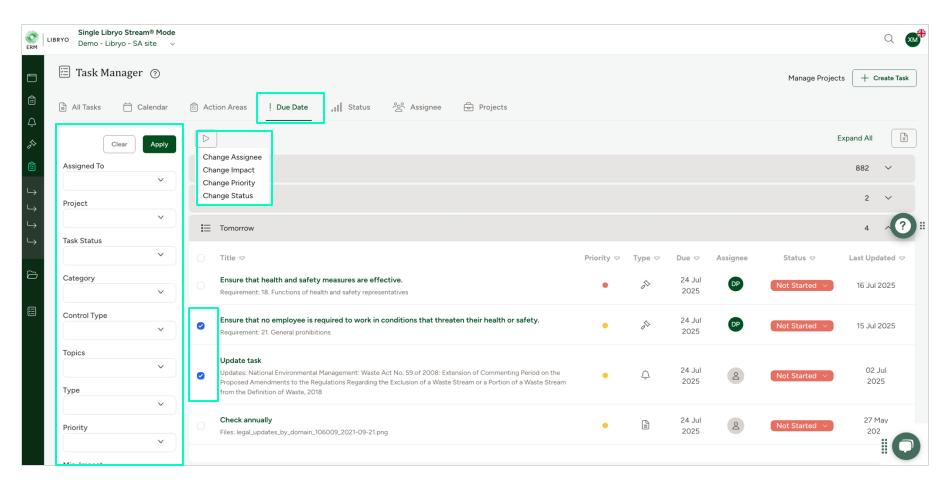
Task Manager - Due Date View

In the **Due Date** view, you can see a list of all Tasks grouped by **Due Date.** They are ordered and categorized
by **Overdue** Tasks, Tasks due **Today**, **Tomorrow**, **Upcoming** Tasks, **Future** Tasks, and those with **No Due Date**.

On the left, you can use filters to refine your Task search results.

You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on the arrow button to choose the item you wish to change from the dropdown list.

Actions module | Task Manager
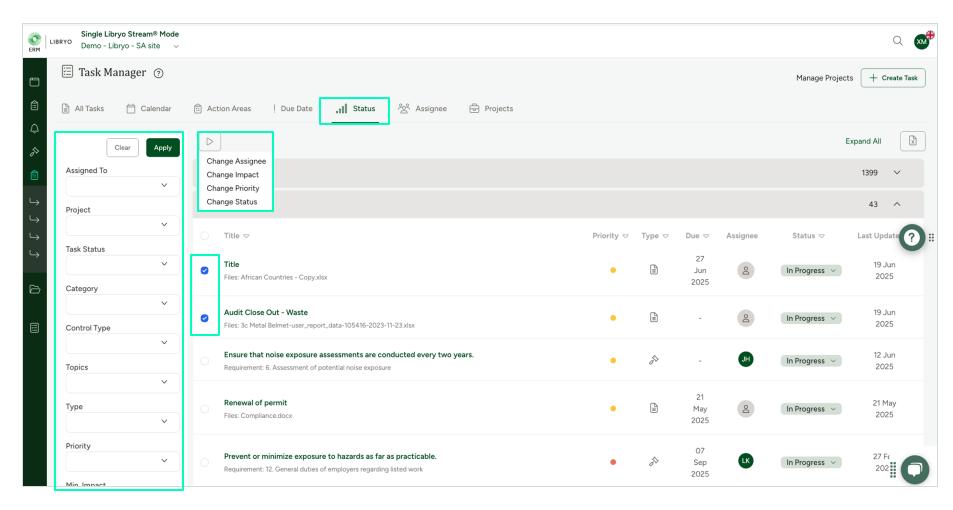
Task Manager - Status View

In the **Status** view, you can see a list of all Tasks grouped by **Status.** These are ordered and categorized by **Not Started**, **In Progress**, **Done,** and **Paused**.


On the left, you can use filters to refine your Task search results.
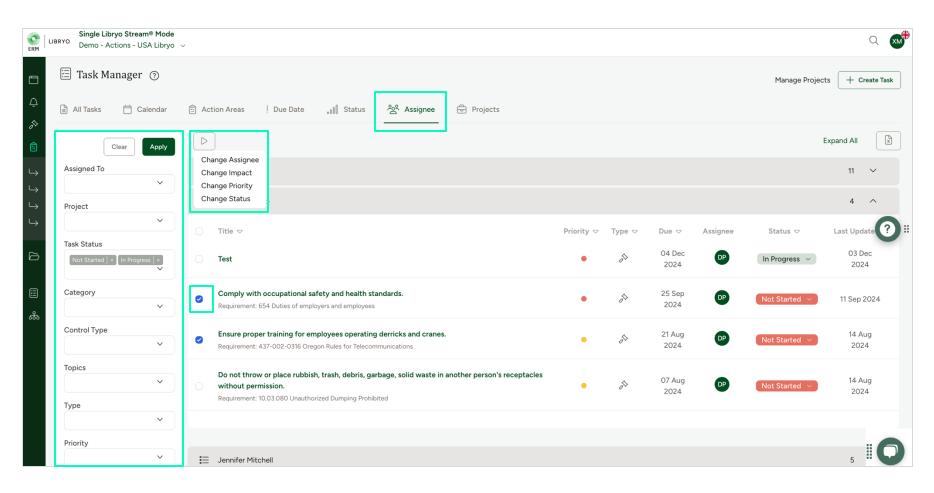
You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on the arrow button to choose the item you wish to change from the dropdown list.

Actions module | Task Manager

Task Manager – Assignee View

In the **Assignee** view, you can see a list of all Tasks grouped by **Assignee,** ordered alphabetically.

On the left, you can use filters to refine your Task search results.
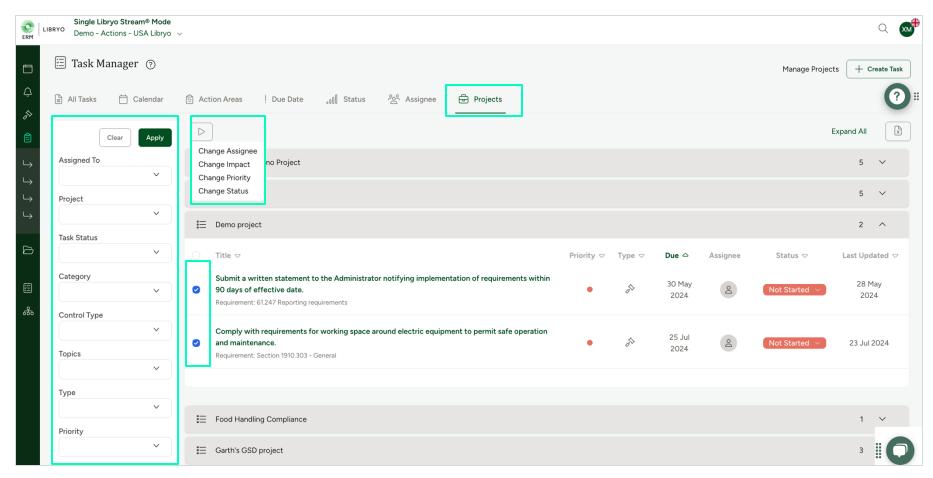
You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on the arrow button to choose the item you wish to change from the dropdown list.

Actions module | Task Manager

ACTIONS MODULE
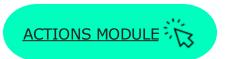
Task Manager – Projects View

In the **Projects** view, you can see a list of all Tasks grouped by **Projects.** They are organized and categorized alphabetically by project name.
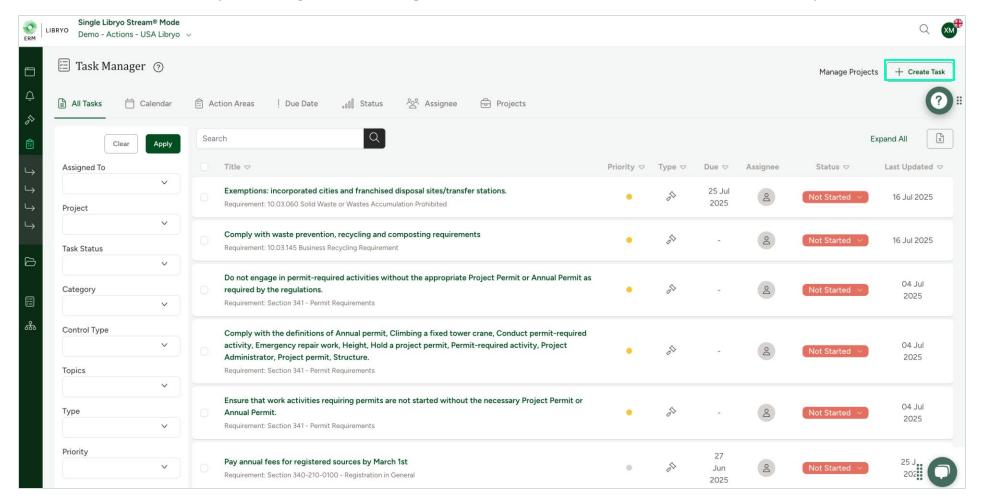
On the left, you can use filters to refine your Task search results.
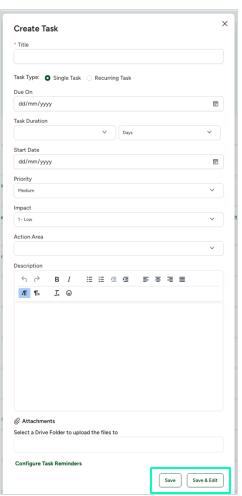
You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on the arrow button to choose the item you wish to change from the dropdown list.

Actions module | Task Manager

Task Manager - Create Task

To create a new Task, click on the button labelled **Create Task**, located at the top-right of the screen. Choose a **Title**, select the level of **Impact**, set a **Due Date**, select the **Priority** level, and provide a **Description** for the Task. Then, click **Save**, or click **Save & Edit** if you want to make further edits.

Actions module | Task Manager
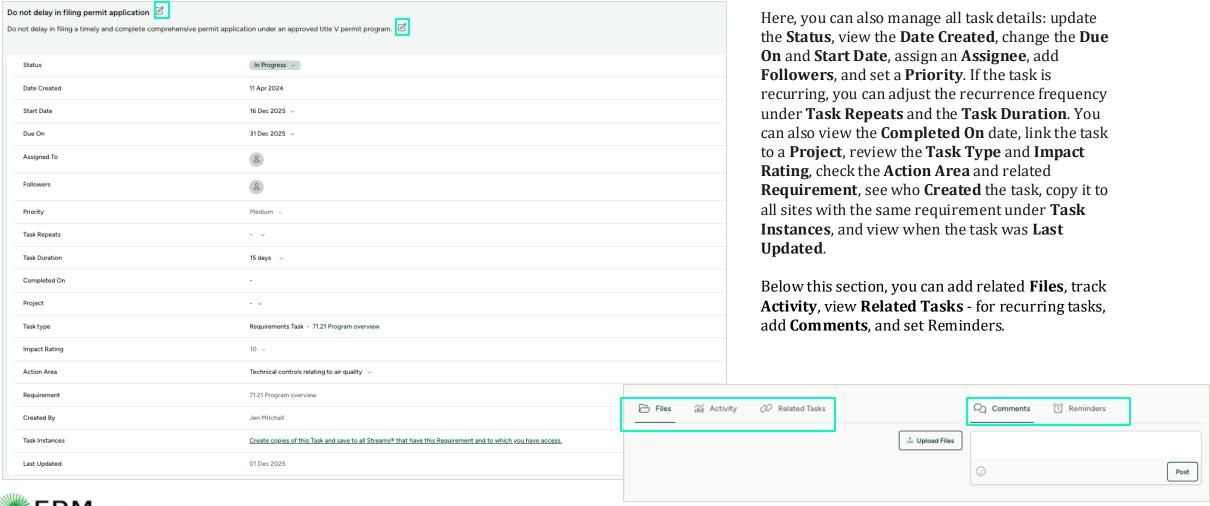
Task Manager - Edit Task
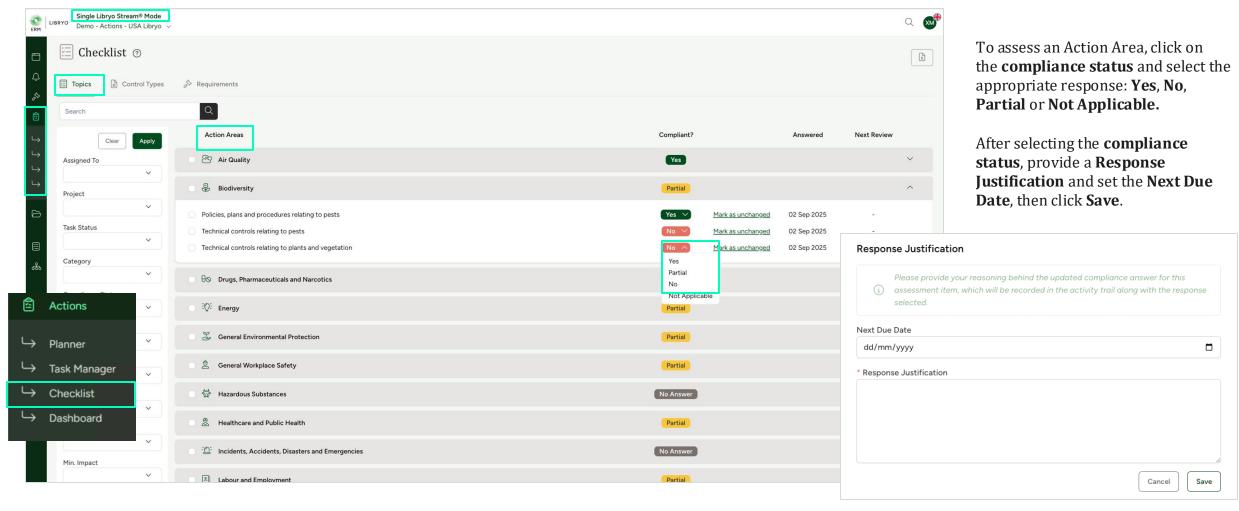
To edit an existing Task, click on the Task you want to make changes to and it will open for editing. At the top of your screen, you can see the title of the Task. Click the symbol next to it to make edits. Additionally, you can also edit the Task's description by clicking the edit symbol next to it.

Do not delay in filing permit application

Do not delay in filing a timely and complete comprehensive permit application under an approved title V permit program.

|	
Status	In Progress ⌄
Date Created	11 Apr 2024
Start Date	16 Dec 2025 ⌄
Due On	31 Dec 2025 ⌄
Assigned To	👤
Followers	👤
Priority	Medium ⌄
Task Repeats	- ⌄
Task Duration	15 days ⌄
Completed On	-
Project	- ⌄
Task type	Requirements Task - 71.21 Program overview
Impact Rating	10 ⌄
Action Area	Technical controls relating to air quality ⌄
Requirement	71.21 Program overview
Created By	Jen Mitchell
Task Instances	Create copies of this Task and save to all Streams® that have this Requirement and to which you have access.
Last Updated	01 Dec 2025

Here, you can also manage all task details: update the **Status**, view the **Date Created**, change the **Due On** and **Start Date**, assign an **Assignee**, add **Followers**, and set a **Priority**. If the task is recurring, you can adjust the recurrence frequency under **Task Repeats** and the **Task Duration**. You can also view the **Completed On** date, link the task to a **Project**, review the **Task Type** and **Impact Rating**, check the **Action Area** and related **Requirement**, see who **Created** the task, copy it to all sites with the same requirement under **Task Instances**, and view when the task was **Last Updated**.

Below this section, you can add related **Files**, track **Activity**, view **Related Tasks** - for recurring tasks, add **Comments**, and set Reminders.

📁 Files   📊 Activity   🔗 Related Tasks   💬 Comments   ⏰ Reminders

⬆ Upload Files
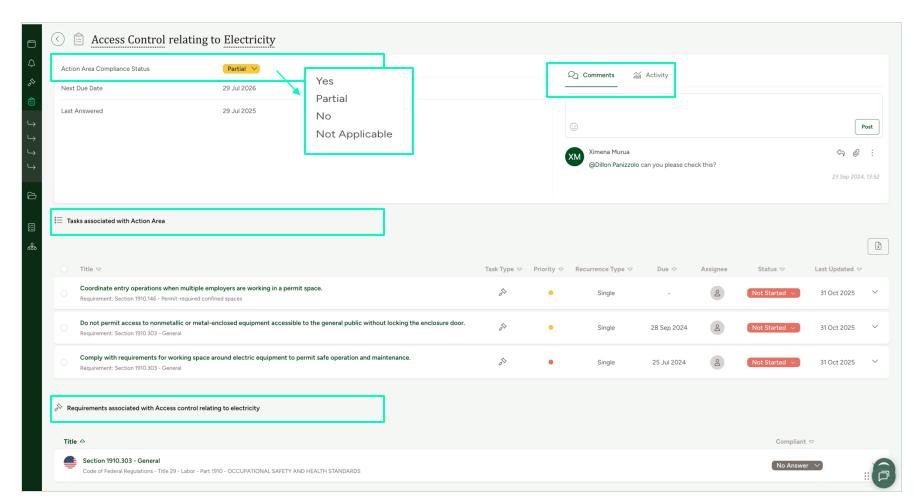
Post

Actions module

Checklist

The Checklist section in the Actions module allows you to assess, check and update the compliance status of Action Areas. You have the option to view Action Areas by **Topics** or **Control Types.** Each Action Area shows key information such as the **compliance status**, the date it was **last answered**, and the **next review date,** if there is one.

To assess an Action Area, click on the **compliance status** and select the appropriate response: **Yes**, **No**, **Partial** or **Not Applicable.**

After selecting the **compliance status**, provide a **Response Justification** and set the **Next Due Date**, then click **Save**.

Actions module

Checklists

For more details, click on an Action Area to open a new page, where you can update the **compliance status**, check the **Next Due Date**, and see who **Last Answered a**nd when. You can add **Comments** and tag colleagues, who will be notified when they are tagged.

Review the **Activity** timeline to see a record of all changes made to the Action Area.
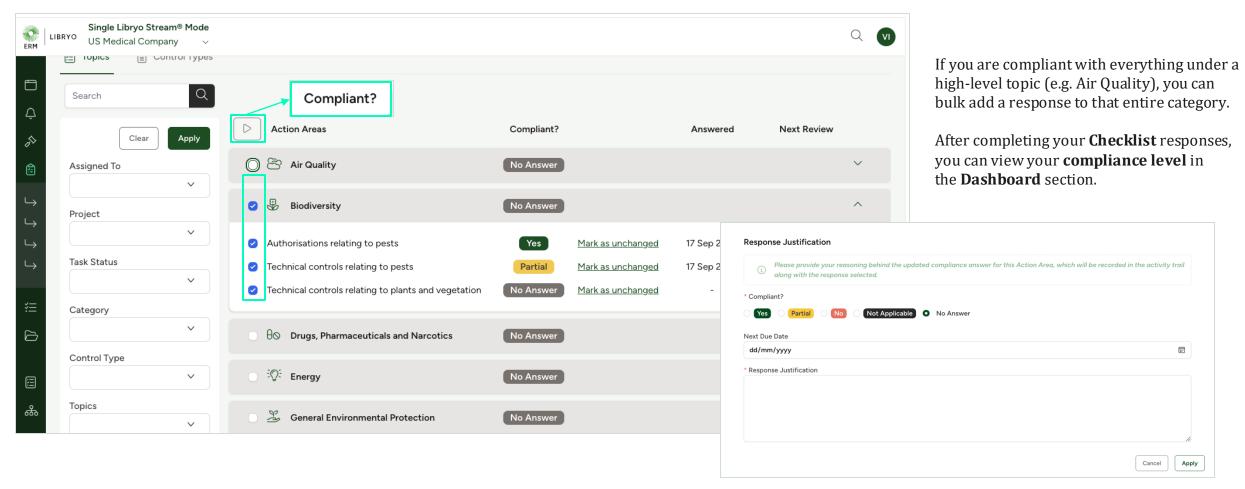
You can also review the **Tasks** linked to each Action Area, as well as the **Requirements** associated with it to ensure compliance with standards.

Actions module

Checklists

If you need to update multiple Action Areas at once select the Action Areas you want to update by clicking on them, then click the checkbox in the top left corner of the list. Provide the **compliance status**, set the **Next Due Date**, and add a **Response Justification** for the selected Action Areas. Then, click **Apply** to save the changes.
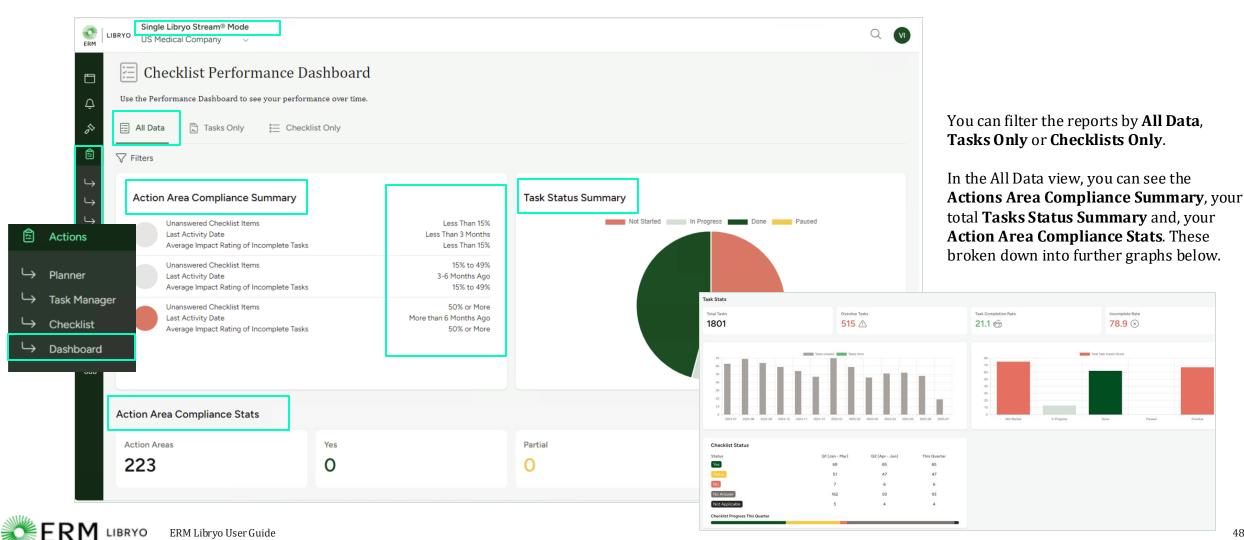

If you are compliant with everything under a high-level topic (e.g. Air Quality), you can bulk add a response to that entire category.

After completing your **Checklist** responses, you can view your **compliance level** in the **Dashboard** section.
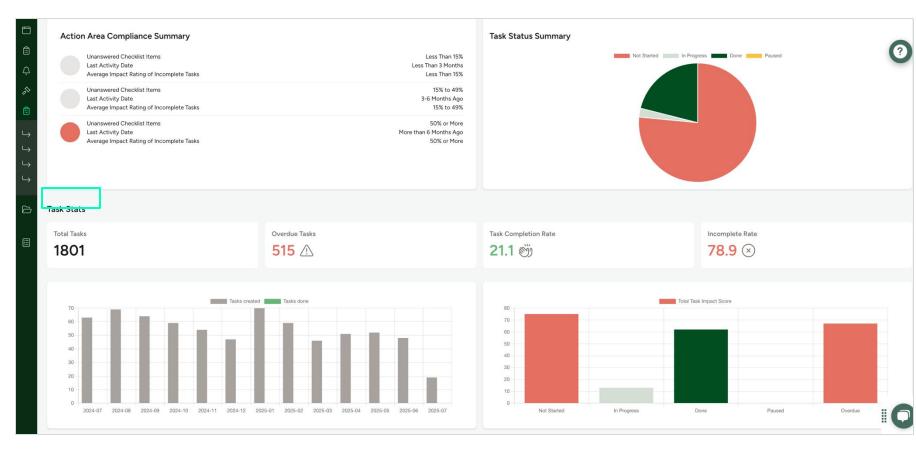
Actions module

Checklist Performance Dashboard - All Data

With the Actions **Dashboard**, you can gain a comprehensive overview of your compliance efforts, conveniently presented through intuitive dashboards and insightful metrics. To explore the comparative performance of the Libryo Streams® in your Org, switch to Multi-Stream® mode.
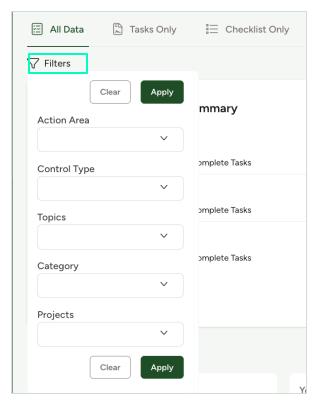

You can filter the reports by **All Data**, **Tasks Only** or **Checklists Only**.

In the All Data view, you can see the **Actions Area Compliance Summary**, your total **Tasks Status Summary** and, your **Action Area Compliance Stats**. These broken down into further graphs below.

Actions module

Checklist Performance Dashboard – Tasks Only

In the Tasks Only view, you can see the **Actions Area Compliance Summary**, your total **Tasks Status Summary** and your **Task Stats**. These broken down into further graphs below.
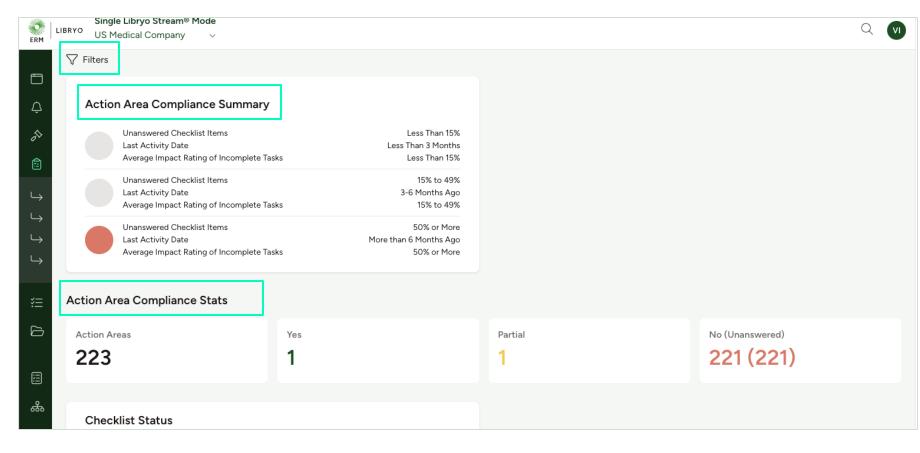
In the top-left, you can click on the Funnel icon to filter your data by **Action Area**, **Control Type**, **Topics**, **Category** or **Projects**. Click **Apply** when you are finished.
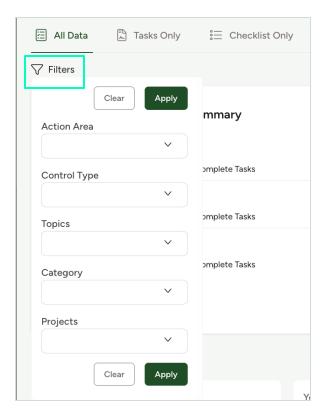
Actions module

Checklist Performance Dashboard – Checklists Only

In the Checklists Only view, you can see the **Actions Area Compliance Summary and** your total **Action Area Compliance Stats**. These broken down into further graphs below.

In the top-left, you can click on the Funnel icon to filter your data by **Action Area**, **Control Type**, **Topics, Category** or **Projects**. Click **Apply** when you are finished.
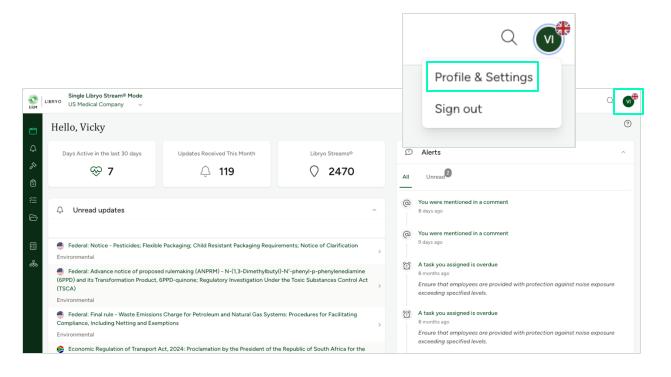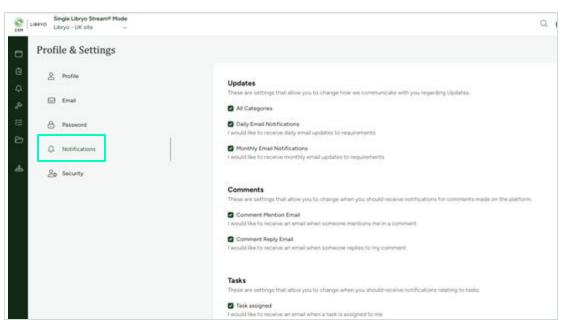
Settings

To change your preferences, click on your initials in the top right-hand corner of the screen and select **Profile & Settings** from the drop-down list that appears.

Under the **Profile** tab you can update your user information such as preferred **Language** and **Timezone.** Under the **Password** tab you can change your **Password**.
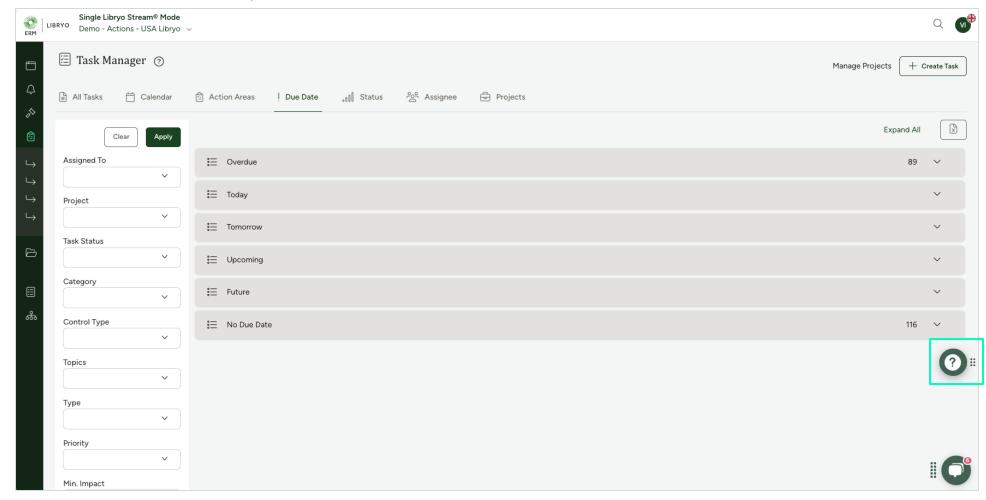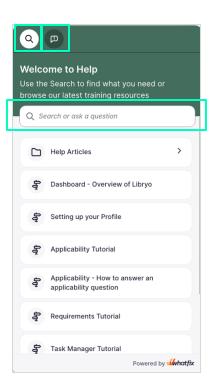

Under **Notifications**, you can also choose whether you want to receive Updates emails from all categories, or just selected categories. You can also set the frequency of notifications you wish to receive, such as daily or monthly.

In-App Training Tool

Click the **?** icon in the bottom-right corner of your screen at any time to open your in-app training assistant. Here you can use the Search bar to find what you need or browse our latest training resources. This tool is always available to users and the widget can be moved to wherever it's most convenient for you.
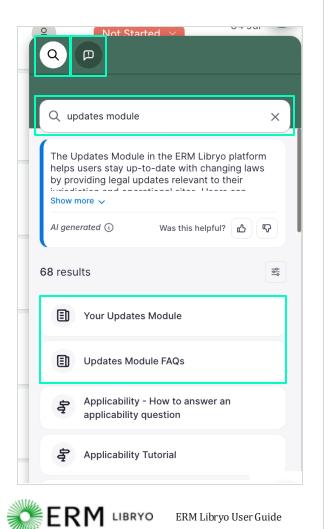

Click on the magnifying glass for platform guidance or click on the speech bubble to share **Feedback** and help us improve your experience.
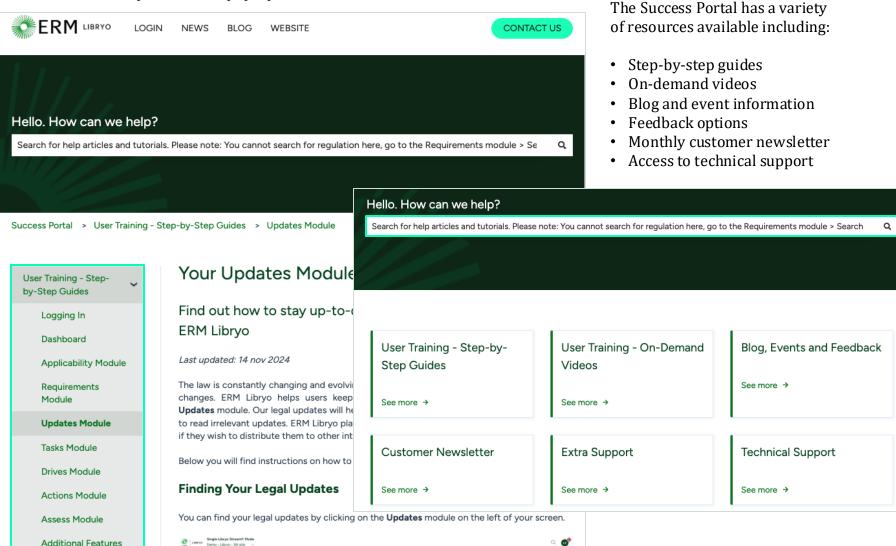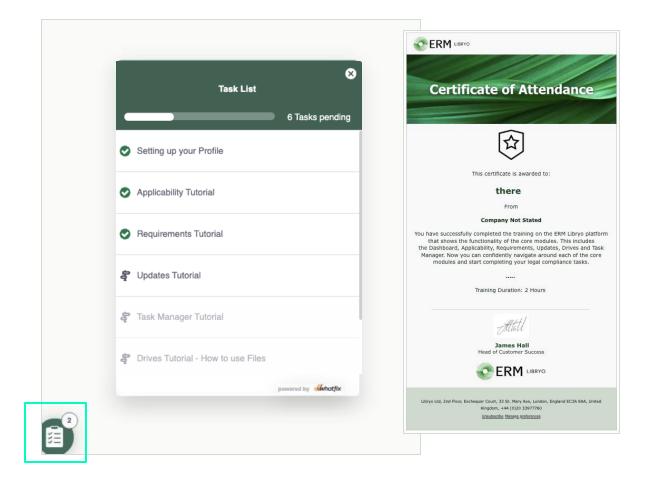
Success Portal

When you open the Help menu via the **?** icon, you can search for guidance articles by typing related keywords. A list of available resources will appear. The signpost symbols indicate in-app flows, whereas the document symbols mean step-by-step articles. Click on the article you want to view and the Success Portal will open in a new pop-up window.

The Success Portal has a variety of resources available including:

- Step-by-step guides
- On-demand videos
- Blog and event information
- Feedback options
- Monthly customer newsletter
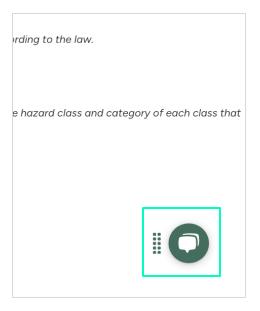- Access to technical support

Complete Your Task List & Get Certified

If you're a new user, you'll see a **Task List** pop up with some quick onboarding guides per module. By completing them, you will learn how to navigate the platform, get introduced to key features and be eligible to request your **Certificate of Attendance.**
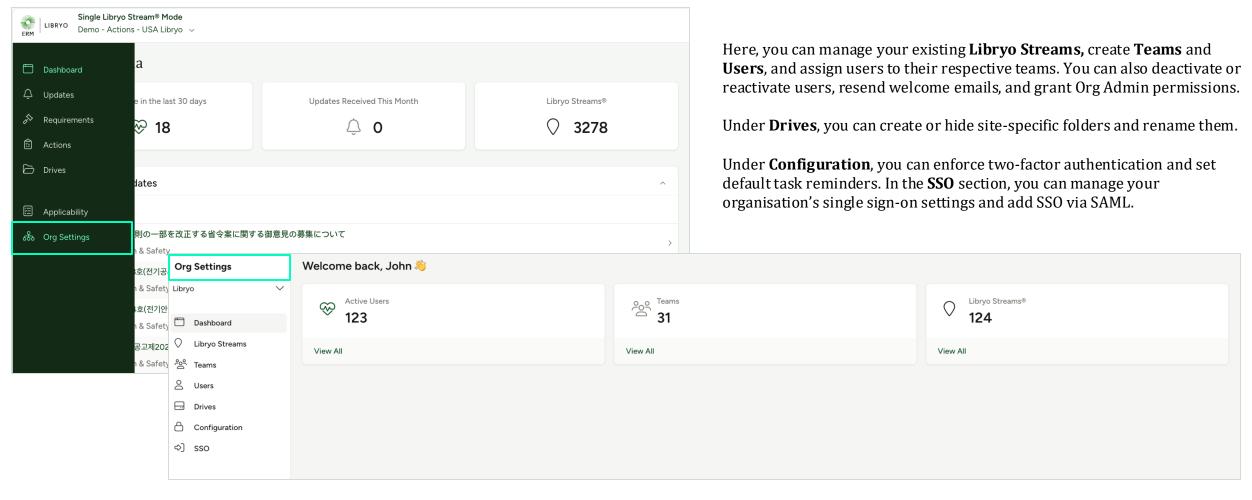

If you still need help, click the **chat icon** in the bottom-right corner to start a conversation with our support team. You can ask questions, and our team will get reply as soon as possible.

Admin Users Permissions

Org Settings

Admin users can access the **Org Settings** portal, which allows them to manage users directly. Key features include adding new users, removing existing users, reactivating deactivated users, and assigning users to specific teams configured during the onboarding phase.

Here, you can manage your existing **Libryo Streams,** create **Teams** and **Users**, and assign users to their respective teams. You can also deactivate or reactivate users, resend welcome emails, and grant Org Admin permissions.

Under **Drives**, you can create or hide site-specific folders and rename them.

Under **Configuration**, you can enforce two-factor authentication and set default task reminders. In the **SSO** section, you can manage your organisation's single sign-on settings and add SSO via SAML.
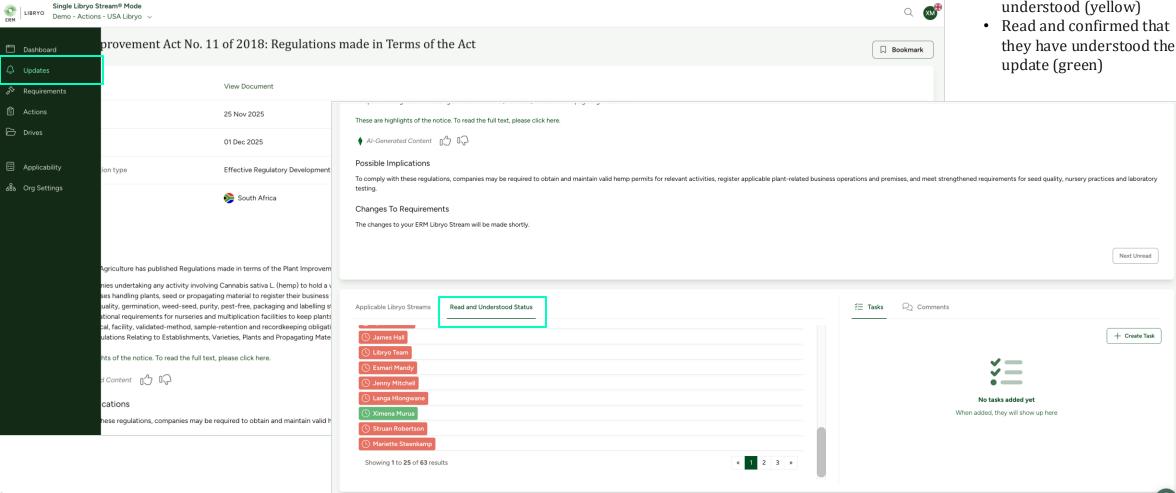
Admin Users Permissions

Updates Module

Admin users can check the status of each user's legal update notifications, per site.
Simply open an Update and scroll to the bottom of the page to the **Read and Understood Status** section.

Here, you can see if users have:
- Not read the update (red)
- Read but not marked as understood (yellow)
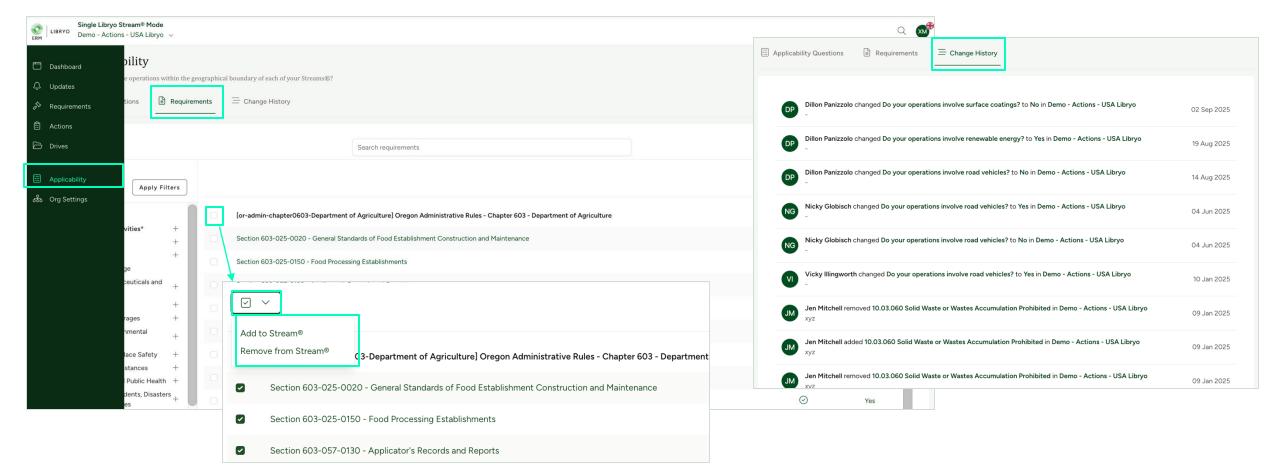- Read and confirmed that they have understood the update (green)

Admin Users Permissions

Advanced Applicability

Within the **Advanced Applicability** functionality, admin users have access to two additional tabs in the **Applicability** module: **Requirements** and **Change History**.
- The **Requirements** tab displays all the legal requirements included in your register. Here, you can remove any legislation you deem irrelevant or add legislation you consider relevant, based on recommendations from the Libryo team.
- The **Change History** tab provides a record of any changes made to the Applicability Questions for a specific site.

Thank you

Our aim is to help you make the most of your Libryo solution and we'd love to hear about your experiences using the email address below. For instant query resolution please use the Help function built into the platform. Alternatively, please email your Customer Success Manager.

UK

2nd Floor Exchequer Court
33 St Mary Axe, London, UK
EC3A 8AA
Email: libryo@erm.com
Phone: +44 (0)20 3206 5200

South Africa

The Great Westerford, 2nd Floor
240 Main Road
Rondebosch, Cape Town, 7700
Email: libryo@erm.com
Phone: +27 (0)21 681 5400