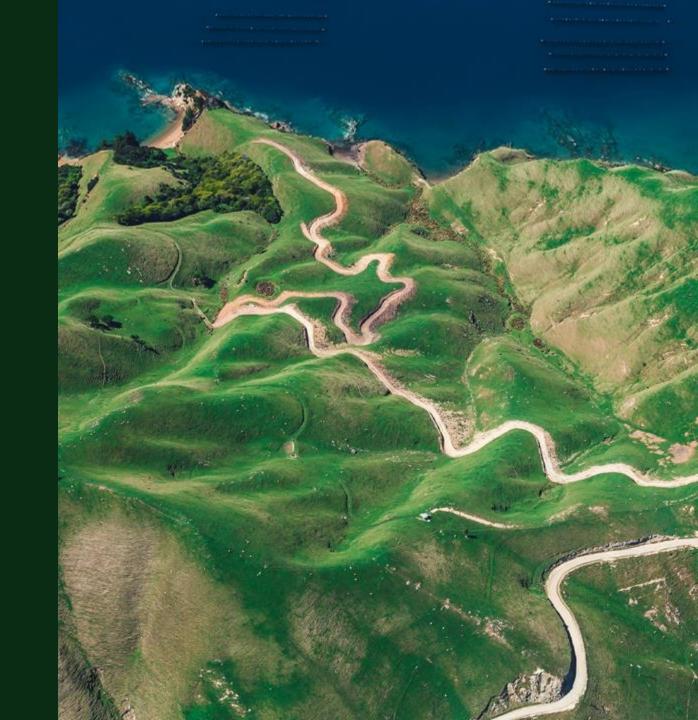


CUSTOMER SUCCESS

ERM Libryo User Guide

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



Sustainability is our business

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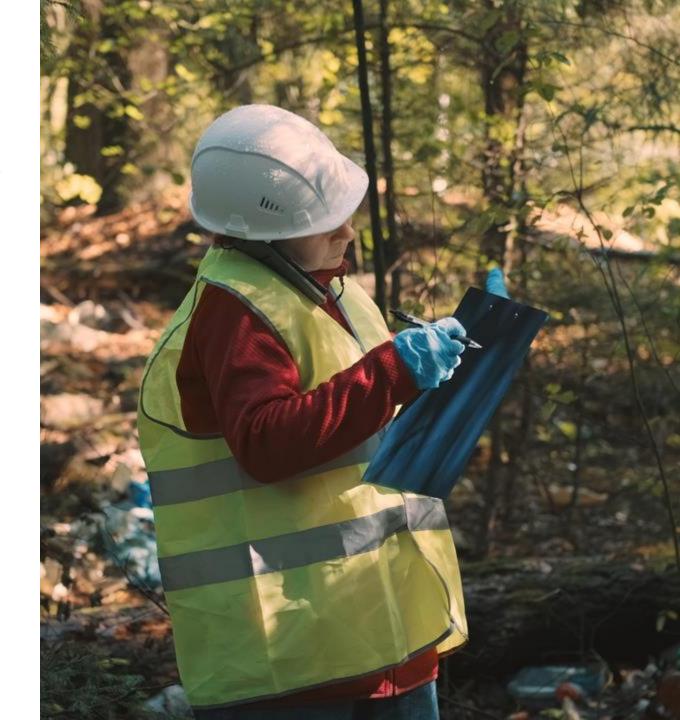


Who can use ERM Libryo?

Risk, Compliance, EHS, Sustainability and anybody else who is dealing with the law will find ERM Libryo's features helpful and more efficient.

Some of the benefits you can expect from using ERM Libryo:

- Enabling operational and legal risk to be managed in an integrated manner.
- The most time efficient way to know which regulations apply to your different operations, keep track of legal changes and understand the implications to your business.
- Easy integration with GRC solutions and management systems.
- Complete legal research much faster, so that you can address other tasks that require your skills.



Login and dashboard

Login

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

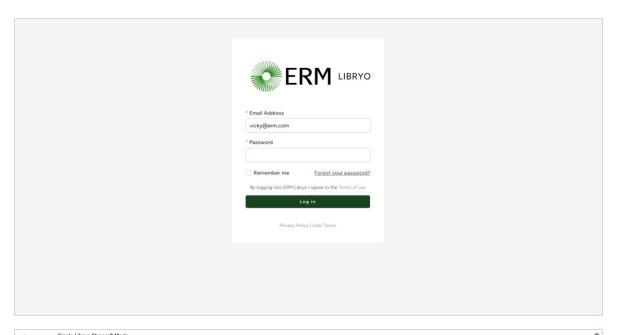
If you have lost or forgotten your password, click on <u>Help, I forgot my login details</u> and then you will be able to reset it.

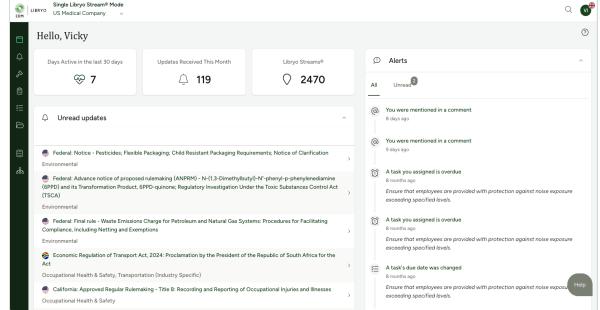
Your dashboard

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.

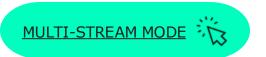






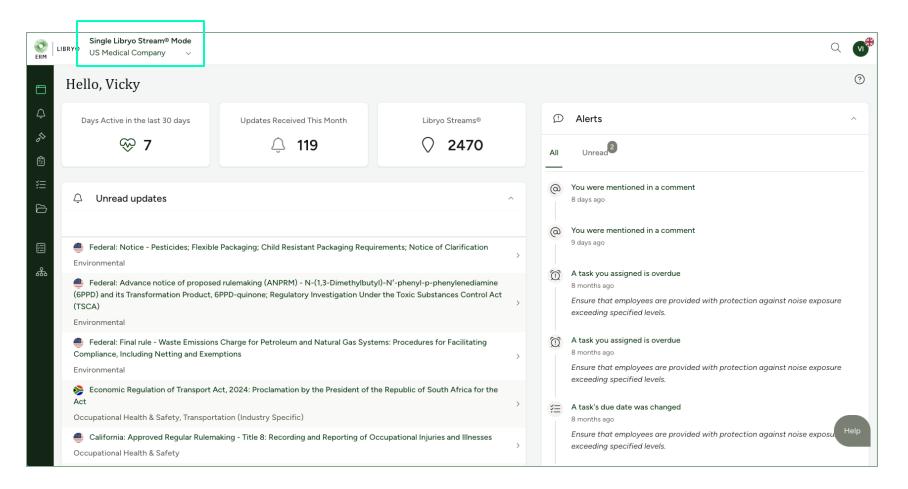


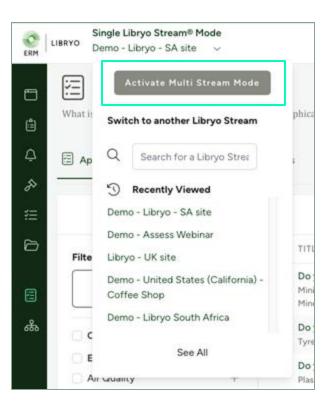
Multi-Stream Mode



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

The function can be enabled and disabled in your **Dashboard** in the top left corner of your screen.

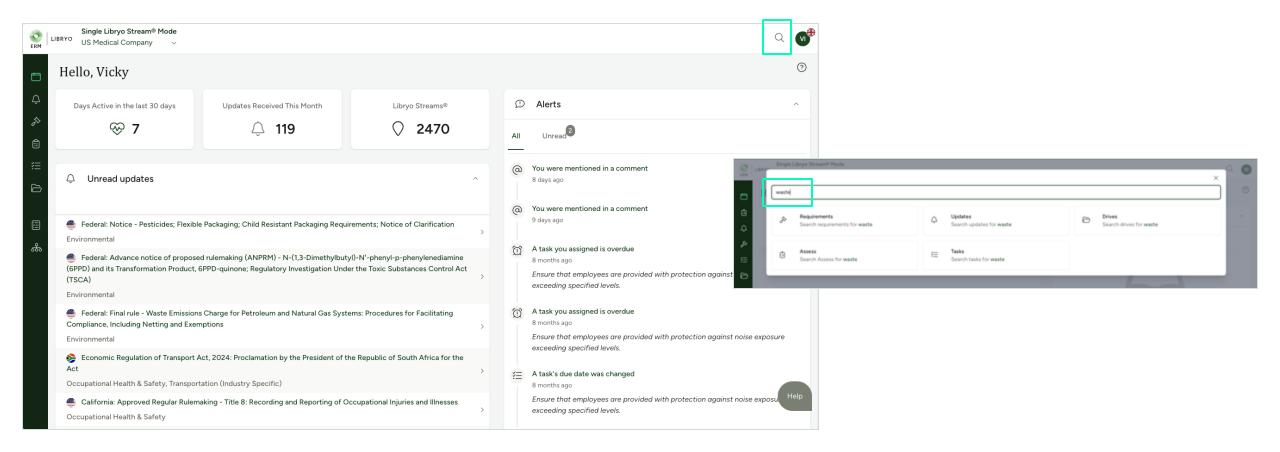




Global Search

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.

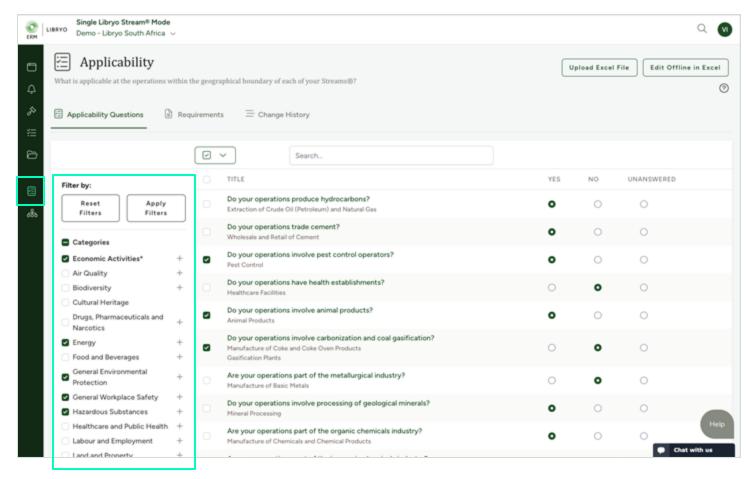


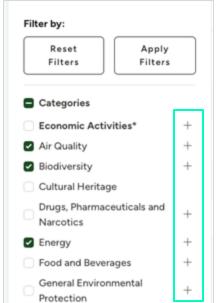


APPLICABILITY MODULE

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 of 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 +.

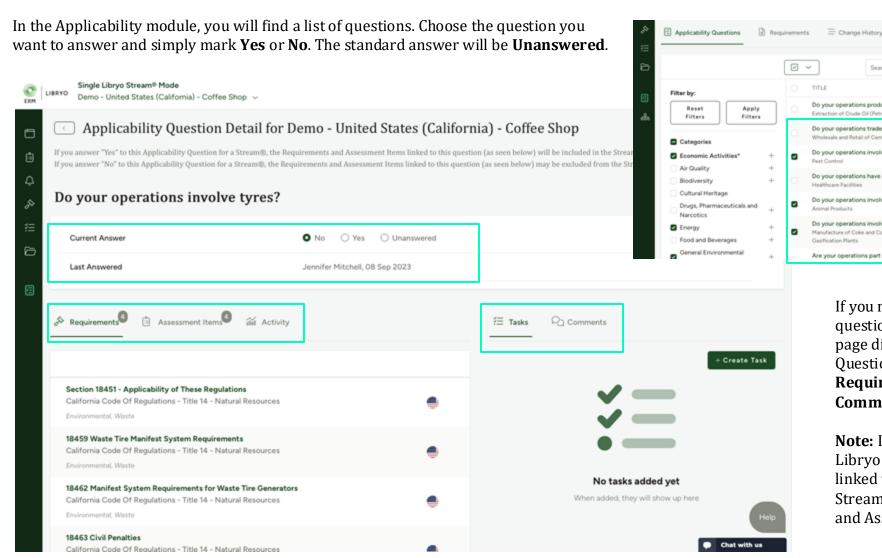
Then click on **Apply Filters** to display the applicability Questions that match your selection.

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



UNANSWERED

Yes, no, unanswered questions



If you require more information about a particular question, click on the question itself. This will open a new page displaying more details about the Applicability Question including Current Answer, Last Answered, Requirements, Assessment Items, Activities, Tasks and Comments.

Search...

Do your operations produce hydrocarbons'

Do your operations trade cement? Wholesale and Retail of Cement.

Healthcare Facilities

Gasification Plants

Extraction of Crude Oil (Petroleum) and Natural Gar

Do your operations involve pest control operators?

Do your operations involve carbonization and coal gasification

Are your operations part of the metallurgical industry?

Do your operations have health establishments:

Do your operations involve animal products?

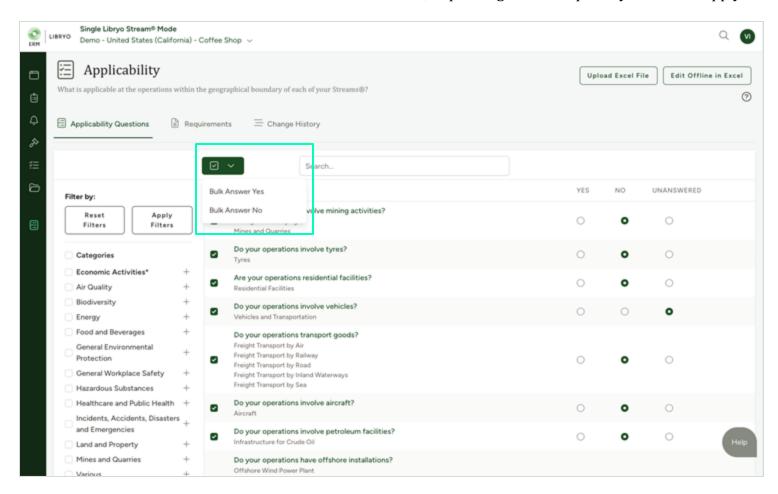
Manufacture of Coke and Coke Oven Products

Note: If you answer **Yes** to an Applicability Question for a Libryo Stream, the Requirements and Assessment Items linked to that question will be included in the Libryo Stream. Conversely, if you answer **No**, the Requirements and Assessment Items may be excluded.

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.



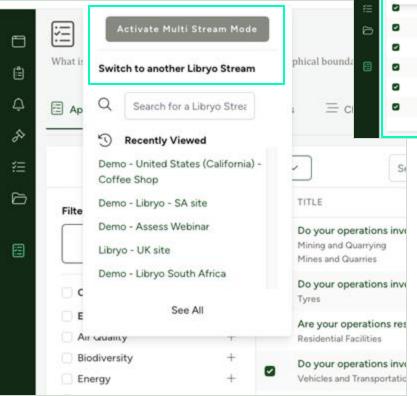
To apply the same answer across all your organization's streams, access the main menu of the Applicability module. Mark the checkbox beside each question you want to answer. Click on the down arrow at the top left corner of the list of questions and select **Bulk Answer Yes** or **Bulk Answer No** from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



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.





Search.

Multi Libryo Stream® Mode All Libryo Free Trial ∨

⊘ ∨

Do your operations involve ships?

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.

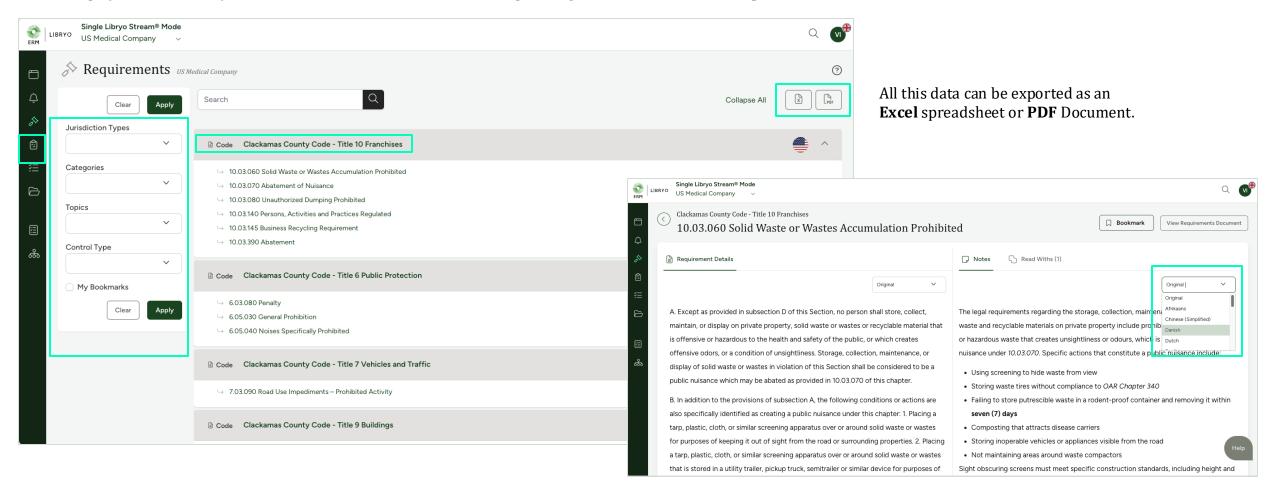
Click on the down arrow at the top left corner of the list of streams and choose **Answer** as **Yes** or **Answer** as **No** from the drop-down menu.

All selected streams will be answered with the chosen option.



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**.



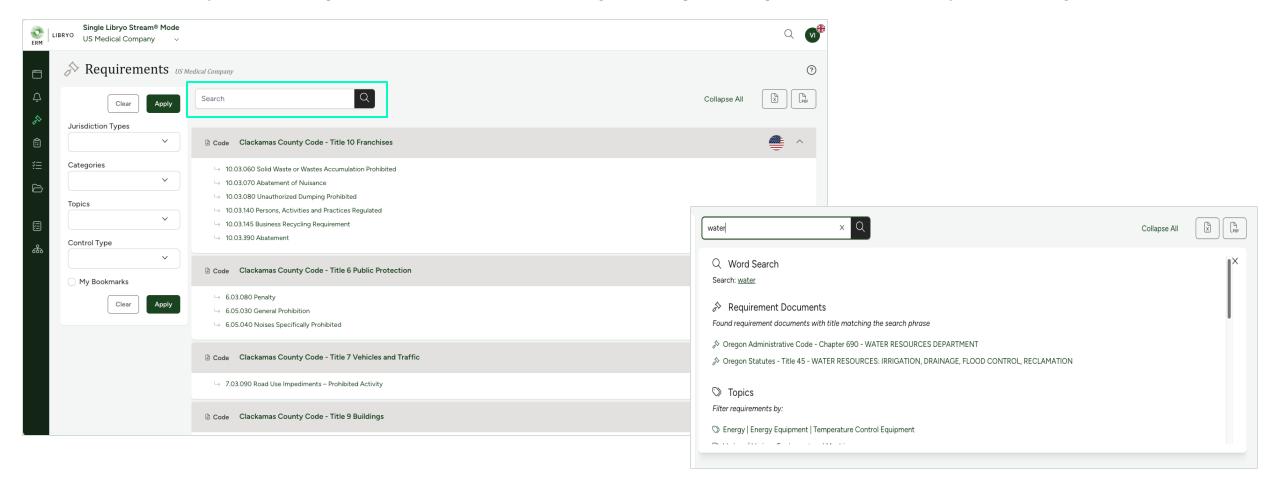




Searching your requirements

To search your requirements, simply start typing what you require in the search bar.

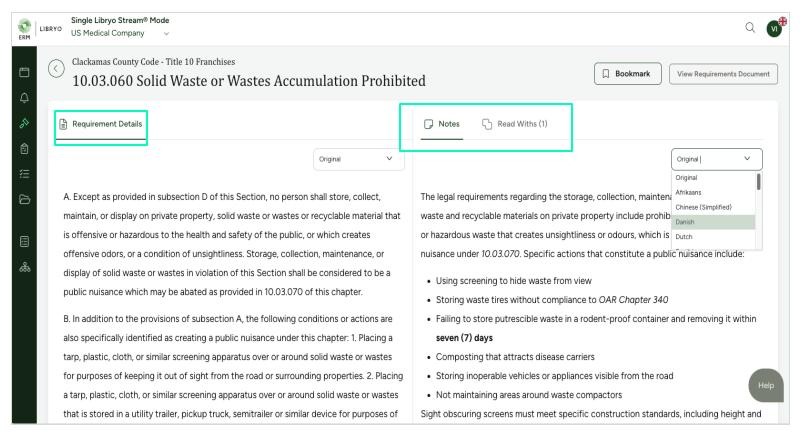
You can find results for a keyword search, requirement documents with title matching the search phrase or topics related with the word you are searching for.



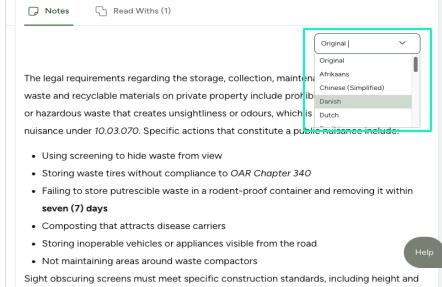


Understanding a specific section

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 summarised version in plain language of the section. **Read Withs** show related citations, including consequences, amendments, and general information. When applied, the applicable **Consequences** in case the requirement is not complied with.



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

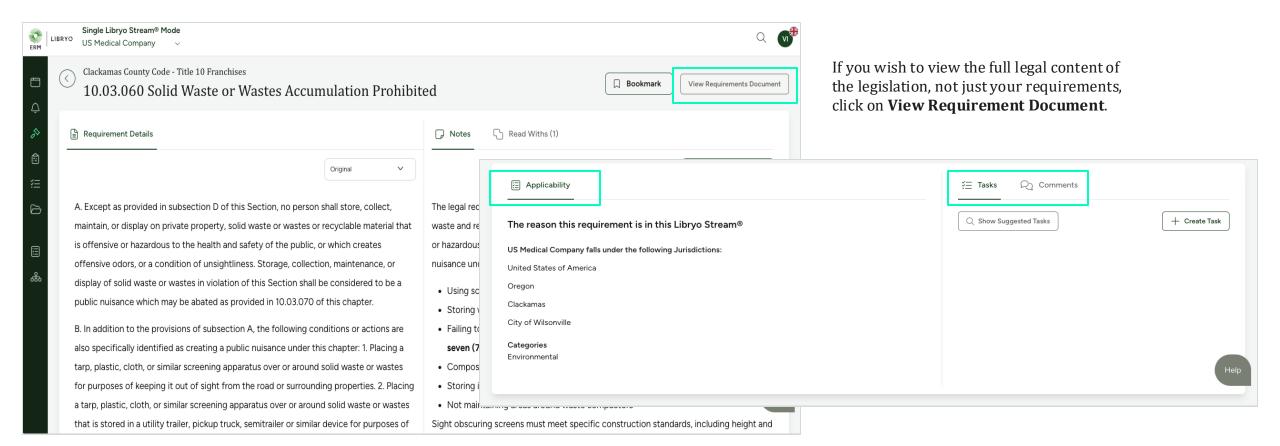




REQUIREMENTS MODULE

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.



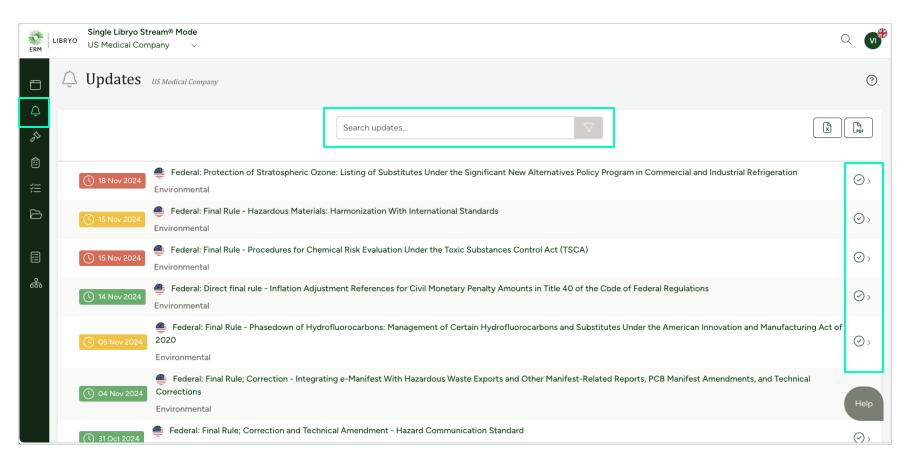


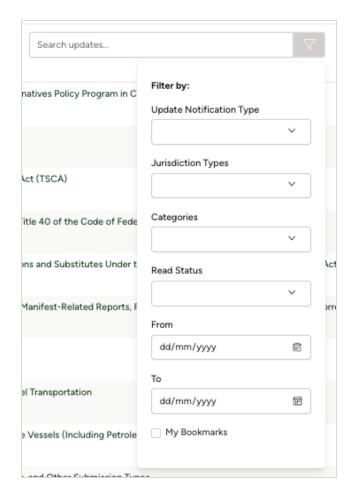


Searching Legal Updates

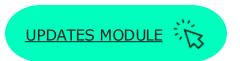
You can find your legal updates by clicking on the **Updates** module on the left of your screen.

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.





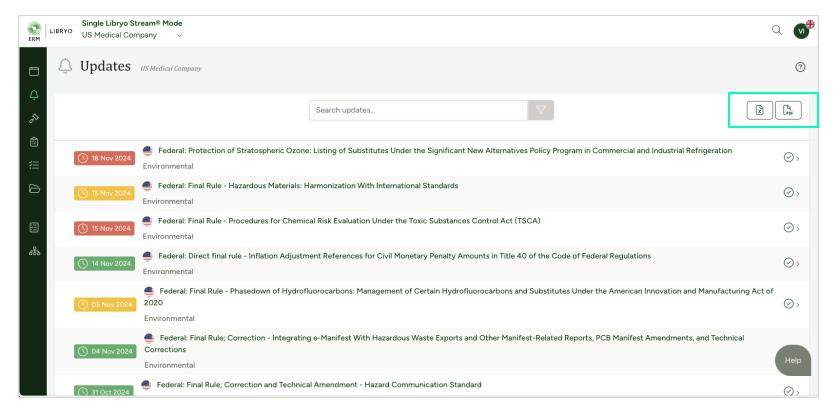


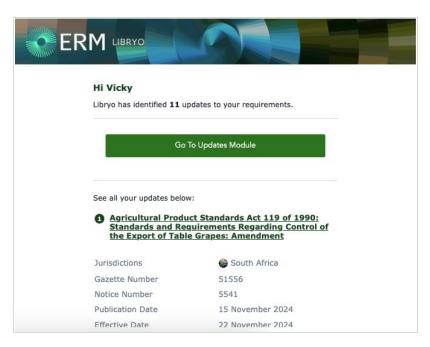


Legal Update Notifications

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.

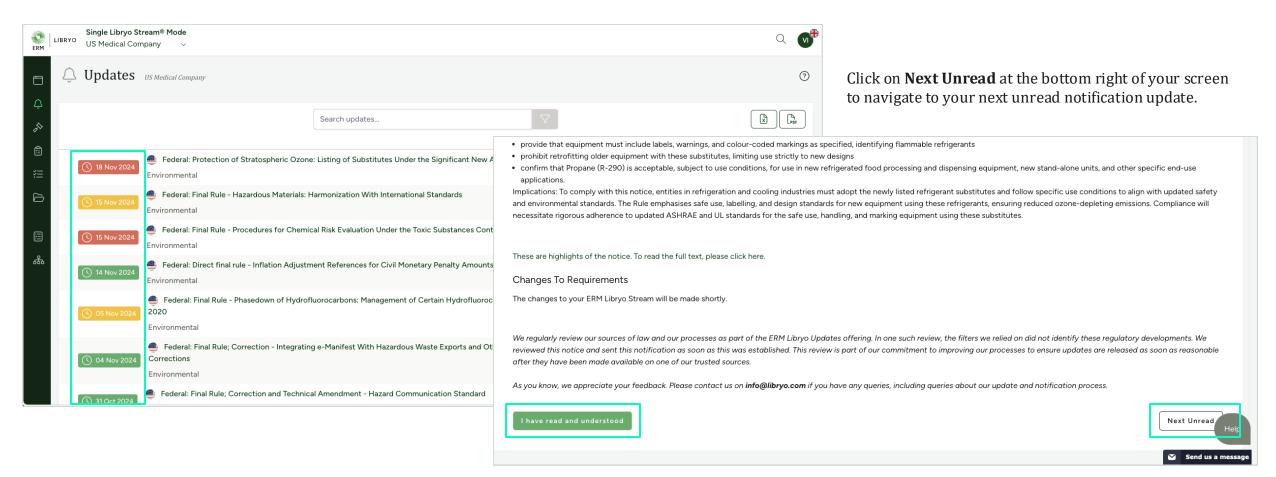
Click on the links in the email to view the full notification in my.libryo.





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.

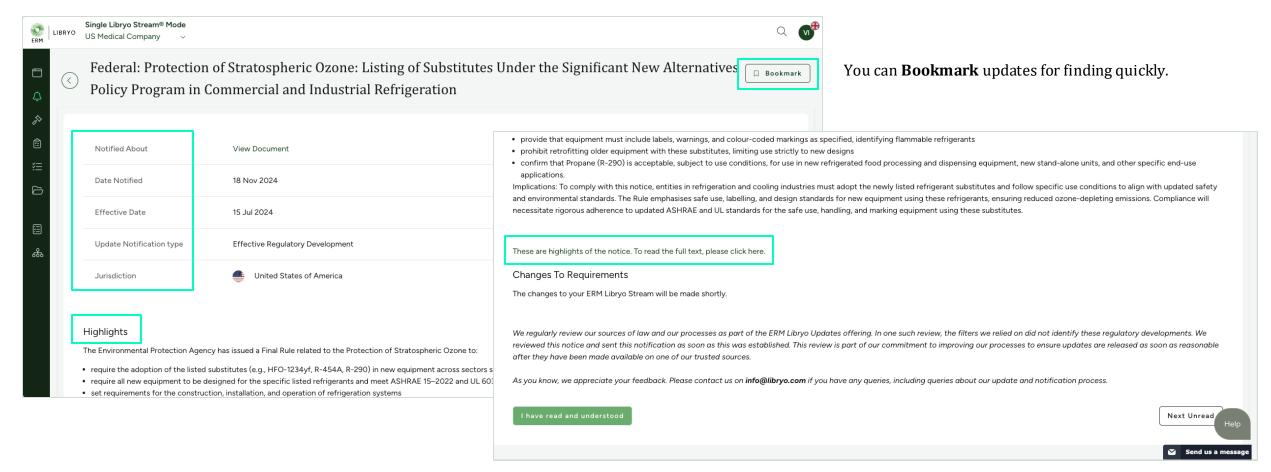




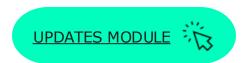


Highlights and Read the Full Text

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.

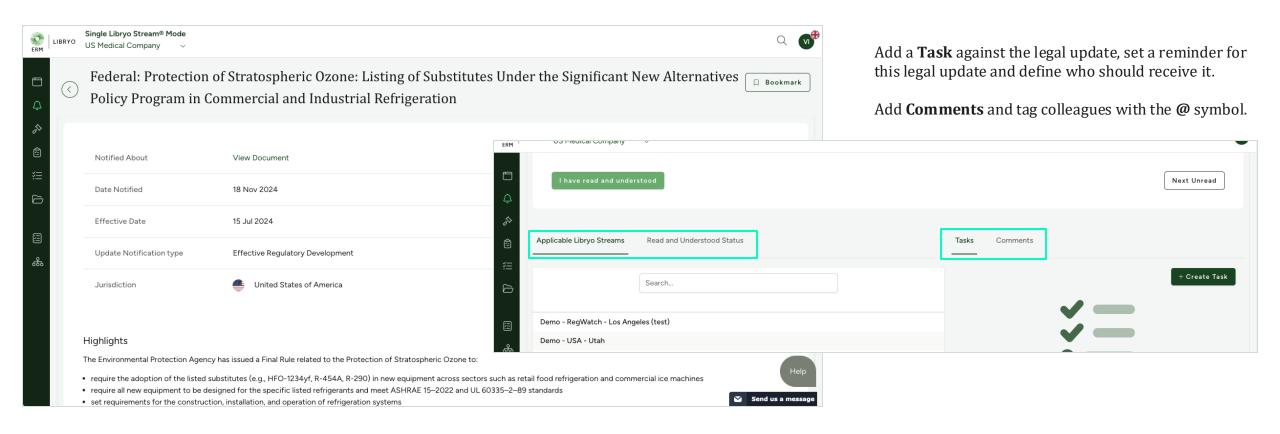






Applicable Streams, Tasks and Comments

If you scroll to the bottom of the Update you will see **Applicable Libryo Streams**. Here you can see all the sites the legal update applies to. You can also check the reading status of each member of your team with **Read and Understood Status**.



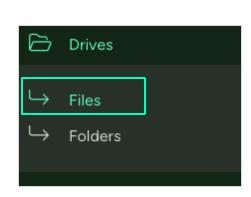


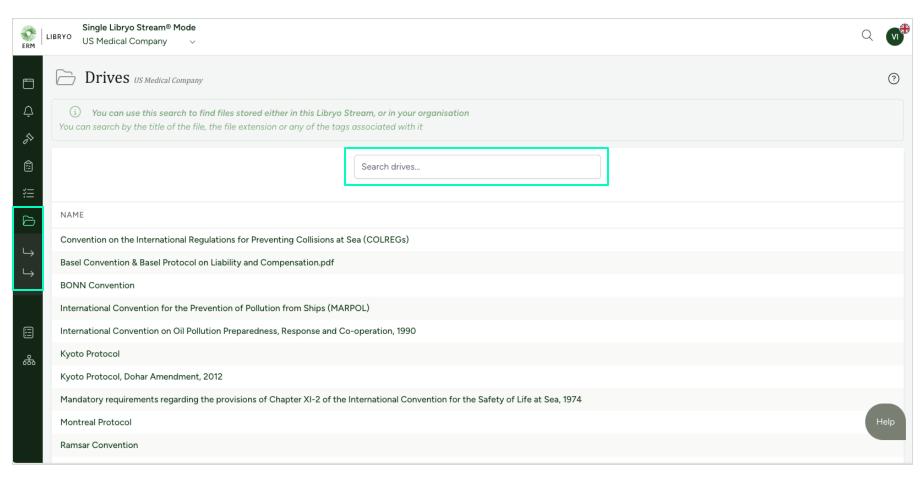


Files

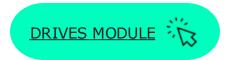
When you click on **Files** under your **Drives**, the platform opens a list of files which contain the documents relating to the law such as government gazettes, notices and schedules, codes of practice, guidelines, policies, protocols; and your Libryo specific content.

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



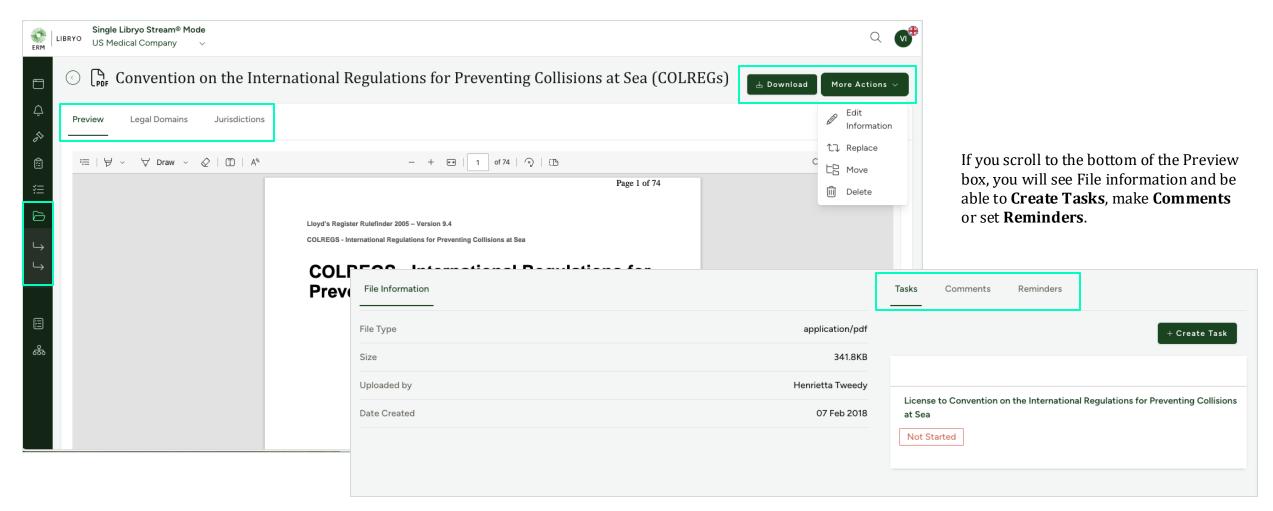






Files

When you click on a file, you can **Preview** the full document. You can also view the related **Legal Domains** and **Jurisdictions**. On the right-hand side you can **Download** the file as a PDF or take **More Actions**.







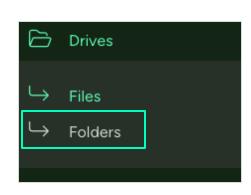
Folders

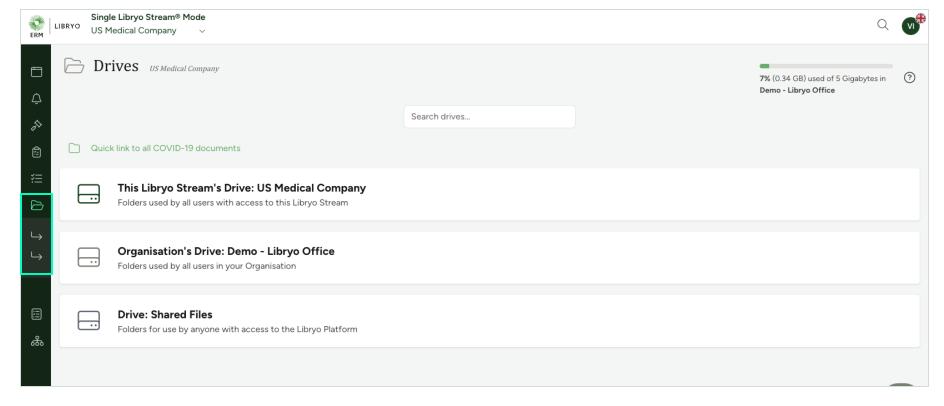
When you click on **Folders** under your **Drives**, the platform opens a library of folders split into three categories to keep your documents properly structured.

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.



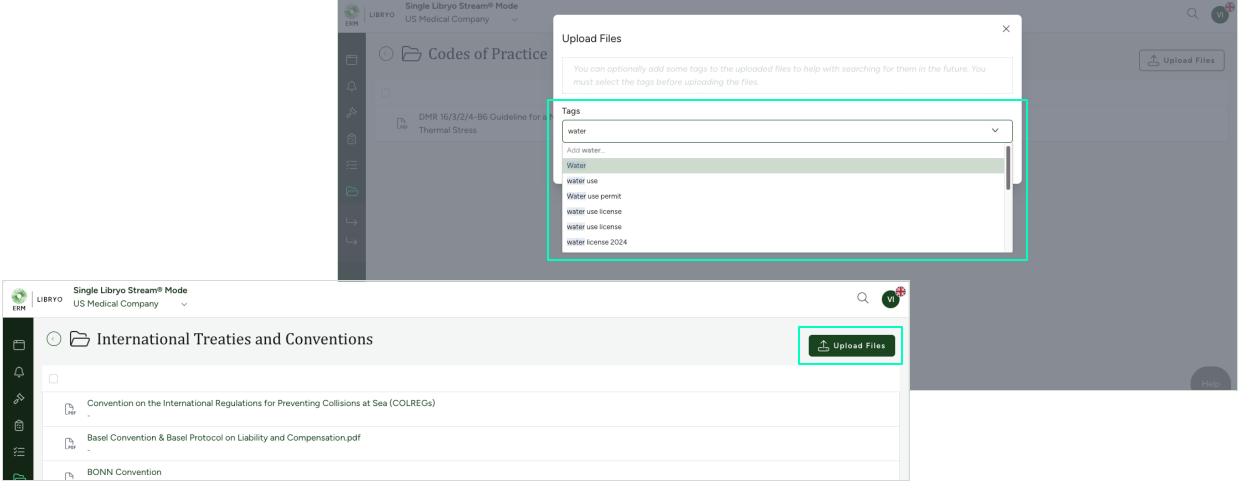






Upload a File

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

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.

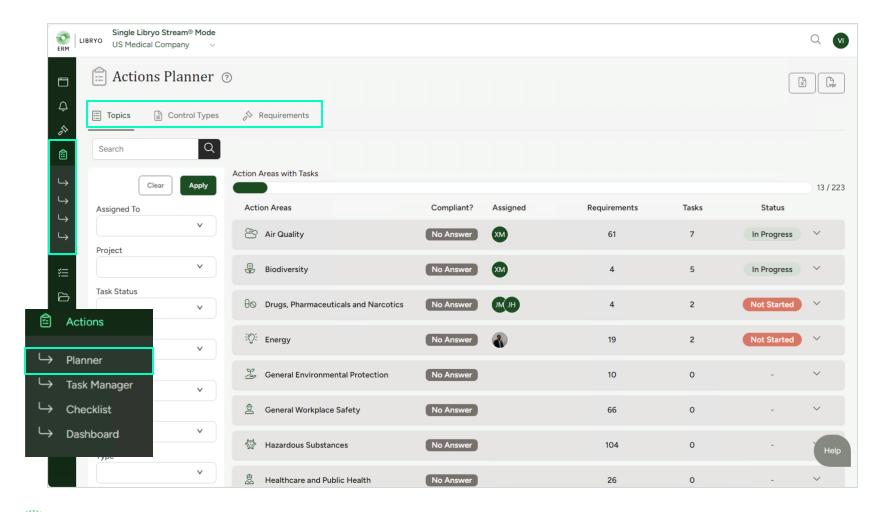




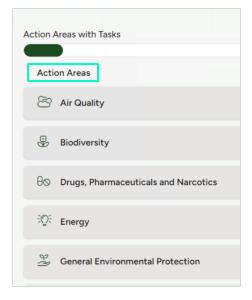
25

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.



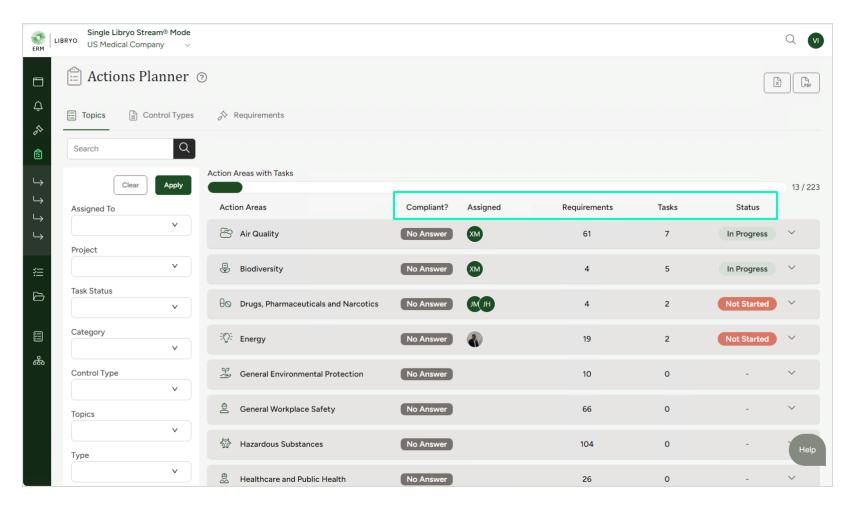




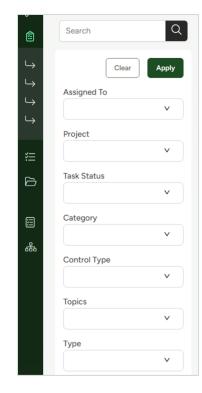
26

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 dropdown menu.

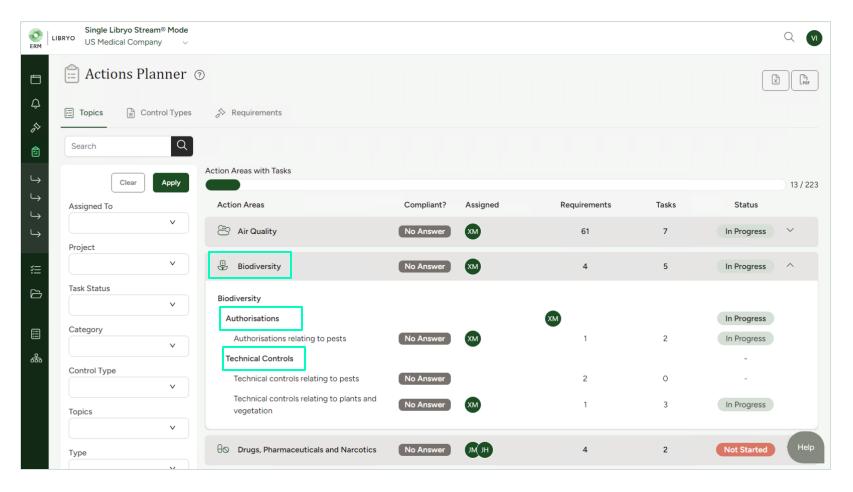






Actions Planner - View ordered by Topics

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.

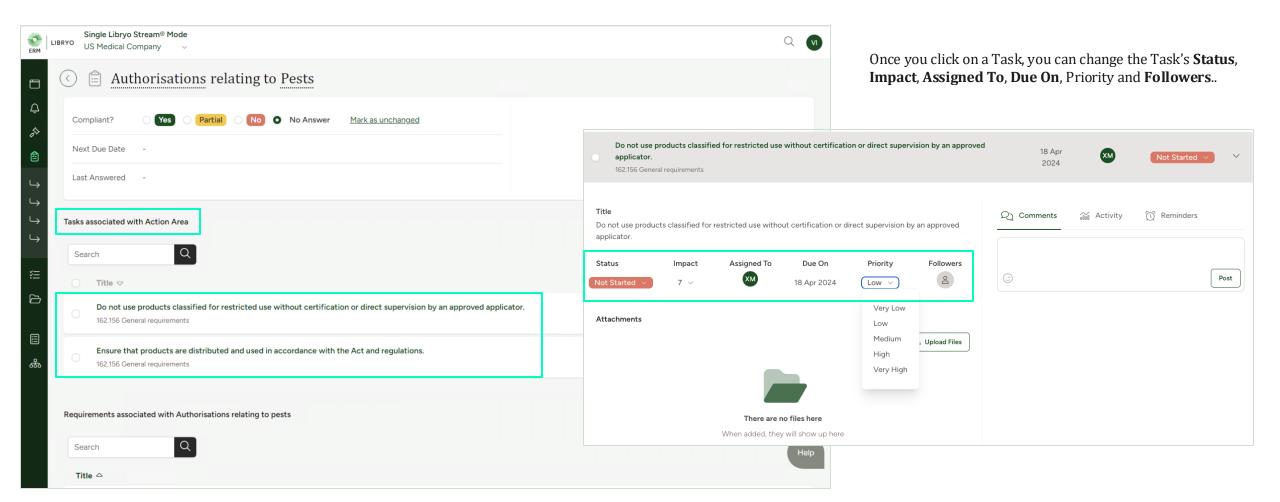






Actions Planner - View ordered by Topics

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

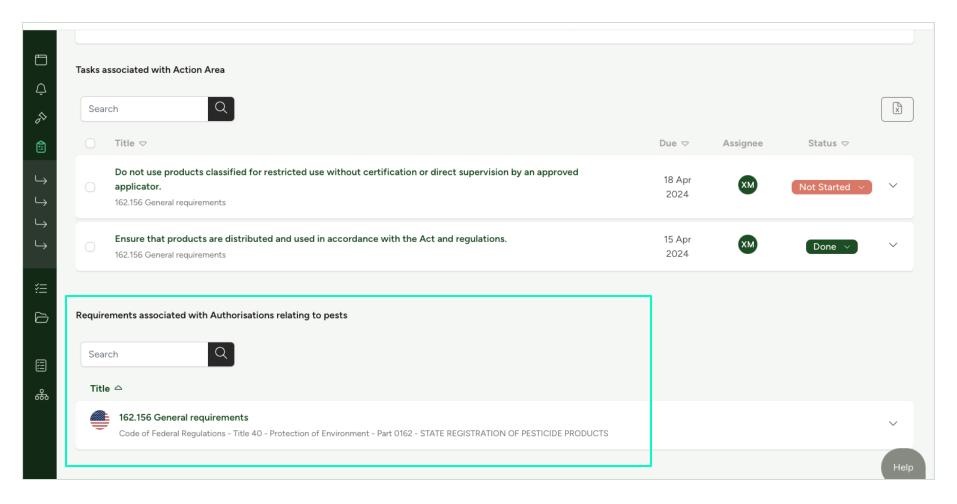






Actions Planner

Under each specific **Action Area**, you can see the associated **Requirements**. Click on a specific Requirement to view its details.

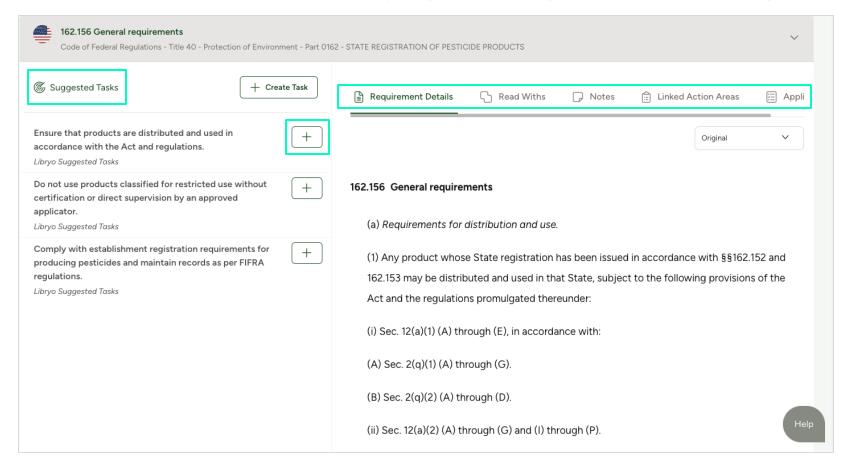






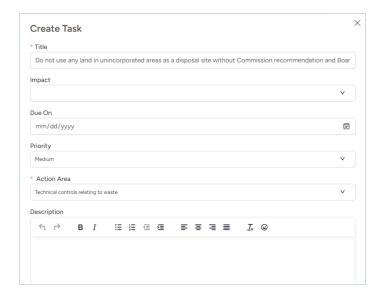
Actions Planner

On the right side, you can view the **Requirements Details**, **Notes** for that Requirement, and **Read Withs**. On the left side, under **Suggested Tasks**, you can view all the Tasks that the Libryo AI suggests may be necessary for you to create against that particular Requirement in order to comply with it. <u>Please note:</u> these are suggestions, they may not all comprehensive nor all necessary. Please be diligent to add the Tasks you deem necessary to manage compliance at your company, and treat suggestions as one opinion.



You 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**.

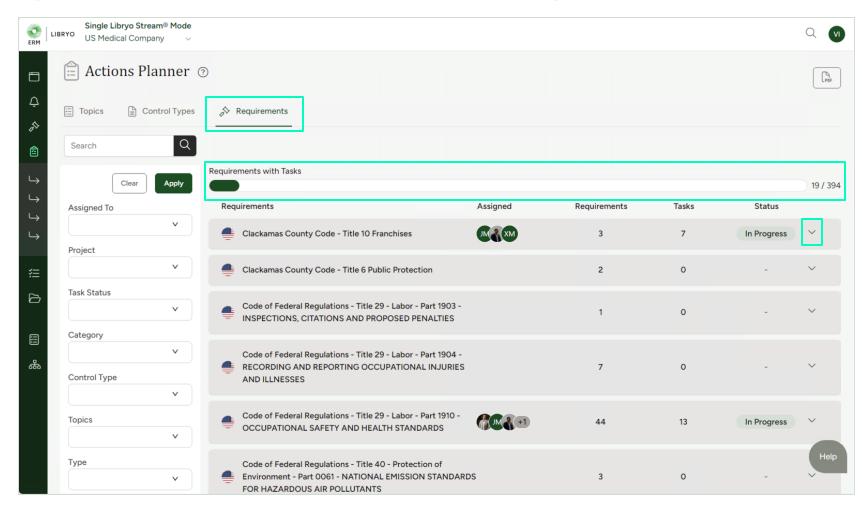
30



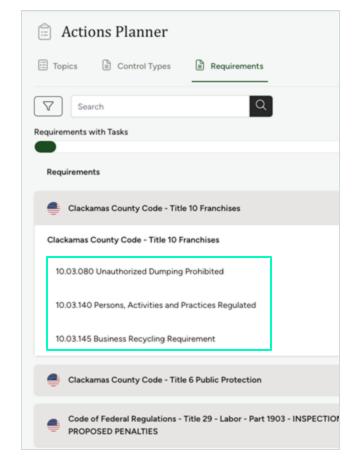


Actions Planner - View ordered by Requirements

In this viewing mode, the Actions are ordered by Requirements. On the bar above the Requirements, you can view the number of Requirements for which Tasks have been created in relation to the total number of Requirements in your Libryo Stream®.



Clicking on a specific Requirement allows you to see the Requirement Details (citations and text).

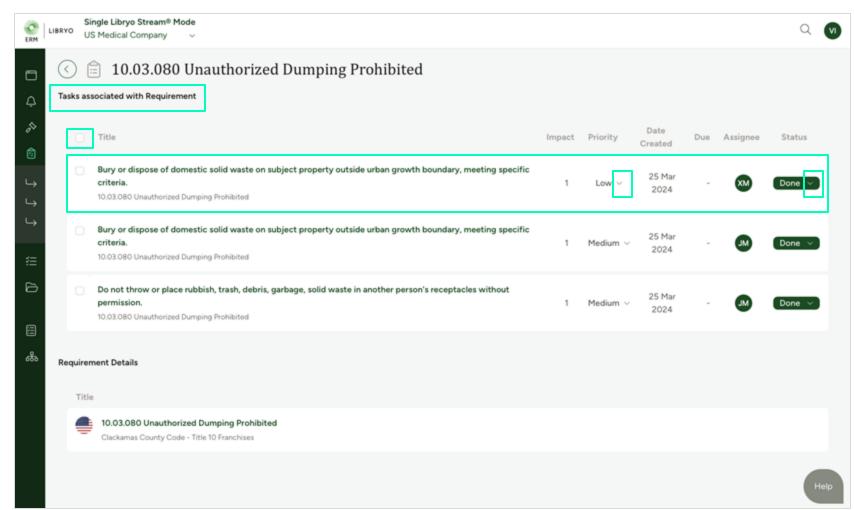




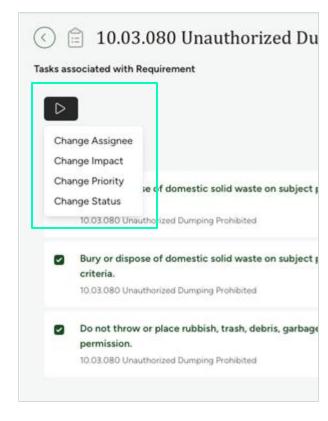


Actions Planner - Requirements

Once you click on the Requirement Details (citations and text), you can view the Tasks associated with that Requirement. You can edit the Task's details by clicking on a specific **Task**. The **Priority** and **Status** can be changed by clicking on the arrows.



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

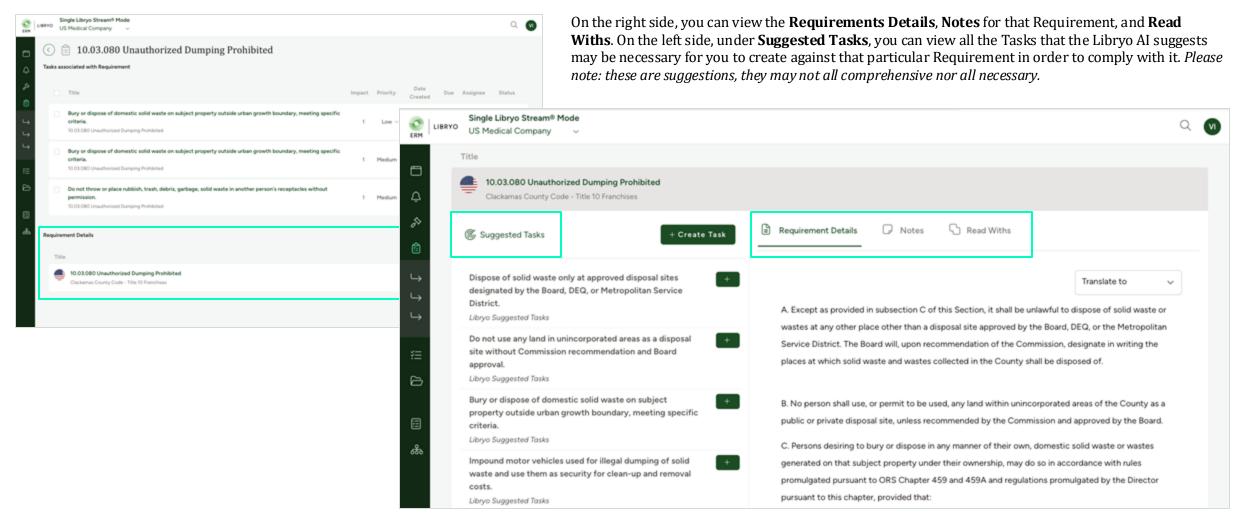






Actions Planner - Requirements

Below, you will see the details of the Requirement by clicking on it.

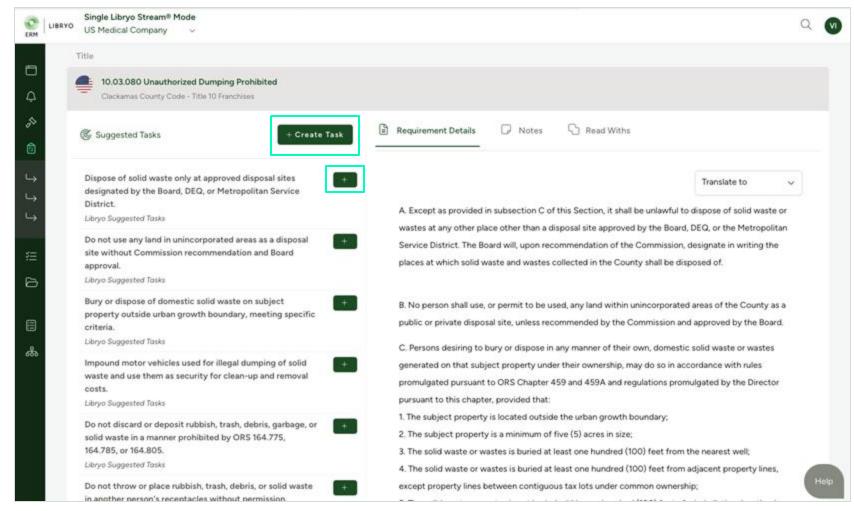




ACTIONS MODULE

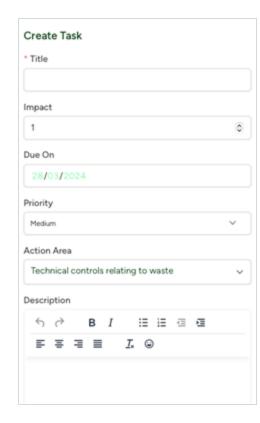
Actions Planner - Requirements

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**.



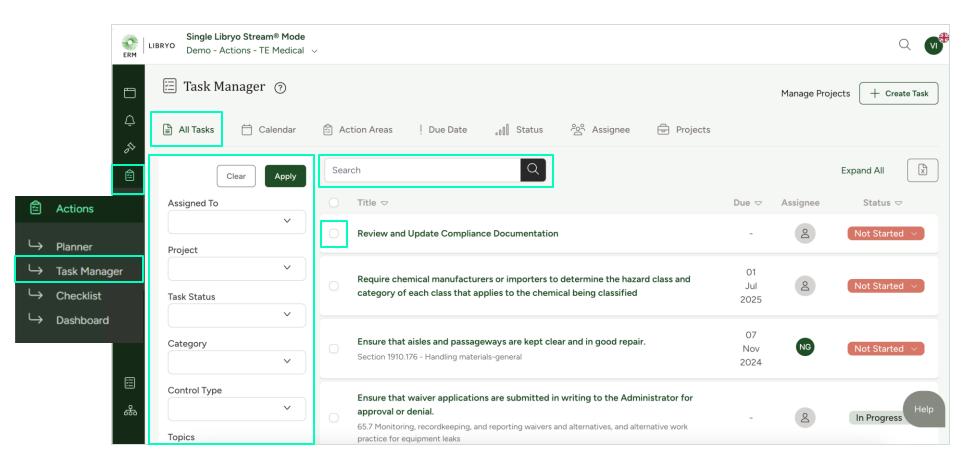


Actions module | Task Manager

ACTIONS MODULE

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**, **Due Date**, **Assignee**, and **Status**.

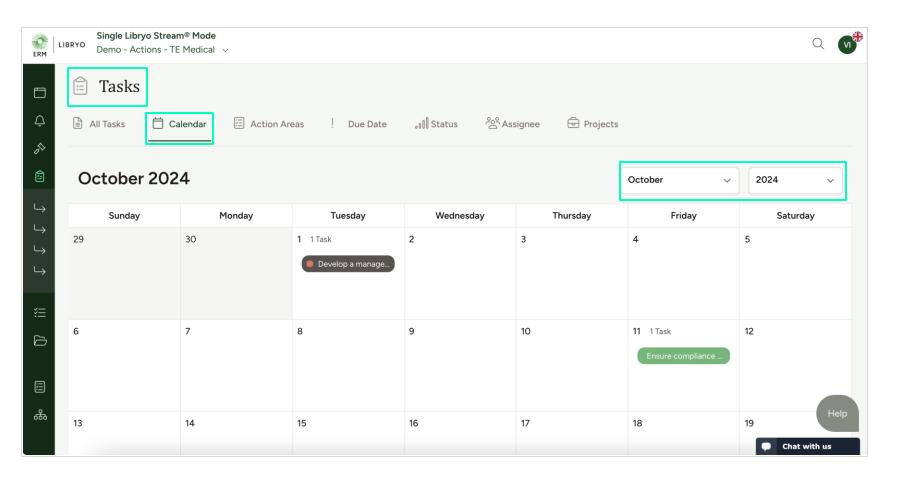
You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on to choose the item you wish to change from the dropdown list.

Actions module | Task Manager

ACTIONS MODULE

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.

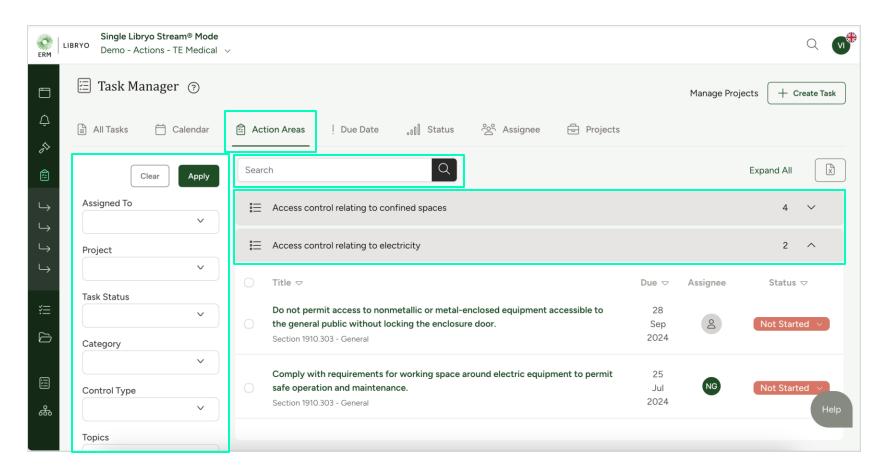




Task Manager - Action Areas

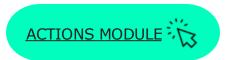
Please Note: The Action Areas view is only available to users subscribed to the Actions module.

In the Action Areas view, you can see all Tasks grouped by **Action Area**. These are categorized according to the areas outlined in the <u>Actions Planner</u>.



On the left, you can use filters to refine your Task search results, and next to them, you'll find the **Search** function.

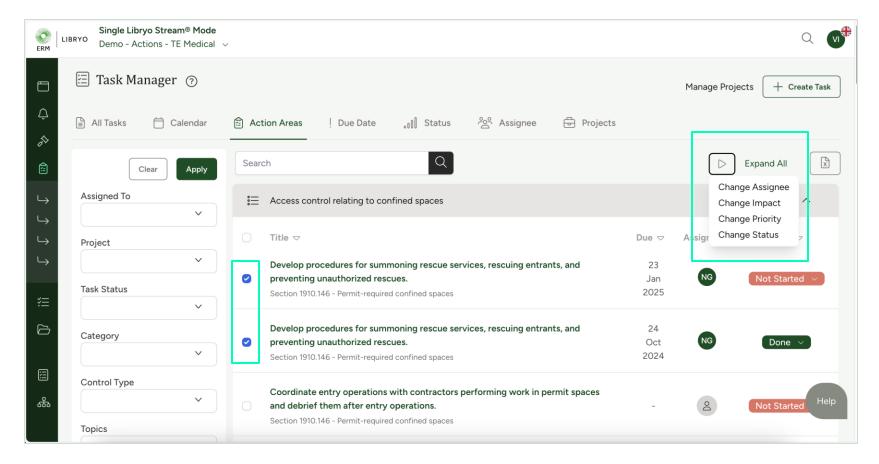




Task Manager - Action Areas

Please Note: The Action Areas view is only available to users subscribed to the Actions module.

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.

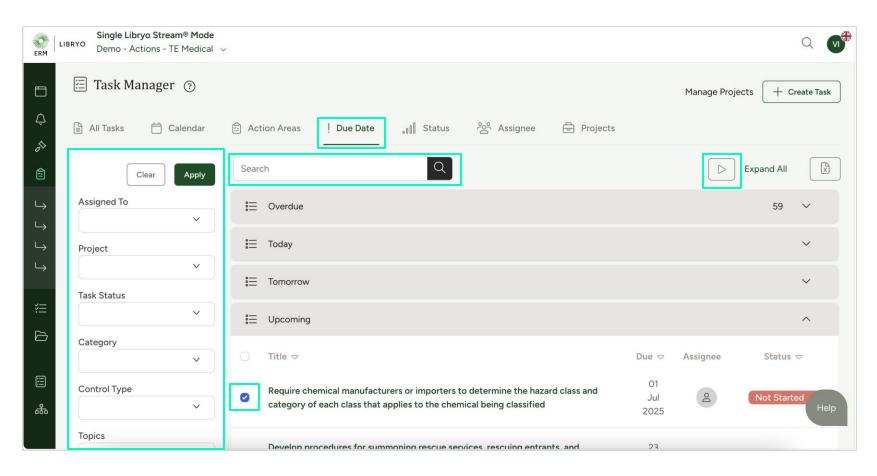




ACTIONS MODULE

Task Manager - 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, and next to them, you'll find the **Search** function.

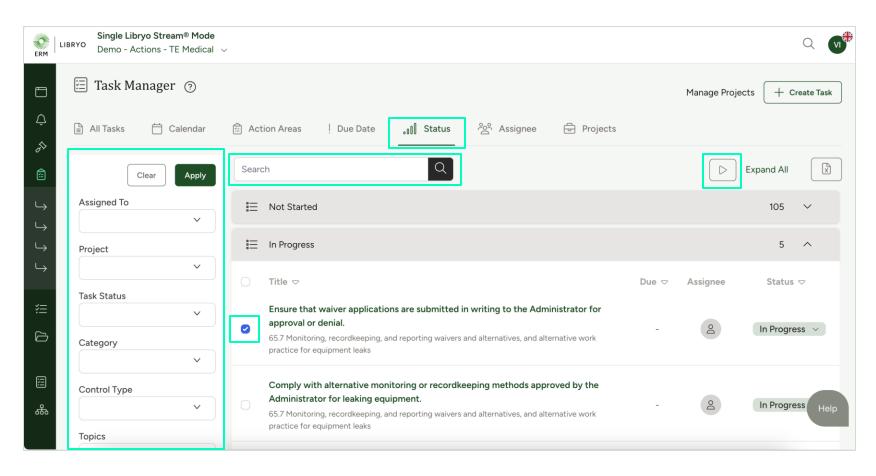
You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on the arrow button to choose the item you wish to change from the dropdown list.

ACTIONS MODULE

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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**.



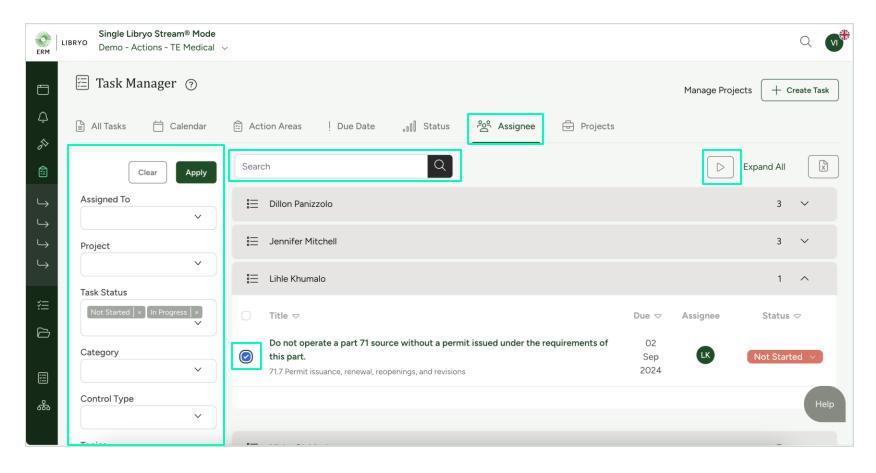
On the left, you can use filters to refine your Task search results, and next to them, you'll find the **Search** function.

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 - Assignee 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, and next to them, you'll find the **Search** function.

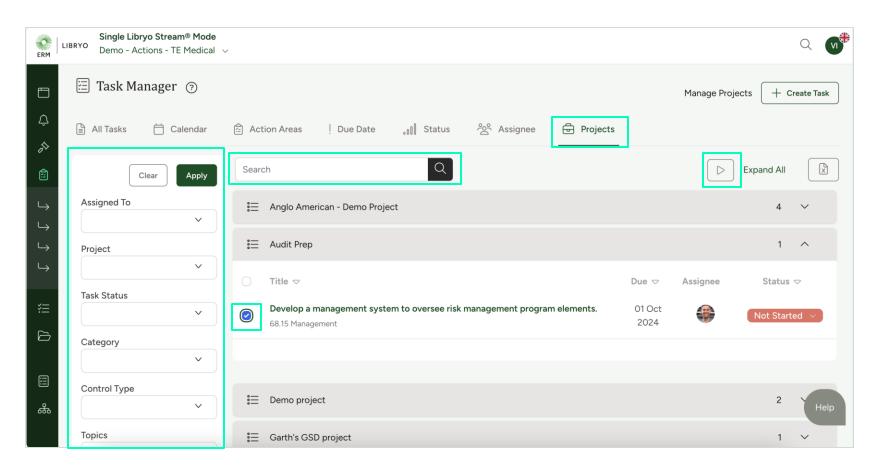
You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on the arrow button to choose the item you wish to change from the dropdown list.

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ACTIONS MODULE

Task Manager - Projects 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**.



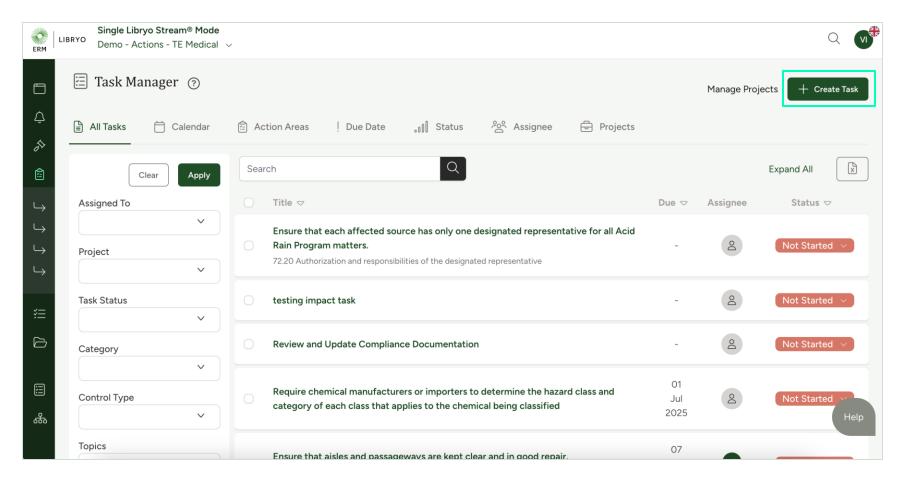
On the left, you can use filters to refine your Task search results, and next to them, you'll find the **Search** function.

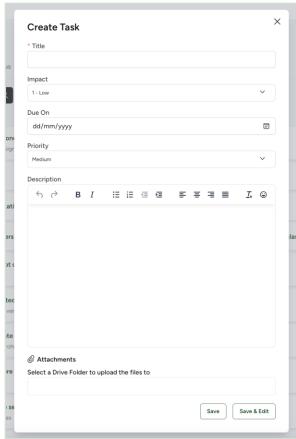
You can make bulk changes to the **Assignee**, **Impact**, **Priority**, or **Status** of Tasks by using the checkbox next to any Task to select it, and then by clicking on the arrow button to choose the item you wish to change from the dropdown list.



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.

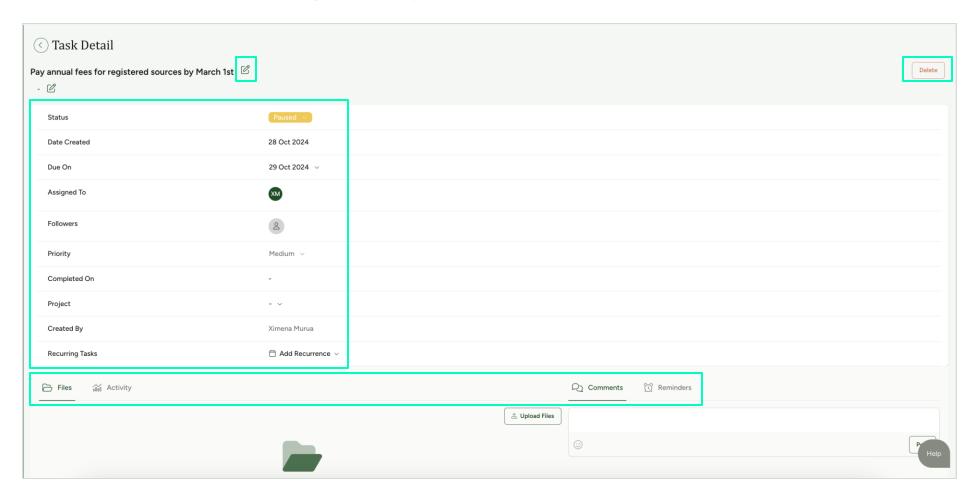




ACTIONS MODULE

Task Manager - 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.



Here, you can also manage the task details: modify the task's **Status**, view the **Date Created**, update the date when the task is **Due On**, select an **Assignee**, add **Followers**, set a **Priority**, add the date the Task was **Completed On**, link it to a **Project**, review the **Action Area** and related **Requirement**, see who the task was **Created By**, copy the task to all sites with the related requirement in **Task Instances**, and set a recurrence frequency for **Recurring Tasks**.

Below this you can add related **Files**, track **Activity**, make **Comments** and set **Reminders**.

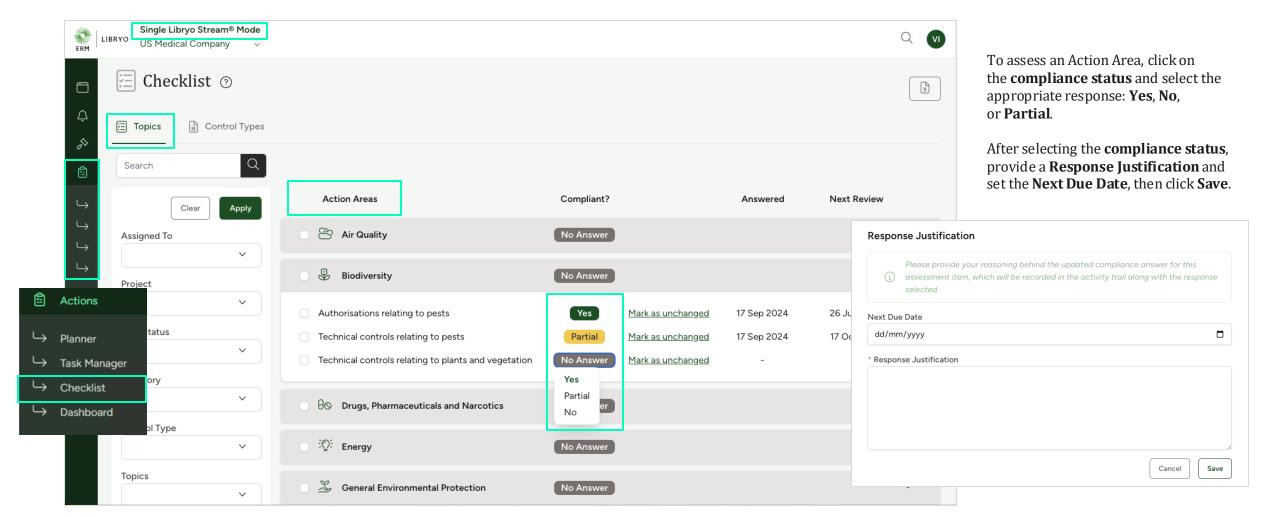
To delete a task, click on **Delete** at the top-right of the screen.





Checklist

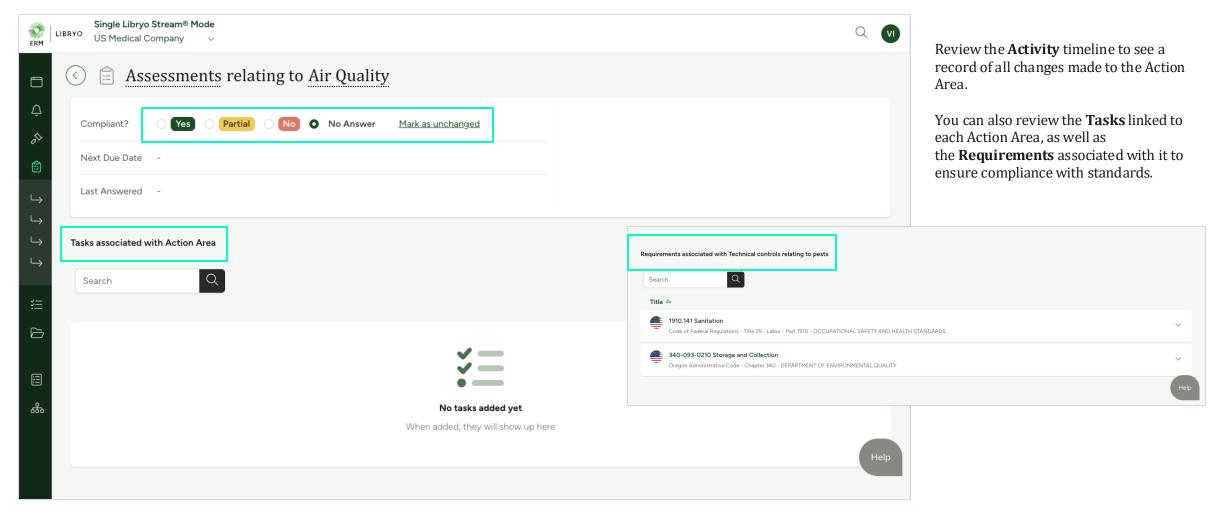
The Checklist section in the Actions module allows you to assess, check and update the compliance status of Action Areas. You have the option to view Action Areas by **Topics** or **Control Types**. Each Action Area shows key information such as the **compliance status**, the date it was **last answered**,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





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 and when. You can add comments and tag colleagues, who will be notified when they are tagged.

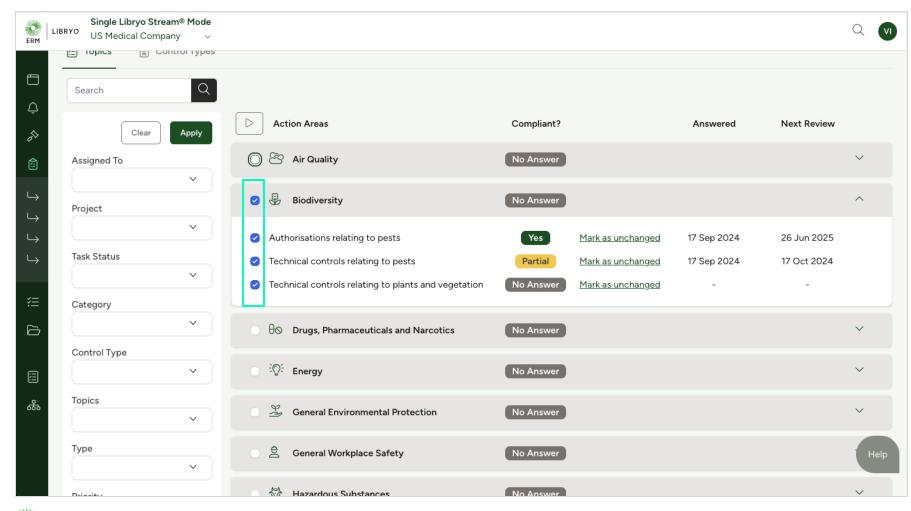






Checklists

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.

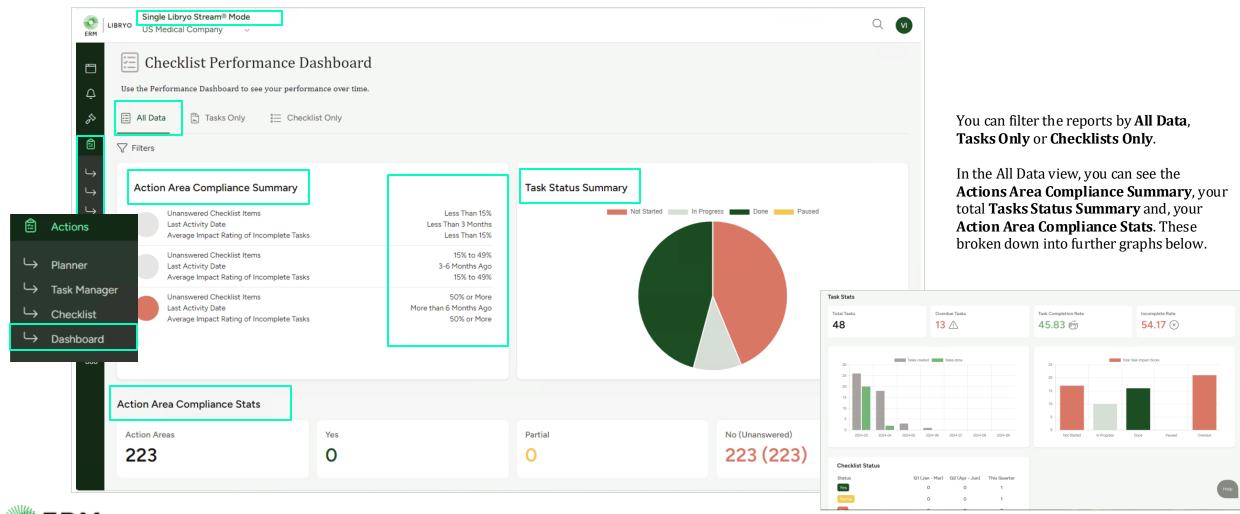


If you are compliant with everything under a high-level topic (e.g. Air Quality), you can bulk add a response to that entire category.

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

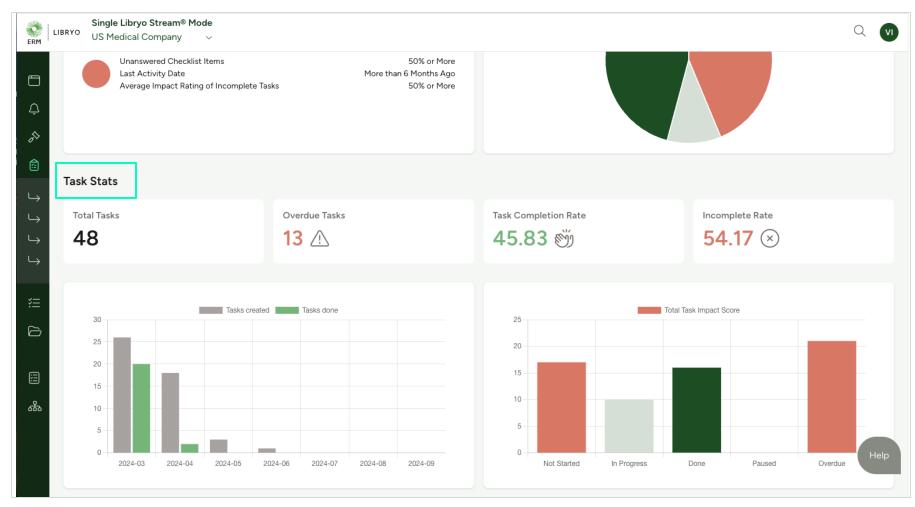
Checklist Performance Dashboard - All Data

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.

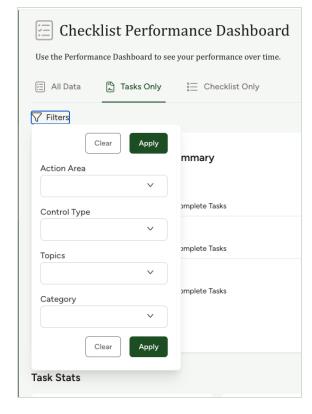


Checklist Performance Dashboard - Tasks Only

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.

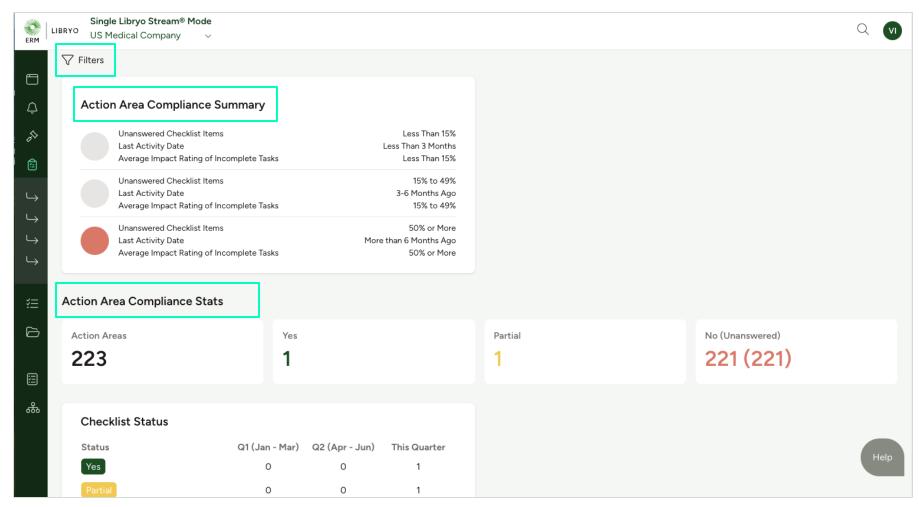


In the top-left, you can click on the Funnel icon to filter your data by **Action Area**, **Control Type**, **Topics** or **Category**. Click **Apply** when you are finished.



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** or **Category**. Click **Apply** when you are finished.

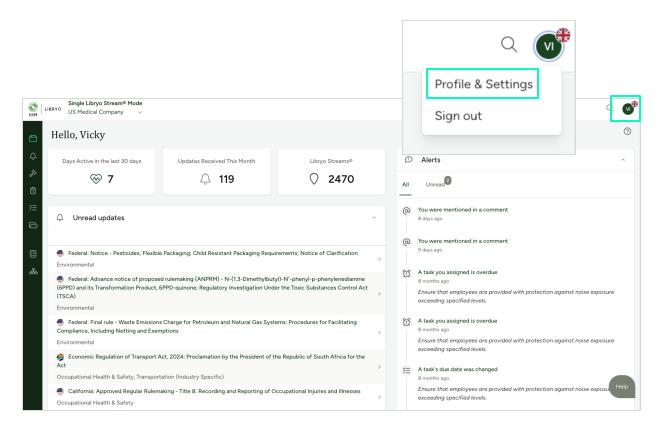
√ Filters	
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Category	
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Clear	Apply

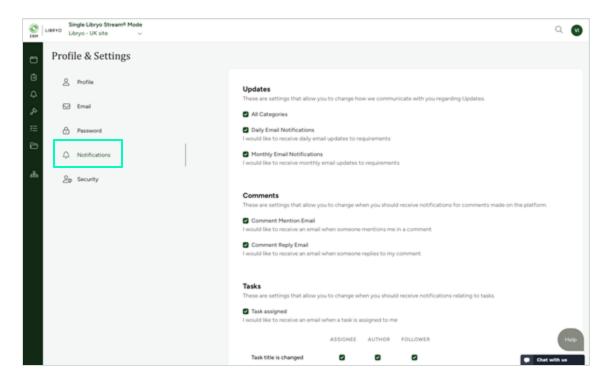


Settings

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**.



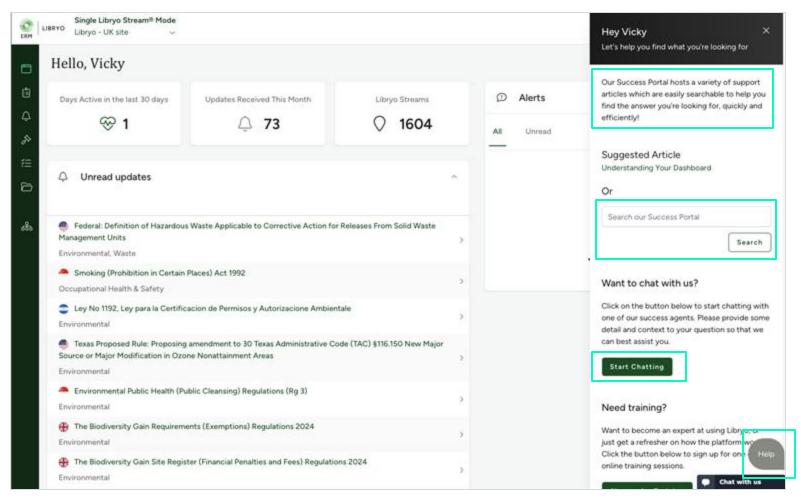


Under **Notifications**, you can also choose whether you want to receive Updates emails from all categories, or just selected categories. You can also set the frequency of notifications you wish to receive, such as daily or monthly.



Extra help

We are here to assist you whenever you need us. We can offer **Live Chat** support and **Training** as well as a fully searchable **Success Portal** full of helpful guides and articles to help you navigate the Libryo Platform with ease.



Our **Success Portal** hosts a variety of support articles. According to the module you are in, an article will be suggested to help you navigate the platform.

Start chatting with one of our success agents

Click the **Help** button in the bottom right-hand corner of the platform.

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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: erm.libryoinfo@erm.com
Phone: +44 (0)20 3206 5200

South Africa

The Great Westerford, 2nd Floor 240 Main Road Rondebosch, Cape Town, 7700

Email: erm.libryoinfo@erm.com

Phone: +27 (0)21 681 5400

