TankAware CMMS User Guide

Introduction

The TankAware CMMS User Guide is designed to help system owners, operators, and industry service providers confidently use TankAware CMMS to manage fuel storage operations. This guide provides clear, step-by-step instructions for completing inspections, managing sites and systems, tracking deficiencies, and maintaining accurate, auditable compliance records.

Whether you are setting up your organization for the first time or performing daily operational tasks, this guide supports consistent, compliant workflows and helps ensure critical information is captured correctly and accessible when needed.

Guide overview and navigation

Table of contents

1. Introduction

1.1. About TankAware CMMS

This user guide is for TankAware Canada Inc.'s (TankAware) cloud-based based computerized maintenance management system (CMMS) purpose-built for fuel storage operations, TankAware CMMS. It brings inspections, maintenance, and records into one centralized, auditable system.

TankAware Canada Inc. (TankAware) is a Canadian SaaS company with decades of real-world experience in fuel storage and environmental compliance, purpose-built to help organizations manage regulated infrastructure with confidence, clarity, and accountability.

1.2. Who this guide is for

This guide serves two main audiences:

System owners and operators: Organizations that own petroleum storage sites - Facility operators managing day-to-day tank operations - Compliance managers ensuring regulatory adherence

Industry contacts (service providers): Contractors performing maintenance and repairs - Service companies providing inspections - Equipment suppliers and other industry partners

1.3. How to use this guide

New users: Start with Getting started and follow the First-time walkthrough
Looking for a specific task: Check Common daily tasks
Having trouble: Visit Troubleshooting and frequently asked questions (FAQs)
Need a quick definition: See Appendix A: Glossary

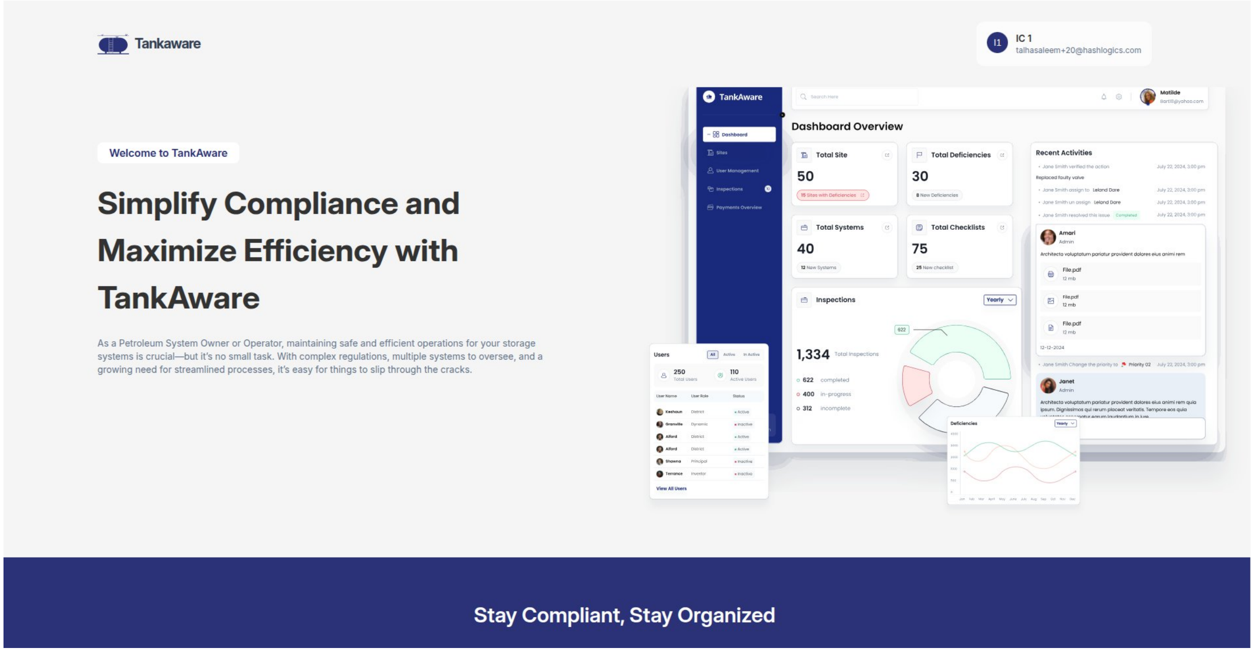
Tip: Use the Table of contents to jump directly to any section.

2. Getting started

2.1. Accessing TankAware CMMS

TankAware CMMS is accessed through your web browser. No software installation is required.

Main Website: https://tankaware.com - Create accounts - Log in - Manage companies



Company Workspace: https://yourcompany.tankaware.com - Access your company's dashboard - Manage sites, systems, and inspections - Perform daily operations

Note: Replace "yourcompany" with your actual company subdomain (assigned during company setup).

2.2. Creating your account

Step 1: Go to the signup page

1. Visit https://tankaware.com
2. Click **Sign Up** in the top-right corner

Step 2: Select your organization type

Choose one of the following:

Option	Choose if you…
System Owners & Operators	Own or operate petroleum storage sites
Industry Contacts	Provide services (contractors, suppliers, engineers, etc.)

Click **Next** after selecting.

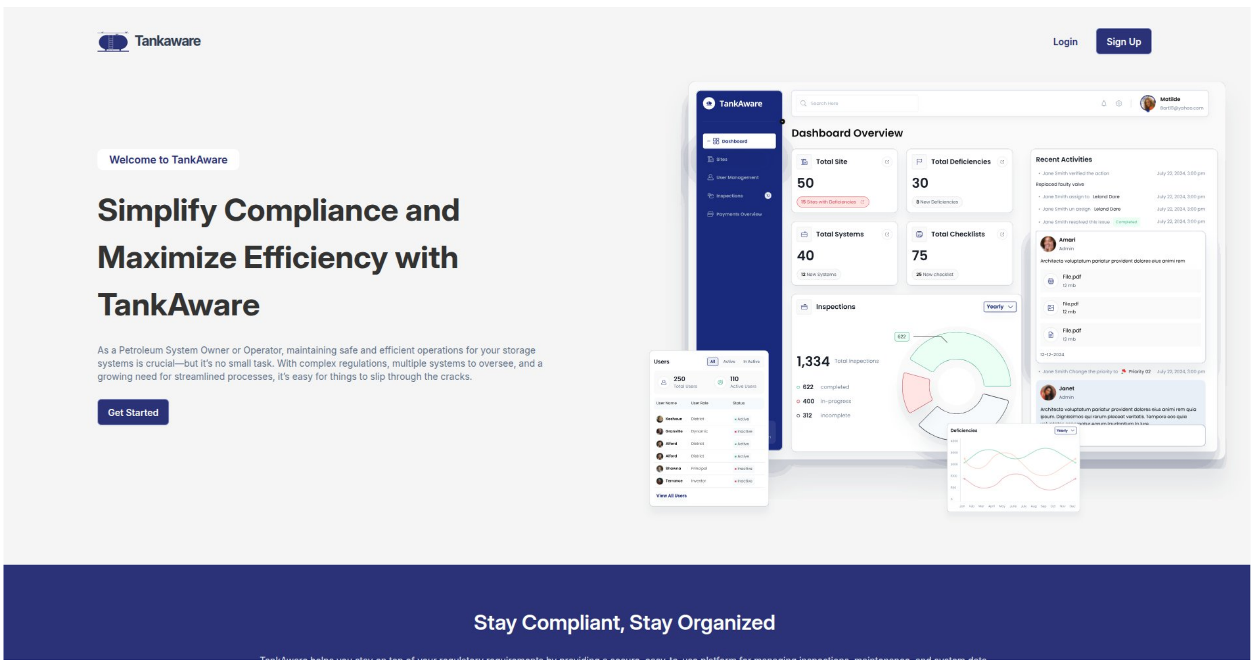
Step 3: Complete the registration form

Fill in the following information:

- **Full Name**: Your complete name
- **Email Address**: Use a valid email you can access
- **Phone Number**: Contact number
- **Address**: Street address, city, province, postal code
- **Password**: Must include:
  - 8-32 characters
  - At least one uppercase letter
  - At least one lowercase letter
  - At least one number
- **Confirm password** – Re-enter your password

Step 4: Accept agreements - Check the box for **Privacy Statement** (required) - Optionally check **Newsletter** to receive updates

Click **Sign Up** to create your account.



2.3. Verifying your email

After signing up, you must verify your email address.

1. Check your inbox for an email from TankAware
2. Click the **verification link** in the email
3. You'll see a confirmation message: "Your account is verified"
4. Click **Continue** to proceed

Email not arriving: Check your spam or junk folder - Wait a few minutes and click
Resend email: Ensure you entered the correct email address

Note: You cannot access your company workspace until your email is verified.

2.4. Logging in

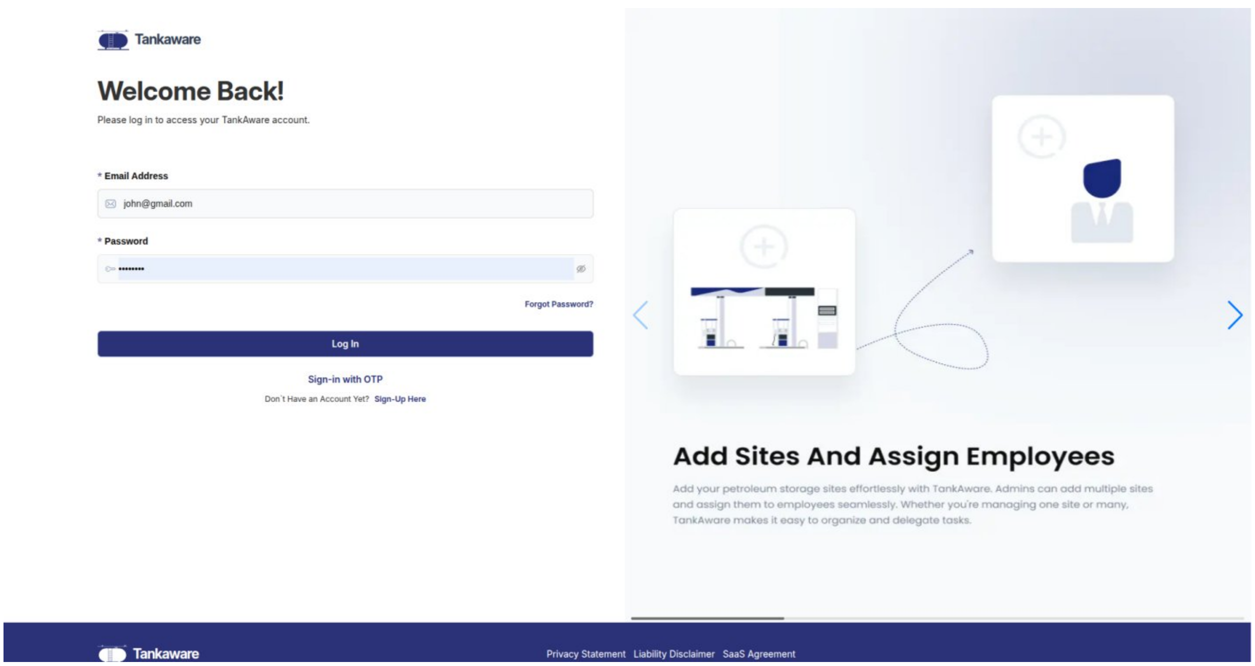
Using password

1. Go to https://tankaware.com
2. Click **Login**
3. Enter your email and password
4. Click **Sign In**

Using one-time password (OTP)

1. Click **Login**
2. Switch to **OTP** sign-in method
3. Enter your email
4. Check your email for a 6-digit code
5. Enter the code to log in

Screenshot placeholder: Login screen with OTP option shown



2.5. Password recovery

If you forget your password:

1. Go to the login page
2. Click **Forgot Password**
3. Enter your email address
4. Click **Submit**

5. Check your email for a reset link
6. Click the link and create a new password
7. Log in with your new password

Note: Reset links expire after a limited time. If your link doesn't work, request a new one.

3. Companies and workspaces

3.1. Understanding company workspaces

TankAware CMMS organizes work by **company**. Each company has its own workspace with:

- A unique web address (subdomain)
- Its own users and roles
- Separate sites and systems
- Independent data and reports

Example: If your company is called "Northern Fuels," your workspace might be at https://northernfuels.tankaware.com

Benefits of this structure: Your data is private to your organization - Multiple people can collaborate within the same company - You can be part of multiple companies (e.g., a contractor working with several clients)

3.2. Creating a new company

After verifying your email, you'll be guided through company creation.

For system owners and operators

Step 1: Company Information - **Company Name**: Your organization's name - **Company Logo** – Upload a square image (200x200px recommended) - **Address** – Street, city, province, postal code

Step 2: Choose a Theme: Select a color theme for your workspace - Click the eye icon to preview how it looks

Step 3: Accept Agreements: Privacy Statement (required) - Liability Disclaimer (required) - Newsletter (optional)

Step 4: Emergency Information: Add at least one emergency contact (name and phone) - Enter emergency procedures in the text editor

Step 5: Subscription: Complete payment to activate your company

For industry contacts (service providers)

Step 1: Service Categories: Select all that apply: Construction - Petroleum Service and Maintenance - Service Providers - Equipment Suppliers - Insurance Providers - Oil companies - Regulators - Others (specify)

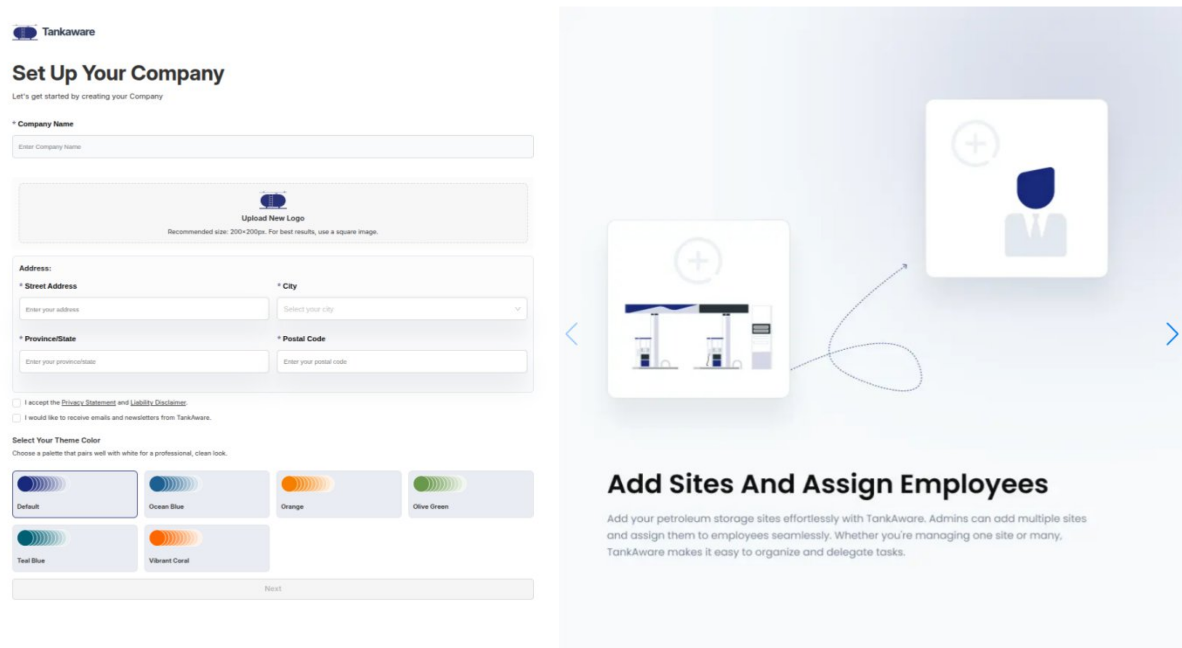
Step 2: Company Information: Company Name and Logo - Address - Website URL - Emergency Contact Phone - Description of services - After-hours policy

Step 3: Theme and Agreements: Same as System Owners

Step 4: Upload Documents: Upload at least one document for each category: General Documents - Supporting Documents - License/Certificate

Step 5: Subscription: Complete payment to activate

Screenshot placeholder: Company setup wizard



3.3. Selecting a company

If you belong to multiple companies

1. After logging in, you'll see the **Select Company** screen
2. Click on the company you want to access
3. You'll be redirected to that company's workspace

Company card information

Company logo and name - Number of members - Number of sites and systems (for owners) - Number of work orders (for industry contacts) - Status indicator (green = active, orange = subscription issue)

To create another company

Scroll down and click **Create New Company**

To switch companies

Click your profile icon - Select **Select Company**

3.4. Company subscription

TankAware CMMS operates on an annual subscription model.

What’s included

1 System - 4 Users - All platform features

Managing your subscription

1. Go to **Settings** → **Billing**
2. View current plan and usage
3. Access billing history
4. Download invoices

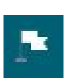
Note: If your subscription expires, your company will be marked as “Subscription Suspended.” Contact support or renew to restore access.

4. Interface overview

4.1. Navigation for system owners

When you log into your company workspace, you’ll see the **Admin Dashboard**.

Main menu items

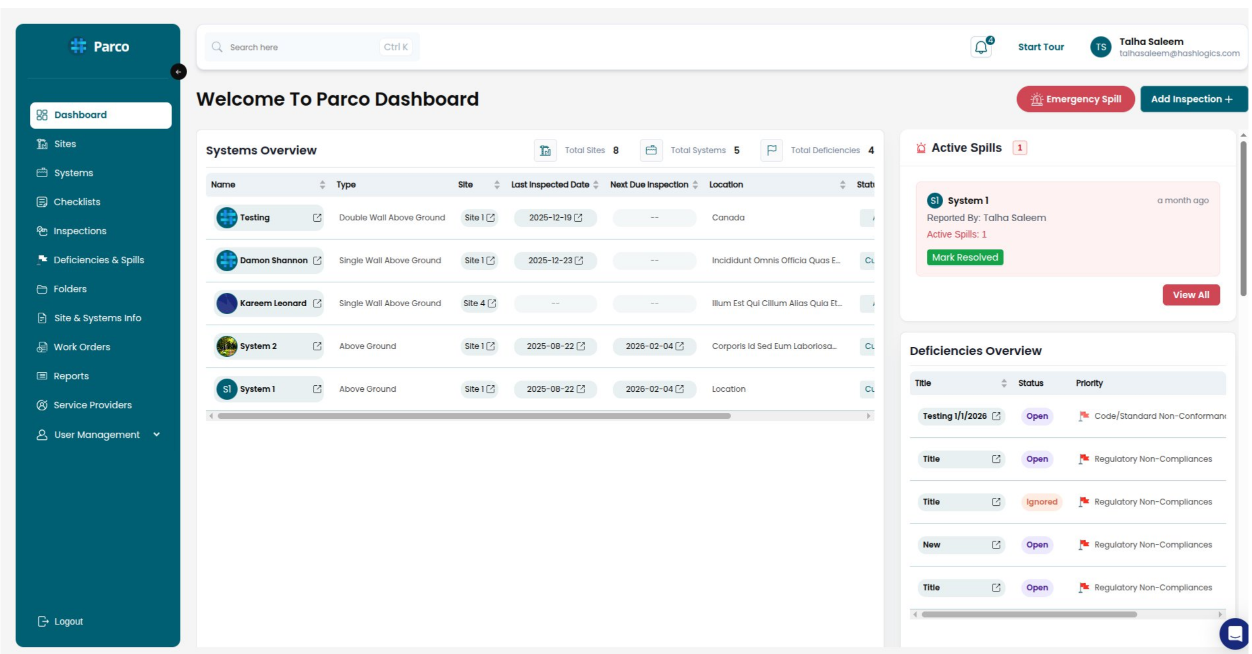
Icon	Menu Item	Purpose
	Dashboard	Overview of your operations
	Sites	Manage physical locations
	Systems	Manage tank systems
	Checklists	Create inspection templates
	Inspections	Schedule and track inspections
	Deficiencies & Spills	Track issues and spills
	Folders	Organize document categories

Icon	Menu Item	Purpose
	Site & Systems Info	Manage documents
	Work Orders	Coordinate with service providers
	Reports	Generate compliance reports
	Service Providers	Find and manage contractors
	User Management	Manage users and roles

Site dashboard

Click on any site to access its dedicated dashboard with: Site-specific systems - Work orders for that site - Observations - Checklists and inspections - Deficiencies - Reports - File manager

Screenshot placeholder: Admin sidebar navigation



4.2. Navigation for industry contacts

Industry contacts see a streamlined interface focused on service work.

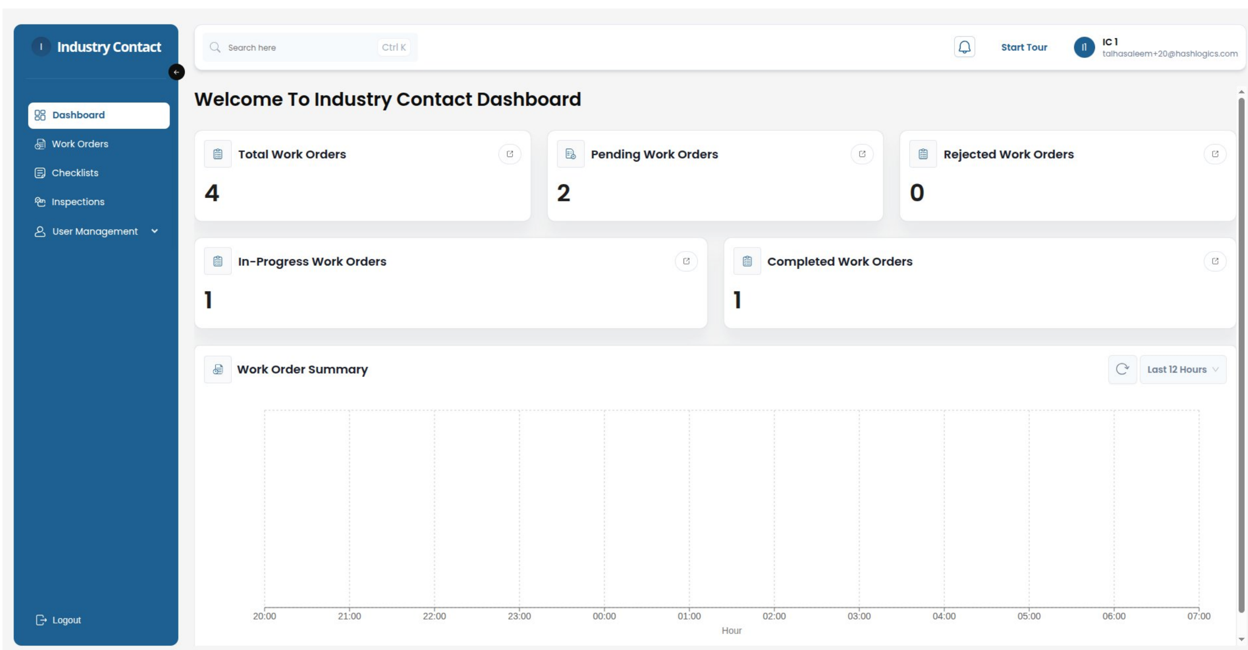
Main menu items

Icon	Menu Item	Purpose
	Dashboard	Work order statistics
	Work Orders	View and manage assignments
	Checklists	Access inspection templates
	Inspections	Perform assigned inspections
	User Management	Manage your team

Work order segments

All – Every work order - **Pending** – Awaiting your response - **Accepted** – Work in progress - **Rejected** – Declined assignments - **Completed** – Finished work

Screenshot placeholder: Industry contact dashboard



4.3. Common interface elements

Views

Most list screens offer two display options: **List View** – Table format with detailed columns - **Grid View** – Card format for visual browsing

Click the view toggle button to switch between them.

Search and filters

- Use the **search box** to find items by name or keyword
- Click **Filters** to narrow results by status, date, or other criteria
- Click **Clear Filters** to reset

Pagination

Large lists are divided into pages: Use **Previous/Next** arrows to navigate - Change page size (10, 20, 50, or 100 items) - Jump to a specific page number

Action menus

Each item typically has actions available: **View** – See details in a side panel - **Edit** – Modify the item - **Delete** – Remove the item (with confirmation)

Status indicators

Color-coded badges show item status:

⍰ **Green**:	Active, resolved, or completed
⍰ **Yellow/Orange**:	Pending or in progress
🔴 **Red**:	Critical, overdue, or requires attention

4.4. Dashboard overview

Admin dashboard (system owners)

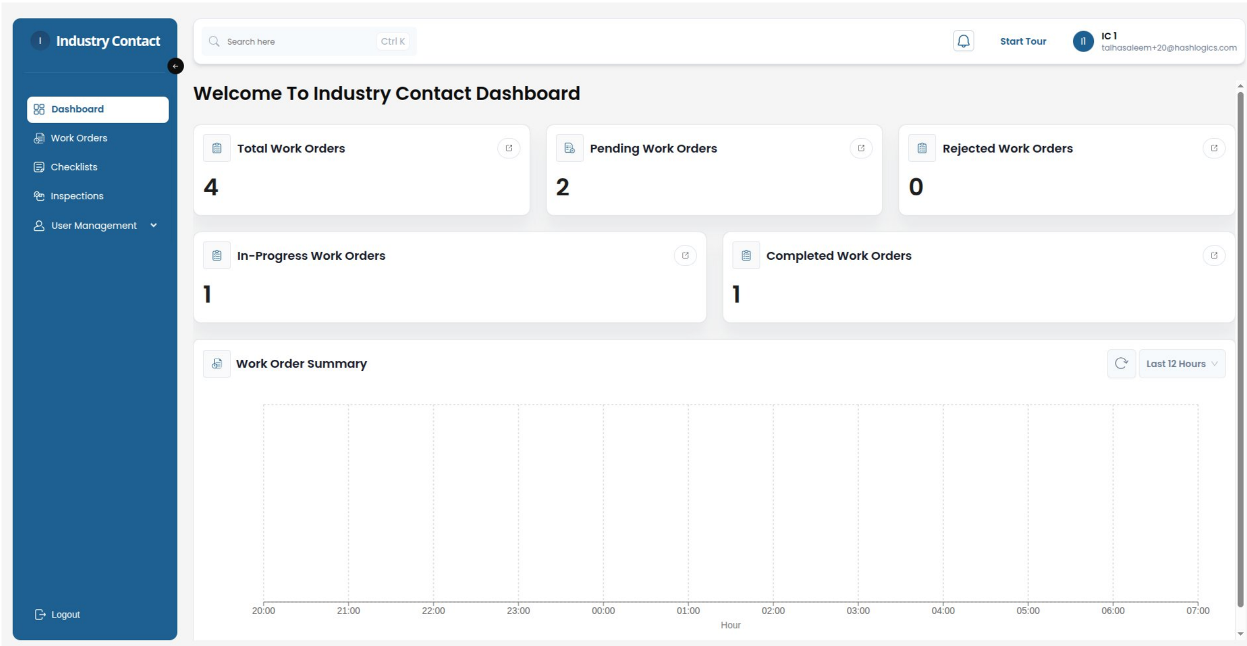
Your dashboard shows:

- **Welcome message** with your company name
- **Quick Action buttons**:
  - Emergency Spill – Report a spill immediately
  - Add Inspection – Create a new inspection
- **Statistics cards**:
  - Total systems
  - Spill reports
  - Deficiency count
  - User activity
- **Charts and graphs**:
  - Deficiency trends over time
  - Inspection completion rates
- **Location map** showing all your sites

Industry contact dashboard

Your dashboard displays: **Work order statistics**: - Total work orders - Pending - In progress - Completed - Rejected - **Trend chart** showing work order volume over time - **Quick links** to each work order category

Screenshot placeholder: Admin dashboard with statistics



5. User roles and permissions

5.1. Understanding roles

A **role** determines what a user can see and do in TankAware CMMS. Roles control:

- Which menu items appear
- What data can be viewed
- What actions can be performed (create, edit, delete)
- Access to the admin dashboard

Key concepts

- **Company Owner**: Has full access to everything. Cannot be restricted.
- **Role Assignment**: Each user is assigned one role.
- **Custom Roles**: You can create additional roles beyond the defaults.

5.2. Default roles explained

TankAware CMMS comes with built-in roles:

Admin

Full access to all features and data.

What they can do

✅ Manage all users

✅ Create, edit, delete sites

✅ Create, edit, delete systems

✅ Create and manage checklists

✅ Create and view all inspections

✅ Manage deficiencies

✅ Create and manage work orders

✅ Generate reports

✅ Access admin dashboard

✅ Create and edit roles

Best for: Operations managers, compliance officers, company administrators

Site manager

Mid-level access focused on operational oversight.

What they can do	What they cannot do
✅ Create and manage sites	✕ Manage other users
✅ Create and manage systems	✕ Create or edit roles
✅ Create and view inspections	
✅ Manage checklists	
✅ Handle deficiencies	
✅ Manage work orders	
✅ Access admin dashboard	

Best for: Site supervisors, regional managers

Employee / contractor

Limited access for performing inspections.

What they can do	What they cannot do
✅ View sites (read-only)	✕ Create or modify sites
✅ View systems (read-only)	✕ Create or modify systems
✅ Create inspections	✕ View all inspections
✅ View assigned inspections	✕ Manage checklists
✅ Perform inspections	✕ Access admin dashboard

What they can do	What they cannot do
✅ Delete own inspections	

Best for: Field inspectors, technicians, contractors

Service provider

Limited access for work-related activities.

What they can do	What they cannot do
✅ View sites (read-only)	✕ Create anything
✅ View systems (read-only)	✕ Delete items
✅ View deficiencies	✕ Access admin dashboard
✅ Update/fix deficiencies	
✅ Update work orders	
✅ Manage documents	

Best for: External repair technicians, maintenance crews

5.3. Creating custom roles

If the default roles don't fit your needs, create your own.

To create a custom role

1. Go to **User Management** → **Roles** tab
2. Click **Create Role**
3. Enter:
    - **Role Name** – e.g., "Inspector Lead"
    - **Description** – What this role is for
4. Set permissions for each entity (see 5.4 Permission categories)
5. Click **Save**

To edit a role

1. Find the role in the list
2. Click **Edit**
3. Modify permissions as needed
4. Click **Save**

Note: You cannot modify or delete the Company Owner's permissions.

5.4. Permission categories

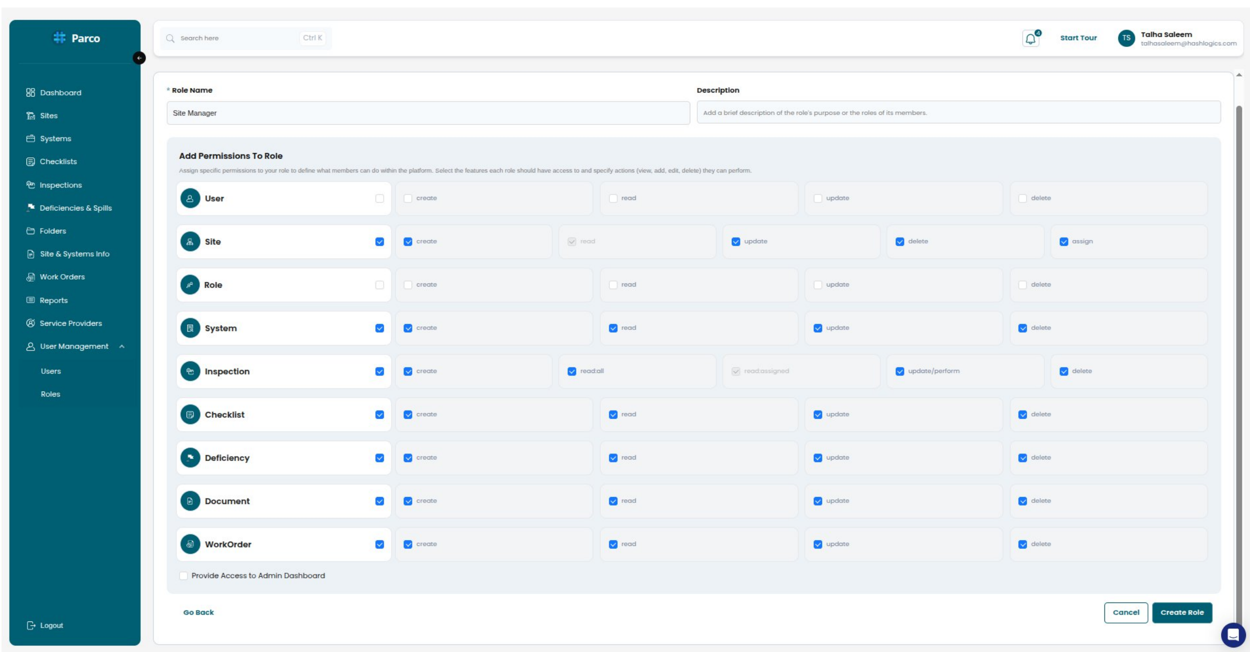
When creating or editing a role, you control permissions for:

Entity	Available Permissions
Users	Create, Read, Update, Delete
Sites	Read
Systems	Read
Inspections	Create, Read All, Read Assigned, Update, Delete
Checklists	Create, Read, Update, Delete
Deficiencies	Create, Read, Update, Delete
Work Orders	Create, Read, Update, Delete
Roles	Create, Read, Update, Delete
Documents	Create, Read, Update, Delete

Special permissions

Admin Dashboard Access: Can view the administrative dashboard - **Read All Inspections** – See every inspection, not just assigned ones

Screenshot placeholder: Role permission matrix



6. Core features

6.1. Sites management

A **site** represents a physical location where you have petroleum storage equipment.

Viewing sites

1. Click **Sites** in the menu
2. Browse the list or grid view
3. Use search to find specific sites
4. Filter by:
    - Deficient status (sites with open issues)

Creating a site

1. Click **Add Site**
2. Complete the forms:
    - **Site Information**: Name, address, coordinates, contact
    - **Tank Ownership**: Who owns the tanks
    - **System Operator**: Who operates the site
    - **Land Owner**: Property owner details
    - **Service Provider**: Assigned contractors
    - **Operation Type**: Type of facility
3. Click **Save**

Editing a site

1. Find the site in the list
2. Click the **Edit** action
3. Make your changes
4. Click **Save**

Deleting a site

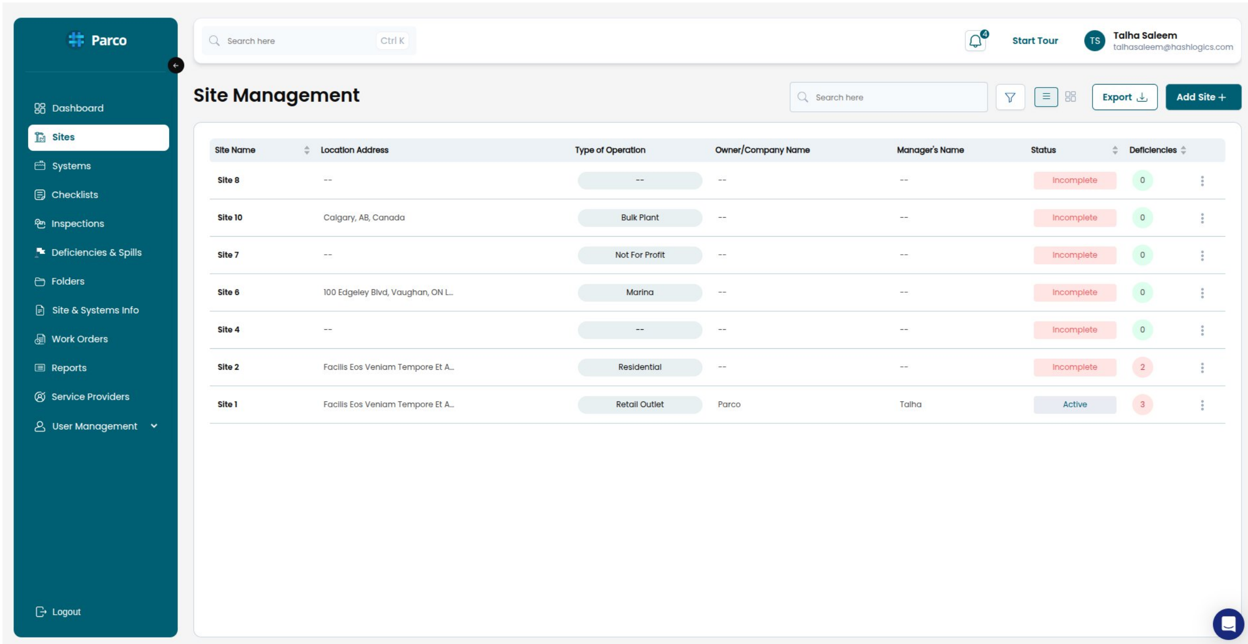
⚠ **Warning**: Deleting a site also removes all associated systems, checklists, inspections, and deficiencies.

1. Find the site
2. Click **Delete**
3. Read the warning carefully
4. Confirm deletion

Site details

Click on any site to see: All systems at that location - Recent activity - Quick access to site-specific features

Screenshot placeholder: Sites list view



6.2. Systems management

A **system** is an individual tank or storage unit at a site.

Viewing systems

1. Click **Systems** in the menu
2. View all systems or filter by:
   - Deficiency status
   - System type
   - Active or Archived status

Tabs: Active – Systems currently in operation - **Archived** – Systems no longer in use

Creating a system

1. Click **Add System**
2. Select the site
3. Enter system details:
   - System name
   - Type (e.g., underground tank, above-ground tank)
   - Registration number
   - Capacity and specifications
4. Click **Save**

System actions

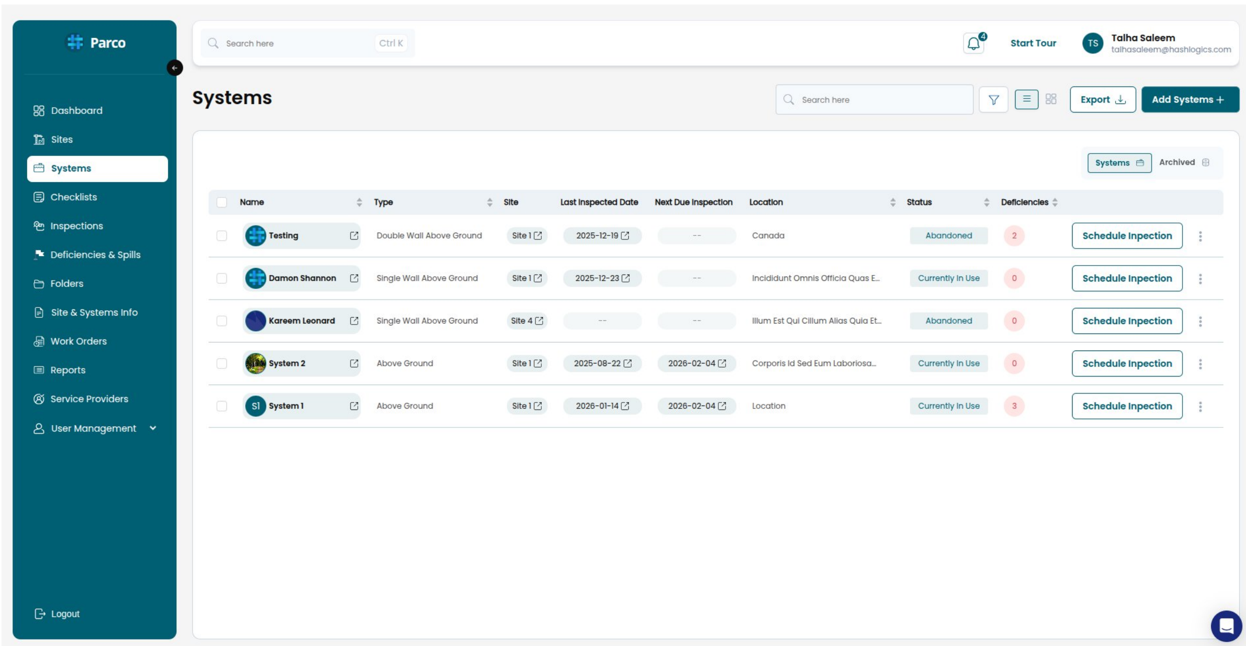
- **View Details** – See full system information

- **Edit** – Modify system details
- **Delete** – Remove system (with confirmation)
- **Archive/Restore** – Move to or from archived status
- **Report Emergency Spill** – Quick spill reporting

Bulk operations

1. Check the boxes next to multiple systems
2. Click the bulk action button
3. Choose an action (e.g., report emergency for all selected)

Screenshot placeholder: System List view



6.3. Checklists

A **checklist** is a template of questions used during inspections.

Viewing checklists

1. Click **Checklists** in the menu
2. View active or disabled checklists
3. Search by name

Creating a checklist

1. Click **Create Checklist**
2. Enter:
   - **Checklist Name** – e.g., “Monthly Tank Inspection”
   - **Description** – What this checklist covers

3. Click **Add Section** to create groupings (e.g., “Visual Check,” “Equipment Test”)
4. Within each section, add questions:

Question types:

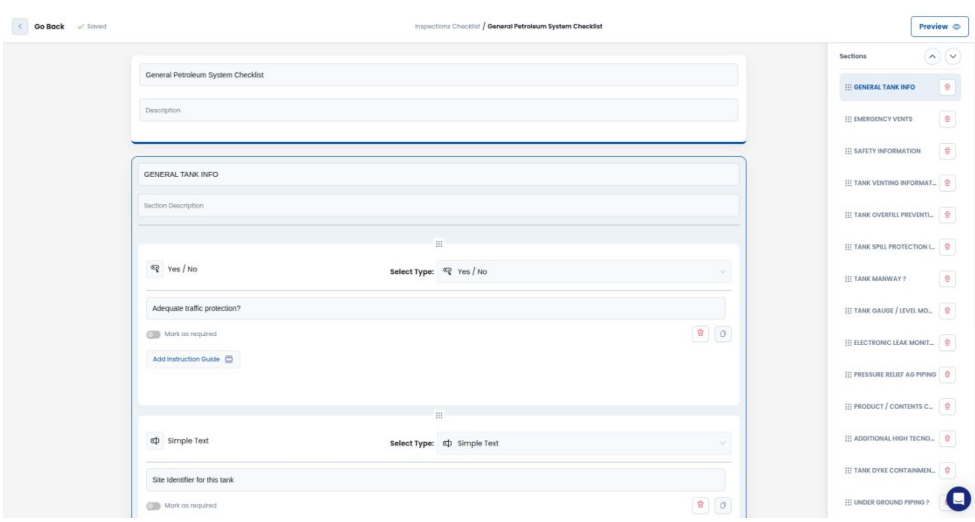
Type	Use For
Text	Short answers
Text Area	Longer descriptions
Number	Measurements or counts
Date	Date entries
Dropdown	Single choice from a list
Multi-select	Multiple choices from a list
Yes/No	Simple boolean responses

5. For each question:
   - Enter the question text
   - Mark as required (if needed)
   - Add answer options (for dropdowns/multi-select)
   - Set up conditional logic (show only if another question has a specific answer)
6. Click **Save**

Managing checklists

- **Edit** – Modify questions and sections
- **Delete** – Remove the checklist
- **Take Snapshot** – Create a frozen copy for record-keeping
- **Enable/Disable** – Control availability

Screenshot placeholder: Checklist builder



6.4. Inspections

An **inspection** is a scheduled evaluation of a system using a checklist.

Viewing inspections

1. Click **Inspections** in the menu
2. Use segments to filter:
    - **All** – Every inspection (if you have permission)
    - **Assigned To Me** – Only your inspections

Creating an inspection

1. Click **Add Inspection**
2. Select:
    - **Checklist** – Which template to use
    - **Site and System** – What to inspect
    - **Assigned User** – Who will perform it
    - **Schedule**:
        - One-time (single occurrence)
        - Recurring (daily, weekly, monthly, etc.)
    - **Due Date** – When it must be completed
3. Click **Save**

Performing an inspection

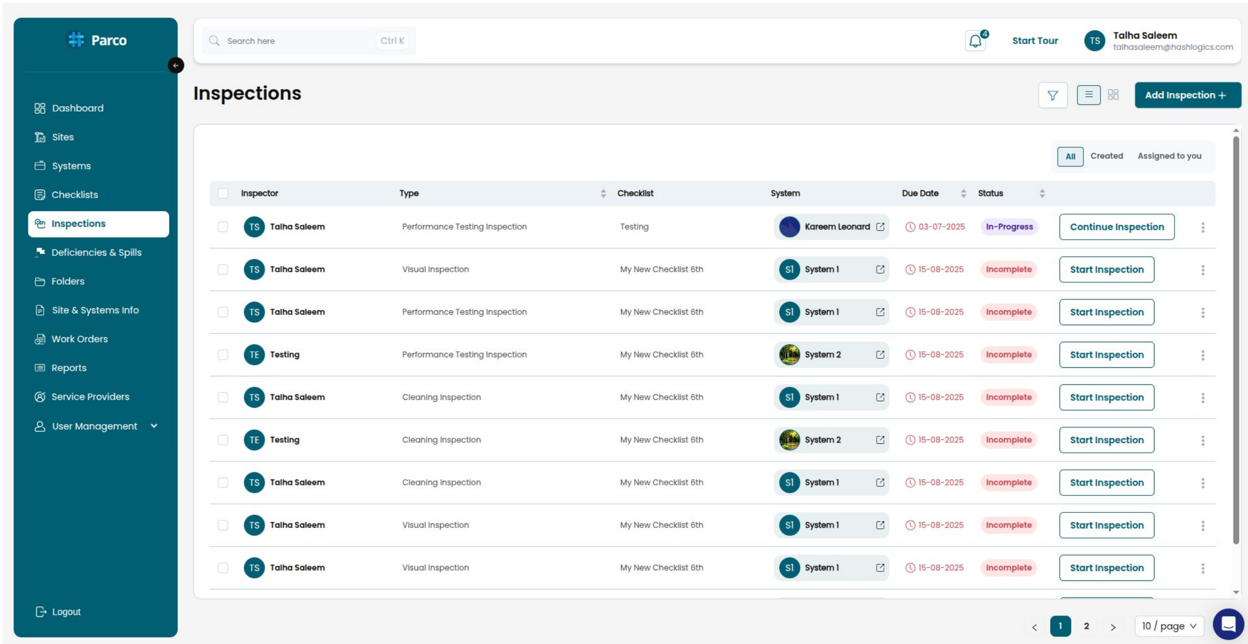
1. Find your inspection in the list
2. Click **Start** or **Continue**
3. Answer each question in the checklist
4. Upload photos if needed
5. Click **Submit** when complete

Inspection Statuses

Status	Meaning
Active	Scheduled but not started
In Progress	Started but not complete
Completed	Finished and submitted
Incomplete	Partially done, not submitted

After an Inspection: Any answers flagged as deficient automatically create deficiency records - The inspection is marked complete - Reports become available

Screenshot placeholder: Inspection in progress



7. Common daily tasks

7.1. Performing an inspection

Time needed: 5-30 minutes (depending on checklist length)

1. Log into your company workspace
2. Go to **Inspections**
3. Find your assigned inspection (look for “Assigned To Me”)
4. Click **Start Inspection**
5. For each question:
   - Read the question carefully
   - Select or enter your answer
   - Upload photos if required or helpful
   - Add notes for any concerns
6. After answering all questions, click **Submit**
7. Review the summary
8. Confirm submission

Tips: Save progress frequently on long inspections - Take clear photos that show the entire area - Be specific in notes about any issues found

7.2. Recording a delivery

Time needed: 2-3 minutes

1. Go to the site dashboard for the delivery location

2. Click **System Observations**
3. Click **Add Observation**
4. Select **Delivery**
5. Enter:
    - Before delivery tank level
    - Delivery amount
    - After delivery tank level
    - Delivery company name
    - Contact information
6. Upload delivery ticket photo
7. Click **Save**

Alternative for external delivery drivers:

1. Access the public system page (via QR code or link)
2. Select **Report Delivery**
3. Enter the same information
4. Submit without needing to log in

7.3. Reporting a deficiency

Time needed: 3-5 minutes

1. Go to **Deficiencies & Spills**
2. Click **Create Deficiency**
3. Select the affected system
4. Enter:
    - What the problem is
    - Where exactly it's located
    - How serious it is (Critical, Concern, Satisfactory)
    - What you recommend doing about it
5. Upload photos showing the issue
6. Assign to someone who can fix it
7. Click **Save**

7.4. Resolving a deficiency

Time needed: 2-3 minutes

1. Go to **Deficiencies & Spills**
2. Filter to show **Open** deficiencies
3. Find the deficiency you've fixed
4. Click **Resolve**
5. Enter:

- What you did to fix it
- When it was completed

6. Upload photos showing the completed repair
7. Click **Save**

7.5. Reporting an emergency spill

Time needed: 3-5 minutes

⚠ **Priority**: Always follow your emergency procedures first. Report in TankAware when safe to do so.

1. From the dashboard, click **Emergency Spill**
2. Select the system(s) involved
3. Enter:
    - Description of what happened
    - Approximate amount spilled
    - Time it occurred
    - Current containment status
4. Enter emergency contact phone number
5. Upload photos
6. Click **Submit** immediately

The system will: Log the spill report - Notify appropriate personnel - Create a record for compliance

7.6. Managing work orders

For system owners

Creating a work order:

1. Go to **Work Orders**
2. Click **Create Work Order**
3. Select site and system
4. Choose a service provider
5. Describe the work needed
6. Set a deadline
7. Click **Send**

Tracking a work order:

1. Go to **Work Orders**
2. Find the order
3. Check its status: Pending = Awaiting provider response - In Progress = Work underway - Completed = Work finished

For industry contacts:

Accepting work:

1. Go to **Work Orders**
2. Check **Pending** segment
3. Click on a work order to review
4. Click **Accept** to take the job

Completing work:

1. Perform the requested work
2. Return to the work order
3. Add completion notes
4. Upload documentation/photos
5. Click **Complete**

Rejecting work:

1. Click **Reject** on the work order
2. Provide a reason (optional)
3. The requester will be notified

7.7. Generating reports

Time needed: 2-5 minutes (plus processing time)

1. Go to **Reports**
2. Click **Create Report**
3. Select:
   - Report type (System Summary, Inspections, etc.)
   - Date range
   - Which sites/systems to include
4. Apply any filters:
   - Status
   - Priority level
5. Click **Generate**
6. Wait for processing (page auto-refreshes)
7. When complete, click **Download**
8. Open the Excel file on your computer

7.8. Adding a new user

Time needed: 2-3 minutes

1. Go to **User Management**
2. Click **Add User**

3. Enter:
    - Email address (they must have access to this)
    - Full name
4. Select their role
5. Optional: Assign to specific sites
6. Click **Save**
7. They'll receive an email invitation
8. Once they accept, they can log in

8. FAQs

8.1. Questions

Question: Can I be part of multiple companies?
Answer: Yes. Use the **Select Company** option to switch between them.

Question: How do I change my company's name or logo?
Answer: Go to **Settings** → **Organization Settings** (owner only).

Question: Can I restore a deleted site or system?
Answer: No. Deletion is permanent. Systems can be archived instead.

Question: Why can't I see all inspections?
Answer: You may only have permission to see inspections assigned to you. Ask an admin for "Read All" permission.

Question: How do I print an inspection report?
Answer: Generate a report, download the Excel file, and print from there.

Question: Can external users submit reports?
Answer: Yes. Systems have public pages for reporting deliveries, repairs, observations, and spills.

Question: What happens when I archive a system?
Answer: It moves to the "Archived" tab. Data is preserved but it won't appear in active lists.

Question: How do recurring inspections work?
Answer: TankAware automatically creates new inspections based on your schedule (daily, weekly, monthly, etc.).

Question: Can I customize the checklist questions?
Answer: Yes. Go to **Checklists**, edit the checklist, and modify questions as needed.

Question: How do I get help?
Answer: Use the in-app help or contact your company administrator. For technical issues, visit the TankAware support page.