

Planning Worksheet

MAS Role and Access Inventory

Before you size a single AppPoint or sign a multi-year contract, you need an honest picture of who does what. In MAS your access design is your license bill, so this inventory is the input to every sizing and security decision that follows. It is also the one piece no vendor can hand you, because they do not know your shop. You do.

Fill one row per role, not per person. Headcount is how many people sit in that role. Each role gets one tier and one access type. They are independent choices, so mark one box in the tier columns and one box in the access columns.

If only a small subset of a role needs heavier access, split that subset into a separate add-on role instead of raising the whole role. Keeping base roles tight and adding access for the few is where the savings live.

Pick one tier

TIER	WHO IT FITS
Admin Premium	System and security administration. The people who configure Maximo and manage users, groups, and the platform.
Premium	Full power users. Plan, schedule, manage work, and run the heavier applications.
Base	Standard day to day work execution without the premium application set.
Limited	Light or single purpose use. Mostly viewing, or one focused task.
Self-Service	Request and status-only use. Submit a request, check status. These use cases consume zero AppPoints, so flag honest candidates. Validate before you assume a role qualifies.
No-Access	Has a record in the system but no application entitlement.

Exact application access per tier depends on your configuration and MAS version. Use this for a first pass, then validate.

Pick one access type

ACCESS TYPE	WHAT IT MEANS	BEST FIT
Authorized	A named seat reserved for one person, whether or not they are logged in.	Steady daily users who are always working.
Concurrent	A shared seat drawn from a pool. Counts only while the person is logged in and using applications.	Occasional or bursty users and large groups rarely all on at once. Shift crews only when peak stays well below headcount.

The inventory

One row per role. Add rows as you need them. When this is filled in, you have your first-pass picture of the bill.

ROLE OR TITLE	COUNT	WHAT THEY DO IN MAXIMO (NORMAL WEEK)	ADMIN PREM	PREMIUM	BASE	LIMITED	SELF-SVC	NO ACCESS	AUTHORIZED	CONCURRENT
			☐	☐	☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐	☐	☐
			☐	☐	☐	☐	☐	☐	☐	☐
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			☐	☐	☐	☐	☐	☐	☐	☐

FREE MONEY

Self-Service use cases consume zero AppPoints. Every role you can honestly keep to request and status-only work may reduce your bill. Look hard for them.

This worksheet gets you to a first-pass inventory. The free AppPoints Estimator turns these numbers into a ballpark, so you can walk into the budget conversation with something real. Estimator link: <https://brockindustries.io/tools/appoints-estimator/>

When you are ready to rebuild rather than port, the Maximo Right-Sizing Playbook walks it end to end, from this inventory through sizing the AppPoints, validating the tiers, and building the security groups in MAS. Playbook link: <https://amzn.to/4uTnwQl>

Tiers and access types verified against Maximo configuration fields and IBM MAS licensing documentation, June 2026. Brock Industries.