

Planning Worksheet

Maximo Mobile Role Inventory

One person is one user at one tier. If a role uses Maximo Mobile and the desktop, size it by the most capable thing it does on either surface, not by the device. List every Mobile role below, flag what it actually does, then check the tier the heaviest action drives. Note what still needs confirming.

1 Inventory your Mobile roles

Use one row per role, not per person. Put the headcount in Count. The capability flags separate a light role from a work-execution role. The tier columns are your first read, to be confirmed against current IBM entitlement terms.

R O L E P R O F I L E			C A P A B I L I T Y F L A G S (C H E C K A L L T H A T A P P L Y)					T I E R (C H E C K O N E)			A C C E S S	
MOBILE ROLE	COUNT	HEAVIEST ACTION IT DOES	INSPECTIONS	MATERIALS	APPROVALS	DISPATCH	ADD-ON APP	DESKTOP TOO	LIMITED	BASE	PREMIUM	ACCESS TO VALIDATE
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2 How to read the flags

INSPECTIONS

Assigned inspections sit inside the light envelope on their own. They get heavier only when they drive materials, approvals, or follow-on work. An inspector who records results is not the same as a tech who executes work, so flag Inspections and Materials separately and let the heavier one set the tier.

MATERIALS, APPROVALS, DISPATCH

These are the actions that tend to push a role past the light envelope. Issuing or returning materials, approving records, and dispatching or planning work are the usual reasons a role needs more than read, status change, and updating its own assigned work.

ADD-ON OR INDUSTRY APPLICATION

Often requires a higher tier, sometimes Premium. Confirm the entitlement for the specific add-on or industry solution before you commit a tier, since the requirement varies by application.

DESKTOP TOO

Check this when the role also works on the desktop. It is still one user at one tier, so the tier is set by the most capable thing the role does across both surfaces. Do not size Mobile and desktop separately for the same person.

ACCESS TO VALIDATE

Note whether the role is best fit by Authorized or Concurrent access, or mark it unknown. Confirm the access type and the point cost in the free AppPoints Estimator. Concurrent is not automatically cheaper, so do not assume it.

3 Heaviest action, from lightest to heaviest

View read-only. Run and view reports. Change status. Update assigned work orders. Complete assigned inspections. Then the heavier ones: issue or return materials, approve, plan or schedule, dispatch, administer. The light envelope covers the first group, capped at three Manage modules. The heavier actions are what move a role up.

WHAT THIS WORKSHEET COVERS

This inventory tells you which roles you have and what to confirm for each. It does not price them. For a ballpark per role, use the free AppPoints Estimator. For the full per-role point math across Authorized and Concurrent, the Access-to-AppPoint Impact Matrix in the Playbook Kit does that work.

Reviewed against IBM Maximo Application Suite licensing and security documentation, June 2026. Tier names from the MASLICENSETYPE domain. Validate current entitlement terms before purchase.