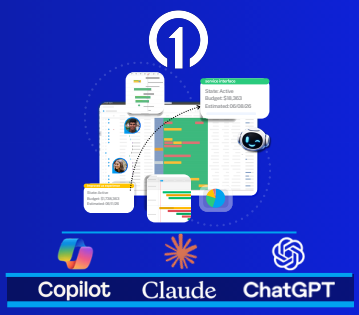
OnePlan

The Portfolio System of Record Your AI Can Maximize

The OnePlan MCP Server — connect Microsoft Copilot, Claude and ChatGPT to one governed portfolio.



4.4 / 5
Gartner Peer Insights
101 ratings

500+
Global organizations
across every industry

Forrester
Strong Performer SPM
Tools Wave™

SOC 2
Type II · ISO 27001
ISO 27701 certified

AI Is Only as Useful as the Portfolio It Can Reach

Work Where You Already Are

Ask about plans, people and budgets from Microsoft Copilot, Claude, Microsoft Teams or ChatGPT instead of switching apps.

Answers Across Modules

One question can combine portfolio, resource, financial and work plan data — such as which over-budget projects also have over-allocated people.

Act, Not Just Read

Update plans, move allocations, log risks, update task status and approve requests from the conversation. Most changes show a before-and-after preview first.

Same Security as OnePlan

Each user signs in with their own OnePlan account over OAuth 2.0, and every request enforces that person's permissions, locks and read-only settings.

Your AI Is Ready. Give It a Portfolio It Can Trust.

One governed record of every initiative, resource and dollar.

3
AI assistants tested and documented

5
OnePlan modules covered

0
OnePlan data cached by the server

> *Most organizations already have capable AI assistants. What they rarely have is a portfolio those assistants can trust.*
>
> *-OnePlan*

What You Gain

- Portfolio answers inside the assistant people already use.
- Reforecasts and reallocations previewed before they are saved.
- Status updates and approvals handled from a chat window.
- Every action governed by the same permissions as OnePlan.

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Plan smarter.
Deliver with confidence.

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From a Question to a Governed Action

Your AI Assistant	Secure Sign-In	OnePlan MCP Server	OnePlan
• Microsoft Copilot • Claude • ChatGPT • Teams via Copilot Studio	• Your own OnePlan account • OAuth 2.0 with PKCE • Single sign-on supported • One group per session	• Stateless, no caching • Hosted by OnePlan • Regional endpoints • Read and write tools	• Resource & Financial Mgmt • Portfolio • Work Plan • My Work & Approvals

Nothing to install. OnePlan hosts a regional server for Global, Canada, Australia and Europe, so each connection stays in its region. Available in preview to approved customers; features and tools may change during the preview.

Ask It What Your Role Needs

PORTFOLIO MANAGER

"Summarize the active projects in the Digital Transformation portfolio and flag any that are over budget."

RESOURCE MANAGER

"Who in the Data team has 40 hours free in March 2027?"

PROJECT MANAGER

"Move the hardware forecast on Project Atlas out by one quarter. Preview it first."

FINANCE

"Compare budget and actuals by cost category for the ERP Upgrade and show the biggest variances."

TEAM MEMBER

"What's on my plate this week? Mark the data migration task 75% complete."

APPROVER

"What approvals are waiting on me? Summarize each one."

PMO

"Here are my meeting notes. Log the risks and decisions on the CRM Upgrade plan."

ACROSS MODULES

"Which over-budget projects also have over-allocated people?"

Read and Act Across Five Modules

Module	What it can answer	What it can change
Portfolio	Plan search and details, child plans, plan types and fields	Create plans and update plan fields
Resource Management	Capacity, teams, resource plans and comparisons	Update, shift and replace allocations, with preview
Financial Management	Financial plans, cost types and categories, comparisons	Update and shift financial allocations, with preview
Work Plan	Work items, child items and assignments	Log risks, issues and decisions, with preview
My Work & Approvals	Your work items and the approvals waiting on you	Status updates and approval decisions, with preview

Guardrails Built In

- ✓ Your OnePlan permissions apply on every request
- ✓ Locked periods and synced plans stay read-only
- ✓ Status updates go to the plan owner for review
- ✓ Preview before most changes are saved
- ✓ Nothing can be deleted through the assistant
- ✓ Stateless server — no OnePlan data cached

Request Preview Access

1. Ask your Customer Success Manager
2. Setup guide: support.oneplan.ai
3. Contact us: oneplan.ai/contact-us

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