OnePlan

OnePlan and SQL Server for Portfolio Data at the Source

Define strategy, prioritize work, and deliver results with live data from the database you already run.

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

Point OnePlan at the Database You Already Have

Four Data Types, One Connector
Plans, resources, resource plans and financial plans all import through a single SQL Server integration. Four strategies, one connection to maintain.

Use Your Existing SQL Model
Point the connector at a view and your filtering, joins, and reshaping stay in the database, where your team already knows how to do it.

Live Data, No File Handoff
No CSV export, no SFTP drop and no nightly job to babysit. Every run reads the current state of your warehouse.

Cloud or On-Premises
Works with Azure SQL over a public endpoint, or with on-premises SQL Server behind the firewall through a relay that opens no inbound ports.

Delivers executive-level insights without needing BI tools or custom reports, all within OnePlan.

You Already Built the Warehouse. Now Make It the Portfolio.

One connection, four kinds of portfolio data.

9
Field mappings ship ready to use

0
Teams asked to migrate

↑
Portfolio visibility across every tool

> *OnePlan received the highest possible scores in the integration and roadmap criteria.*
>
> *-The Forrester Wave™: Strategic Portfolio Management Tools*

What You Gain

- One source of truth for resources, plans and financials.
- Projects from every system consolidated into one portfolio.
- Compare budget against actuals imported straight from the ledger.
- Executive dashboards without standing up a BI stack.

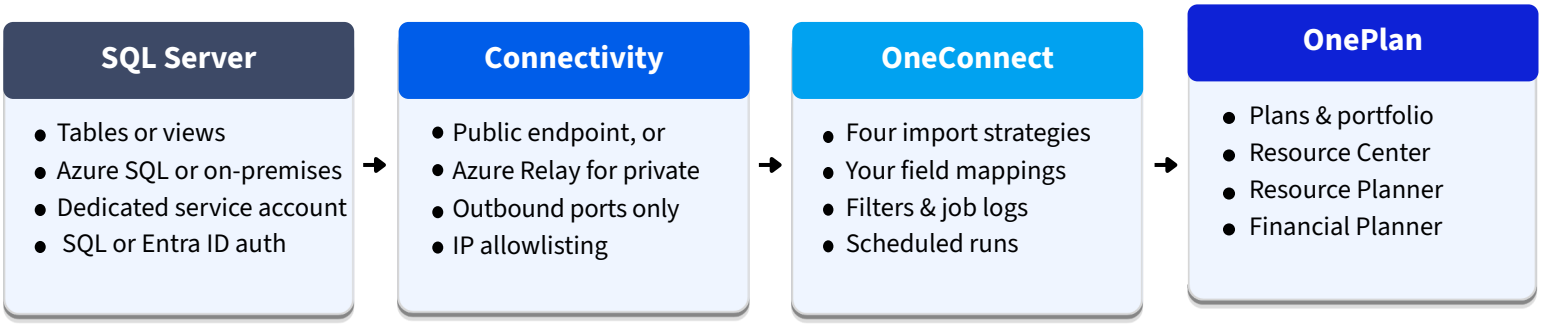
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Plan smarter.
Deliver with confidence.

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From a Table to a Funded Portfolio



Import only. Data flows from SQL Server into OnePlan; the separate OneAnalytics integration handles the return trip when you want OnePlan data back in the database.

Four Strategies, Four Tables

Strategy	Source object	OnePlan target	Minimum fields to map
SQLTableToPlans	dbo.Plans	Plans & portfolio	Name · Portfolio Plan Type · Plan External Id
SQLTableToResources	dbo.Resources	Resource Center	Display Name · Email, or Generic for generic resources
SQLTableToResourcePlanner	dbo.ResourcePlans	Resource Planner	Plan External Id · Resource · Type Name · Hours · Fiscal Month Period
SQLTableToFinancialPlanner	dbo.CostTable	Financial Planner	Plan External Id · Cost Date · Cost Value · Cost Type · Cost External Id

Sample CREATE TABLE scripts ship with the connector for all four sources. Mappings are configured to your schema rather than assumed, and custom fields on financial and resource plans are picked up automatically by matching column name.

Where Teams Use It

Centralized resource import
Names, roles, departments and locations load from SQL Server, keeping one source of truth and ending manual entry.

Capacity planning at scale
Availability and actual hours feed capacity modeling across departments and geographies.

Actuals tracking
Actual financials from ERP or accounting systems held in SQL Server drive budget versus actual at plan and portfolio level.

Multi-system project consolidation
Projects already aggregated in the warehouse sync into OnePlan for one executive view across a mixed estate.

Budget import and synchronization
Approved budgets originate in finance and land on the plan, so the portfolio reflects the funded number.

Cost-to-resource rollups
Resource plan hours import alongside cost, so labor demand and spend sit against the same plan.

Turn Your Database Into a Portfolio

1. Talk to us: **oneplan.ai/contact-us**
2. Start a free trial at **oneplan.ai/trial**
3. Documentation: **support.oneplan.ai**

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