OnePlan

OnePlan and SharePoint for List-Driven Portfolio Intake

Turn the Lists You Already Keep into a Governed Portfolio.

4.4 / 5
Gartner Peer Insights
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Turn the Requests List You Already Keep into a Governed Portfolio

List Items Become Portfolio Plans
Requests already sitting in a SharePoint list arrive in OnePlan as real plans, ready to be prioritized and funded. One column you control decides the plan type.

Least-Privilege Access
Access runs through an Entra service principal, granted one site at a time, and read-only wherever that is all the integration requires.

Updates Flow Both Ways
This is not a one-way feed. Values mapped in both directions return to SharePoint the moment a connected plan is saved, so the list stays trustworthy.

Choice Values Stay Aligned
A lookup strategy keeps SharePoint choice columns and OnePlan lists in step, so nobody maintains two copies of the same picklist.

Governance Without Retraining Anyone

Requests stay where people already file them.

The portfolio picture assembles itself.

1
Connector covering plans and tasks

0
New tools for your teams to learn

↑
Portfolio visibility from day one

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

What You Gain

- Teams keep filing requests where they always have.
- The PMO gets governed, comparable plans instead.
- Decisions in OnePlan land back in the list people read.
- Efficiencies from streamlined project request process.

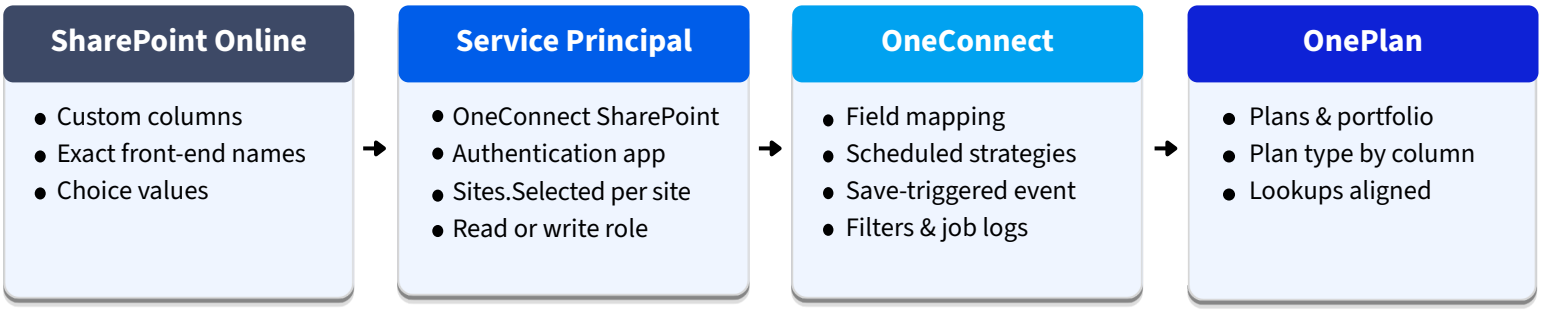
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From a List Item to a Funded Plan



One integration feeds both destinations. SharePoint Online only; SharePoint Server is not supported, and service principal is now the only supported authentication method.

What the Connector Does

SharePoint Lists to OnePlan

Each list item becomes a plan-level portfolio item, where it can be scored, funded, resourced and reported alongside everything else. A text or choice column carries the plan type, so a request can arrive as a project, a program, an epic or an idea.

Runs on schedule, and pushes mapped values back to SharePoint whenever a connected plan is saved.

What Ships Out of the Box

Destination	SharePoint field	OnePlan field	Direction	Notes
Plans	Title	Name	Both	Required
Plans	SP List ID	SP List Name	Both	
Plans	Your plan-type column	Portfolio Plan Type	SP to OnePlan	Recommended
Tasks	Title	Name	Both	Required
Tasks	Your Plan Id column	Plan Id	Both	Required

Everything else, from dates and status to owners and custom fields, is mapped explicitly during setup against OnePlan's Fields and Work Fields.

Security and Scope

Security Your IT Team Will Accept

Authorizing the integration adds one Entra application scoped with Sites.Selected, which grants nothing at all until an administrator approves a named site. Choose read-only wherever the integration only needs to import.

A Clear, Predictable Scope

Plans receive the fields defined in your OnePlan configuration, along with name, owner and plan type. Tasks receive work fields. Hierarchy, ordering and dependencies remain under OnePlan's control.

Turn Your SharePoint Lists 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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