OnePlan

OnePlan and Tabular Data for Connected Portfolio Financials & AI Cost Management

Define Strategy · Prioritize Work · Deliver Results — fed by the ERP and accounting systems 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

Five Tabular Data Integrations — Every Record OnePlan Needs

- **Five Import Types**
  Plans, Resources, Resource Plans, Financial Plans and Time Off — each licensed independently
- **Time-Phased Financials**
  Monthly cost detail by cost type and cost category, rolled up to the plan and across the portfolio
- **Least-Privilege Security**
  Entra service principal scoped with Sites.Selected and grantable read-only, one SharePoint site at a time
- **ERP & Accounting Actuals**
  Land budgets, forecasts and actuals from SAP, Oracle, Dynamics or any GL that can export a CSV
- **Scheduled, Automated Imports**
  Strategies run on a schedule beginning at the Professional tier — up to 24 runs a day at Enterprise
- **No Integration Build**
  CSV is a universal export target. No API work, no middleware, no custom development to maintain

Why Finance and the PMO Both Win

One financial truth across every system

Actuals where the work is actually planned

5
Import types, licensed independently

0
Lines of integration code to maintain

↑
Budget vs. actual in one portfolio view

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

What You Gain

- Budget, forecast and actuals side by side at plan and portfolio level
- Resource capacity built from your HRIS instead of re-keyed
- Approved time off feeding capacity automatically
- Cost categorization for CapEx, OpEx and emerging AI spend

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Deliver with confidence.

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How Tabular Data Works

Source Systems
- ERP / General Ledger
- Accounting & AP
- HRIS / Payroll
- BI & Data Warehouse

→

CSV Extract
- CSV UTF-8
- Header row required
- # marks comment rows
- External Id as key

→

Landing Zone
- SharePoint Online
- OneDrive folder
- SFTP site

→

OneConnect
- Field mapping
- Sync strategy
- Schedule & filters
- Job logs & alerts

→

OnePlan
- Plans
- Resources
- Resource Plans
- Financial Plans
- Time Off

Import only. Data flows from your source systems into OnePlan; OnePlan does not write back to the source.

The Five Integrations

OnePlan target	OneConnect integration	Sync strategy	Key fields in the CSV
Plans	Tabular Data to OnePlan Plans	SyncPlansByPrimaryKey	Name · Plan External Id
Resources	Tabular Data to OnePlan Resource Center Import	SyncResources	Display Name · Email · Generic
Resource Plans	Tabular Data to OnePlan Resource Planner	ResourceImportToResourcePlanner	Plan External Id · Resource · Type Name · Hours · Fiscal Month Period
Financial Plans	Tabular Data to OnePlan Financial Planner	CostImportToFinancialPlanner	Plan External Id · Cost External Id · Cost Type · Cost Date · Cost Value
Time Off	Tabular Data and OnePlan Time Off Import	SyncTimeOff	Resource Name · Email · Start · End · Category · Hours

Each integration is licensed independently. Resource Plans ships with default field mappings; the others are mapped to your columns.

Security, Scheduling and Scope

Authentication

SharePoint and OneDrive authenticate through an Entra app registration OnePlan creates — Microsoft Graph User.Read plus SharePoint Sites.Selected.

Sites.Selected grants nothing until you approve a specific site, and an import-only integration can be granted read.

OnePlan side uses a per-integration Authentication Key.

Scheduling

Strategies ship enabled with Schedule Type set to None — they run on demand until you schedule them.

Basic: manual execution only.
Professional: scheduled runs, under 1M records a month.
Enterprise: to 24 runs a day, over 1M records.

Files process in full unless a filter is applied.

What It Does Not Do

Import only — no write-back to the source system.

No schedule or task import; schedules import one at a time in the product.

No timesheet import.

Plans import does not build plan hierarchy, and does not support filtering.

Where Teams Use It

Actuals tracking
Actual financials from ERP or accounting systems load into OnePlan for budget vs. actual comparison at project and portfolio level

Budget import and synchronization
Approved budgets originate in finance and flow into the plan, so the portfolio always reflects the funded number

Multi-system consolidation
Projects tracked in systems with no native connector still land in one portfolio view through a scheduled CSV

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

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From ERP Actuals to AI Cost Accountability

AI initiatives are funded like projects but spend like infrastructure — cloud and model consumption, licenses, professional services and internal labor, each landing in a different system. Tabular Data pulls those actuals out of the general ledger and onto the plan they belong to, so every AI initiative carries a real cost, a real variance and a real return.

AI Spend Sources

- Model & API consumption
- Cloud compute / GPU
- Platform & tool licenses
- Vendors and services
- Internal engineering time

Coded in the GL

- Cost center / project code
- Mapped to Cost External ID
- Exported monthly as CSV

Cost Structure

- Cost categories per plan
- Budget · Forecast · Actuals
- Benefits as a cost type
- CapEx / OpEx categorization

Plan & Portfolio

- Cost at the project level
- Budget vs. actual variance
- Time-phased by month
- Rolled up to the portfolio

What You Can Answer at the Project Level

What has this AI initiative actually cost?
Model consumption, licenses and services land against the plan, not a shared bucket

Which initiatives are worth continuing?
Benefits are a cost type too — track realized value against spend on one plan

How much capacity is AI work consuming?
Resource Plan imports put demand and time off next to spend

Are we over or under budget this month?
Time-phased actuals sit beside budget and forecast in the same cost table

What is CapEx and what is OpEx?
Cost Categorization tags each line independently of your cost breakdown

What does the whole AI portfolio cost?
Plan-level costs roll up into portfolio dashboards and OneAnalytics

How It Comes Together

1 Give every plan an External ID
Add a text Enterprise Field in OnePlan and set it as the External Id. This is the key your GL rows match on.

2 Code AI spend in the source
Tag model, cloud, license and services spend to the project code your finance team already uses.

3 Export a monthly CSV
Plan External Id, Cost External Id, Cost Type, Cost Date and Cost Value — dated the first of the month.

4 Schedule the import
Drop the file in SharePoint, OneDrive or SFTP and let CostImportToFinancialPlanner run on schedule.

Costing AI initiatives this way is an application of OnePlan's financial planning and Tabular Data import — a solution pattern, not a separate product module. Cost categories created by the import are scoped to the plan they are written to, not created globally.

One Month of AI Spend, as OnePlan Reads It

A single CSV row is one cost, on one plan, in one month. Cost Date is dated the first of the month for monthly time phasing.

Plan External Id	Cost External Id	Cost Type Name	Cost Date	Cost Value
AI-014	LLM-API	Actuals	2026-08-01T00:00:00	42,180
AI-014	GPU-COMPUTE	Actuals	2026-08-01T00:00:00	18,940
AI-014	LLM-API	Forecast	2026-09-01T00:00:00	45,000

Connect Your ERP Financials to OnePlan

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