OnePlan

ULTIMATE ENTERPRISE

The Full Platform. Supported. AI-Ready.

Enterprise, Premier Success, Advantage, the MCP Server and 15 AI credits per user each month — in one license.



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

One License. Everything Included.

Enterprise
Strategic portfolio management, advanced analytics, automation and architecture for the enterprise.

Premier Success
Priority support and faster SLAs, quarterly business reviews, OnePlan Academy LMS, advisory council and early feature access.

Advantage
Ongoing configuration and admin support. With Premier Success, customization (JS / CSS) is unlocked.

MCP Server
Connect Microsoft Copilot, Claude and ChatGPT to OnePlan, with each person's permissions in force.

15 AI Credits
Capped OnePlan AI credits, per user, per month. Add more with AI Bundles.

EVERYTHING IN BASIC, PLUS

- ✓ Evaluate, approve and convert ideas
- ✓ Portfolio Modeler and what-if scenarios
- ✓ Financial Planner, what-if and pivot charts
- ✓ Power BI report packs and OData
- ✓ Power Automate and Enterprise API
- ✓ Strategic alignment and custom metrics
- ✓ Business rules
- ✓ Gantt, list, boards and activities
- ✓ Enterprise architecture and Visualizer
- ✓ Enterprise permissions and audit logs
- ✓ Board and roadmap views
- ✓ Resource Planner, negotiations and what-if
- ✓ Status reports, approvals and trending
- ✓ Standard and advanced integrations
- ✓ Customization (JavaScript / CSS)

15 AI Credits a Month. Built Into Every License.

Capped, predictable AI usage — expand any time with AI Bundles.

15
AI credits per user per month

0
Credits for standard MCP actions

+
More usage through AI Bundles

> *OnePlan AI credits power Sofia AI, helping teams find information, analyze portfolios, manage resources, and take action using natural language.*
>
> *-OnePlan*

What You Gain

- The full platform, with customization unlocked out of the box.
- Priority support, QBRs and ongoing configuration help.
- AI across portfolio, resource and financial data.
- Predictable AI spend with a capped monthly allowance.

Trusted by: Microsoft · Johnson & Johnson · Bridgestone · Molson Coors · PACCAR · Purple · Kiewit · Ross Dress For Less

Plan smarter.
Deliver with confidence.

www.oneplan.ai

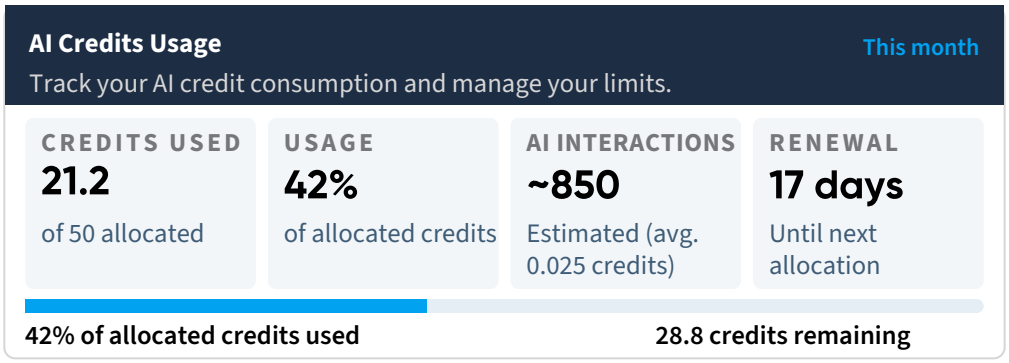
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How Your AI Credits Work

Ultimate Enterprise includes 15 capped OnePlan AI credits per user, per month. Usage depends on request complexity, data processed and the AI model used. Credits are consumed mainly by advanced capabilities that use large language models for analysis, reasoning and responses.

See Every Credit

- ✓ Credits used against allocation
- ✓ Usage and credits remaining
- ✓ Estimated AI interactions
- ✓ Days until next allocation



Settings › AI Credits. Sample data shown.

Activity	Estimated credits	Typical request
Quick questions	0.01–0.03	Find a specific answer, such as “Which projects are overdue?”
Portfolio insights	0.02–0.05	Summarize portfolio status, trends, risks or key priorities.
Resource or financial analysis	0.03–0.08	Compare resource capacity, allocations, budgets or actual costs.
Standard MCP actions	0	Retrieve or update OnePlan records using MCP tools, without LLM processing.
Complex AI analysis	0.10–0.30	Analyze multiple datasets, evaluate trade-offs or recommend actions.

Credit-Free Actions (MCP)

Many OnePlan MCP tools do not use AI credits, including standard data retrieval and update actions — find, create, update, move. Connect Microsoft Copilot, Claude or ChatGPT and handle everyday portfolio work without drawing down your allowance.

Use Your Credits Efficiently

- ✓ Be specific and focused in your requests.
- ✓ Limit scope to specific projects or time periods.
- ✓ Keep responses concise.
- ✓ Use MCP tools for common tasks — no credits.
- ✓ Reuse conversation context for follow-ups.

Put It to Work

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.”

APPROVER
“What approvals are waiting on me? Summarize each one.”

ACROSS MODULES
“Which over-budget projects also have over-allocated people?”

Manage AI Credit Limits

Administrators can set AI credit limits by group and individual user, giving power users more and adjusting as needs evolve.

Need More AI?

Additional AI usage can be purchased through OnePlan AI Bundles.

AI credit estimates are illustrative; actual consumption varies by AI model, request complexity, data volume and processing requirements. MCP tools work only for modules enabled in your edition. The OnePlan MCP Server is available in preview; features and tools may change.