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Agile Project Management



**Agile PM – your projects, powered by
ERP.net**



Business challenges



Rigid processes

Traditional approaches are slow to adapt to change.



Isolated tools

Separate systems cause data silos and manual work.



Poor collaboration

Lack of transparency and involvement slows progress.

Agile PM - solving real business challenges



ERP.net embedded: plan, execute & track in one system



Flexible structures: project types, projects, areas, milestones, sprints, case categories



Unified collaboration: social groups, discussions, and notifications



In-context discussions: keep communication and work in one place



Case hierarchies: parent-child structure for better organization



Smart routing: automate assignment based on context & workflow state



WIP & time tracking: limit overload and monitor effort precisely

Core structures

Project Types

High-level classification
of projects

Projects

Organize teams & work
by business goals

Project Groups

Share configuration
across projects

Project Areas

Divide projects into
manageable domains

Milestones

Mark key delivery
checkpoints

Case Categories

Define work item
behavior and layout

Sprints

Time-boxed iterations
(1–4 weeks)

States

System & user states
drive workflows

Cases

Core work items: tasks,
bugs, features

Cases – the heart of your project workflow

- Core work items that drive your process forward.
- Store context, assignments, discussions, and files – all in one place.
- Key updates and transitions are automatically logged for traceability.
- Workflows follow **standard states** like Backlog, In Progress, Closed, etc., with optional **user sub-states**.
- WIP limits** keep workloads balanced and teams focused.

The screenshot displays a project management interface for a user story. At the top, the title is "4: Revise Main Navigation Structure Based on User Tasks" under the category "User Story". The interface includes a top navigation bar with icons for Edit, Run, Start time, Share, Notifications, Add to favorites, Close, and Menu. Below this is a state transition bar with stages: BACKLOG, CONSIDER (Needs clarification), READY, IN PROGRESS, WAITING, RESOLVED, and CLOSED. The main content area shows the title "Revise Main Navigation Structure Based on User Tasks" and tabs for Basic, Advanced, and Subcases. The Basic tab is active, showing fields for Project (Website Redesign), Milestone (01. Concept Approval), Area (UX & Content Strategy), and Assigned To (Sophia Fletcher <sophia.fletcher> [INT]). Below these fields is a COMMENT section. The DEVELOPMENTS section shows a list of updates with a search bar and a filter icon. The updates include: "2025-07-22 08:48:18 Assigned to Sophia Fletcher <sophia.fletcher> [INT] by Jacob Turner <admin> [INT]", "2025-07-21 14:46:28 Assigned to Jacob Turner <admin> [INT] by Sophia Fletcher <sophia.fletcher> [INT]", "2025-07-21 14:35:58 Changed state to CONSIDER by Sophia Fletcher <sophia.fletcher> [INT]", and "2025-07-21 14:09:02 Edited by Sophia Fletcher <sophia.fletcher> [INT]". Below the updates is an "Additional context:" section with text: "Feedback from usability testing sessions confirms that users often rely on top-level navigation to locate specific tasks, but the current layout groups items in ways that do not match mental models." and "Proposed revision should explore re-grouping based on task frequency and logical user flows, possibly supported by card sorting results." The Parent is set to "case 3". The Context / Problem section states: "User interviews and analytics indicate that visitors struggle to find key information (e.g. services, pricing, and contact options) due to a cluttered and inconsistent navigation menu." On the right side, there is a "Discuss" panel showing a conversation between Jacob Turner and Sophia Fletcher. Jacob Turner's message is: "I was reviewing the story — do we have a clear scope on which navigation sections this revision will affect? I'm a bit unclear whether this applies only to the top-level menu or also to in-section navigation." Sophia Fletcher's response is: "Great point. The focus is primarily on the top-level structure, but we'll likely propose minor adjustments in key sections as well — especially where we've seen drop-off in task completion. I'll update the story to make this clearer." Jacob Turner's final message is: "Thanks! Once that's clarified, I'm good to approve it for the next planning round."

Organize and visualize your work

🎯 **Hierarchy:** break down large projects into parent and child cases for better structure

Case hierarchy

✓ 5: Enhance Website Usability for Key User J...

✓ 3: Redesigned Main Navigation

4: Revise Main Navigation Structure B...

7: Improve Label Clarity in Main Navig...

9: Enhance Navigation Responsivenes...

6: Improve Key Page Layouts for Enhanc...

4: Revise Main Navigation Structure Based on User Tasks

Website Redesign

CONSIDER (Needs clarification)

Open

Assigned To User: Sophia Fletcher <sophia.fletcher>

[INT]

Case Category: User Story

Project Milestone: 01. Concept Approval

Priority: Three

🎯 **Kanban view:** track progress visually and manage transitions with simple drag & drop.

Projects

Search

Projects / Cases

Cases

Standard

KANBAN - CASES

BACKLOG

2: Defeature functions for CAD models

Design Idea / Conception

9: Enhance Navigation Responsiveness and Accessibility

User Story

Need Review

CONSIDER

4: Revise Main Navigation Structure Based on User Tasks

User Story

Needs clarification

READY

6: Improve Key Page Layouts for Enhanced Task Completion

Feature

7: Improve Label Clarity in Main Navigation

User Story

For Design

IN PROGRESS

1: New Feature - Automatic Thread Type and Parameters Recognition

Design Idea / Conception

3: Redesigned Main Navigation

Feature

Work In Progress

WAITING

5: Enhance Website Usability for Key User Journeys

Initiative

Design & Development

RESOLVED

8: Automatic Graphing Tool for Engineering Analyses

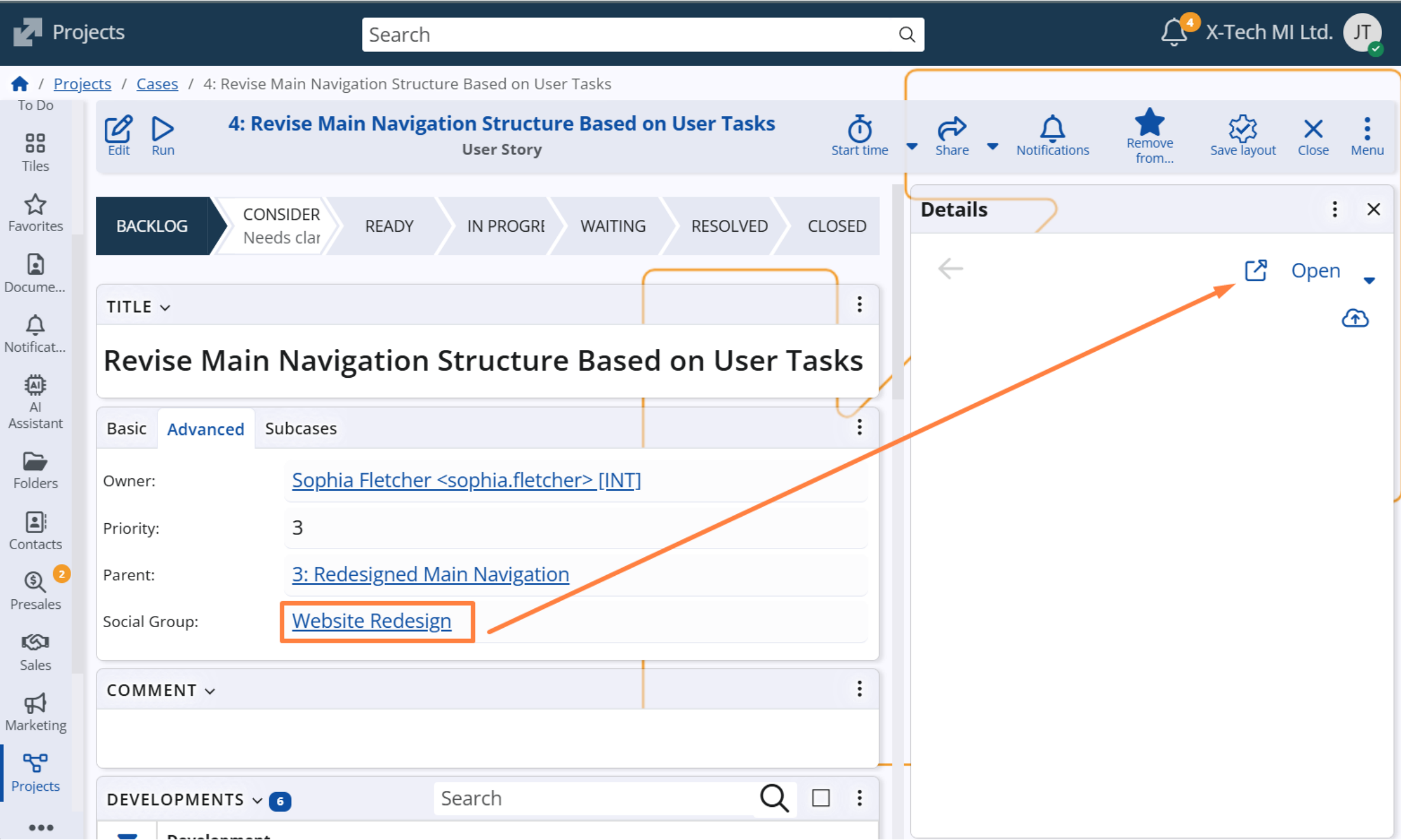
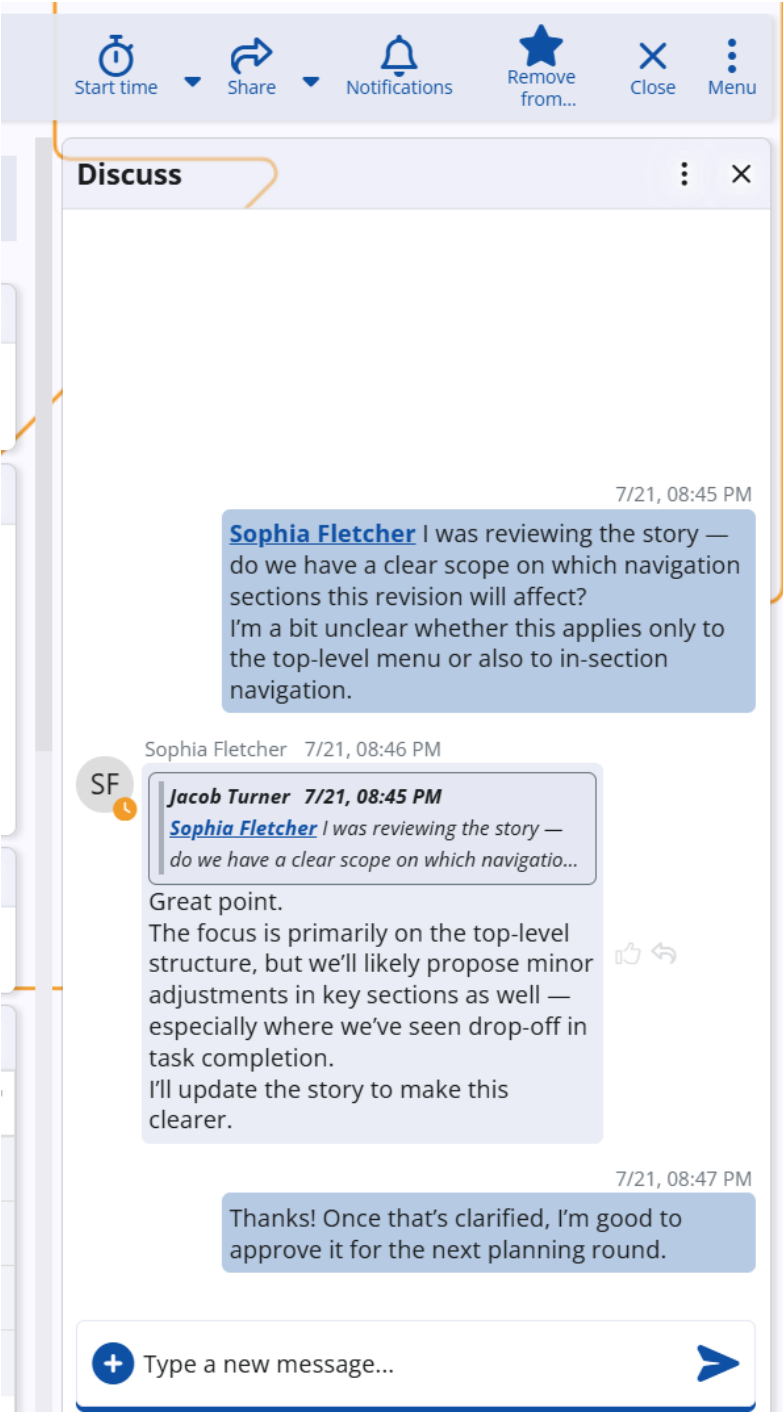
Feature

Completed

CLOSED

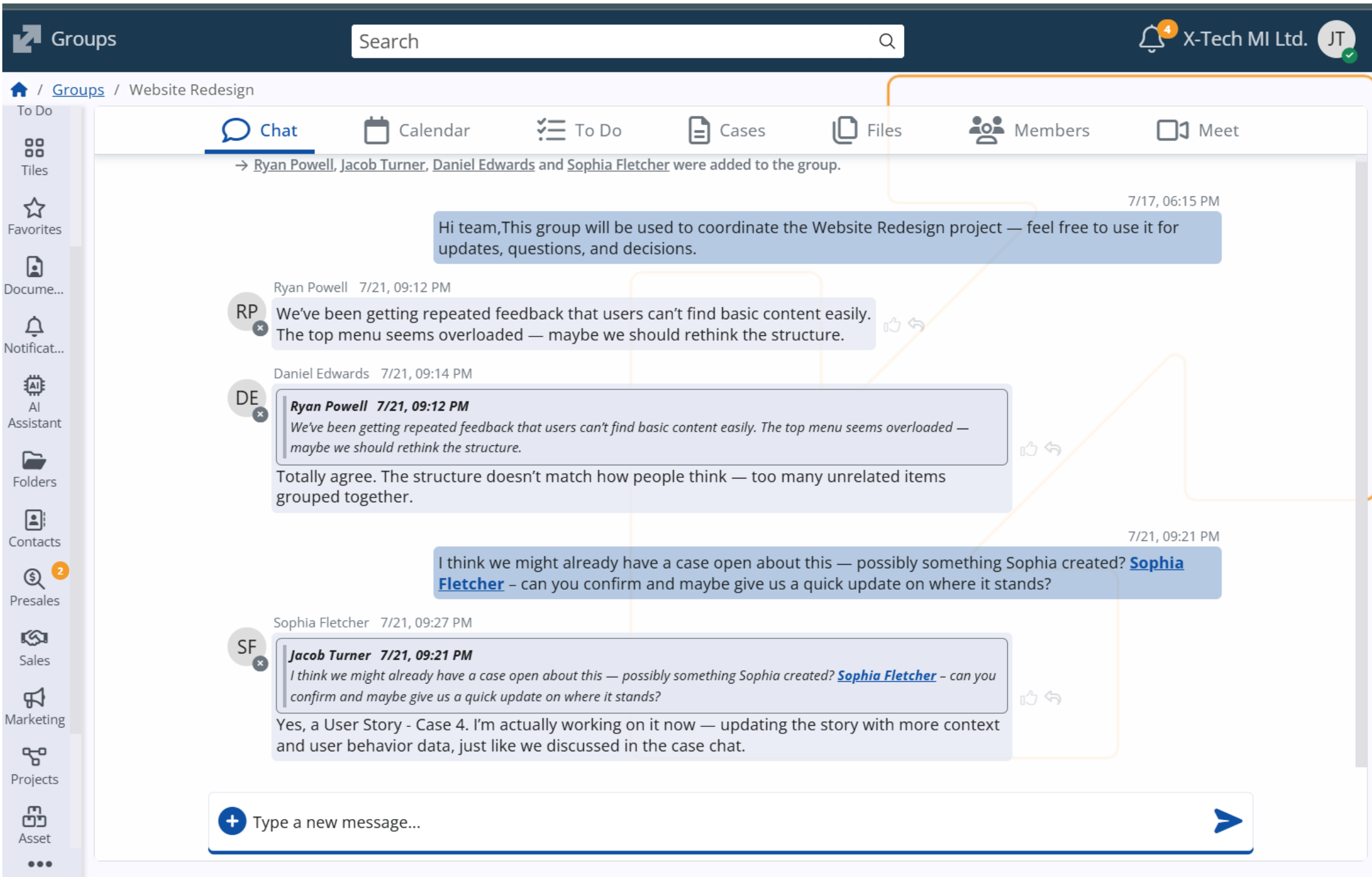
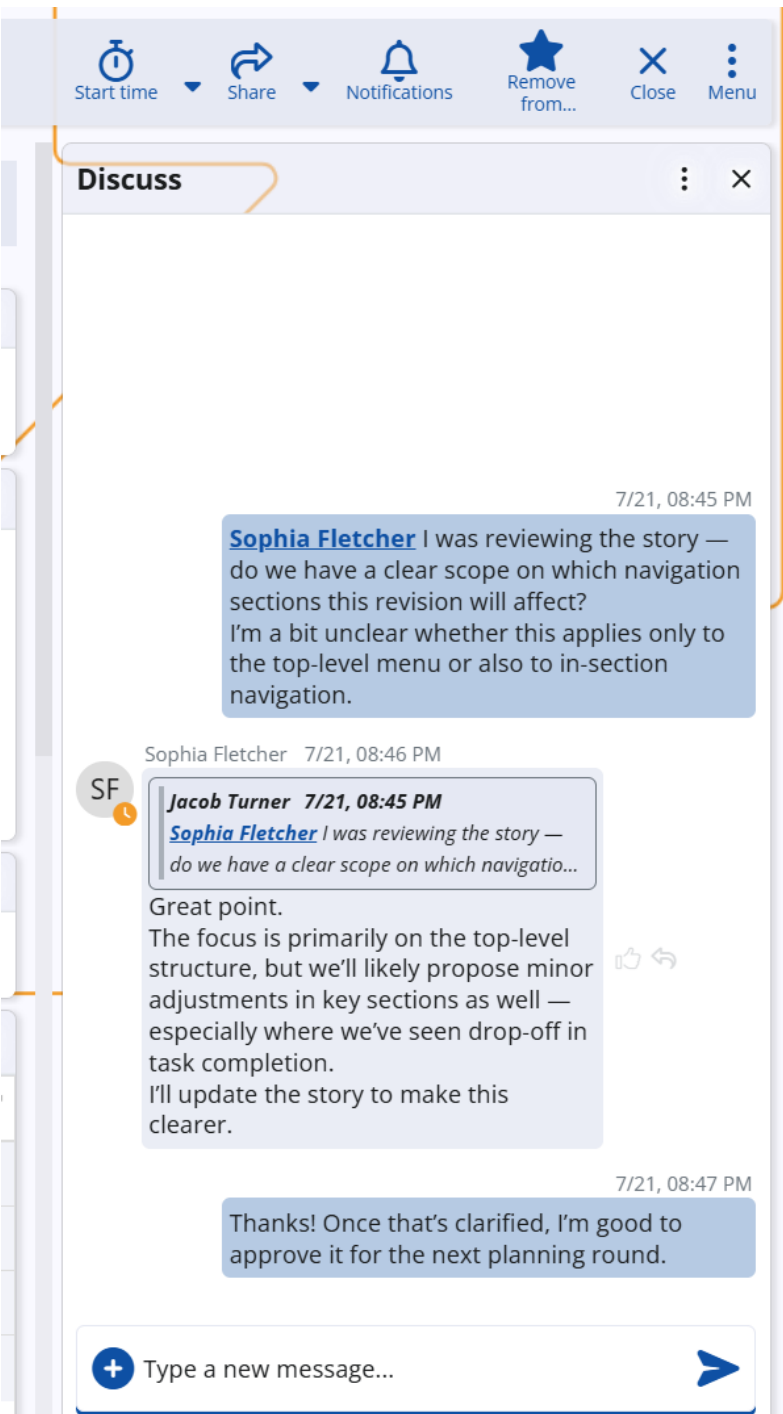
Collaborate seamlessly and stay aligned

🎯 **Collaboration:** communicate in context through case discussions or related social groups — without cluttering the case itself.



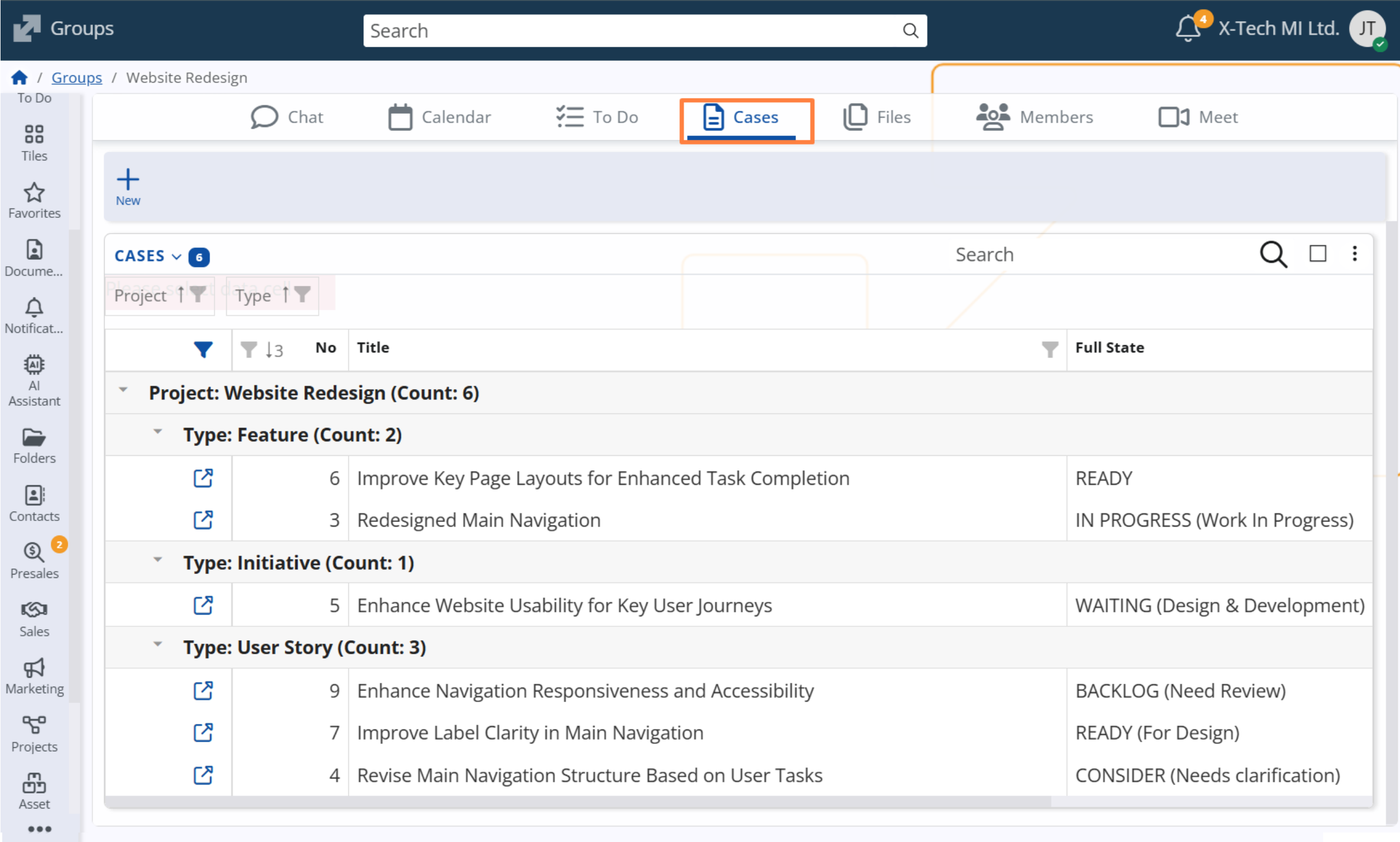
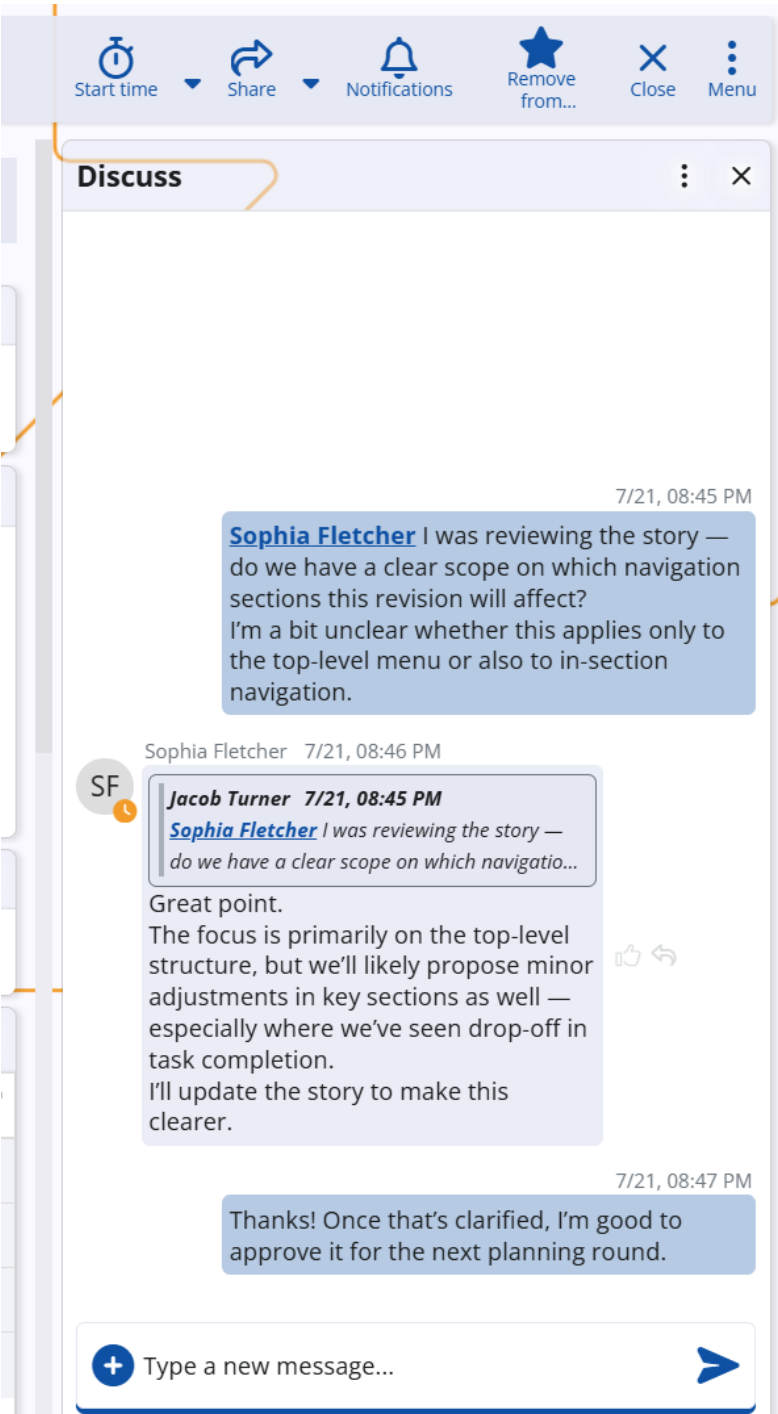
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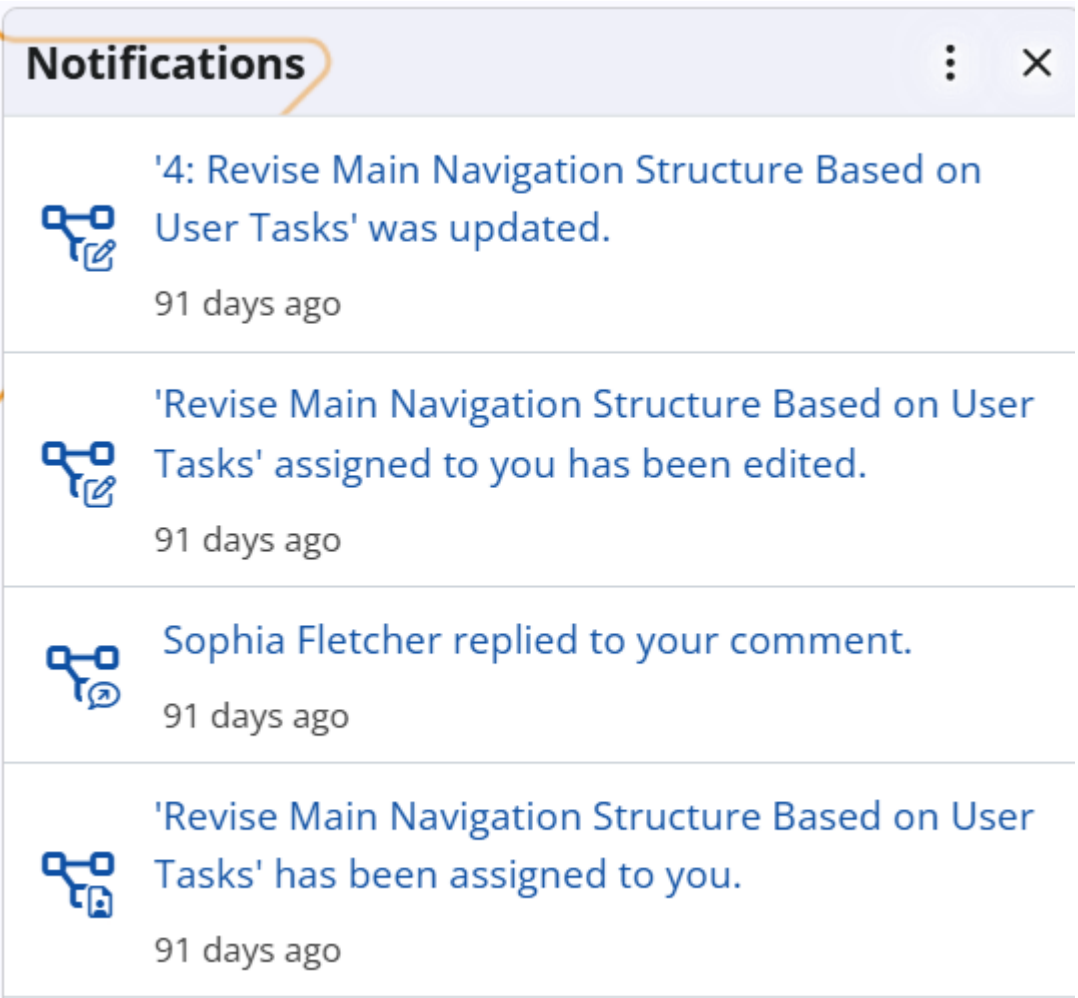
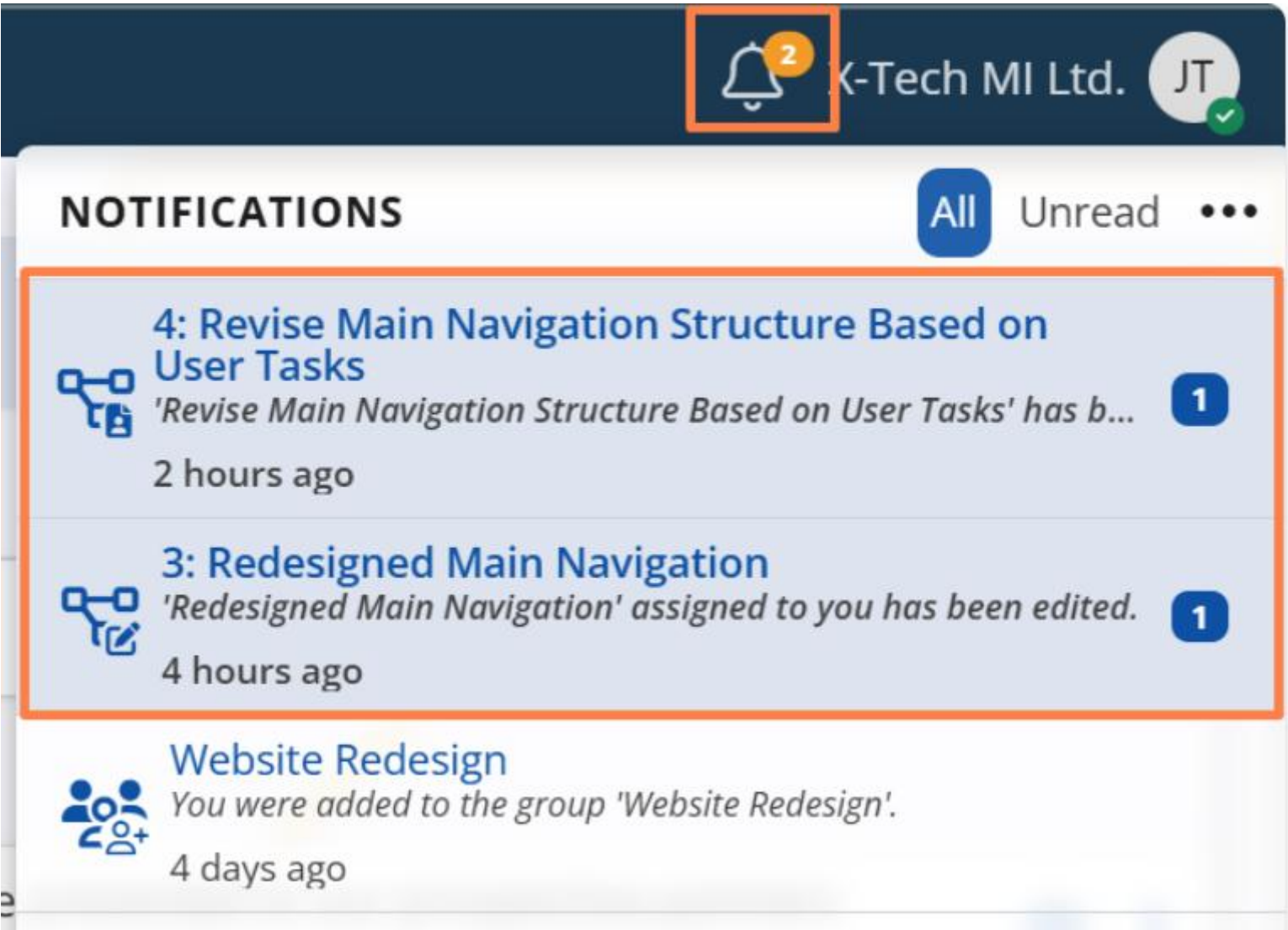
Collaborate seamlessly and stay aligned

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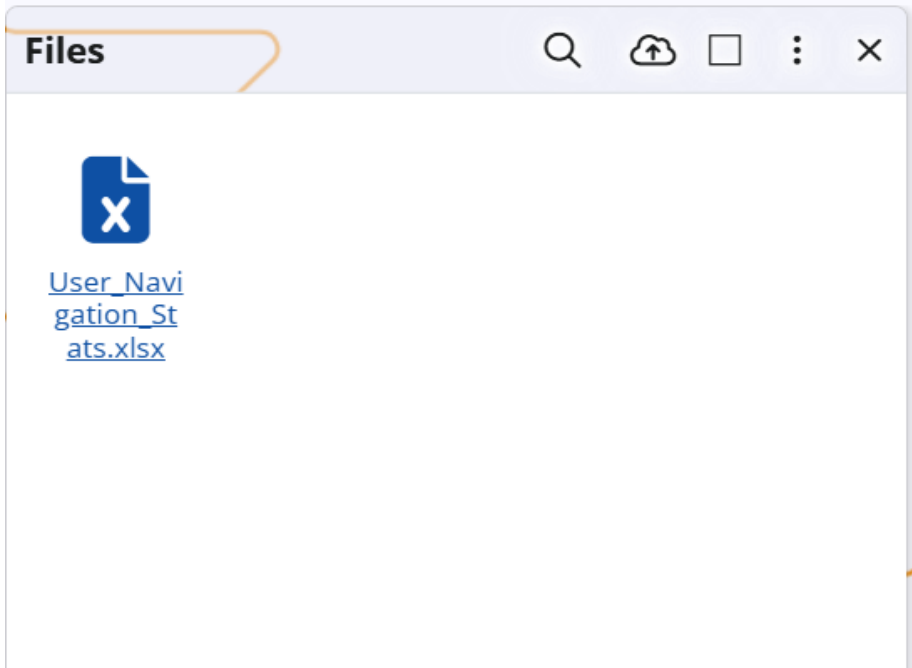


Stay informed and in control

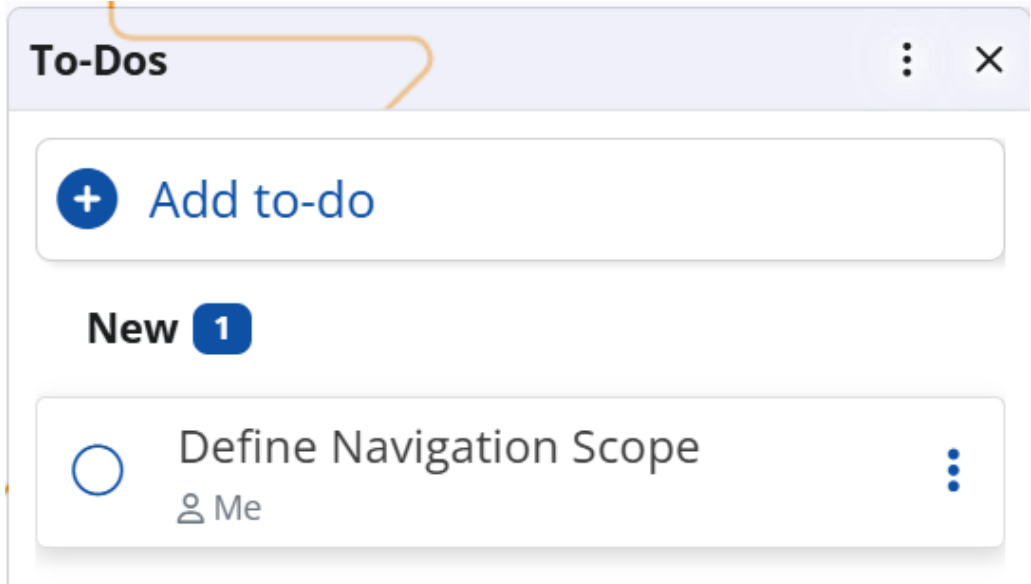
🎯 **Notifications:** get real-time updates on case changes, assignments, and comments - and review them directly within the case.



🎯 **Files & attachments:** store and access related files right where the work happens.



🎯 **To-dos:** manage personal or shared subtasks without disrupting the main case flow



Work smarter with advanced tools

Time tracking

- Record actual work hours via built-in timers
- Analyze workloads & identify time-intensive tasks
- Calculate costs based on invested effort

Agile projects Search X-Tech MI Ltd. JT

Agile projects / Cases / 4: Revise Main Navigation Structure Based on User Tasks

4: Revise Main Navigation Structure Based on User Tasks User Story

Start time Notifications Remove from... Save layout Close Menu

BACKLOG CONSIDER Needs clarification READY IN PROGRESS WAITING RESOLVED CLOSED

TITLE v

Title: Revise Main Navigation Structure Based on User Tasks

Agile projects Search X-Tech MI Ltd. JT

Agile projects / Time Entries / 2025-07-22 12:02 - 12:12

2025-07-22 12:02 - 12:12 Time Entry

Add to favorites Close Menu

GENERAL v

Case: 4: Revise Main Navigation Structure Based on User Tasks

User: Jacob Turner <admin> [INT]

Date: 2025-07-22

Start Time: 12:02

End Time: 12:12

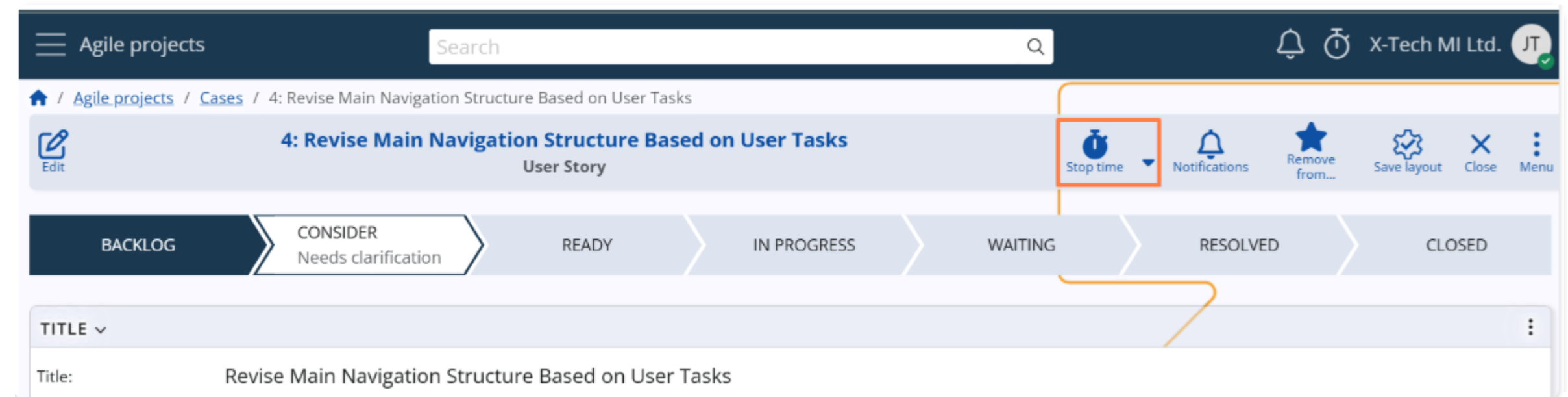
Duration Hours: 0.16

Notes:

Work smarter with advanced tools

Time tracking

- Record actual work hours via built-in timers
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Agile projects

Search

4: Revise Main Navigation Structure Based on User Tasks

User Story

Stop time

Notifications

Remove from...

Save layout

Close

Menu

BACKLOG

CONSIDER Needs clarification

READY

IN PROGRESS

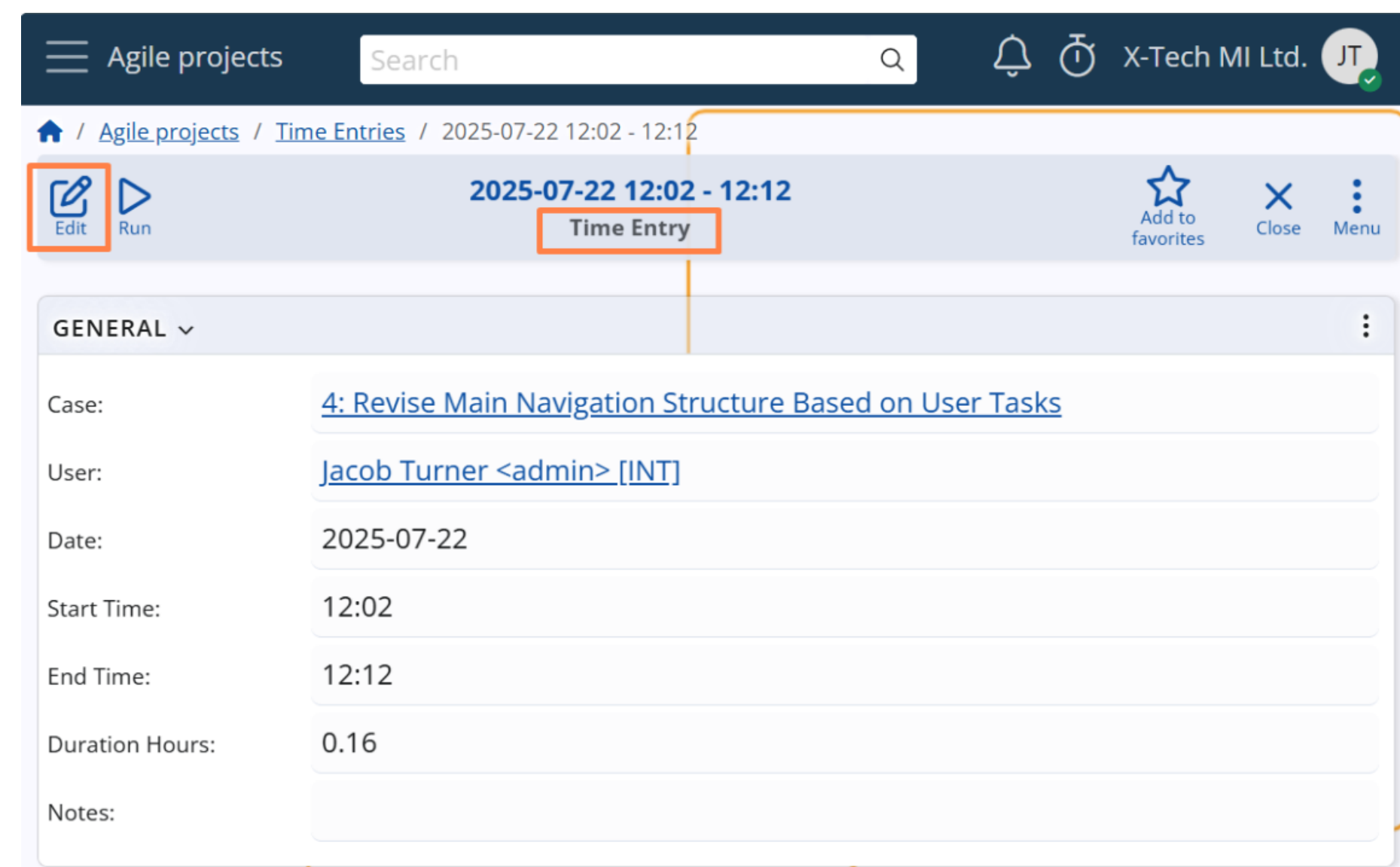
WAITING

RESOLVED

CLOSED

TITLE

Title: Revise Main Navigation Structure Based on User Tasks



Agile projects

Search

2025-07-22 12:02 - 12:12

Time Entry

2025-07-22 12:02 - 12:12

Edit

Run

Add to favorites

Close

Menu

GENERAL

Case: 4: Revise Main Navigation Structure Based on User Tasks

User: Jacob Turner <admin> [INT]

Date: 2025-07-22

Start Time: 12:02

End Time: 12:12

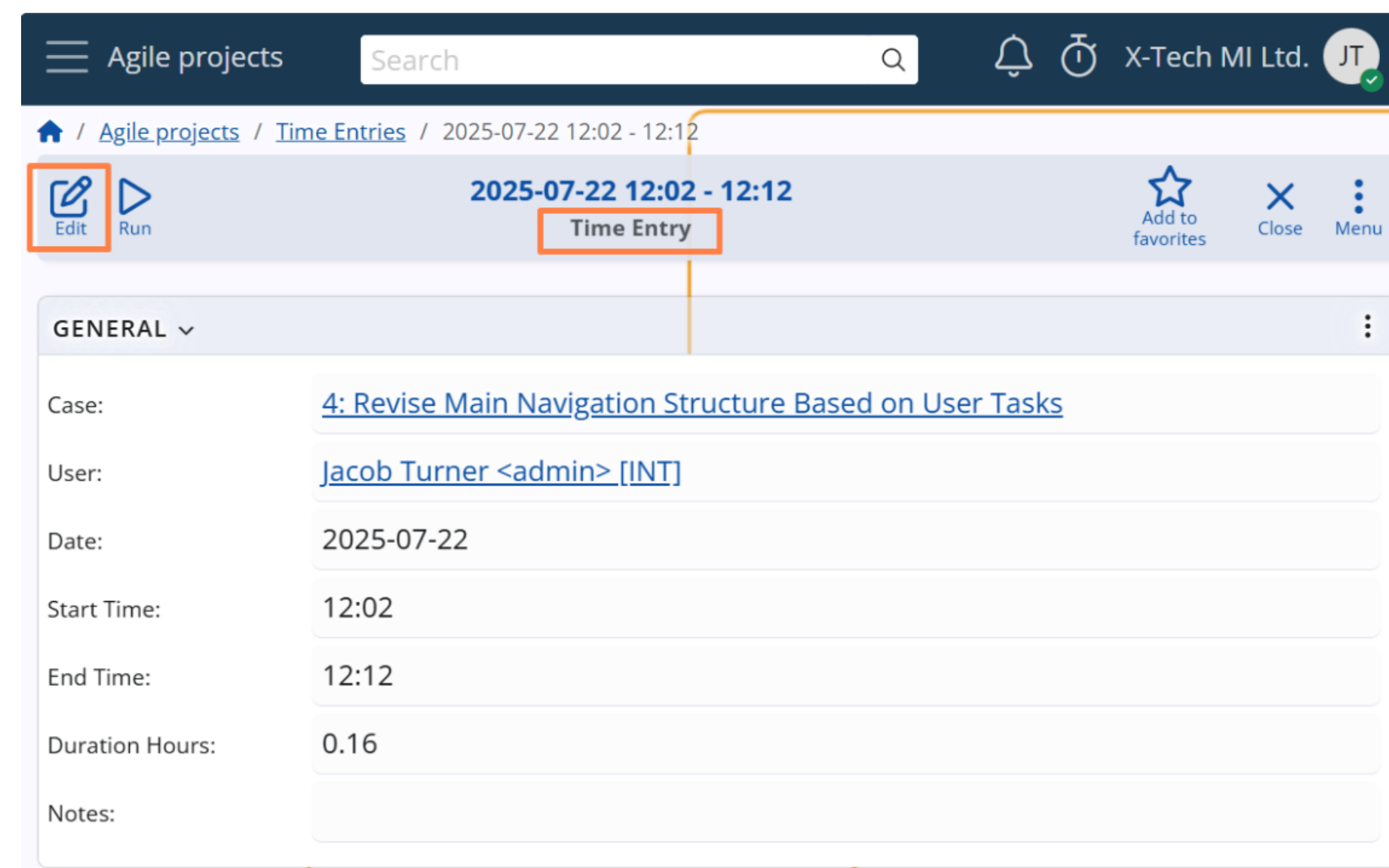
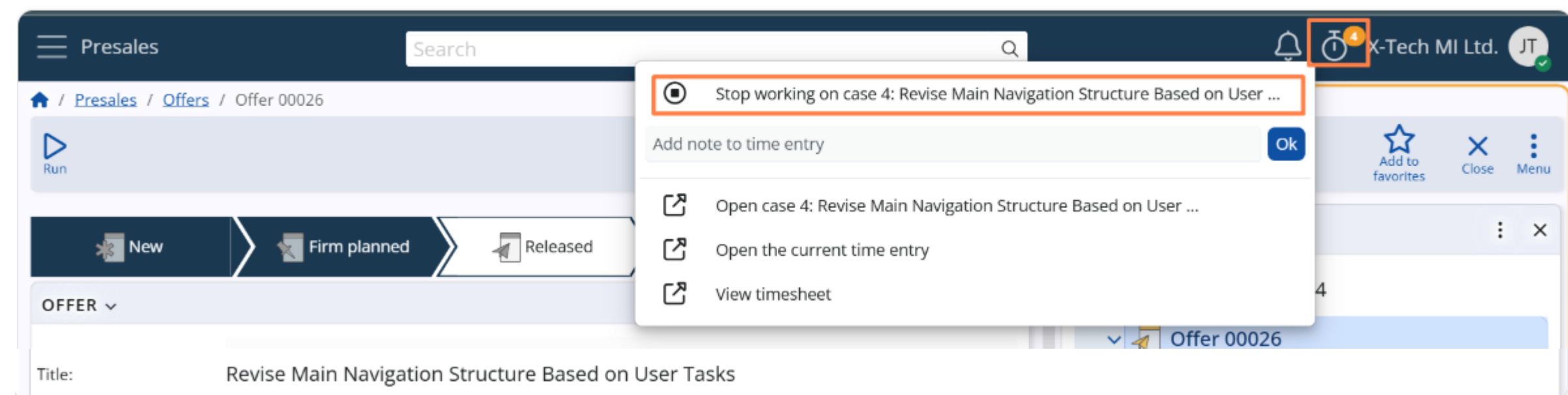
Duration Hours: 0.16

Notes:

Work smarter with advanced tools

Time tracking

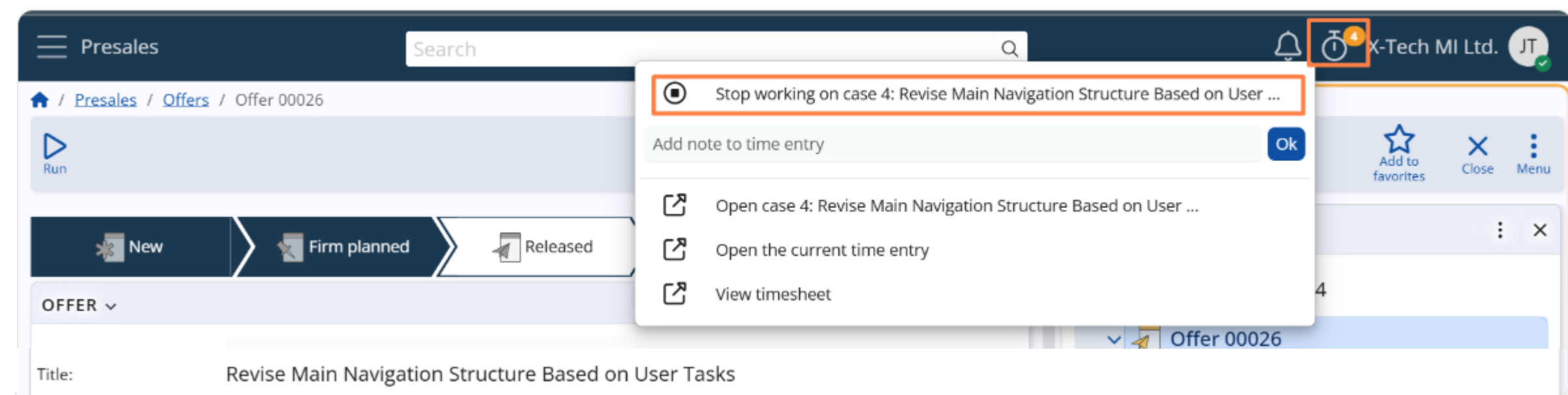
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Work smarter with advanced tools

Time tracking

- Record actual work hours via built-in timers
- Analyze workloads & identify time-intensive tasks
- Calculate costs based on invested effort



Time Entries					
Standard - All users					
TIME ENTRIES 39					
Date ↓ User ↑					
Case	Start Time	End Time	Duration Hours	Notes	
Date: 2025-07-30			Sum: 8.74		
User: Jacob Turner <admin> [INT]			Sum: 3.69		
1: New Feature - Automatic Thread Type and Parameters Recognition	12:37	14:44	2.11		
8: Automatic Graphing Tool for Engineering Analyses	15:02	16:37	1.58		
User: Sophia Fletcher <sophia.fletcher> [INT]			Sum: 5.05		
4: Revise Main Navigation Structure Based on User Tasks	12:38	17:42	5.05		
Date: 2025-07-22			Sum: 3.95		
User: Michael Reeds <michael.reeds> [INT]			Sum: 2.47		
2: Defeature functions for CAD models	10:34	11:46	1.2		
2: Defeature functions for CAD models	15:49	17:05	1.27		
User: Sophia Fletcher <sophia.fletcher> [INT]			Sum: 1.48		
4: Revise Main Navigation Structure Based on User Tasks	13:24	14:53	1.48		
Date: 2025-07-18			Sum: 3.43		
User: Jacob Turner <admin> [INT]			Sum: 0.82		
			Sum: 55.80		

Work smarter with advanced tools



Assignment rules

- Define routing logic using project, area, category & state
- Automatically assign cases to the right person
- Balance workloads & ensure accountability

Save and close

Run

30: Area Responsible
Case Assignment Rule

Share

Add to favorites

Close

Menu

Basic

Advanced

Rule No:

30

Notes:

Website Redesign | User Story | READY / For Design → Area Responsible

Active:

☒ Yes

TRIGGER CONDITIONS

Project:

Website Redesign

Area:

Category:

User Story

System State:

READY

User State:

For Design

ASSIGNMENT LOGIC

Assignment Kind:

Area Responsible

Assign To:

Area Responsible

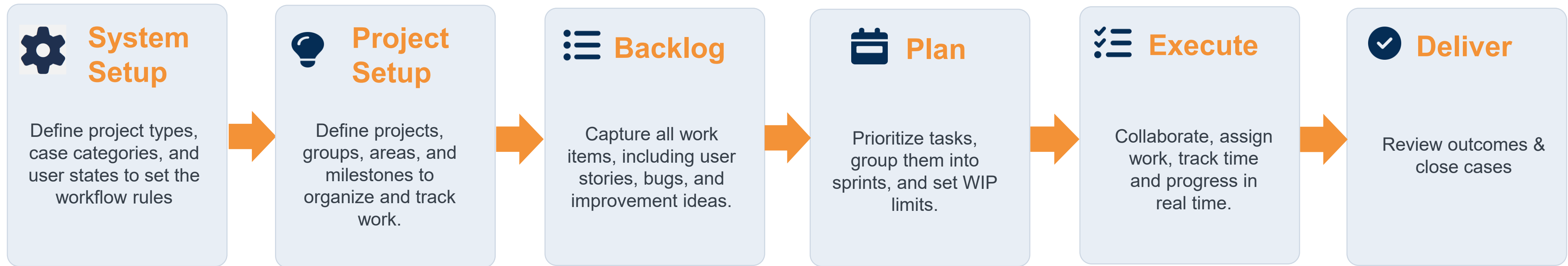
Project Responsible

Case Owner

Current User

Specific User

From setup to success



Agile PM in action – real results, real impact

	Before	With Agile PM	Result
 Collaboration	Scattered tools	In-case collaboration	Unified team
 Accountability	Unclear roles	Auto assignments	Accountability
 Structure	No structure	Configurable projects	Consistency
 Tracking	Manual tracking	Smart time logs	Efficiency
 Integration	Disconnected data	ERP-embedded	Full visibility

Bring Agile into the heart of your ERP

Get started today with ERP.net Agile PM





Thank you!