



Quarterly Product Update

December 2014

What We'll Cover Today

- What's New in LeanKit
- What's Ahead
- Q & A

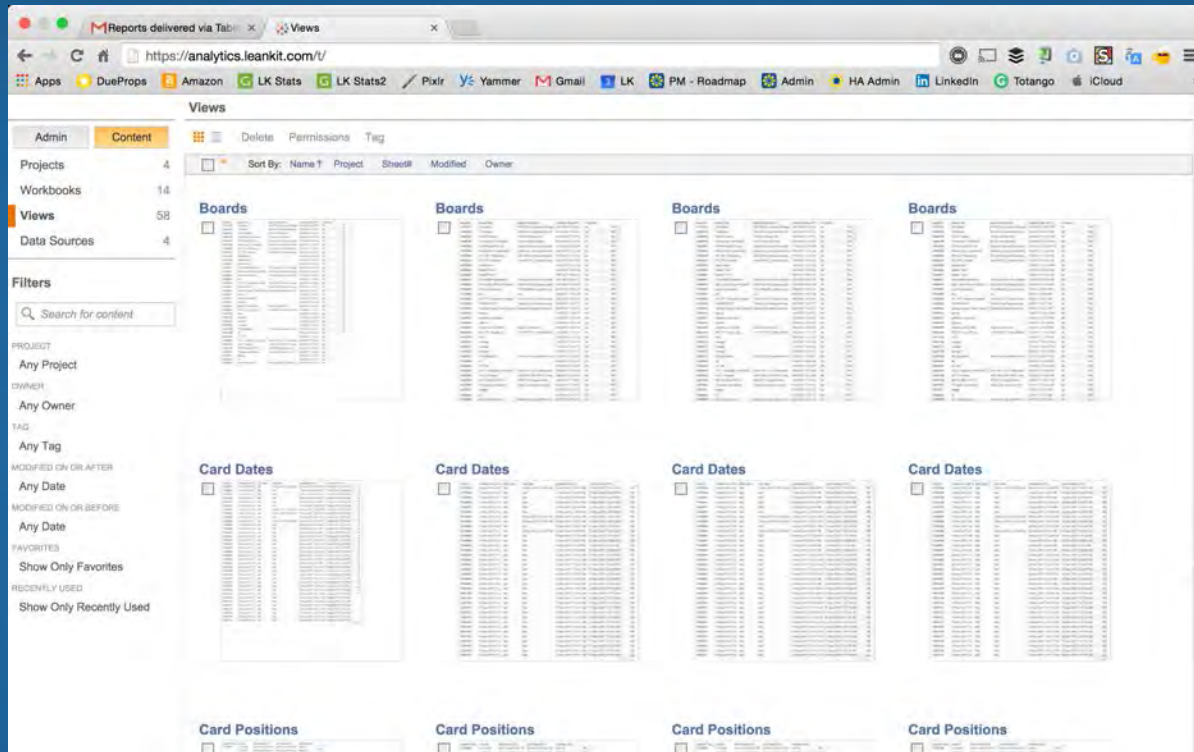


**JON
TERRY**
CHIEF OPERATING OFFICER

Since our last update

- Reporting & analytics overhaul – prep
- Ongoing integrations work
- Work connections
- Filter functionality
- Calendar view improvements
- User interface/experience enhancements
- Templates for scaling Agile
- Task cards saved to board templates
- Access to user management APIs

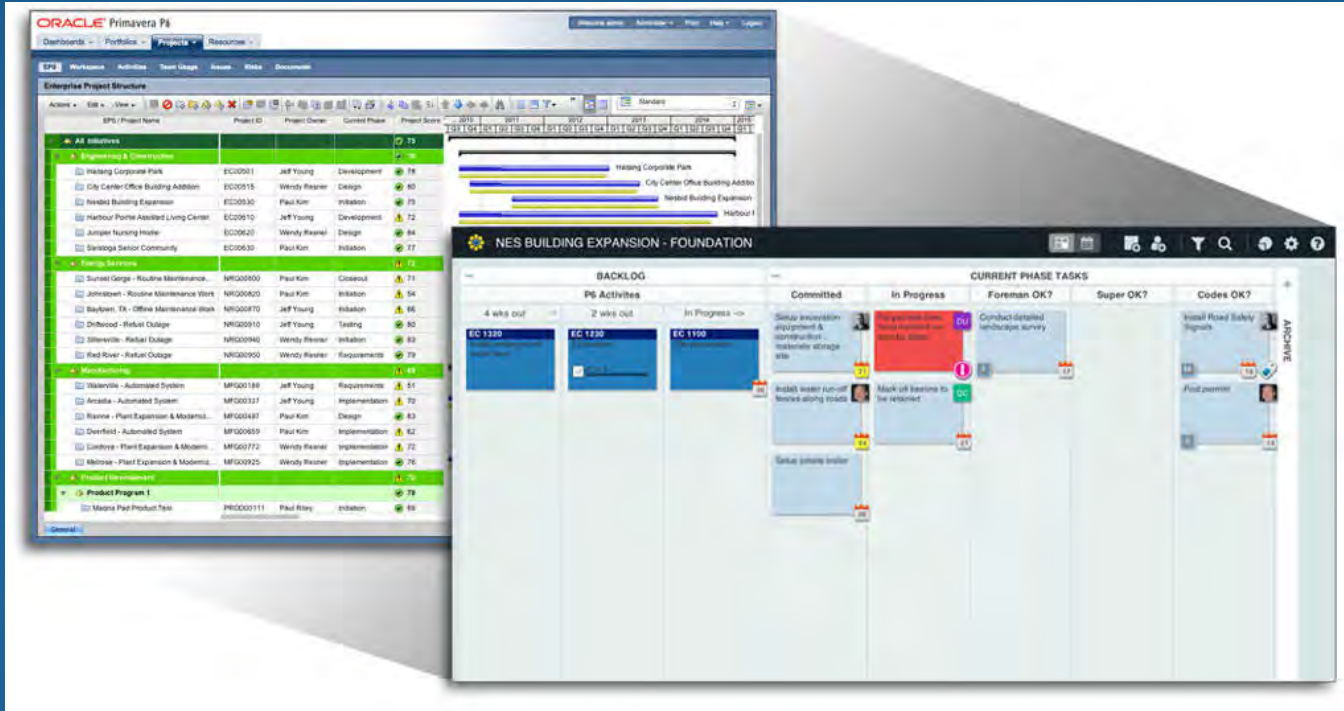
Reporting & Analytics Overhaul



Custom reporting site – prep for Tableau transition



LeanKit Application Integrations



Bringing Microsoft Project Server and Oracle Primavera work into LeanKit for easier, more visual tracking

Work Connections

The screenshot displays the 'Work Connections' section of the LeanKit interface. On the left, a sidebar contains navigation links: Details, Tasks, **Connections** (highlighted with a red box), Assigned Users, Comments, Attachments, and History. Below the sidebar is a blue card titled 'Add users to Ordering Platform' with a calendar icon showing '10'.

The main content area is titled 'Card Connections' and includes the following text:

Connections let you create parent-child relationships between cards on different boards.

This enables you to delegate work to other teams or breakout work onto a dedicated project board.

Stay informed of progress using roll-up statistics at the parent card level and drill into the details as needed.

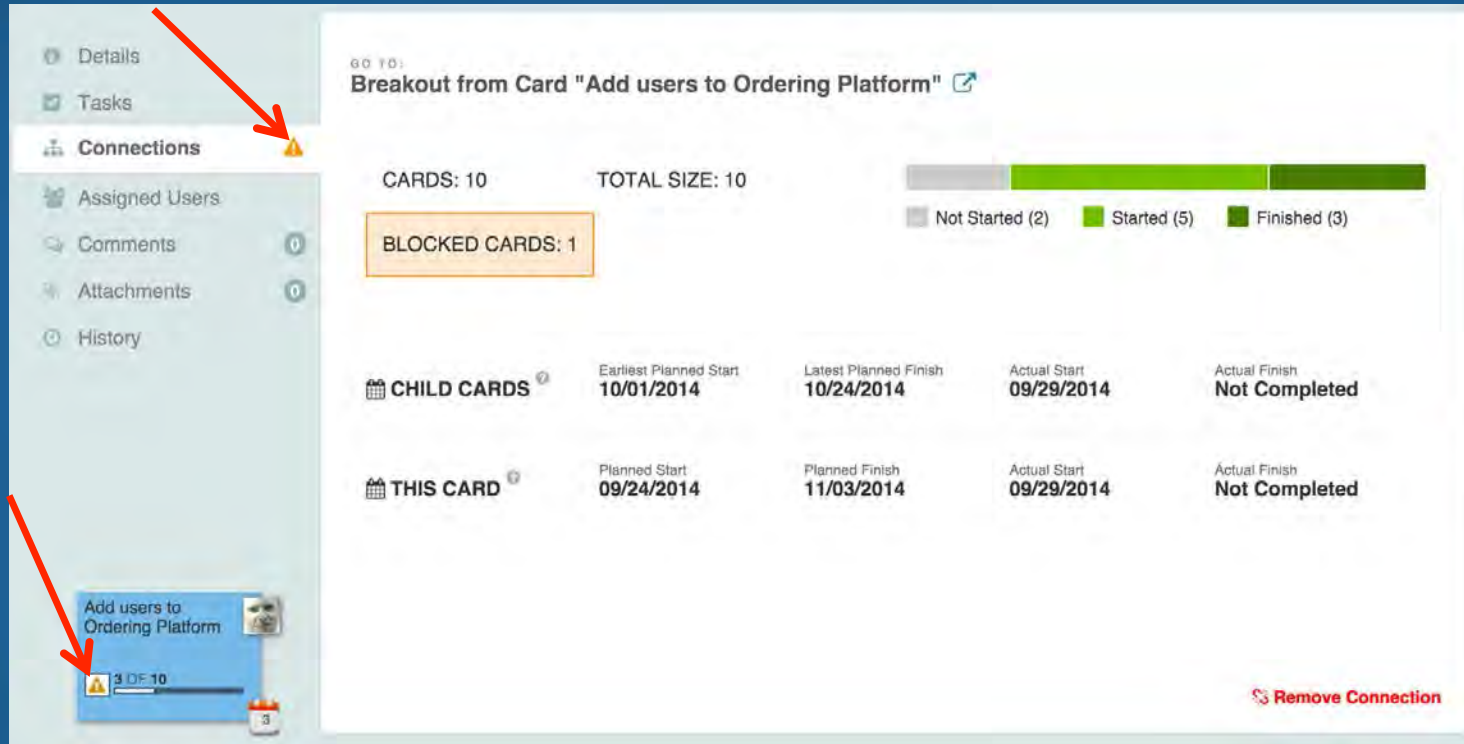
Two action buttons are provided:

- Breakout to a New Board** (green button)
- Delegate to an Existing Board** (blue button)

To the right, a diagram illustrates the connection functionality. It shows a yellow card at the top with the text 'Connect this card to cards on another board' and a progress indicator '3 OF 5'. This card is connected by lines to a central board, which in turn is connected to two other boards at the bottom, demonstrating a hierarchical relationship between cards and boards.

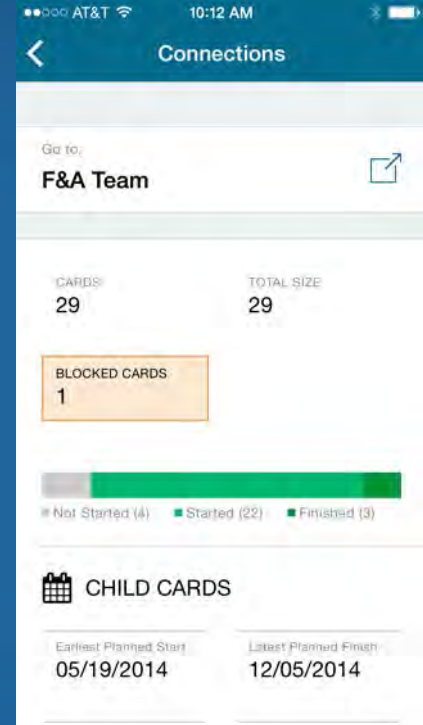
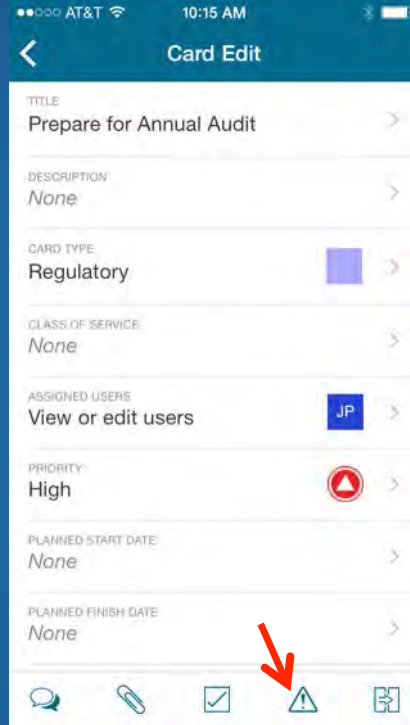
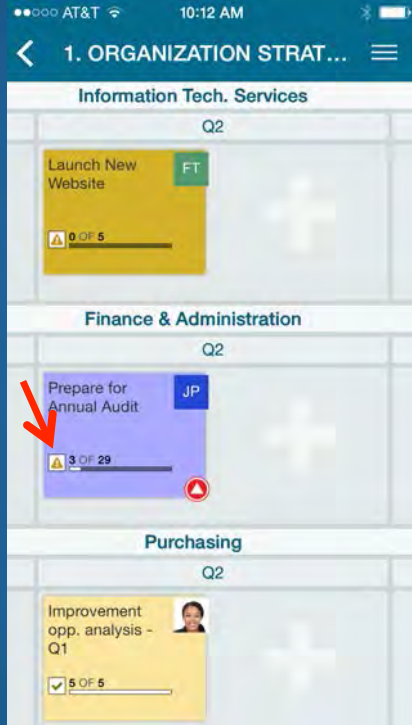
Streamlined breakout functionality

Work Connections

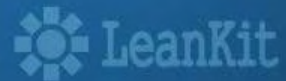


Progress status surfaces for quick insight

Work Connections



Consistent experience between iOS app and browser



Filter Palette

3. WORK TRACKING - Z123 PROJECT

WORK FOR NEXT IMPLEMENTATION

Core Effort

In Dev 10 Ready for Code Re... In Code Review Ready for Build Ready for QA In QA 10

Tooling/Content

In Dev 10 Ready for Code Re... In Code Review Ready for Build Ready for QA In QA 10

Filters

Off Highlight Show Only

CARD TITLE AND ID

INCLUDE DESCRIPTION

Reset All

Blockers

Card Type

Date

Parent Cards

Priorities

Staleness

Tag

User

Frank Turner ✓

James Patrick ✓

Jen Davy ✓

Jon Terry ✓

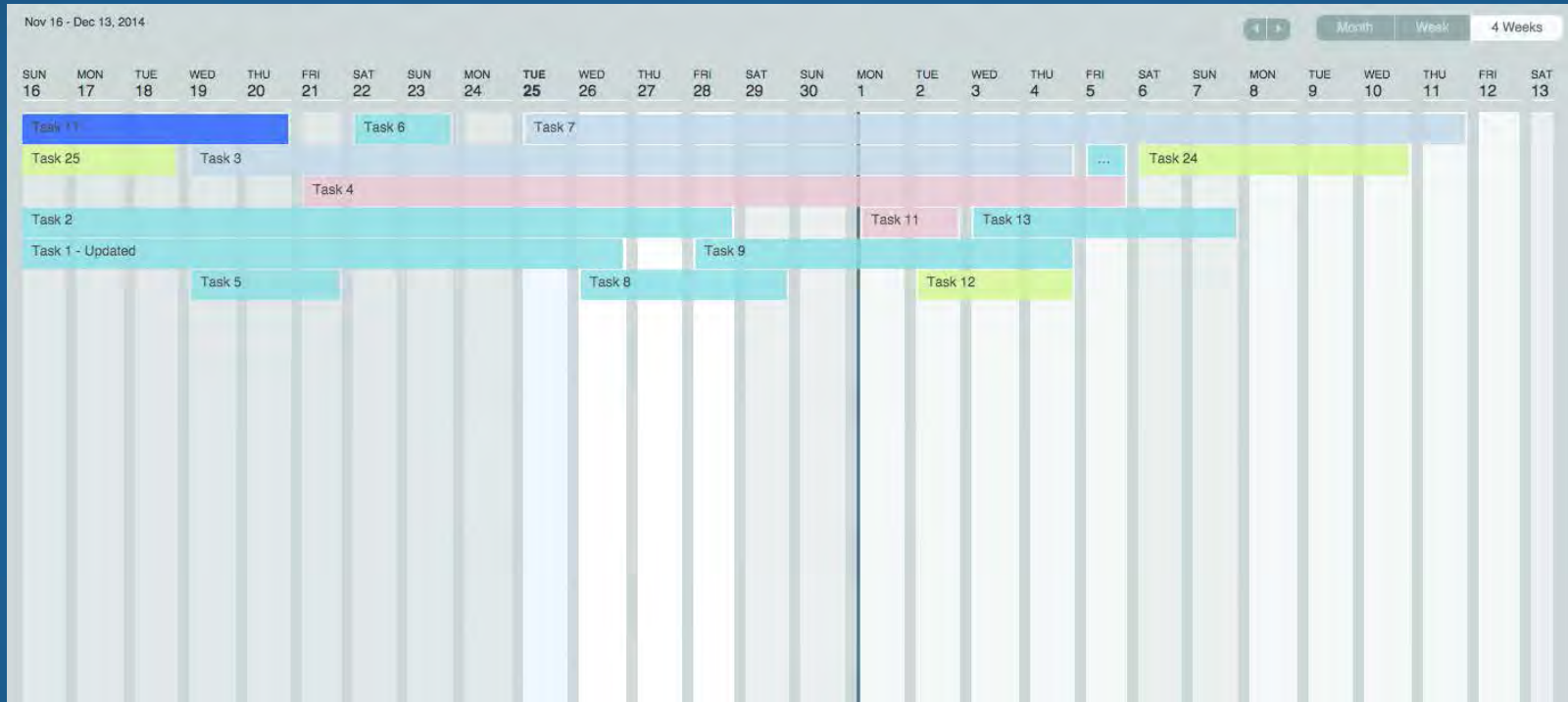
Katie St. Francis ✓

KC Jones ✓

Kyle Aspri ✓

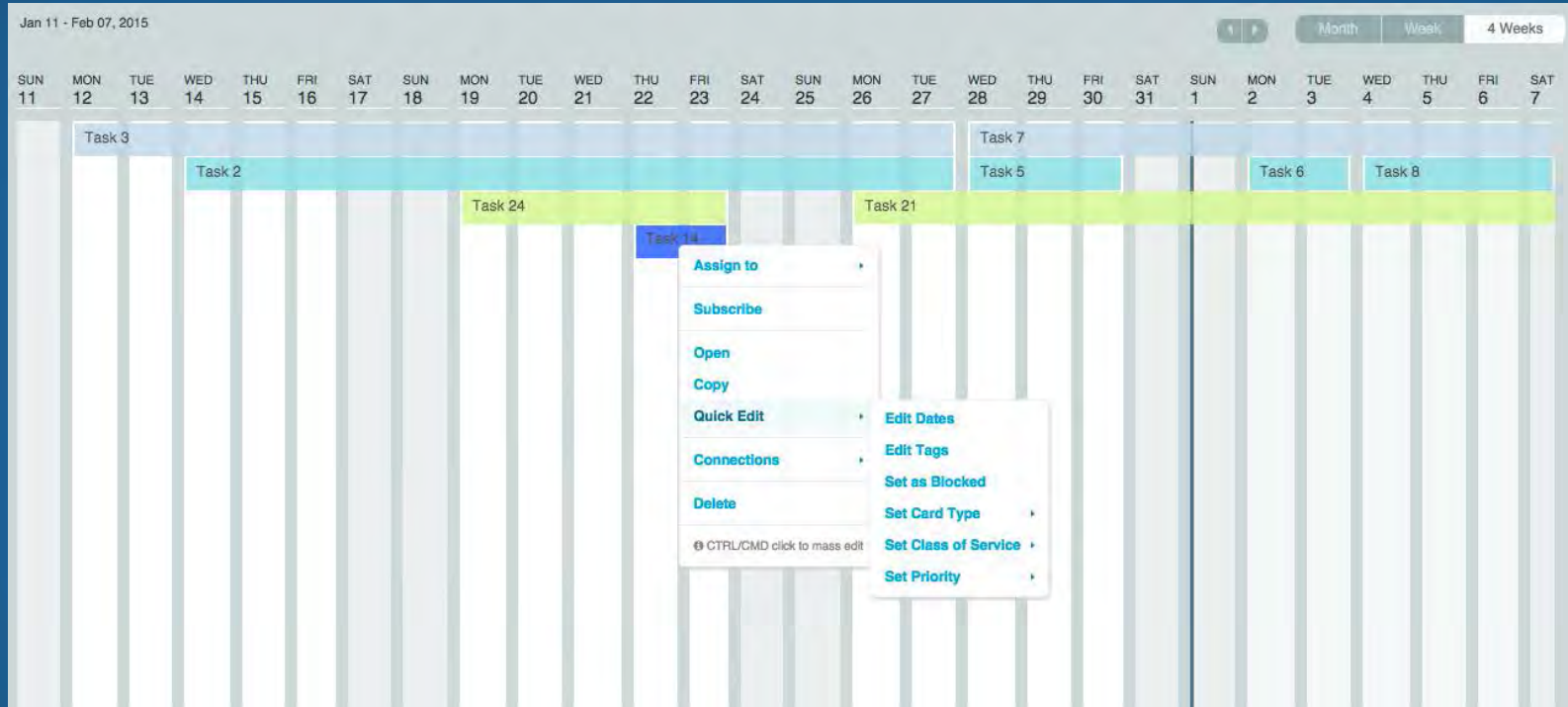
Easier to use with added options

Calendar View Updates



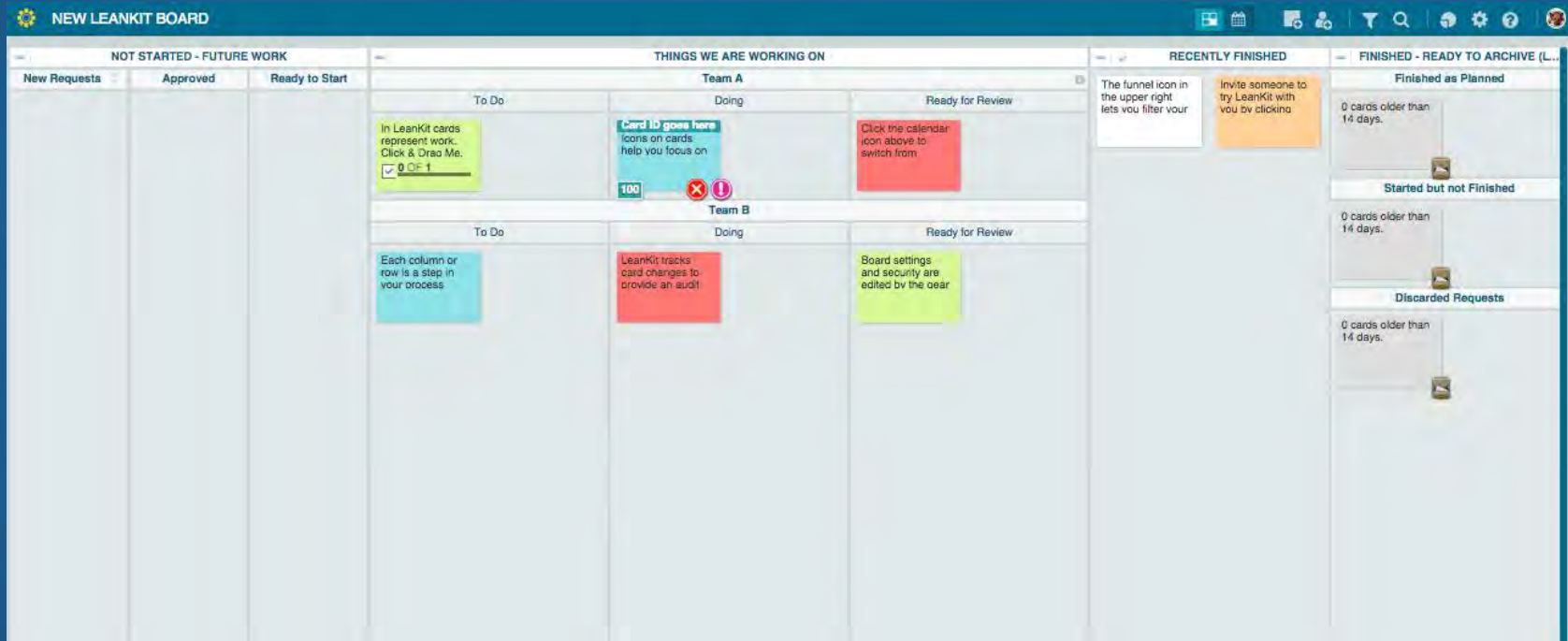
4 week view for easier scheduling with consistent card information based on open lanes

Calendar View Updates



Quick updates with right-click menu options

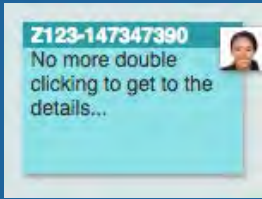
UI/UX Improvements



Rename backlog and archive lanes based on your needs



UI/UX Improvements



Details

Tasks

Connections

Assigned Users

Comments

Attachments

History

No more double clicking to get to the details...

DESCRIPTION:

B I U Font Size

< > [List Icons]

[Link Icon] [Image Icon] [Video Icon]

...open a card with a single click (or single tap in mobile apps)

CARD TYPE: Improvement

SIZE: 6

TAGS

PLANNED START: [Date Picker]

PLANNED FINISH: [Date Picker]

CARD ID: [Text Field]

PRIORITY: Normal UNLOCKED

LABEL: Work For Next Implementation-Core Eff

PARENT CARD: No Association

AUD EXTERNAL LINK: [URL Field]

CV: [Card View Icon]

2125-14254206

No more double clicking to get to the details...

Save Changes

Cancel




Subscribe to Card Events by Email


[https://productmarketing.gladlinkit.com/folders/view/05641355/...](#)

~~2 clicks~~


Cards open with just a single click

Scaling Agile Templates


 **LEANKIT ACCOUNT**  **Templates** **Boards** **Archive** **New Template** 



SAFe Program Backlog and Release Train Board
This board is an example of how to...



SAFe Portfolio Kanban Board
This board template is an example...



SAFe Agile Release Train Board
This board is an example of how to...

Simplifying the adoption of the Scaled Agile Framework[®]
(SAFe)



Task Cards in Board Templates

Select Template

Create New Board

TITLE:
New Scrumban Board

DESCRIPTION:

TEMPLATE:
Scrum Team Applying Kanban

☒ Include cards from template when creating board

☒ Set default user security for this board to User

Save Cancel

Template the whole thing – even the subtasks – for repeatable work efforts

Access to User Management APIs

API

Users

- Account Details
- Activity Types
- Export Usage Reports
- Advanced Security

New User Sort By Name (A-Z) Search

	David Neal david.neal@leankit.com	Enabled
	David Stone katie.st.francis+4@leankit.com	Enabled
	David Walker david.walker@leankit.com	Enabled
	Denise Grey denise.grey@leankit.com	Enabled
	FT ft@leankit.com	Enabled
	James Patrick katie.st.francis+55@leankit.com	Enabled
	Jen Davy katie.st.francis+2@leankit.com	Enabled
	Jon Terry jon.terry@leankit.com	Enabled
	Katie St. Francis katie.st.francis@leankit.com	Enabled

< 1 2 3 4 >

By default set users on new boards to

☒ Subscribe users to cards when they are assigned or @mentioned User

You can create unlimited users.

Easier user maintenance

Recently Released

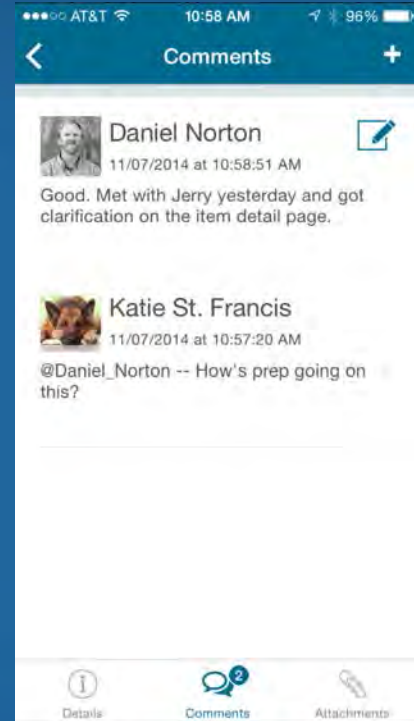
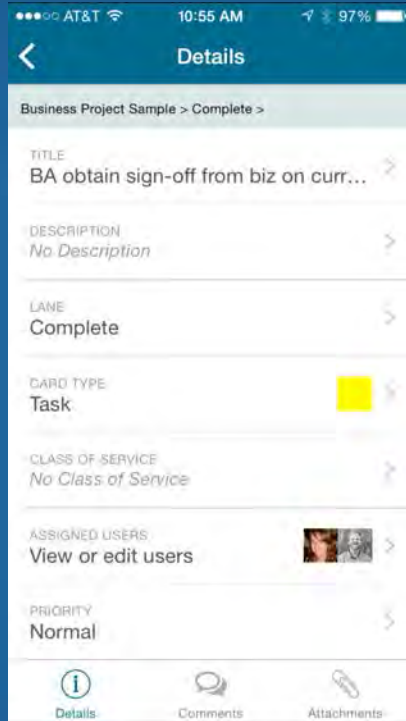
- Single Sign-on
- My LeanKit for iOS
- Consolidated user profile and preferences
- Account-level setting for default board security
- Two way work connections
- Recognize task activity in staleness filter
- Replace old TFS integration with new VS/VSO
- Edit dates via right click and lane header menus

Single Sign-on



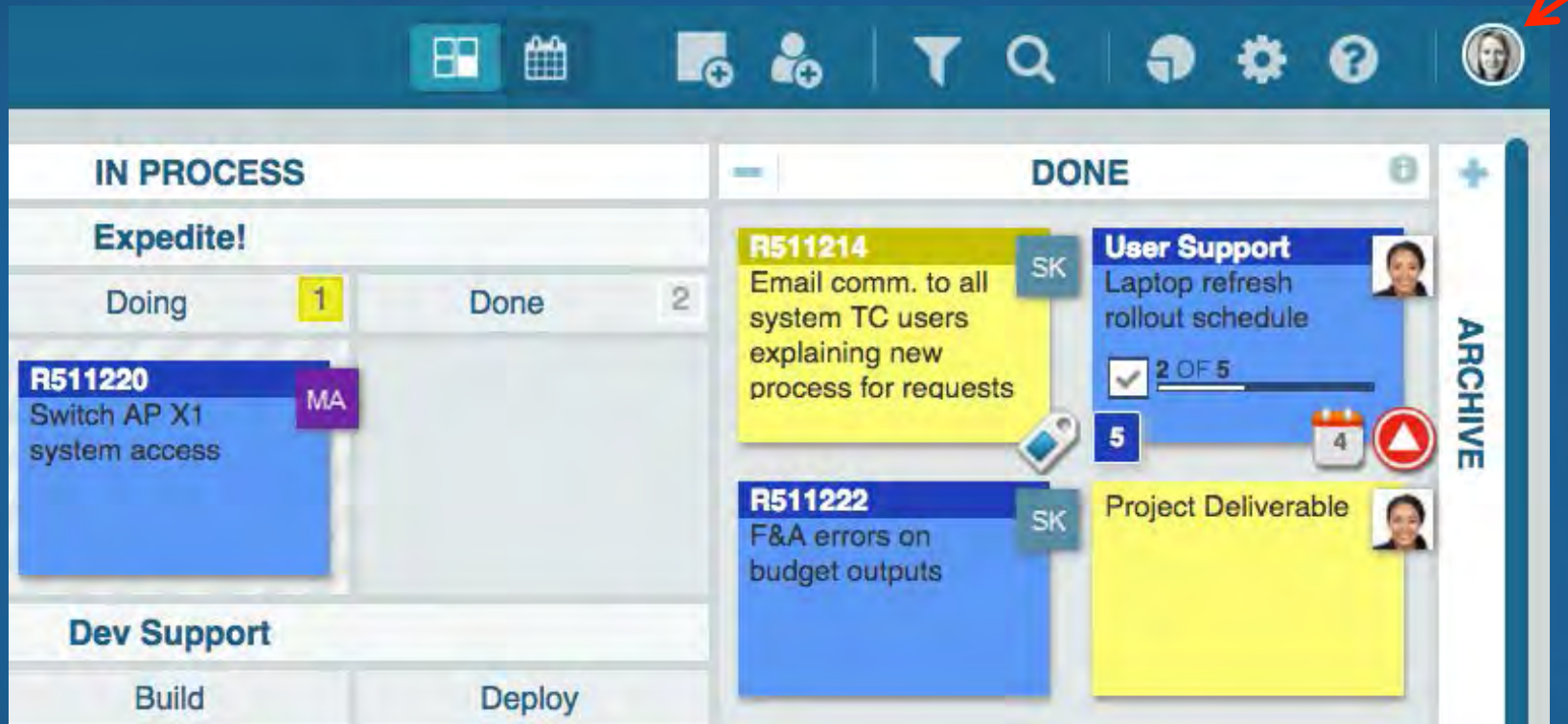
Supports any SAML based SSO provider

My LeanKit for iOS



All of your work – in a single view

User Profile and Preferences



Quicker access to your profile and preferences

User Profile and Preferences

SUPPORT TEAM - REMEDY TICKET TRACKER

My User Profile

My Board Preferences

My Apps & Devices

EMAIL ADDRESS (THIS IS ALSO YOUR USERNAME)

katie.st.francis@leankit.com

FIRST NAME

Katie

LAST NAME

St. Francis

[Change Password](#)

TIMEZONE

(UTC-06:00) Central Time (US & Canada)

DATE FORMAT

Month/Day/Year

☐ In calendar view, use Monday as the starting day of the week

MY AVATAR

Use my picture

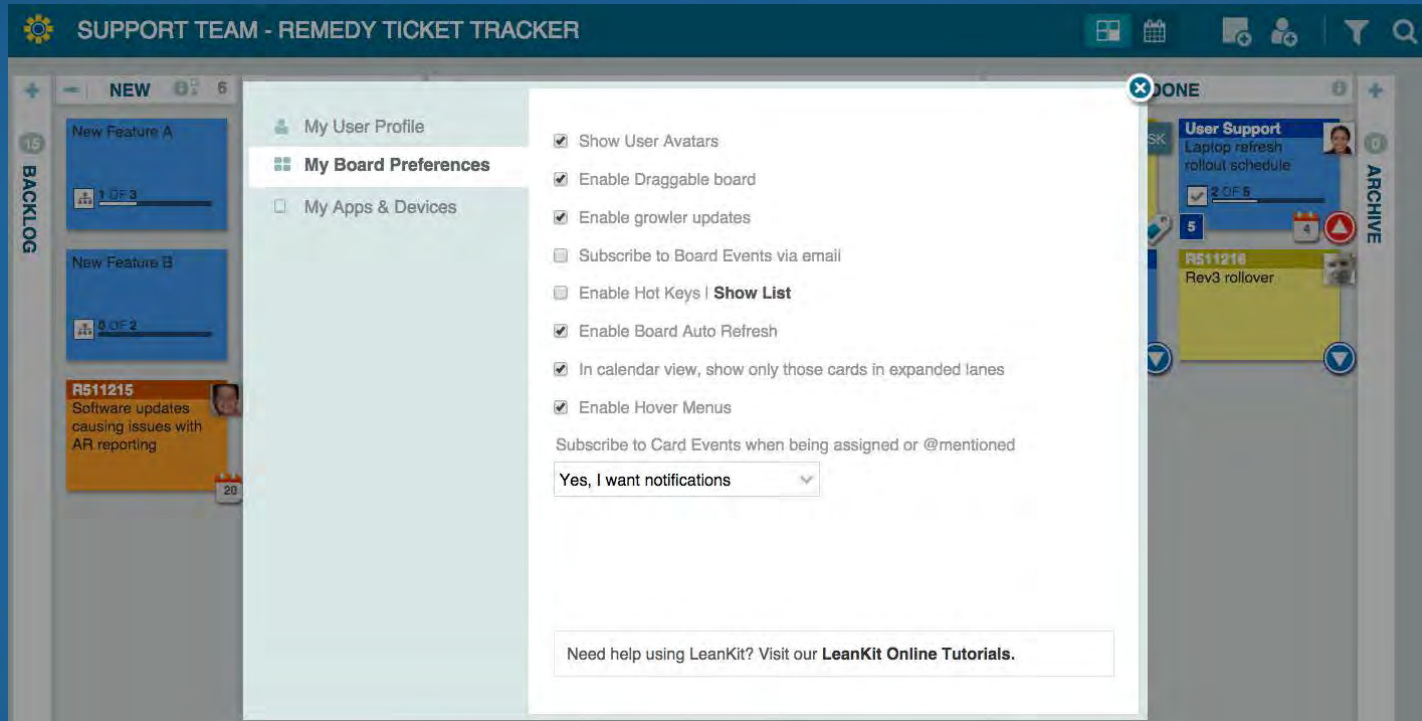
[Edit Picture](#)

Avatar changes may take up to 3 hours to appear

Save Cancel

Easily update contact details

User Profile and Preferences



Update notification settings, avatar selection, and date format

User Profile and Preferences

The screenshot displays the LeanKit 'SUPPORT TEAM - REMEDY TICKET TRACKER' interface. A settings panel is open, showing options for 'My User Profile', 'My Board Preferences', and 'My Apps & Devices'. The 'My Apps & Devices' section is active, displaying a table for 'CURRENTLY AUTHORIZED DEVICES' with columns for 'Device', 'App', and 'Platform'. The table is currently empty. A sidebar on the left shows a 'BACKLOG' with items like 'New Feature A' and 'New Feature B'. A top navigation bar includes tabs for 'NEW', 'TRIAGE', 'IN PROCESS', and 'DONE'. A right sidebar shows an 'ARCHIVE' section.

SUPPORT TEAM - REMEDY TICKET TRACKER

NEW 6 TRIAGE IN PROCESS DONE

BACKLOG

New Feature A
1 OF 3

New Feature B
0 OF 2

R511213
Database ext failure - Finan Service team

R511215
Software updates causing issues with AR reporting

20

My User Profile

My Board Preferences

My Apps & Devices

Add New Device

WHAT'S THIS?

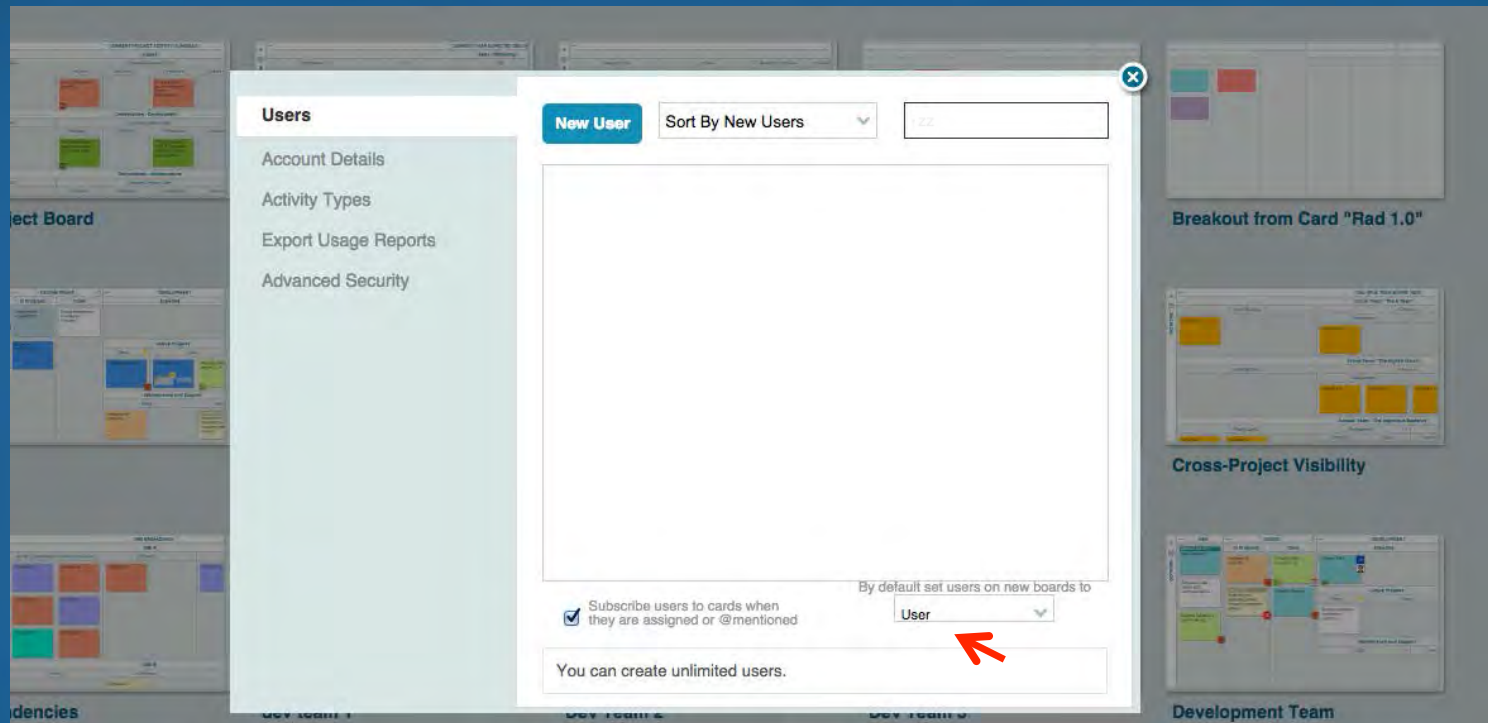
CURRENTLY AUTHORIZED DEVICES

Device	App	Platform
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ARCHIVE

Add devices for use with single sign-on

Default Board Security



Get new users up and running with fewer steps



Two Way Connections

The screenshot displays a LeanKit Development Team Board with two main sections: a general team board on the left and a project-specific board on the right.

DEVELOPMENT TEAM BOARD

- BACKLOG**
 - HOLDING AREA**
 - Dev103733395: New Tasks: IE8 is not rendering font-awesome fonts in Dogfood
 - Dev103733379: Backlogged Cards are in the product roadmap
 - Dev103733402: new tasks: scroll bars missing in taskboards that exceed view area
 - Dev103731983: Architecture work for...
 - WIP**
 - Dev103731962: System enhancement (highlighted with a red circle)
 - Dev114794762: Extremely Urgent Item
 - Dev103731970: Security Patch XYZ
 - NEW**
 - Dev130051391: test 3
 - Dev114794762: Extremely Urgent Item
 - Dev103731964: Security Review for New Features
 - Dev149818271: Project request -- simulation improvements
 - DESIGN/TRIAGE**
 - In Progress**
 - Dev103731955: New Feature B
 - Dev103731957: Security audit: servers 1-10
 - Dev130049190: test 2

3. WORK TRACKING - Z123 PROJECT

- Ready for Dev**
 - Z123-105146629: Portfolio accounts can't filter task cards by default
 - Z123-105146614: new tasks: scroll bars missing in taskboards that exceed view area
 - Z123-105146696: Account Upgrade messages suspended in Zendesk
- In Dev**
 - Z123-105146625: New tasks: Newly created boards have no card or task types enabled, All
 - Z123-105146693: Salesforce Security Review Findings
 - Z123-105146696: new tasks: filter drop down arrows are misaligned in IE10
 - Z123-105146699: Simulation Improvements (highlighted with a red circle)
- Ready for Code Re...**
 - Z123-105146698: API GetBoardHistorySync missing EventDateTime
 - Z123-105146692: ZD #27228: Statuses not populating when mapping LeanKit to
 - Z123-105146694: Consolidate card context menu options & remove those that don't
 - Z123-149817370: Request for system enhancement

Red arrows indicate two-way connections between tasks across different boards and stages:

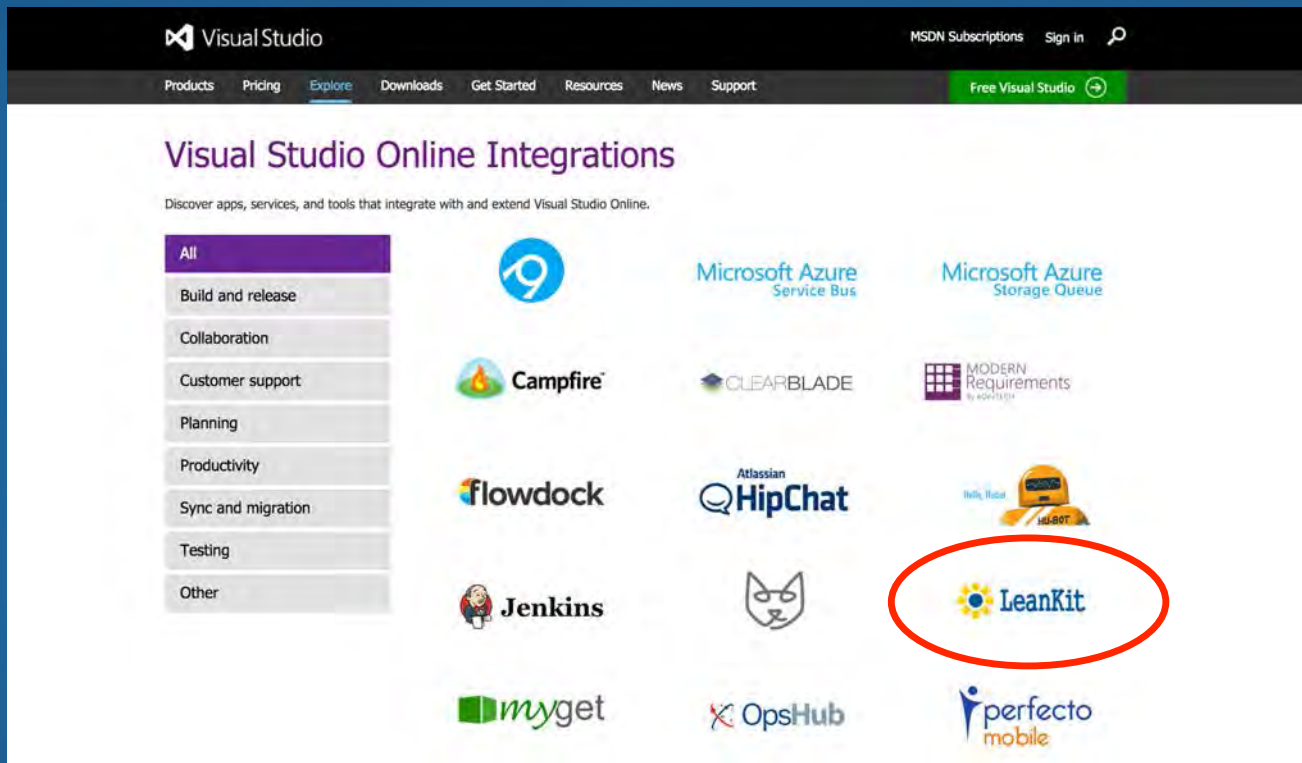
- From **Dev103731962** (System enhancement) to **Dev114794762** (Extremely Urgent Item).
- From **Dev114794762** to **Dev103731964** (Security Review for New Features).
- From **Dev103731964** to **Dev149818271** (Project request -- simulation improvements).
- From **Dev149818271** to **Z123-105146699** (Simulation Improvements).
- From **Z123-105146699** to **Z123-149817370** (Request for system enhancement).

Staleness Filter

The screenshot displays the LeanKit Development Team Board, a Kanban-style task management interface. The board is organized into four main columns: NEW, DESIGN/TRIAGE, DEVELOPMENT, and REVIEW. Each column contains task cards with details such as IDs (e.g., Dev103731957, Dev105451961), titles (e.g., Security audit: servers 1-10, Routers for new support center), and progress indicators (e.g., 2 OF 4). A red circle highlights the 'Staleness' filter in the right-hand sidebar, which is set to '3 DAYS'. The sidebar also includes other filters like 'Off', 'Highlight', 'Show Only', 'Blockers', 'Card Type', 'Class of Service', 'Date', 'Priorities', and 'Staleness'.

More comprehensive view of activity includes task updates

TFS Integration → VS/VSO Updates



Quick Date Edits

CHANGE SELECTED CARD DATES

Option 1

PLANNED START: PLANNED FINISH:

☐ ☐ Move Selected Cards Days

Option 2

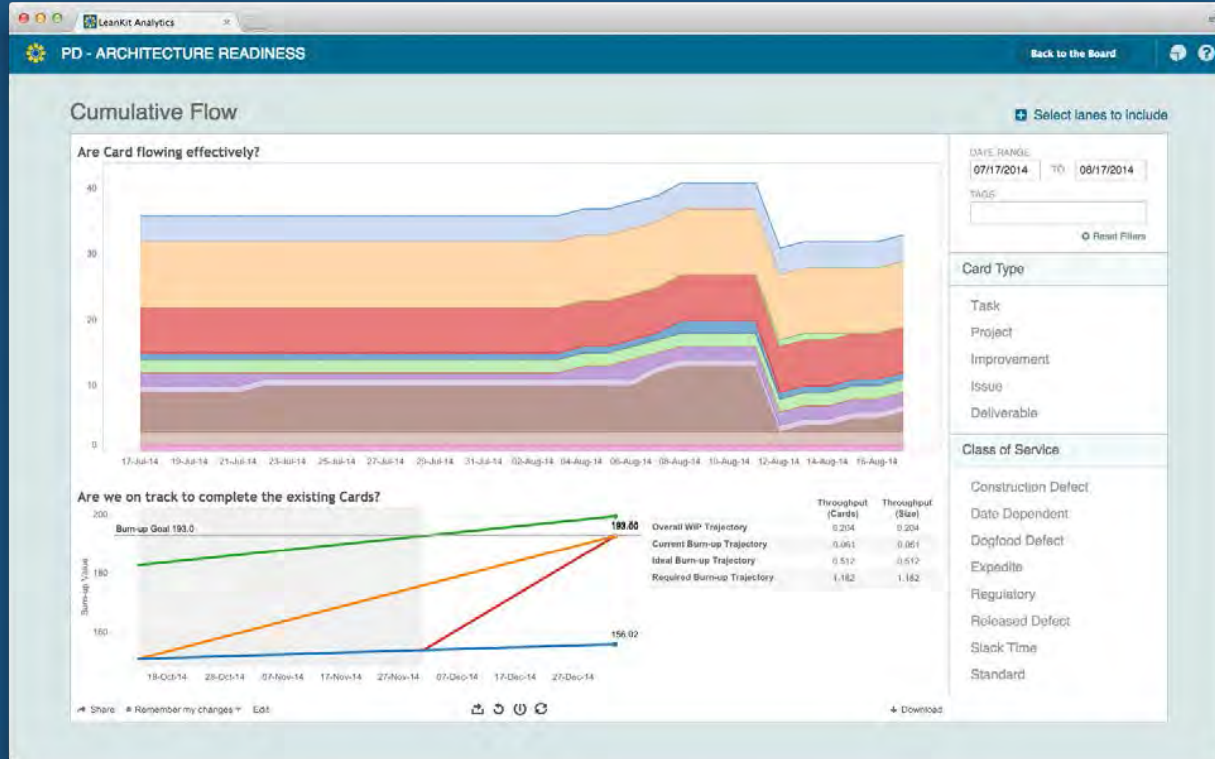
Save Cancel

Quick edit start and/or finish dates or adjust sequenced work without losing the order

Coming Soon

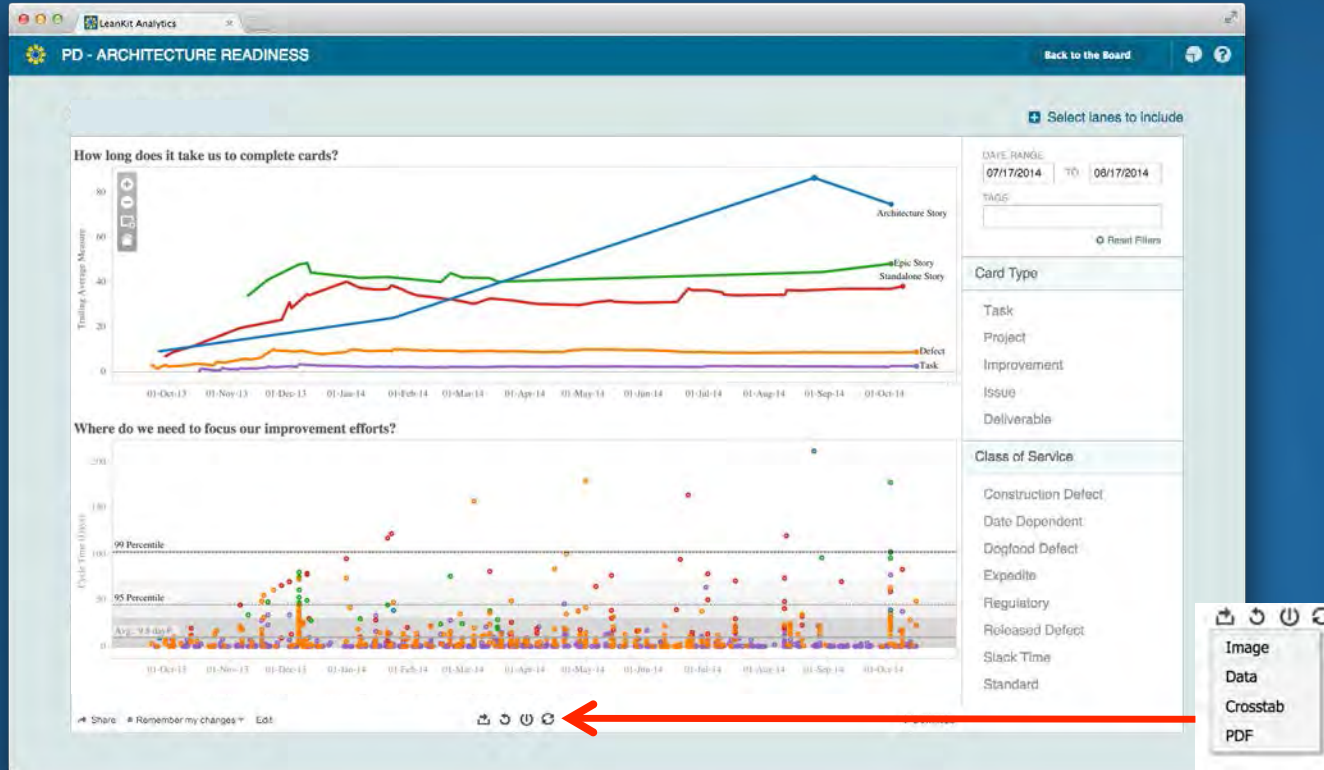
- Reporting enhancements
- Offline features for My LeanKit
- Custom label for current Class of Service icon
- Board setting to disable card delete
- Board templates with card start/finish dates

Reporting Enhancements



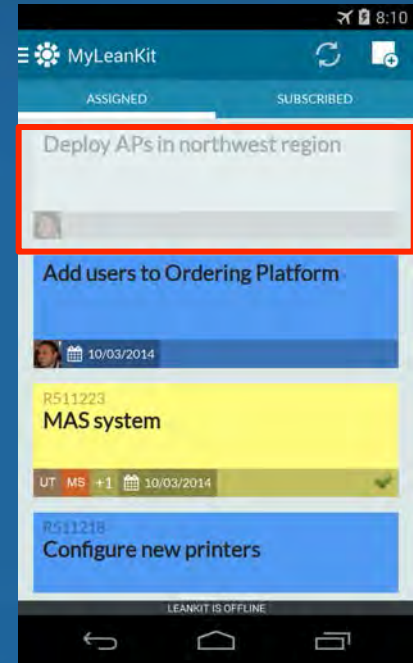
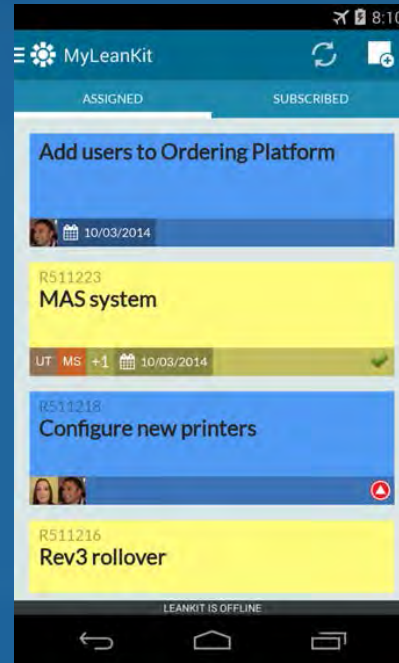
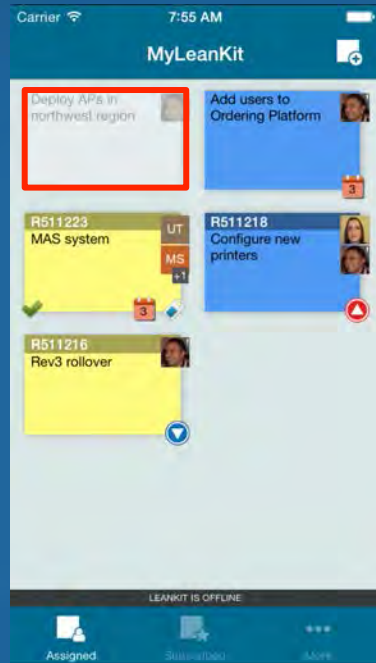
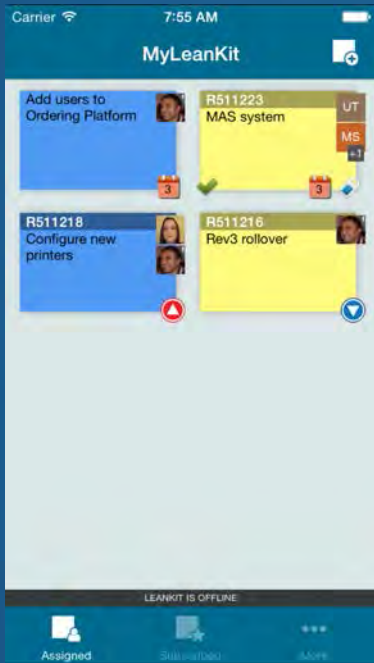
Faster charts and analysis

Reporting Enhancements



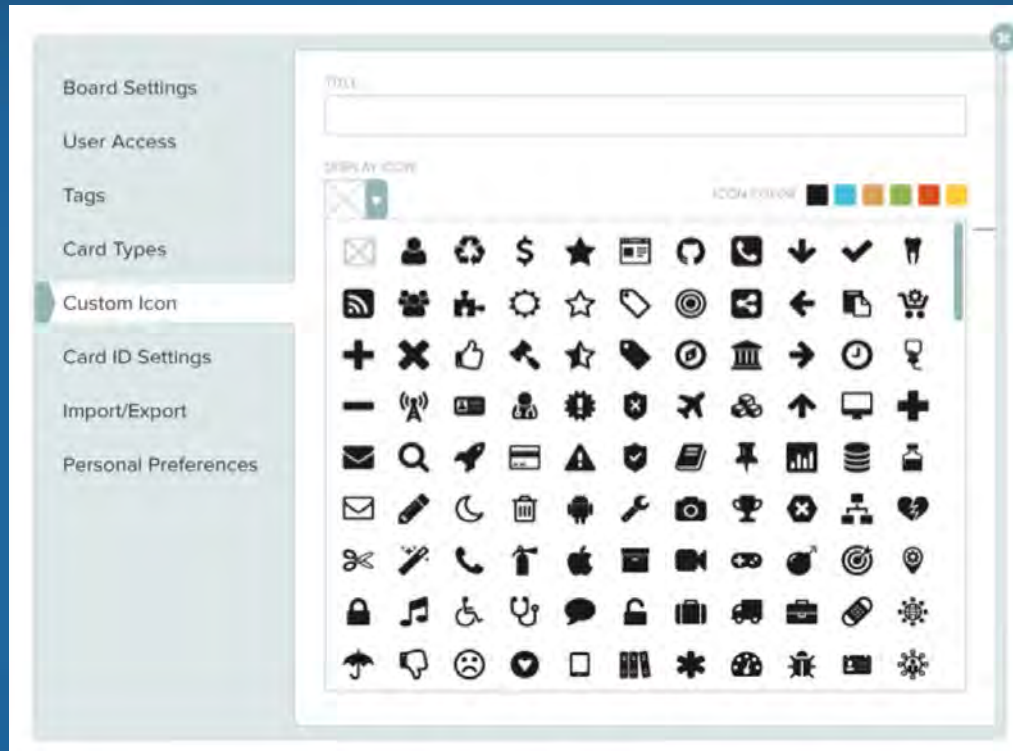
Allow chart data exports, printing, and PDFs

Offline My LeanKit Features



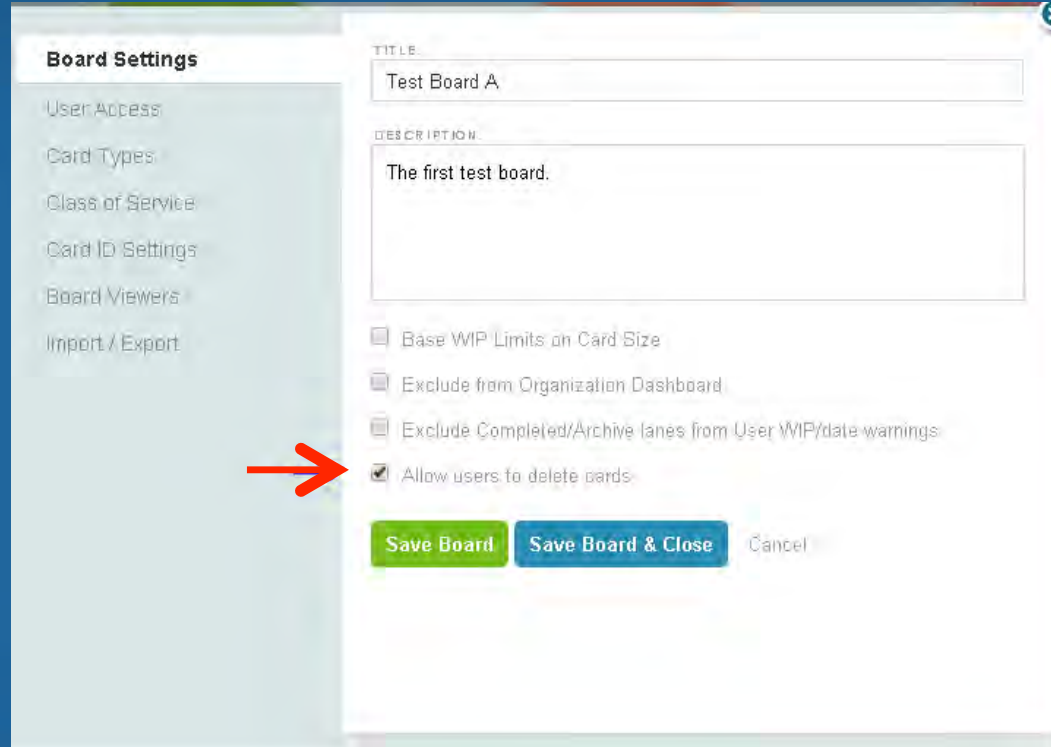
You won't need a connection to add cards, comments, and attachments

Custom Icon



Meet your unique visual tracking needs

Setting to Disable Card Delete



Board Settings

User Access

Card Types

Class of Service

Card ID Settings

Board Viewers

Import / Export

TITLE

Test Board A

DESCRIPTION

The first test board.

☐ Base WIP Limits on Card Size

☐ Exclude from Organization Dashboard

☐ Exclude Completed/Archive lanes from User WIP/date warnings

☒ Allow users to delete cards

Save Board **Save Board & Close** Cancel

Board setting for administrators

Board Templates with Card Dates

The screenshot displays a LeanKit project board template titled "TEMPLATE PROJECT WITH STANDARD TIMELINES". The board is organized into four main sections: "Labor Management Team Tasks", "Documentation/Training Team Tasks", "IT Team Tasks", and "Risks & Issues". Each section contains a Kanban board with columns for "To Do", "In Process", and "Complete".

Labor Management Team Tasks:

- To Do:** "Work with Marketing team to develop flyers" (due 20), "Work with union reps to align goals" (due 22), "Design new reports" (due 30), "Outline gaps between current process and desired process" (due 18).
- In Process:** (Empty)
- Complete:** "Document current process" (due 15), "Develop desired process" (due 15).

Documentation/Training Team Tasks:

- To Do:** "Load training documentation into web-based training tool" (due 3).
- In Process:** "Develop first draft process training docs" (due 25), "Build training calendar" (due 25).
- Complete:** (Empty)

IT Team Tasks:

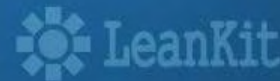
- To Do:** "BA obtain sign-off from biz on 'to be' process flow" (due 7), "BA develop list of high-level requirements" (due 11), "BA review requirements with biz" (due 9), "BA to document 'to be' process flow" (due 19), "BA obtain biz sign-off on reqmts" (due 7), "Outline system gaps" (due 7), "Develop approach to address system gaps" (due 13).
- In Process:** (Empty)
- Complete:** "BA to document current process flow" (due 19), "BA obtain sign-off from biz on current process flow" (due 19).

Risks & Issues:

- Identified:** "Documentation resource unavailable until 11/11/2014" (due 19).
- Mitigation/Resolution Strategy:** (Empty)
- Mitigated/Resolved:** "Union Disruption" (due 19).

The interface includes a "PROJECT TEMPLATE" header, a "BACKLOG" sidebar on the left, and an "ARCHIVE" sidebar on the right. The top navigation bar contains various icons for project management functions.

Quickly replicate projects with similar timelines/tasks



Looking Ahead

- My LeanKit (browser version)
- Custom fields
- Custom icon library
- Replace current organizational dashboard
- New charts in Tableau
- Expand available integrations

My LeanKit for the Browser

The screenshot displays the LeanKit web interface. The main area is a Kanban board with columns for 'BACKLOG' and 'CURRENT WORK'. The 'BACKLOG' column is divided into 'Later?' and 'Would you please?' sections. The 'CURRENT WORK' column is divided into 'Webcor Work', 'Marketing Deliverable', and 'UpFront Design Activity' sections. A sidebar on the right shows the user profile for 'KC Jones' with a search bar, settings, and a grid of 14 task cards. The task cards are arranged in a 4x4 grid and include titles like 'Add prothru view brand button', 'Update TOS copy', 'Mockups for new feature', 'Bacon ipsum dolor amet metloaf pork porchetta', 'Rump tenderloin triestloaf', 'Pork belly sausage prosciutto', 'Kevin strip steak shoulder bacon', 'Biltong shankle chuck tri-tip ground round', 'Pierced beef pork belly pig', 'Landjaeger hamburger tail', 'Swine keibasa ball tip', and 'Tri-tip porchetta alcatraz'.

CURRENT BOARD TITLE HERE

BACKLOG

Later?

Would you please?

Design Meeting Sept 25, 2014

PPM system field mapping UI design

Onboarding wizard for new accounts

Style mobile SSO invitation and device management emails

On-Boarding Comps

UI QuickFixes

Rebranding

Card Redesign

CURRENT WORK

Webcor Work

Marketing Deliverable

UpFront Design Activity

my LeanKit

Activity Stream Improvements

Style Guide Work

Custom Fields

Custom Labels

Analytics V

KC Jones

36

14

Add prothru view brand button

Update TOS copy

Mockups for new feature

Bacon ipsum dolor amet metloaf pork porchetta

Rump tenderloin triestloaf

Pork belly sausage prosciutto

Kevin strip steak shoulder bacon

Biltong shankle chuck tri-tip ground round

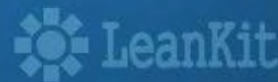
Pierced beef pork belly pig

Landjaeger hamburger tail

Swine keibasa ball tip

Tri-tip porchetta alcatraz

See all of your work in a single view

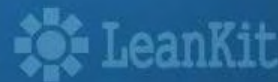


Custom Fields

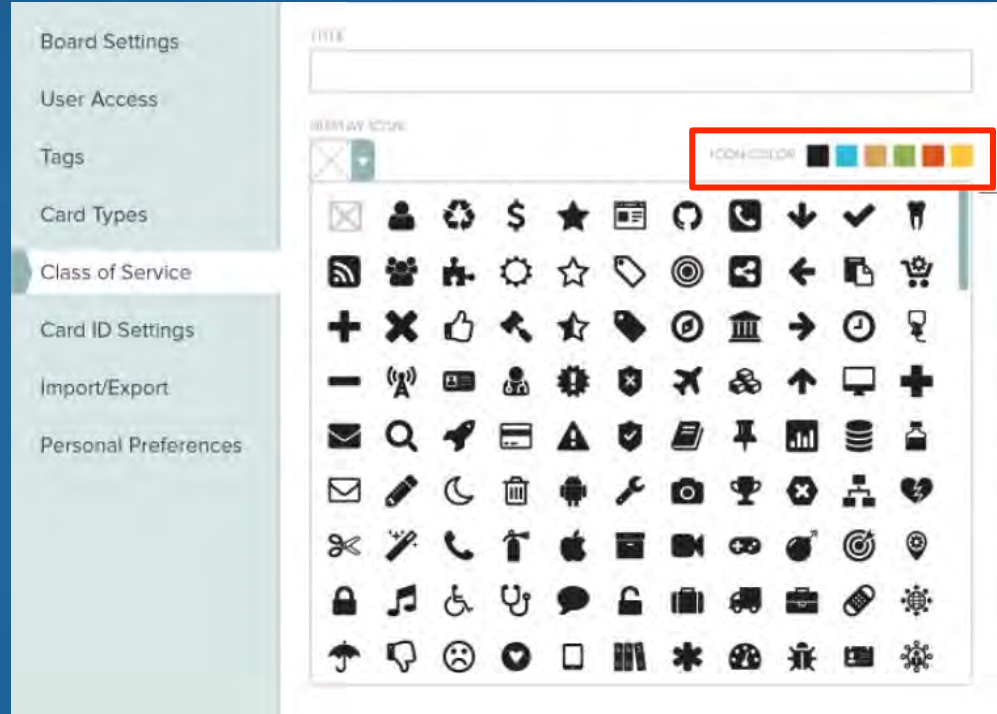
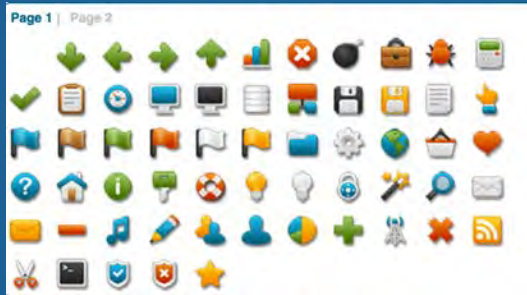
The screenshot displays the LeanKit interface for editing a card. The interface is divided into several sections:

- Details Panel (Left):** Contains links for Tasks, Drill-Through (5), Comments (28), Attachments (3), and History.
- Title:** A text field with the placeholder "My Card title goes here and tells me some general info about this card and what I might need to do".
- Description:** A rich text editor with a toolbar (Bold, Italic, Underline, Font Size, Bulleted List, Numbered List, Link, Unlink, Image, Video, Embed, Code, Full Screen, Print) and a text area containing Lorem Ipsum text.
- Assigned Users:** A section with a text input "Enter user name..." and a row of user avatars. A red box highlights this section.
- Custom Fields (Right):** A series of dropdown menus and input fields, all highlighted by a red box:
 - CUSTOM ICON: Select custom icon
 - PARENT CARD: Parent card name
 - CARD ID: THX1138
 - CUSTOM DATE LABEL: Select date
 - CUSTOM TEXT LABEL: Enter custom text
 - CUSTOM DROP DOWN ONE LABEL: Custom option one
 - CUSTOM DROP DOWN TWO LABEL: Custom option one
- Bottom:** Buttons for "Save Changes", "Save and Add More", and "Cancel". A URL "https://core29.leankit.com/Boards/View/64280660/65275264" is visible at the bottom right.

Freedom to use LeanKit like you want

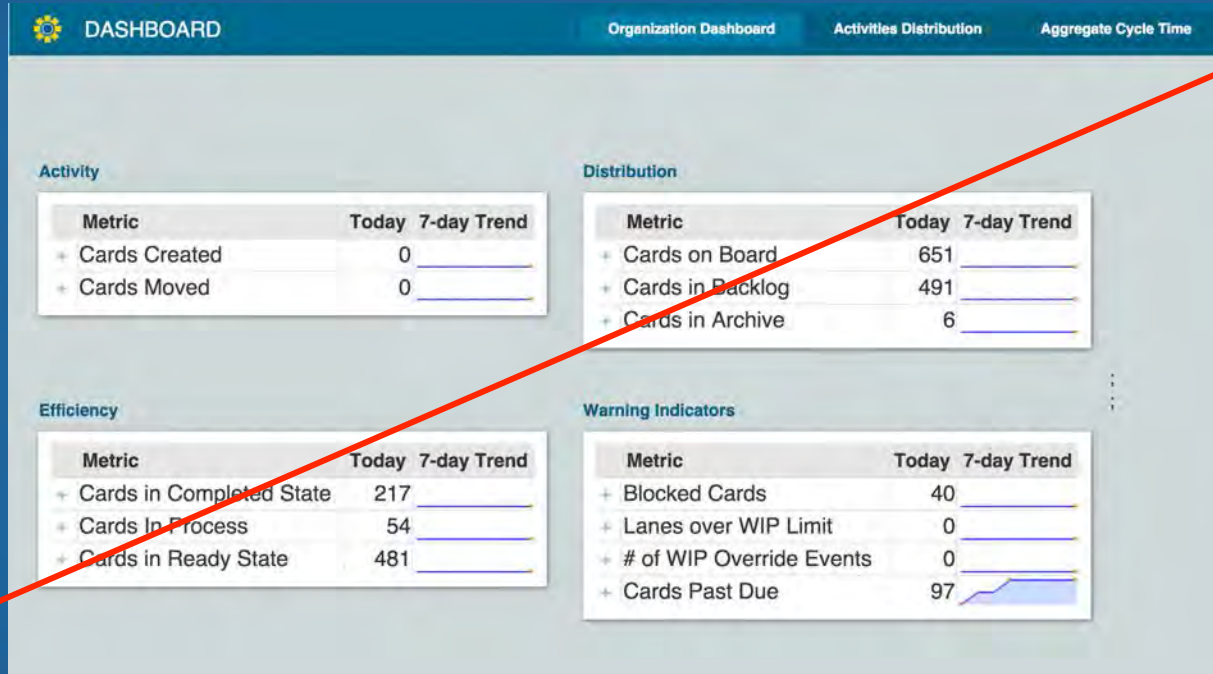


Custom Icon Library



Expand and improve selection of icons for cards

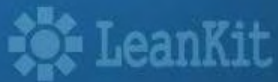
Replace Organizational Dashboard



Create New Charts

???

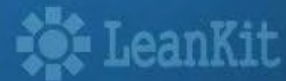
Considering many options – what are your thoughts?



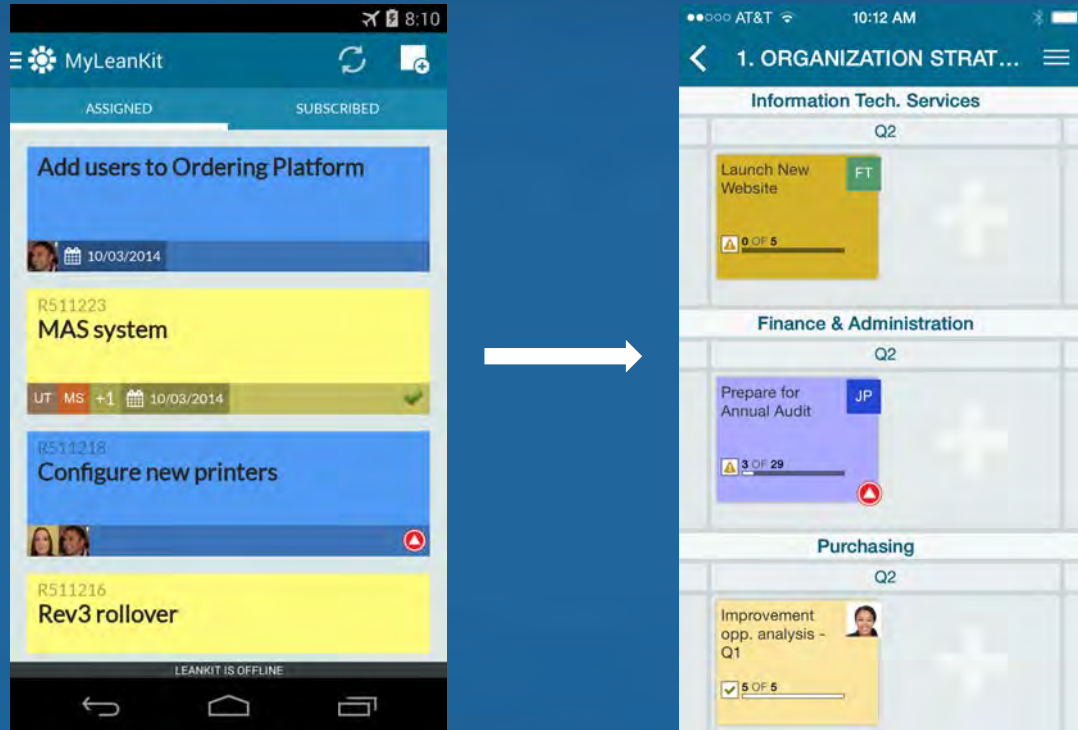
Expand Available Integrations



IT Operations, DevOps, Requirements, ALM, CRM



Feature Parity for Mobile Apps



More consistent across the board

Q & A

Available Features Covered Today

Feature	Basic Edition	Team Edition	Portfolio Edition
My LeanKit mobile app	✓	✓	✓
Work filtering	✓	✓	✓
Quick work edits	✓	✓	✓
User profile/preferences	✓	✓	✓
Board templates	✓	✓	✓
Default user security setting	✓	✓	✓
Work connections			✓
Calendar view			✓
System integrations			✓
User management APIs			Add-on
Single sign-on capability			Add-on
Tableau reporting site			Add-on

Learn More

Check out our support site for product updates and feature requests.

<https://support.leankit.com>

The LeanKit blog and monthly newsletter offer Lean/Kanban education and feature updates.

<http://leankit.com/blog/>

Quarterly Product Update
Thank you for joining us!