



Using GitLab as a Project Management Tool

A Complete DevOps Platform Delivered as a Single Application



Manage



Plan



Create



Verify



Package



Secure



Release



Configure



Monitor



Defend

Single Conversation
Single Data Store
Single Permission Model
Single Interface
Governance & Security
Team Collaboration
Lifecycle Analytics

Organizing the work



```
graph TD; Group[Group] --- SubGroup[Sub Group]; SubGroup --- Project[Project];
```

Group

GitLab Groups provide capabilities for assembling related projects together and grant members access to several projects at once.

The **Group** provides a layer for strategic planning, governance, and management.

Sub Group

Sub Groups are nested, child Groups for additional levels of organization.

Project

Projects are where teams collaborate, plan work, write code, and deliver applications.

Defining the work



Epics provide grouping of Epics and Issues.

Epic (Capability)

Issue (Non-Functional)

Issue (Acceptance)

Sub Epics represent smaller pieces of a larger Epic, larger than an Issue.

Sub Epic (Feature)

Issues describe small, discrete pieces of work.

Issue (User Story)

Issue (User Story)

Issue (User Story)

Planning the work



Roadmaps are visual representations of an Epic with a defined *Start* and *End Date* within a group, and are shown in a timeline view (e.g. a Gantt chart)

Roadmap

Milestone

Roadmaps exist at the Group and Sub Group level.

Roadmap

Milestones group and track *Issues* and *Merge Requests* against a set period of time.

Milestones exist at the Group, Sub Group, and Project level.

Milestone



Project

The *Git Repository* is the foundation of a **GitLab Project**.

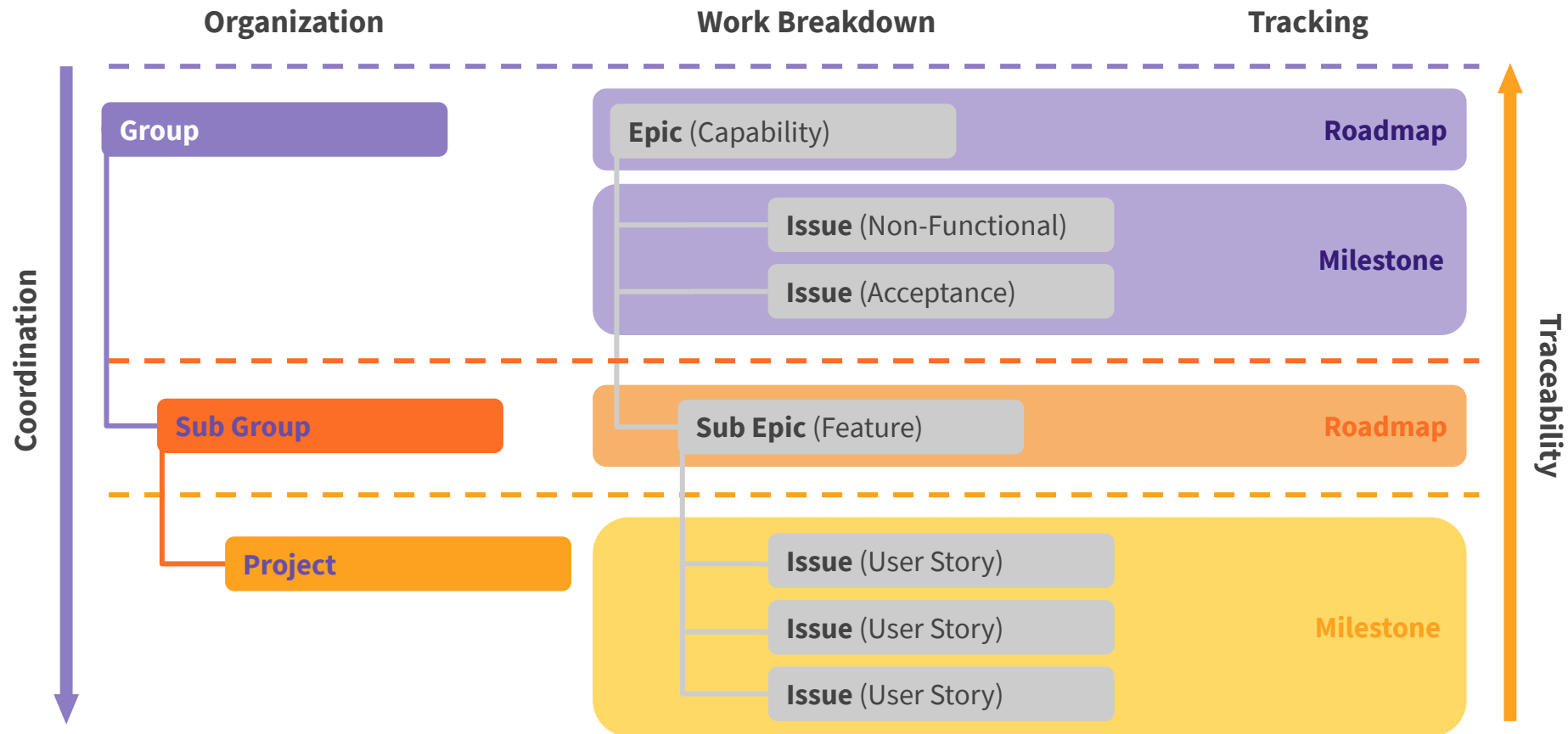
Merge Requests are project assets to visualize and collaborate on proposed changes to source code on a Git branch.

CI/CD Pipelines describe code build and test jobs and stages for a Merge Request.

Code Reviews are discussion threads on Merge Requests where developer peers review and comment on changes to the code.

Approvals are explicit acceptance events, recorded in the Merge Request, signaling sign-off on associated code changes.

GitLab Agile Planning Structure



Label It All

Labels allow you to categorize **epics**, **issues**, and **merge requests**

- Allow you to quickly and dynamically filter
- Use labels to help search
- There are two types of labels in GitLab:

Project labels and **Group labels**

The screenshot shows the GitLab interface for managing labels. At the top, there are tabs for 'All' and 'Subscribed', a search bar, and a dropdown for 'Name'. A green 'New label' button is on the right. Below the tabs, a text box explains that labels can be applied to issues and merge requests and can be prioritized by dragging. The 'Prioritized Labels' section shows a 'critical' label, which is a 'Project label' and has been starred. The 'Other Labels' section shows 'bug', 'confirmed', and 'discussion' labels, all of which are 'Project labels' and have not been starred. A tooltip labeled 'Prioritize' points to the star icon of the 'bug' label.

All Subscribed Filter Q Name v New label

Labels can be applied to issues and merge requests.
Star a label to make it a priority label. Order the prioritized labels to change their relative priority, by dragging.

Prioritized Labels

critical Issues · Merge requests Prioritized label Project label ☆ ✎ ⋮ Subscribe

Other Labels

bug Issues · Merge requests Project label ☆ ✎ ⋮ Subscribe

confirmed Issues · Merge requests Project label ☆ ✎ ⋮ Subscribe

discussion Issues · Merge requests Project label ☆ ✎ ⋮ Subscribe

Labels can be applied to issues and merge requests.
Star a label to make it a priority label. Order the prioritized labels to change their relative priority, by dragging.

Prioritized Labels

This close-up shows the 'Prioritized Labels' section. It features a 'critical' label, which is a 'Project label' and has been starred. Below it is a 'bug' label, which is also a 'Project label' but has not been starred. A hand cursor is shown hovering over the 'bug' label, indicating it can be dragged to change its priority.

critical Issues · Merge requests Prioritized label Project label ☆ ✎ ⋮ Subscribe

bug Issues · Merge requests Prioritized label Project label ☆ ✎ ⋮ Subscribe



- GitLab Plan Phase of the DevOps Lifecycle
 - <https://about.gitlab.com/stages-devops-lifecycle/plan/>
- How GitLab's **Marketing Team** uses GitLab for Project Management
 - <https://about.gitlab.com/handbook/marketing/#-marketing-project-management-guidelines>
- How GitLab's **Quality Team** uses GitLab for Project Management
 - <https://about.gitlab.com/handbook/engineering/quality/project-management/>
- **GitLab Agile Planning**
 - <https://about.gitlab.com/solutions/agile-delivery/>
- SAgile and Agile Planning with GitLab
 - <https://youtu.be/PmFFlTH2DQk>



GitLab

Lab Exercises



Plan Stage Practice Lab 1



Plan Stage Practice Lab 1

Lab Assignment

Part 1

Scenario:

Key Tasks to Complete

1. Create a Group
2. Create a Project
3. Create at least 3 labels, including at least 1 group label, 2 project scoped labels
4. Create New Board using List Labels with P1 and P2
5. Create Project Milestone
6. Create a few Issues in Board
 - a. Put different due dates not too far out in the future
7. Review project milestone Burndown chart

GitLab Project and Group Hierarchy



Virtual DevOps Automation Workshop

The GitLab Demo Cloud platform allows you to access a sandbox lab environment to evaluate GitLab features and workflows. Please see your lab guide for step-by-step instructions.

Your GitLab Credentials

Please download your credentials. You will not be able to access your username and password after you navigate away from this page.

We have provisioned a user account and organizational group on our GitLab instance that you can configure with your own subgroups or projects. These credentials are only valid on our instance and will not work on gitlab.com.

GitLab URL: <https://gitlab-core.us.gitlabdemo.cloud>

Username: [let1xanh](#)

Password: [jpe217w](#)

[Download Credentials](#)

[GitLab Dashboard](#)

[My Group](#)

Sign in for GitLab Team Members

E-Mail Address

Password

☐ Remember Me

[Sign In](#)

[Forgot Your Password?](#)

New to the GitLab Demo Portal?

Are you a GitLab team member? You can self-register for an account to access the Demo Portal.

Have an invitation code from an event or training class? You can redeem the invitation code to create an account.

This portal is for GitLab team members. If you have already redeemed your invitation code, you can use your credentials to sign in to the GitLab instance directly.

[Team Member Registration](#)

[Redeem Invitation Code](#)

[Access GitLab Instance](#)

GitLab Project and Group Hierarchy



Groups

Sub Groups

Epics

Milestones

Roadmap

Labels (group level)

Boards (group level)

Projects (multiple)

At the top of the GitLab model, the **Group** provides a layer for strategic planning, governance and management.

Groups can contain **SubGroups** and **Projects**

Groups = Portfolios and / or Programs

GitLab Projects are the home for *Issues* and *Discussions*



Groups

Sub Groups

Epics

Milestones

Roadmap

Labels (group level)

Boards (group level)

Projects

Repository (git)

Issues & Discussion

Labels (project level)

Boards (project level)

Milestones (Sprints)

Cycle Analytics

At the top of the GitLab model, the **Group** provides a layer for strategic planning, governance and management.

Groups can contain **SubGroups** and **Projects**

Groups = Portfolios and / or Programs

SubGroups allow for additional levels of Groups

Projects are where teams collaborate, plan work, write code, and deliver applications.

Issues = User Stories

Milestones = Sprints

The *Repository* is the foundation of GitLab Projects



Groups

Sub Groups

Epics

Milestones

Roadmap

Labels (group level)

Boards (group level)

Projects

Repository (git)

Issues & Discussion

Labels (project level)

Boards (project level)

Milestones (Sprints)

Cycle Analytics

Repository (git)

Branches

Merge Requests

Changes

Reviews & Discussion

Approvals

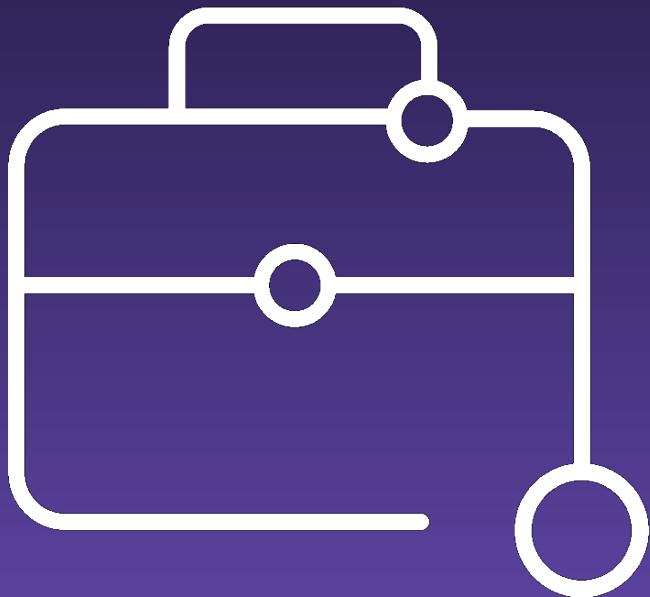
CI/CD Pipelines

Review Apps

Security Scans & Reports



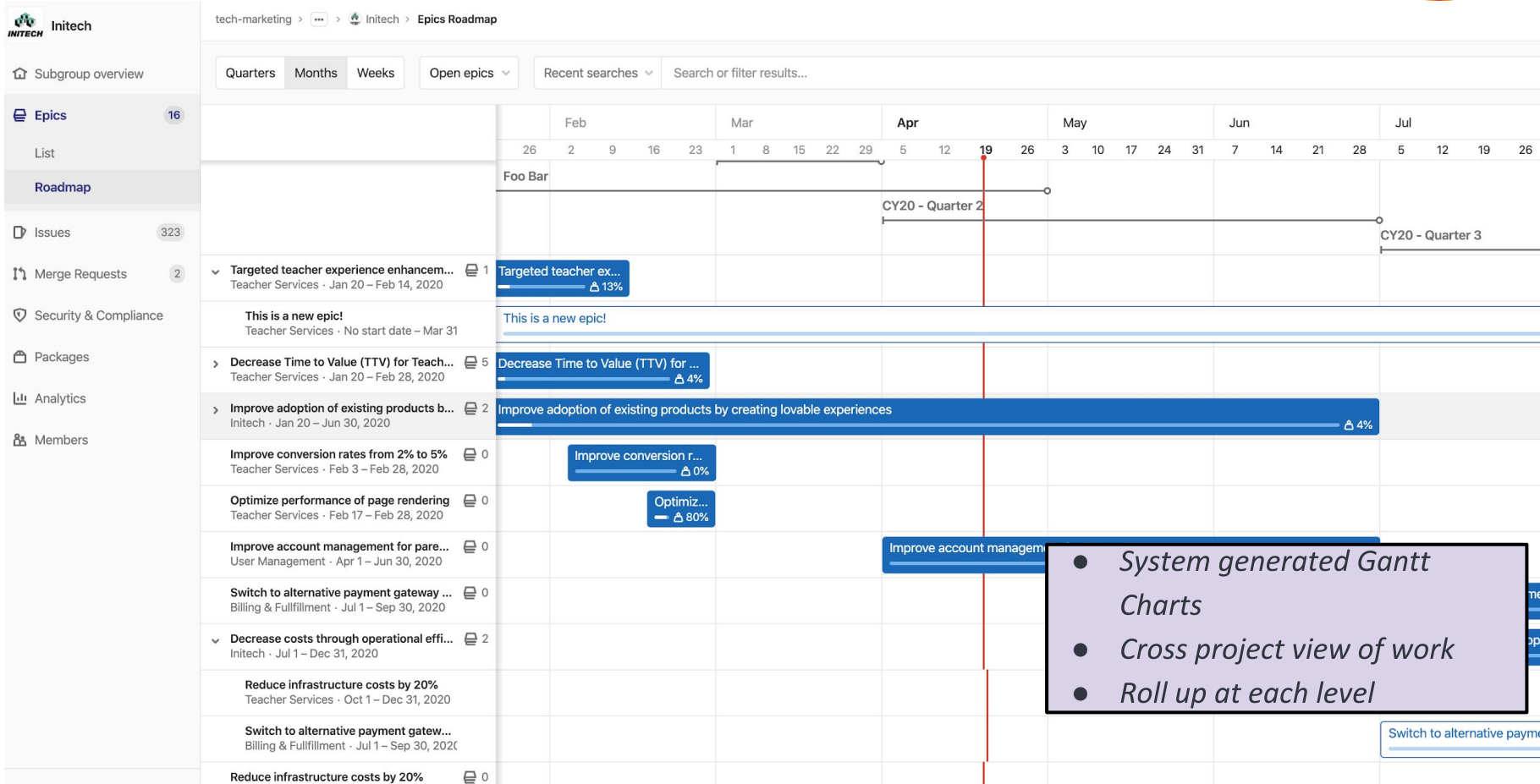
Portfolio Management



Portfolio Management

- Groups and Sub Groups
- Epics and Child Epics
- Roadmaps
- Milestones
- Burndown Charts
- Labels
- Boards, Group Level

Visualize delivery of Epic over time via *Roadmaps*



Plan Milestones via Group Issue Boards



GitLab Projects Groups Activity Milestones Snippets

Search or jump to...

Create: roadmap Edit board Add list

Open

11.5 SSH push mirroring support with public-key authentication

Create Deliverable In dev P1 backend customer customer+ devops:create direction feature proposal mirror missed-deliverable missed:11.5

gitlab-org/gitlab-ce#49565 5

11.6 Send one email notification for one published code review

Create Deliverable GitLab Premium P1 Product Vision 2018 UX backend devops:create direction emails frontend merge requests

gitlab-org/gitlab-ee#4326 3

Multiple blocking merge request approval rules

Create Deliverable GitLab Premium P1 UX approvals backend customer customer+ devops:create direction feature proposal frontend merge requests

gitlab-org/gitlab-ee#1979 5

[Frontend] Send one email notification for one published code review

Create Deliverable GitLab Premium P1 Product Vision 2018 UX ready devops direction emails frontend merge requests

gitlab-org/gitlab-ee#8349 4

[Frontend] Multiple blocking merge request

11.7 Mirror changes from Web IDE to CI runner

Accepting merge requests Create Deliverable GitLab Ultimate P1 Requires e2e tests backend devops:create direction feature proposal release post item web ide

gitlab-org/gitlab-ee#5276 5

Block command line pushes if they have the user's private email address

Create Deliverable P1 UX backend devops:create direction feature proposal movingtogitlab repository

gitlab-org/gitlab-ce#52355 3

Require merge request approval by code owners

Accepting merge requests Create Deliverable GitLab Premium Product Vision 2019 UX backend customer+ devops:create direction feature proposal repository

gitlab-org/gitlab-ee#4418

Expand diff to entire file

11.8 Releases Page

Accepting merge requests Product Vision 2018 devops:release movingtogitlab release orchestration

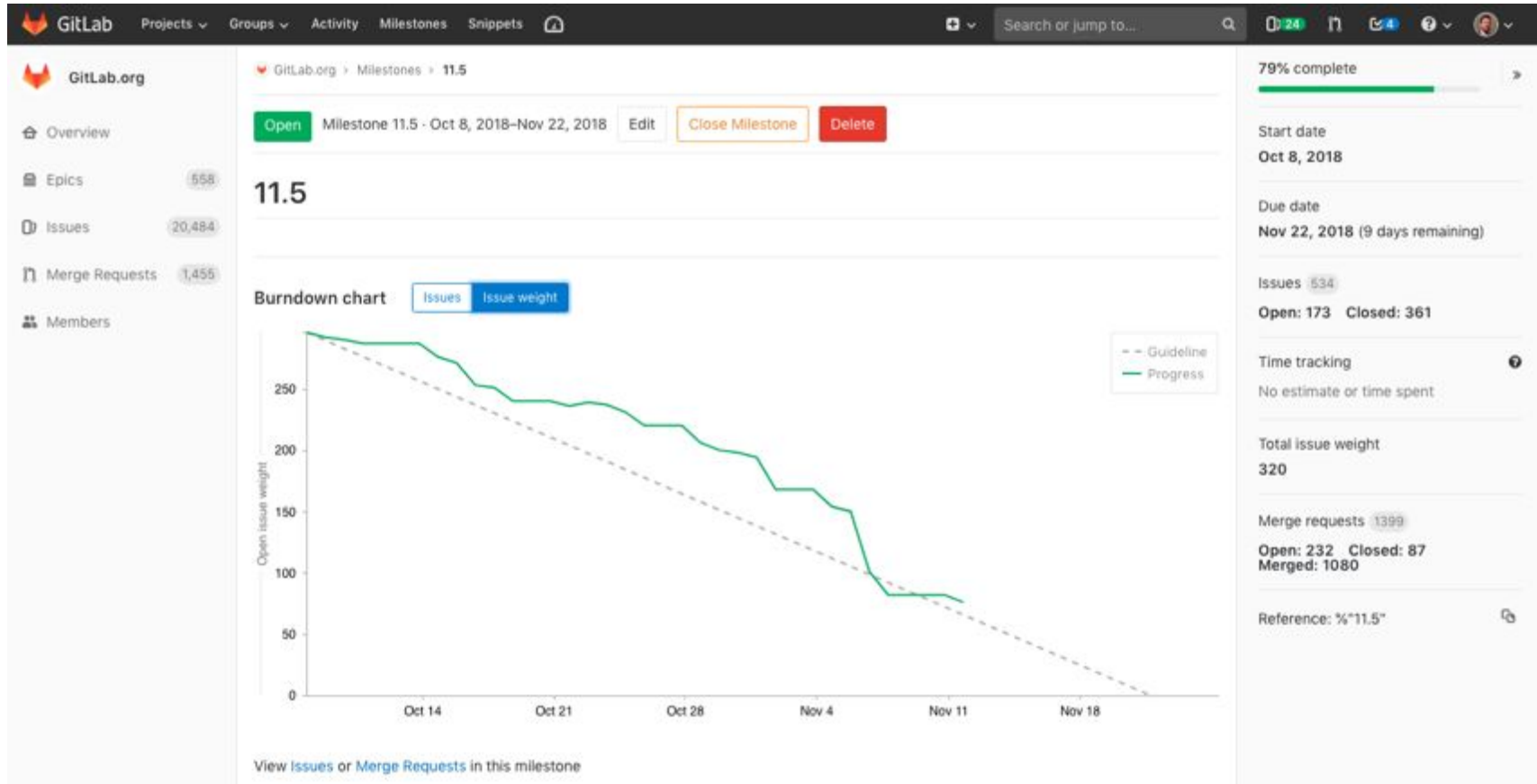
gitlab-org/gitlab-ce#...

Override squash

Accepting merge requests devops:create frontend merge requests

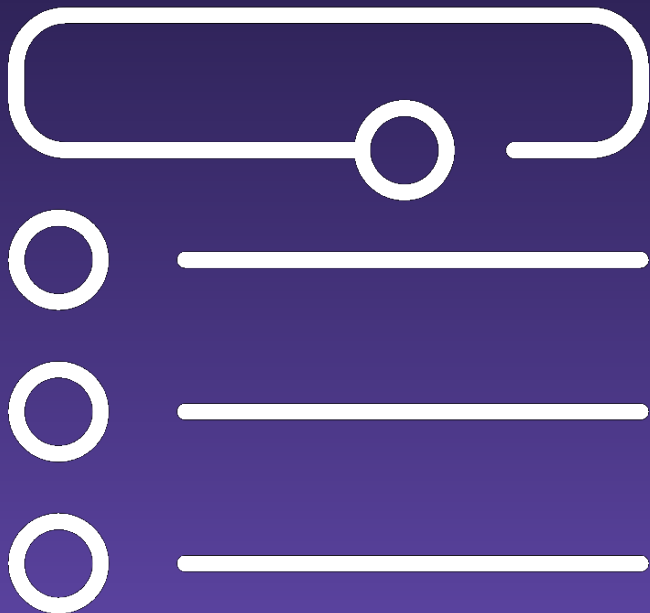
gitlab-org/gitlab-ce#...

Track Milestone progress with *Burndown Charts*





Project Management



Project Management

- Projects
- Issues
- Milestones
- Burndown Charts
- Labels
- Boards, Project Level
- Cycle Analytics
- Wikis
- Service Desk



Demonstration



Plan Stage Practice Lab 2

Lab Assignment

Part 2

Scenario: Your organization now has a few different projects related to improving the app. Use GitLab to create different views of the issues based on milestones and users.

Key Tasks to Complete

1. Create an Epic
2. Create a Board using Scoped Labels
3. Move issues through the Board
4. Assign issues to an Epic
5. Look at the Roadmap to see when this epic is due to finish



GitLab

Thank you



Overview

Define a large body of work with an *Epic*



The screenshot displays the GitLab web interface. At the top, the navigation bar includes 'GitLab', 'Projects', 'Groups', 'Activity', 'Milestones', and 'Snippets'. A search bar is on the right. The left sidebar shows the 'Epics' section with 558 items, along with 'Issues' (20,481) and 'Merge Requests' (1,449). The main content area shows an Epic titled 'User status messages' opened 3 months ago by Andreas Kämmerle. The Epic description includes a 'Problem to solve' and a 'Proposal'. A modal window titled 'Set your status' is open, showing suggestions like 'Making magic', 'Having lunch', 'Out sick', 'Vacationing', and 'Working remotely'. The right sidebar contains a 'Todo' list, 'Labels' (Current, Manage, UX, devops:manage, user profile), '5 participants', and a 'Notifications' toggle.

User status messages

Problem to solve

Right now, a number GitLab team members add emoji to their real name when they go on vacation to indicate to other users that they may not be able to respond or for reviews for a while. This is only one of several cases where promoting your status in the application would be helpful. Let's incorporate this into the product natively by allowing users to communicate their status.

Proposal

Let's add status messages as first class citizens to the user profile. Status messages consist of an emoji and a delimited message. You can add an individual status message or choose from a list of predefined messages. Your status is displayed on your user profile page and within discussions (issues, MRs, epics, ...).

Set your status

Making magic

Suggestions

- Making magic
- Having lunch
- Out sick
- Vacationing
- Working remotely

Labels

- Current
- Manage
- UX
- devops:manage
- user profile

5 participants

Notifications

- List of high level work
- Cross project
- Roll up at each level of groups
- Labels for quick recognition of type of work

Identify discrete parts of an Epic with *Issues*



The screenshot displays the GitLab web interface for the 'gitlab-org/gitlab-ce' project. The left sidebar shows navigation options: Overview, Epics (558), List, Roadmap, Issues (20,481), Merge Requests (1,449), and Members. The main content area is titled 'Issues' and shows a list of 11 issues. The issues are filtered by the 'Current' label. The right sidebar shows the 'Todo' section with start and due dates, labels, and participants.

Issue ID	Issue Title
gitlab-org/gitlab-ce#35463	Status messages in GitLab
gitlab-org/gitlab-ce#49645	Restyle user status message setting
gitlab-org/gitlab-ce#49644	Make margin of user status emoji consistent
gitlab-org/gitlab-ce#49075	Add status message from within user menu
gitlab-org/gitlab-ce#51393	Show set status message in user menu
gitlab-org/gitlab-ce#49641	Display user status in merge request widget
gitlab-org/gitlab-ce#49009	Add GitLab-wide predefined status messages
gitlab-org/gitlab-ce#49271	Display user status message
gitlab-org/gitlab-ce#49327	Add customizable predefined
gitlab-org/gitlab-ce#50295	Status messages: Schedule
gitlab-org/gitlab-ce#48276	Status messages: Sync with

- *Intra-project view of work*
- *Filtering by label*
- *Search*
- *Assign issues*
- *Multiple assignees*
- *Alerts!*

Plan a Sprint using *Issues*



The screenshot displays the GitLab web interface. The top navigation bar includes links for Projects, Groups, Activity, Milestones, and Snippets, along with a search bar and user profile. The left sidebar shows the 'Issues' section with 13,177 items, and a list of other features like Merge Requests, CI/CD, and Operations. The main content area shows an issue titled 'Status messages in GitLab' (ID #35463) created by Mark Fletcher. The issue is closed and has a description about adding emoji status messages to user profiles. Below the description is a 'Design' section with a 'Settings page' link. The right sidebar contains a 'Todo' list, 'Assignees' (4 users), 'Epic' (User status messages), 'Milestone' (11.2), 'Time tracking' (No estimate or time spent), 'Due date' (No due date), and 'Labels' (Community contribution, Deliverable, In review, Platform (DEPRECATED), UX ready, backend, devops:share, direction, emoji, feature proposal, frontend, release post item, settings, user profile).

GitLab Projects Groups Activity Milestones Snippets

Search or jump to...

GitLab Community Edition

Project

Repository

Issues 13,177

List

Boards

Labels

Service Desk

Milestones

Merge Requests 731

CI / CD

Operations

Registry

Snippets

Members

GitLab.org GitLab Community Edition Issues #35463

Closed Opened 1 year ago by Mark Fletcher

Reopen issue New issue

Status messages in GitLab

Problem to solve

Right now, a number GitLab team members add emoji to their real name when they go on vacation to indicate to other users that they may not be able to respond or for reviews for a while. Let's incorporate this into the product natively by allowing users to communicate their status.

Design

Settings page:

GitLab Projects Groups Activity Milestones Snippets

User Settings Edit Profile

Profile

Account

Applications

Chat

Access Tokens

Emails

Password

Notifications

SSH Keys

API Keys

Public Avatar

You can upload an avatar here or change it at [gravatar.com](#)

Upload new avatar

Choose file... No file chosen

The maximum file size allowed is 200KB.

Current Status

This emoji and message will appear on your profile and next to your name throughout the interface.

Your status

Make magic

Try to keep it short and sweet

Main settings

This information will appear on your profile.

Name

Luke Middleton

Enter your name, so people you know can recognize you.

User ID

1

Todo Add todo

4 Assignees Edit

Epic

User status messages

Milestone Edit

11.2

Time tracking ?

No estimate or time spent

Due date Edit

No due date

Labels Edit

Community contribution Deliverable

In review Platform (DEPRECATED)

UX ready backend devops:share

direction emoji feature proposal

frontend release post item

settings user profile

Collaborate and track development of a User Story



The screenshot displays the GitLab web interface for a project. The left sidebar contains navigation links: Project, Repository, Issues (13,177), Merge Requests (731), CI / CD, Operations, Registry, Snippets, and Members. The main content area is titled "5 Related Merge Requests" and lists five items with their status (Closed, Merged, or Open). Below this, there are reaction buttons (thumbs up, thumbs down, heart, and a smiley face) showing 14 upvotes, 0 downvotes, and 2 hearts. A "Show all activity" dropdown is also present. The activity feed shows three comments from Mark Fletcher and Winnie Hellmann, all dated "1 year ago". The right sidebar contains sections for "Time tracking" (No estimate or time spent), "Due date" (No due date), "Labels" (Community contribution, Deliverable, In review, Platform [DEPRECATED], UX ready, backend, devops:share, direction, emoji, feature proposal, frontend, release post item, settings, user profile), "Weight" (3 - remove weight), "Confidentiality" (Not confidential), "Lock issue" (Unlocked), and "41 participants" (with 34 more).

GitLab Projects Groups Activity Milestones Snippets

Search or jump to...

GitLab Community Edition

Project

Repository

Issues 13,177

List

Boards

Labels

Service Desk

Milestones

Merge Requests 731

CI / CD

Operations

Registry

Snippets

Members

5 Related Merge Requests

- !16823 add status/status_emoji fields to user, validation, strong parameters, and include on the profile **Closed**
- !18184 WIP: Status message on user profile **Closed**
- !20614 Allow users to set a status **Merged**
- !21045 Add documentation for setting up a user status **Merged**
- !6749 WIP: Add status message documentation in GitLab.org / GitLab Enterprise Edition **Closed**

14 0 2

Show all activity

Mark Fletcher @markglenfletcher commented 1 year ago **Maintainer**

Mentioning @to1ne and @winh because I know you've used emojis for this before 😊

Mark Fletcher @markglenfletcher commented 1 year ago **Maintainer**

/cc @zj

Winnie Hellmann @winh commented 1 year ago **Developer**

@markglenfletcher I think this is related to gitlab-ee#2546

Winnie Hellmann @winh commented 1 year ago **Developer**

Time tracking

No estimate or time spent

Due date Edit

No due date

Labels Edit

Community contribution Deliverable

In review Platform [DEPRECATED]

UX ready backend devops:share

direction emoji feature proposal

frontend release post item

settings user profile

Weight Edit

3 - remove weight

Confidentiality Edit

Not confidential

Lock issue Edit

Unlocked

41 participants

+ 34 more

Scrum and Kanban *Issue Boards* as Information Radiators



The screenshot displays the GitLab web interface for managing issues using Kanban boards. The top navigation bar includes links for Projects, Groups, Activity, Milestones, and Snippets, along with a search bar and user profile. The left sidebar shows the 'GitLab Community Edition' navigation menu with options like Project, Repository, Issues (13,177), Boards, Labels, Service Desk, and Milestones. The main content area is titled 'Issue Boards' and shows a 'Workflow' board with a search filter. A dropdown menu for 'Workflow' lists various boards: Rails 5.0, regression / bug / technical debt, Support, upcoming, Upgrade to Rails 5, victor board, and Workflow. The board itself consists of several columns, each representing a stage in the workflow. Issues are represented as cards within these columns, each with a title, a description, and various labels indicating their status and priority. For example, the 'In dev' column contains issues like 'Skip per commit Checks::ChangeAccess which have already passed on another change/branch' and 'SSH push mirroring support with public-key authentication'. The 'In review' column contains issues like 'ExpireBuildArtifactsWorker' is broken and 'Ensure that all CI/CD queries take less than 15 seconds to complete'. Each card also shows a count of related items (e.g., 42, 76, 25, 40) and a plus sign for more options. The bottom of the board shows a list of issues with their titles, labels, and counts.

Capture team Retrospectives with *Project Wikis*



The screenshot shows the GitLab interface for a project named 'The Quark App'. The left sidebar contains navigation links: Project, Repository, Issues (1), Merge Requests (1), CI / CD, Operations, Registry, Packages, Wiki (selected), Snippets, and Settings. The main content area displays the 'Sprint 1 retrospective' page, which was last edited by Victor Hernandez 1 minute ago. The page has three buttons: 'New page', 'Page history', and 'Edit'. The content is organized into sections: 'Purpose' (Reflect on what happened during the Sprint and identify actions for improvement going forward.), 'Before we begin...' (Review as needed, followed by a bulleted list: Team Working Agreement, Timebox, Sprint Objective, Agenda items), 'What Went Well' (Keep it positive, record observations, findings, successes, and ideas as a team, followed by a numbered list 1, 2, 3), and 'What Needs Improvement' (Surprises, obstacles, learning opportunities - actions and outcomes, followed by a numbered list 1, 2). The right sidebar shows a 'Clone repository' button and a 'Sprint 1 retrospective' section with a 'More Pages' button.

GitLab Projects Groups Activity Milestones Snippets

Search or jump to...

The Quark App

Project

Repository

Issues 1

Merge Requests 1

CI / CD

Operations

Registry

Packages

Wiki

Snippets

Settings

Victor Hernandez > The Quark App > Wiki > Sprint 1 retrospective

Sprint 1 retrospective

Last edited by Victor Hernandez 1 minute ago

New page Page history Edit

Purpose

Reflect on what happened during the Sprint and identify actions for improvement going forward.

Before we begin...

Review as needed

- Team Working Agreement
- Timebox
- Sprint Objective
- Agenda items

What Went Well

Keep it positive, record observations, findings, successes, and ideas as a team.

- 1.
- 2.
- 3.

What Needs Improvement

Surprises, obstacles, learning opportunities - actions and outcomes.

- 1.
- 2.

Clone repository

Sprint 1 retrospective

More Pages

Service Desk - Talk directly with your customers straight from GitLab



- How it works
 - Enable Service Desk for your GitLab Enterprise Edition Premium instance
 - GitLab generates a unique email per project, to be shared with the people you want to connect
 - Your customer sends an email which will automatically create an issue in your project
 - By replying to that issue thread, your customer will receive updates in their mailbox
 - By replying to that email, your customer can post back to the thread
- Ability to email new issues to a project's service desk
 - Subject = Title
 - Body = Description
- If the project is private and details/issues/content is confidential
 - Non-members can contribute issues via service desk
- Documentation: https://docs.gitlab.com/ee/user/project/service_desk.html
- Example: Contract and NDA submissions to GitLab Legal

How GitLab Marketing Uses GitLab for Project Management



Marketing Project Management Guidelines

Marketing uses GitLab for agile project management including groups, projects, epics, roadmaps, issues, labels, and boards. Read through the documentation on each of these GitLab features if you are unfamiliar.

Groups and projects

1. The Marketing General Group houses all marketing projects.
2. Labels should exist at the group level so they can be used across projects.
3. The following are the approved marketing projects, CMO approval is needed to begin a new project.
 - Product Marketing (includes PMM, AR, Customer Case studies, etc.)
 - Community Relations
 - Digital Marketing Programs
 - Corporate Marketing (includes content, website, corp events, brand, etc.)
 - Marketing Operations
 - Field Marketing
 - XDR
4. Issues should only be logged in team project (i.e. do not use `marketing/general`).
5. Don't create groups with subgroups (use labels to segment workstreams within a team's project issue tracker.)

Issues, Milestones, and Epics

1. Each issue represents a discrete unit of work with a deliverable. For example 1.2.3
2. Every MR should have an issue so that it can be tracked on issue boards.
3. Milestones represent units of work to be completed within a specific time frame, sometimes referred to as sprints. They are comprised of multiple issues that share a common due date, and help break large projects into more manageable parts.
4. Epics represent projects that comprise multiple issues. (Don't use "meta" issues for this purpose. If you have an existing meta issue you can promote them to epics using the `/promote` slack command.)
 - Epics live at the group level (e.g. issue from multiple marketing projects can be added to an epic.)
 - Epics are labeled with a group label of the team that owns the epic.
5. The top 3-5 strategic initiatives are tracked in epics using the `CMO` label. (Don't apply the CMO label to other epics.)
6. Roadmaps are used for time-based display of epics with a start and end date. (for example, events and time-based campaigns.)

Boards and Labels

1. Each team has one or more boards to track ongoing workstreams.
7. Generally create a board for each function. (For example PMM has boards for Sales Enablement, Analyst Relations

<https://about.gitlab.com/handbook/marketing/#marketing-project-management-guidelines>

Issue Example - Marketing events



Open Opened 2 months ago by **Marc Kriz** 0 of 37 tasks completed

Close issue

New issue

WIP - Geoint 2019 - June 2-5



- Event Name: Geoint 2019 - June 2-5
- Location: San Antonio, TX
- Event website: <https://usgif.org/events/geoint-symposia>
- Justification for wanting to sponsor the event (please be as detailed as possible): Among the attendees were 847 government and military personnel, including 264 employees of the National Geospatial-Intelligence Agency (NGA), 58 representatives from U.S. Special Operations Command (USSOCOM), and 53 members of the U.S. Air Force. There were 314 international attendees representing 36 countries. Among this year's attendees were 206 young professionals and 113 participants from academia.
- If we went last year, link to SF.com campaign:
 - I wasn't sure if there was a campaign but here is the link for last year's event: [general#1849](#) (closed)

Everything below this section will be updated once the event has been approved.

Event Details

- SFDC campaign:
- Location:
- Speakers:
- Number of Attendees:
- Staffing Needs:
- Sponsorship:
- Lodging:
- Expo Center:
- Dress code:
- Audience Demographics/ Breakdown:
- Goals:
- Other Benefits of attending/ sponsorship:
- Total costs (sponsorship + travel + collateral + etc.):

Invitation plan:

- [Review the Field Marketing handbook](#) on how to add members to a campaign & have marketing send an email for you.
- Will marketing send email on SALs behalf: Y/N

Campaign Checklist - Marketing Programs

- Event budget:

Speaker Checklist

- ☐ Speaker brief + bio sent
- ☐ Slides reviewed by content and design
- ☐ Speaker Slides Sent (Deadline:)
- ☐ Speaker final run through scheduled

Outreach Checklist/ At Event Meeting Plan - Marketing Programs (w/ Mktg OPS support)

- ☐ Calendar links provided to XDR team for outreach- Create Meeting Schedule in outreach
- ☐ [Client Meeting Prep Template](#) must be completed for every on site meeting by AE
- ☐ Target customers/ prospects identified

Post Event:

- ☐ Leads shared with team (24 hours after event close)
- ☐ Leads uploaded to campaign and list locked (all changes after lock to be made in SFDC)
- ☐ Sales notified of lead/contact assignments - auto-assign to match named accounts
- ☐ After event follow up launched
- ☐ After event survey sent

Event Checklist

- ☐ Contract Signed
- ☐ Event added to Events Cal and Events page
- ☐ Invoice paid
- ☐ Artwork sent
- ☐ Booth Artwork sent
- ☐ Slack channel created and attendees invited
- ☐ Planning spreadsheet (included travel, booth duty, meetings...)
- ☐ Tickets allocated
- ☐ Attendee directory from organizers
- ☐ Press list sent
- ☐ Badge scanners
- ☐ AV ordered
- ☐ Furnishings ordered
- ☐ Electrical if needed
- ☐ Booth duty scheduling
- ☐ Social media copy written and scheduled [@evhoffmann](#)
- ☐ Flights/ transport booked- added to spreadsheet
- ☐ Booth slideshow/ demo (shared with staff)
- ☐ Final prep meeting scheduled
- ☐ Event post mortem scheduled
- ☐ After event follow up set up in Marketo

Swag checklist:

Project Level Board Example - Marketing Events



▼ Open

4 0 +

Agile events - CFP

Field Marketing Corporate Event West East

Public Sector

#108

Docker Summit Public Sector May 29th, 2019

status:plan Public Sector MktgOPS - FYI

Marketing Programs Marketing Campaign

MPM - Radar Field Marketing

#10 Jan 31

Public Sector Marketing asks

Public Sector Field Marketing

#33

Gitlab Carahsoft LaunchPlan and Onboarding Tasks as of 1-14-2019

Public Sector Field Marketing

#87

FY20-Q1

18 0 +

Executive Roundtable Briefing with Federal News Radio - January 7th

status:wip FY20-Q1 Public Sector

MktgOPS - FYI Marketing Programs

Marketing Campaign

#17

GitLab Connect - Dallas - March 19

Public Sector status:wip FY20-Q1 MktgOPS

Marketing Programs East MktgOPS - FYI

Field Marketing

#8

GitLab Connect - San Antonio - March 21

Public Sector status:wip FY20-Q1

Marketing Programs East MktgOPS - FYI

Field Marketing

#7

Argyle Executive Forum DC - March 28

status:wip Field Marketing East

Public Sector FY20-Q1

#178 Mar 28

AFCEA New Horizons 2019 - March 5 - 6

status:wip Public Sector FY20-Q1

#203 Wednesday

Monkton press release

Public Sector FY20-Q1

#186

FY20-Q2

6 0 +

AWS Public Sector Summit - June 11 - 12, 2019

MktgOPS - Planning Marketing Programs

Marketing Campaign status:wip

Field Marketing Public Sector FY20-Q2

#111 Jun 12

TechNet Cyber 2019 (formerly named the AFCEA Defensive Cyber Operations Symposium) Baltimore, MD May 14-16, 2019 - Booth 2125

status:plan FY20-Q2 Public Sector

MktgOPS - Future Action Needed

Marketing Programs Marketing Campaign

#27 May 14

WIP - Geoint 2019 - June 2-5

status:plan FY20-Q2 Public Sector

MktgOPS - Future Action Needed MktgOPS - FYI

Marketing Programs Marketing Campaign

MPM - Radar Field Marketing

#28

WIP-DevOpsDays-DC - Date TBD (Likely June 2019)

status:plan FY20-Q2 Public Sector

MktgOPS - Future Action Needed

Marketing Programs Marketing Campaign

MPM - Radar

#36

WIP - NASCIO Midyear Conference 2019

status:plan FY20-Q2 Public Sector

MktgOPS - FYI MPM - Radar Field Marketing

FY20-Q3

3 0 +

DoDHS Worldwide - Aug 18 - 21, 2019 Tampa, FL

status:plan FY20-Q3 Public Sector

MktgOPS - Future Action Needed MPM - Radar

Field Marketing

#30 Aug 21

WIP - AFCEA - Intelligence and National Security Summit, September 4-5, 2019 Gaylord Hotel, Washington DC

status:plan FY20-Q3 Public Sector

MktgOPS - Future Action Needed MktgOPS - FYI

Marketing Programs Marketing Campaign

MPM - Radar Field Marketing

#31

NASCIO Annual Conference 2019

status:plan FY20-Q3 Public Sector

MktgOPS - FYI Marketing Programs MPM - Radar

Field Marketing

#56

Issue Example - Marketing



Update messaging on main page

Business Value

Proper messaging and a consistent user experience will *delight* our Customers and keep them coming back wanting more!

Tasks

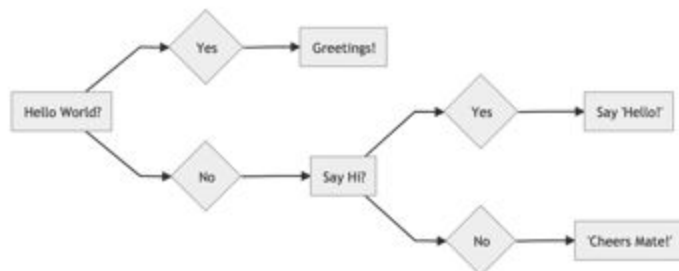
- ☒ Get correct messaging with Product, @ChloeHdz
- ☒ Verify spelling with Tech Writer, @vehernandez
- ☐ User Experience
- ☒ Get correct Corporate color code for red
- ☐ Write WCAG 2.0 / ADA color tests

Code Fix Suggestion

```
background-color: #800000;
```

```
message = "Hello GitLab World!"
```

Workflow



- *Issue description*
- *Tasking*
- *Diagramming done with Mermaid integration with Markdown*

How GitLab Quality Uses GitLab for Project Management



Project Management

Our team's **Quality: Development board (top level board)** can span 10k+ issues and it's not easy to work on that level. As a result, it's only meant to capture the current workload of the team. The board shows who currently owns what in the entire GitLab.org space.

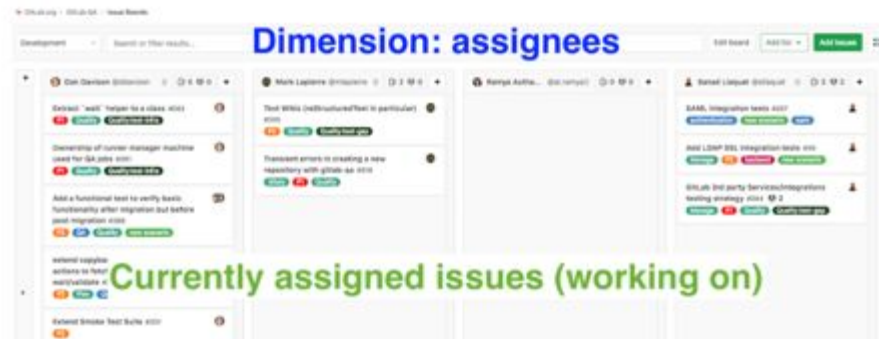
The board is meant to be read-only. We don't manage the project on that level.

We have sub-boards at the project level that are used for project management, triaging and scheduling issues.

Each project has 3 boards each for a given dimension of the project management component: **Development**, **Prioritization**, and **Scheduling**

Development

This board shows the current ownership of workload / issues with assignees as the dimension.



<https://about.gitlab.com/handbook/engineering/quality/project-management/>

Prioritization

This board is for prioritization with priorities as the dimension (~P1 ~P2 ~P3 ~P4).

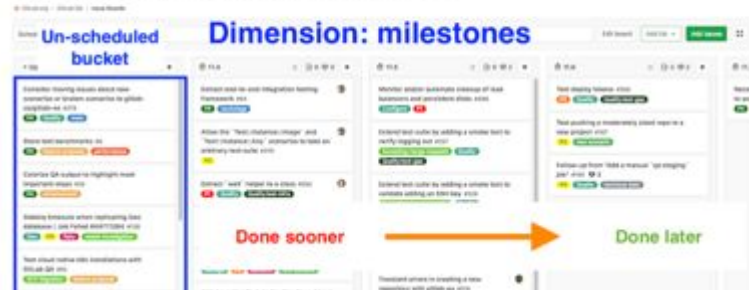
Most important is left most and gradually moves to least urgent.



Scheduling

This board is for scheduling with milestones as the dimension.

Earliest milestone is left most and gradually moves into later milestones.



Issue Example - Employee Onboarding



Onboarding Kevin Chasse, Starting January 24th, as Federal Technical Account Manager

Welcome to your onboarding issue! We are so excited you're here! As a new GitLabber, you will use GitLab as part of your job, and if you come from a non-technical background, this might be new to you. At times the onboarding issue might feel overwhelming, but if you have any questions along the way, please feel free to ask [People Ops](#), your manager, or anyone else at GitLab in the [#questions channel](#) on [Slack](#), our chat communication tool. If you have any questions or suggestions about onboarding, please feel free to create an issue on the [People Ops issue tracker](#) or a merge request for [this template](#) and assign it to People Ops to make this documentation better for the next new team member (you will learn more about how to do that as you progress through this issue!).

The onboarding issue is broken out into what your ("New team member") responsibilities are, what your manager's ("Manager") responsibilities are, and what our People Ops team's ("People Ops") responsibilities are. Just focus on "New Team Member," and don't feel you need to rush through it or complete each and every task on the required day. If you can't move forward with your onboarding tasks because People Ops, your manager, or your buddy haven't checked tasks they are responsible for, don't hesitate to send them a reminder!

In addition to general onboarding, you may have department- or role-specific tasks to complete. See below main section for details.

Before Starting at GitLab

1. [People Ops](#): Once the offer letter or contract is signed, create a **confidential** issue called 'Onboarding (NAME), starting (DATE), as (ROLE)' in the [People Ops Employment issue tracker](#) with relevant lines of the master checklist, and choose the [onboarding](#) label, /cc [@brittanyr](#), [@aherrmann](#)
2. [Manager](#) is [@klawrence](#), buddy is [@sengehard](#), and People Ops is tackled by [@aherrmann](#). Assign this issue to the People Ops team member and the hiring manager.
3. [People Ops](#): Send an email to the chosen buddy letting them know that they have been chosen, and include a link to the onboarding issue.
4. [Buddy](#): Schedule video call for first day to introduce yourself, and make sure they know that if they have questions, they can come to you. Check with the new team member if they will need help setting up their SSH key and installing a Shell ready for using Git locally. You may need to set up an additional meeting for this step. But your main job as a buddy will be to direct them to the right parts of the handbook, and/or encourage them to ask their questions of the wider group on chat, etc.
5. [Manager](#): Assign a member of your team to act as a buddy during the second week at GitLab. This should be someone who can act as a trainer to help get the new team member up to speed with the team workflow/priorities etc.
6. [People Ops](#): If the team member is outside of the US, confirm that the new team member is not on any known [Denied Party List](#) add their name to the "Denied Parties List" Google Doc.
7. [Google account](#)
 1. [People Ops](#): Log on to the [Google Admin console](#) and verify [first.initial.last.name\[at\]gitlab.com](#) is not conflicting with a current account. Click the + sign to create an account for the new team member, and email the instructions to new team member's private email address.
 2. [People Ops](#): Add new Google user to the 'Disable 2FA' group under the Groups tab to disable 2FA for them.
 3. [People Ops](#): Add new user to proper regional group through the admin console.

Week 2

Git Basics

Goal: Become more familiar with git and GitLab basics

1. [Try Git](#) if you aren't already familiar
2. [Review the Git basics training materials](#) commonly delivered by Professional Services

GitLab General Knowledge

Goal: Understand how GitLab is used by our customers

1. [Understand GitLab Flow](#) and why it's different from [Git flow](#) and [GitHub flow](#)
2. [Learn about GitLab Namespaces](#)
3. [Review the GitLab Basics](#) that you don't feel comfortable with. Pay special attention to:
 - [Command line basics](#)
 - [Creating SSH keys](#)
 - [Creating a branch](#)
 - [Creating a merge request](#)
4. [Take a look at how the different GitLab versions compare](#)
5. [Learn the differences between Core and Enterprise](#)
6. [Review the various features of GitLab](#)
7. [Review the basics of GitLab HA and GitLab GEO](#)
8. [Watch video: GitLab Security solutions](#)
9. [Watch video: GitLab HA-GEO infrastructure benefits](#)
10. [Watch video: GitLab Services](#)
11. [Watch video: GitLab custom in-app monitoring for Value Stream Mapping](#)
12. [Read: GitLab blog highlighting use of GitLab for Agile](#)

Customer Success Group Activities

1. [Shadow 2-3 calls](#) with a team member in your Customer Success team (SA, TAM or IE).
2. [Shadow at least 1 call](#) with each of the OTHER Customer Success teams

Support Group Activities

1. [Review the GitLab Support documentation](#)
2. [Review the process for support tickets](#)

Other Teams

Goal: Get to know how other teams at GitLab help our product and customers

1. [Take a look at the GitLab.com Team page](#) to find the resident experts in their fields

Issue Example - Group Discussion



Related issues ⓘ 2 +

External cloning for CAC/PIV smartcards or PKI certs. #6990

WIP: Test plan for Implement Smartcard/CAC Authentication in GitLab #7607

Related merge requests ⓘ 4

Smartcard authentication gitlab-org/gitlab-ee!8120

Fix release version for smartcard auth in doc gitlab-org/gitlab-ee!8734

Adding support for TLS client certificates gitlab-org/gitlab-runner!86

Configure 2-way SSL client authentication for Issue #1458 gitlab-org/omnibus-gitlab!901

- *Issue discussion*
- *@ mentions = alerts*
- *Relating other issues*

Jeremy Watson · @jeremy · 5 months ago · Developer ⓘ

We discussed this internally, and think the simplest first iteration here will be authenticating with a card with a single certificate, mapped to a single user, just for the GitLab omnibus package.

@reprezent, I don't recall if we planned to leave LDAP out of the first iteration, or if that was achievable in a single release as well. Our goal would be to iterate from there and add multiple users, LDAP, and other distros - hopefully by end of year.

Bob Van Landuyt @reprezent · 5 months ago · Developer ⓘ

I don't recall if we planned to leave LDAP out of the first iteration, or if that was achievable in a single release as well.

@jeremy, The first idea was to only use the certificate, no LDAP. Register a new user on first visit with a valid cert. LDAP is highest priority to get in though, as allowing multiple gitlab-accounts for a single certificate depends on it.

Jeremy Watson · @jeremy · 5 months ago · Developer ⓘ

@reprezent, I previewed this with @ifarkas. Thanks to Imre for the discussion.

Imre may be focusing on this in %11.4. He's also working on [gitlab-ce#33054](#), so we're trying to assess whether or not we can accomplish both.

I'll let you both connect on how hard this first iteration will be, and whether or not we need to stop work on [gitlab-ce#33054](#).

Jim Riley @jrileybrva · 5 months ago · Developer ⓘ

@usethedata Bruce, we had an internal meeting last week to discuss this issue. Our team appreciates your feedback on this topic. Two questions: 1) what GitLab installer are you using- Omnibus? and 2) do you have a Slack account?

Imre Farkas @ifarkas · 5 months ago · Developer ⓘ

@bryan.alexander1, I am quite new to this topic but started looking into this issue. I was wondering what type of smart card reader/writer and smart cards I should acquire to test the scenarios you described in #5411 (comment 92995083). I believe @reprezent had issues with the cards mentioned in #5411 (comment 87751955). Do you have any recommendations?

Edited by Imre Farkas 5 months ago