Delivery configurations

Delivery configurations apply to the Ticket log, Retrospective, and Sprint movement reports. These reports help you consistently deliver value to your customers. With these reports, you can manage the workflow and efficiency of your teams.

Who can use this?

Core	Plus
✓	✓

Ticket log is available on Core and Plus plans. It allows you to gain insights into the metrics associated with specific tickets. Learn more about Ticket log ().

Retrospective is available only on Plus plans. It allows you to compare your teams' delivery metrics across specific time frames. Learn more about Retrospective (https://help.pluralsight.com/help/retrospective).

The Sprint movement report is available only on Plus plans. It helps improve your team's efficiency by tracking how much work your team is completing and adding during your sprints. Learn more about Sprint movement (https://help.pluralsight.com/help/sprint-movement).

Learn more about delivery metrics (https://help.pluralsight.com/help/delivery-module-metrics).

> **Note:** You need to set delivery configurations for each ticket project to view those metrics. These configurations allow us to calculate metrics based on your team's unique workflows.

How do I set delivery configurations?

These reports display the ticket information from your ticket vendor as well as the metrics calculated by Flow. These metrics are used in the Ticket log, Retrospective, and Sprint movement reports.

Flow auto-configures your ticket projects by default, so you can see data. Double-check that the auto-configurations align with your team's workflow and make any changes as needed so the delivery reports and metrics work better for you.

To utilize and calculate delivery metrics in Flow, you need to:

1. Integrate Flow with your ticket vendor.
2. Import the ticket projects you want to analyze in Flow.
3. Create delivery configurations for those projects. This tells Flow what your team's workflow looks like.

Below are the details of these steps.

Integrate Flow with your ticket vendor

In order to get the ticket information from your ticket vendor, you need to integrate the ticket vendor with Flow. Once the ticket vendor is integrated, you can view and import your ticket projects on the Integrations page under settings.

> **Note:** At this time, Jira and Azure DevOps are the only supported ticketing systems.

For more information on managing integrations, click here (https://help.pluralsight.com/help/manage-integrations).

To learn about how to connect with Jira, click here (https://help.pluralsight.com/help/how-do-i-connect-with-jira).

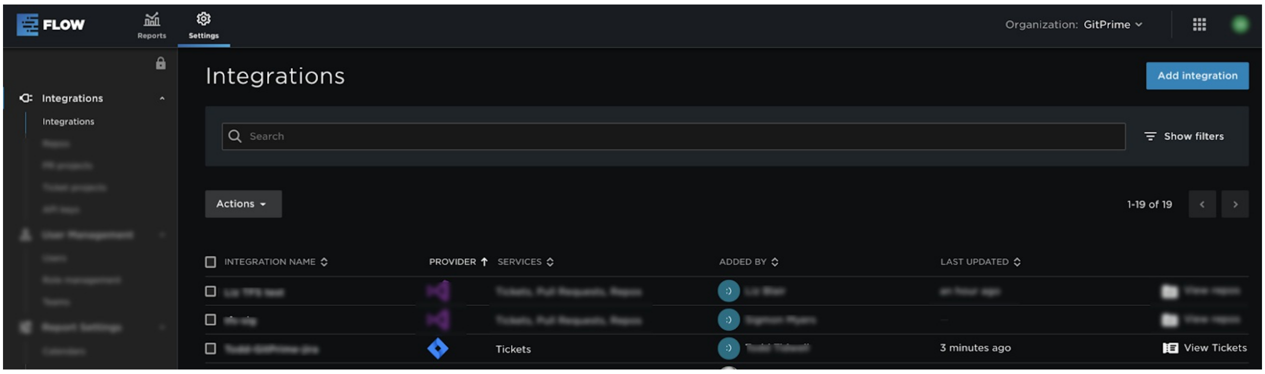
To learn how to connect with Azure DevOps (ADO), click here (https://help.pluralsight.com/help/azure-devops-vsts-setup).

Import projects

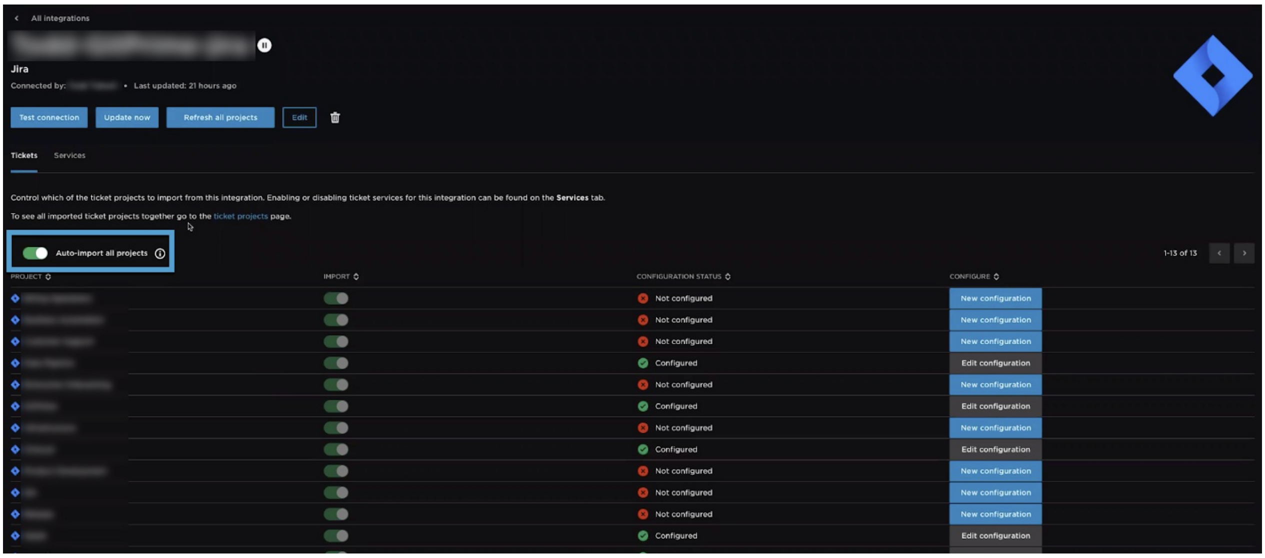
Once your ticket vendor is integrated, you will need to import ticket projects.

To import ticket projects:

1. Navigate to the Integrations page in Flow.
2. Select the integration you want to import projects from.



3. On the integrations ticket tab, toggle **Auto-import all projects** if you want to automatically import all projects for that integration. You can also use the **Import** column to select specific projects to import.



Manage delivery configuration permissions

You must have both the **Manage Integrations** and **Manage delivery configuration** permission to create or edit configurations for ticket projects. Manage integrations provides access to the list of all integrations, repos, prs, and tickets list. Manage delivery configurations provides access to ticket projects list and the ability to create and edit delivery configurations.

Users can create or edit delivery configurations for ticket projects without being able to access the entire set of integration controls via the list of already imported ticket projects found under the “Ticket projects” option in the settings side navigation.

Manage delivery configuration permission allows the user to:

1. Access the **ticket projects** page under settings
2. View all imported ticket projects
3. Create new or edit existing delivery configurations

> **Note:** Manage delivery configuration permission does not allow the user to access the integrations list or integration details. They will not be able to import additional ticket projects or delete ticket projects that have already been imported.

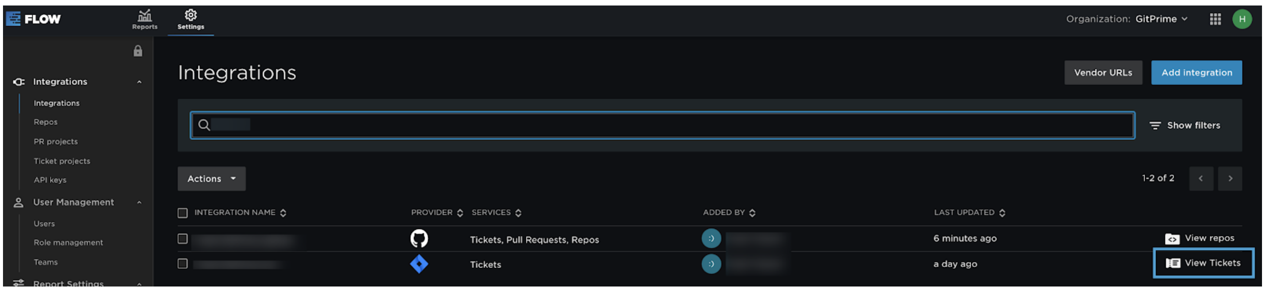
Navigate to the configurations wizard

Once you have imported the projects, you need to set the project’s delivery configurations. Flow uses these configurations to calculate the delivery metrics.

> Note: To configure your ticket projects, you will need to access the configuration wizard. You can access the wizard from the integrations page or the integrations detail page. To access the integrations detail page, click on the integration name., You can then edit or create new configurations for a particular project. From there, the process is the same. Here, we access the configuration wizard from the integrations page.

To get to the configuration wizard:

1. On the integrations page, select an integration associated with a supported ticket vendor. Click **View Tickets**.

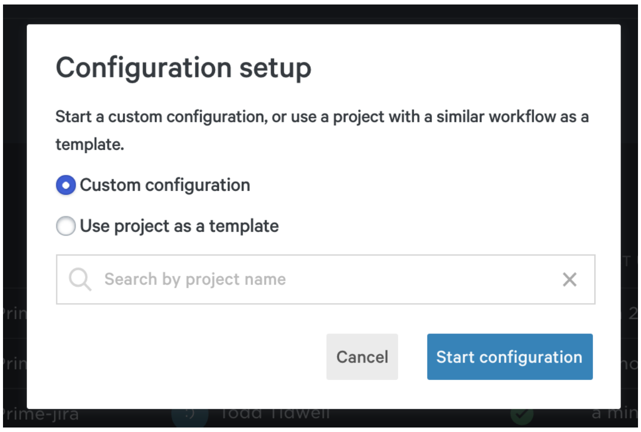


2. On the Ticket Projects page, set configurations using the **Configure** column for any projects that have been

imported. To set configurations for the first time, click **New Configuration**. You can edit existing configurations by clicking **Edit Configuration**.

3. Next, you'll see the Ticket project configuration wizard. Choose a configuration setup method. You can set up your configuration from scratch with a custom configuration or use an existing configuration as a template if your projects use the same or similar workflows.. Custom configuration allows you to customize the configuration from the beginning. Using a ticket project as a template allows you to select a project that has a similar workflow. If no configurations have already been created, this option will not be available.

> **Note**: When creating a configuration from a template, a brand new configuration is created. Changing the configurations on one project will not affect the other.



We will go through the configuration steps below.

There are three steps to setting configurations for tickets.

To set configurations, you need to:

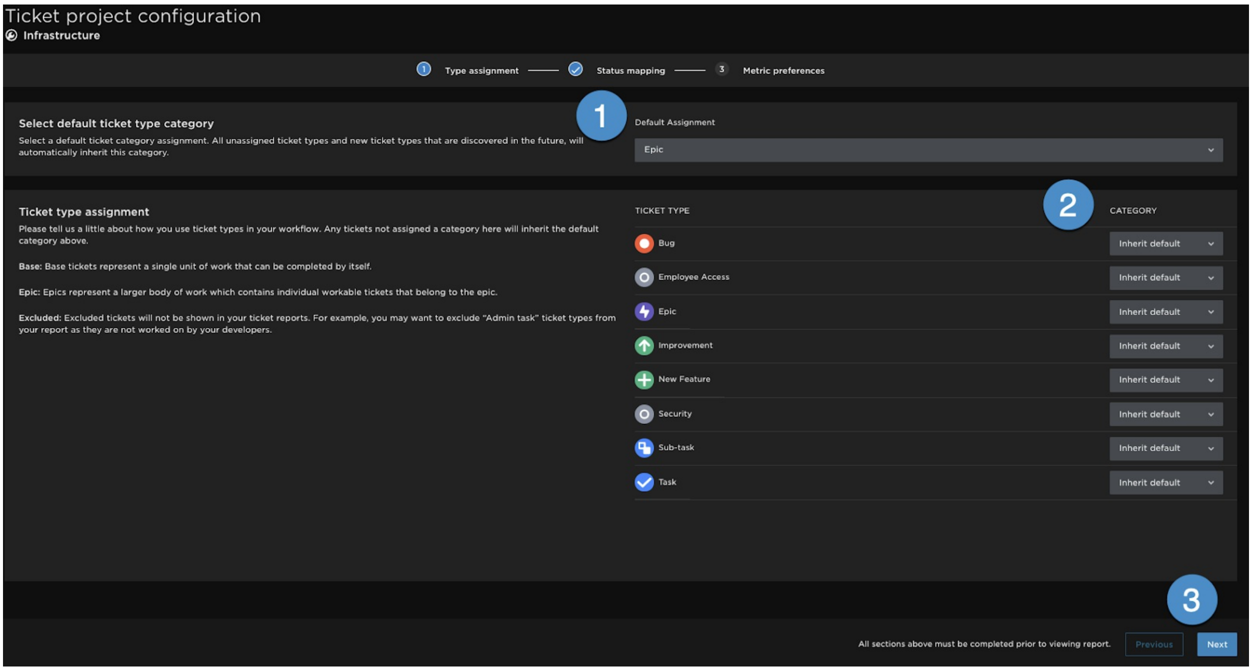
1. Categorize each ticket
2. Map the ticket status
3. Set metric preferences for Heat & Jitter calculations

Categorize each ticket

You categorize tickets into three categories. The three categories are:

1. **Base:** Base tickets represent a single unit of work that can be completed by itself.
2. **Epic:** Epics represent a larger body of work which contains individual workable tickets that belong to the epic.
3. **Excluded:** Excluded tickets will not be shown in your ticket reports. For example, you may want to exclude “Admin task” ticket types from your report as they are not worked on by your developers.

The first page in the configuration wizard is the Ticket project configuration page. Here, you will categorize the tickets.

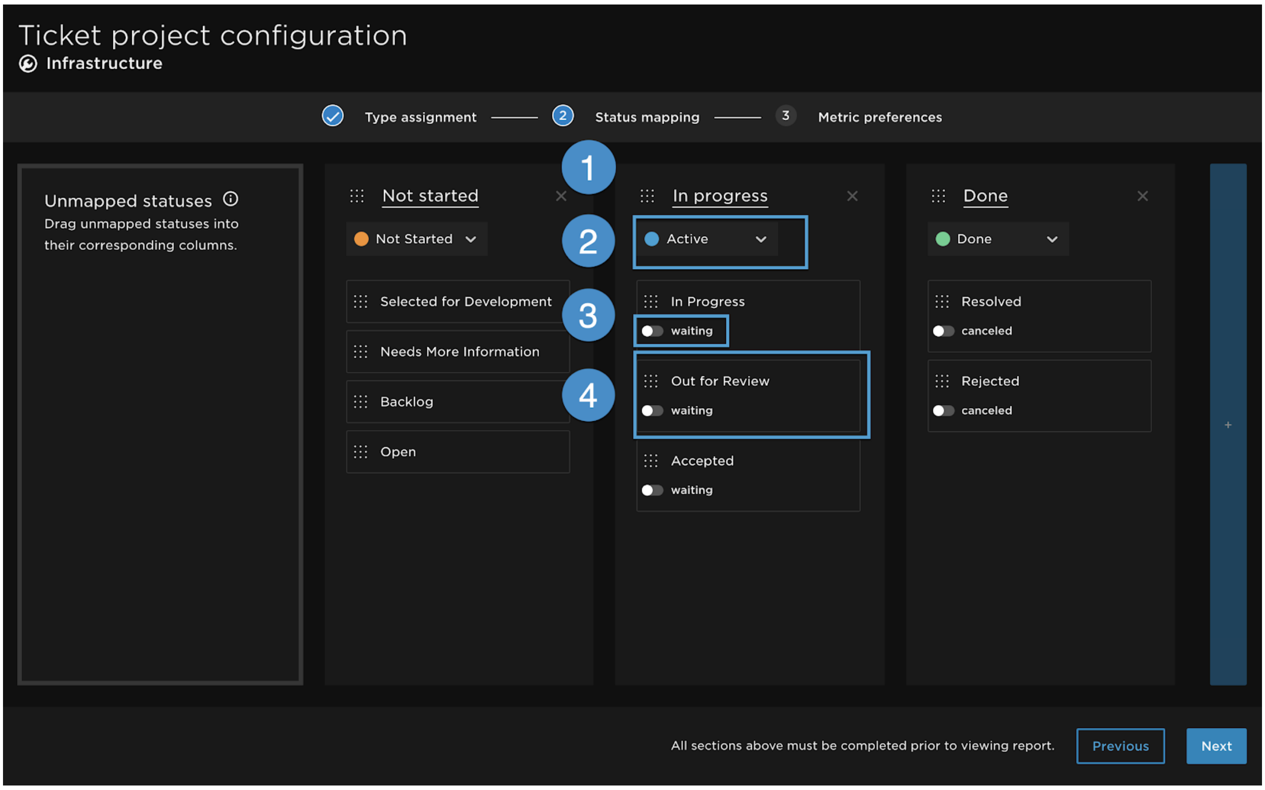


To categorize tickets:

1. Set the **Default assignment** for new tickets in this project.
2. In the **Category** column, select the desired category for each ticket type. You can categorize as inherit default, base, epic, or excluded.
3. Select **Next** in the bottom right hand corner of the page.

Map ticket statuses

The next step in setting configurations is to map the statuses of your workflow to columns on a Kanban board. Status mapping allows you to easily update statuses and transitions to match your project's specific workflow. Flow uses this Kanban board to know how to treat transitions between statuses in your workflow and calculate delivery metrics.



1. **Columns** are the columns on the board. Flow provides three columns by default: not started, in progress, and done. You can rename, edit, delete, and add columns.
2. **States** are the three primary states for a ticket. The three primary states are not started, active, and done. Map the states by selecting a state in the dropdown box within the column.
3. **Sub states** are additional states to modify tickets' primary states. You can toggle waiting substates on for statuses in active columns. You can toggle cancelled substates on for statuses in done columns
4. **Statuses** appear as tiles that can move between columns. Use statuses to visualize the workflow. During the initial integration, the statuses reflect the statuses in your ticketing system. You can edit these statuses to better reflect your workflow..

To map or change statuses:

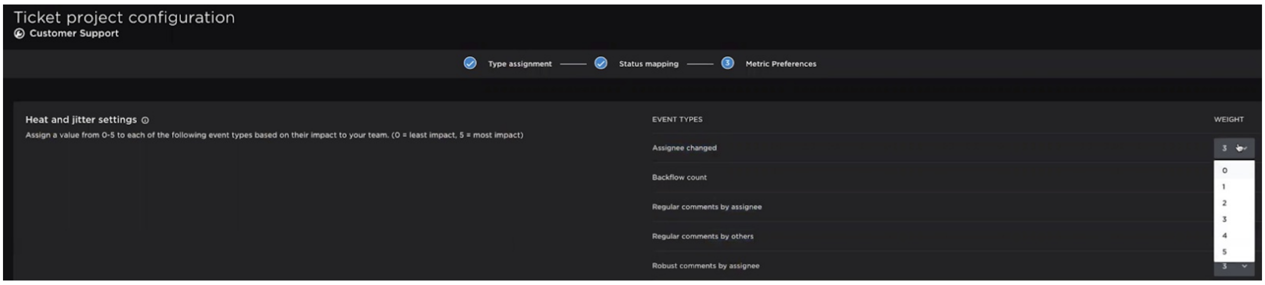
1. Drag and drop statuses across columns.
2. Use the **waiting** and **cancelled** state toggles to update the sub states of ticket statuses in **Active** and **Done** columns. The waiting toggle indicates the ticket is in a waiting state, during which Queue time actively accrues for that ticket. The cancelled toggle indicates that ticket resolution was not deployed to production. Tickets in the cancelled sub-state will be excluded from the Retrospective report metrics.
3. Use the + on the far right of the page to add needed columns. You can place the new column in the desired location by dragging it to the top left of the column.

The **Unmapped status** column contains statuses that have not been mapped. These statues may have been brought over from the ticketing system during the integration. Statuses may also be unmapped because the status was added after the configuration was initially set up. To map these statuses, drag the unmapped status into the appropriate column.

Set Heat and Jitter weight for ticket events

Once statuses are mapped, you are ready to set the weight for specific event types. Setting the weight assigns a level of importance for that event type given that team/projects workflow and work habits. These weights are used to calculate Heat and Jitter metrics, which are representations of the level and severity of activity occurring on a ticket.

Weight is measured on a scale of 0-5. 0 carries no weight and indicates the event type does not have any impact on the project. Event types with a weight of 0 will not be used to calculate Heat or Jitter. 5 has the most weight and indicates the event type has a large impact on the ticket.

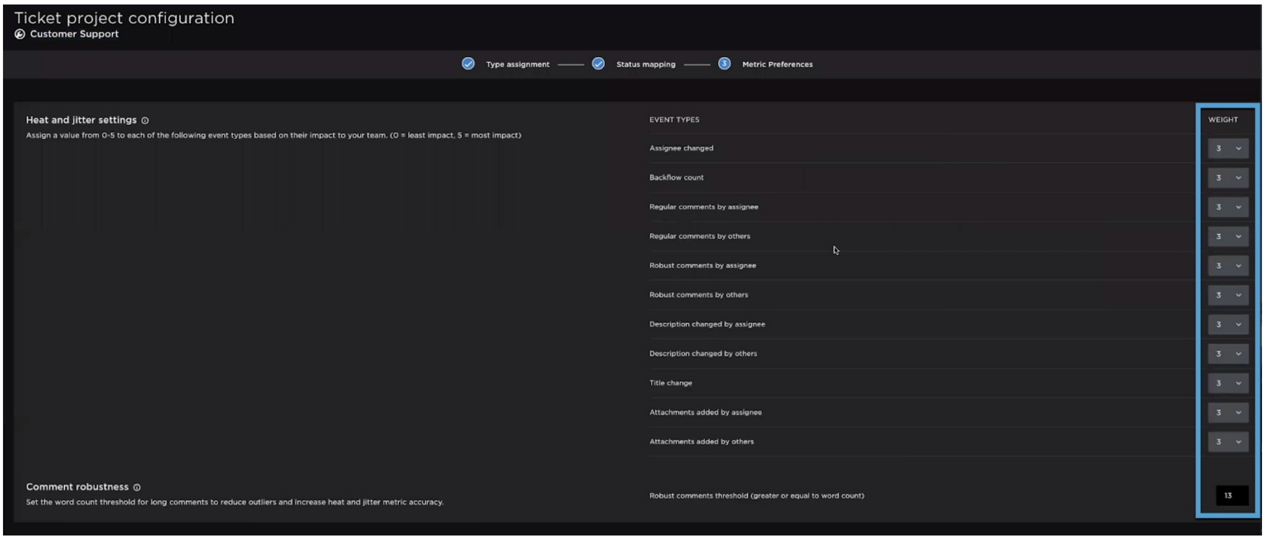


Set Comment robustness

Comments can be regular comments or robust comments. Regular and robust comments are their own event type. Use the drop down menu in the **Weight** column to assign a weight for each comment type.

To distinguish robust comments from regular comments, you will need to set the comment robustness threshold. Comment robustness refers to the number of words in a comment.

For example, if you set Comment robustness to 20, all comments with 20 or more words will be counted as robust comments in the heat and jitter metrics. Comments with fewer than 20 words will be counted as regular comments.



Once you are done setting the configurations, click **Finish** in the lower right hand corner. Once saved, Flow uses the project configurations to calculate the delivery metrics. It can take up to four hours for your metrics to appear in Ticket log, Retrospective, and Sprint movement reports.

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If you need help, please email support@pluralsight.com () for 24/7 assistance.