Ticket project configurations

Ticket project configurations apply to the Ticket log, Retrospective, Sprint movement, and Investment profile reports. These reports help you consistently deliver value to your customers. Use these reports to manage the workflow and efficiency of your teams.

Learn more about ticket metrics.

Note: You must set ticket configurations for each ticket project to view those metrics. These configurations allow Flow to calculate metrics based on your team's unique workflows.

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How do I set delivery configurations?

These reports display the ticket information from your ticket vendor as well as the metrics calculated by Flow.

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 ticket 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 ticket 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 Services are the only supported ticketing systems.

Learn more about managing integrations.

Learn more about how to connect with Jira.

Learn more about how to connect with Azure DevOps Services (ADO).

Import projects

Once your ticket vendor is integrated, import ticket projects.

To import ticket projects:

1. In the top navigation, click **Settings**.

2. Under **Integrations**, click **Integrations**.

3. Select the integration you want to import projects from.

4. On the integrations ticket tab, toggle **Auto-import all projects** if you want to automatically import all projects for that integration. Use the **Import** column to select specific projects to import by toggling import on.
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 Configuration provides access to the ticket projects list and the ability to create and edit ticket configurations.

If you only have the Manage Delivery Configuration permission, configure ticket projects from the Ticket Projects page.

Manage Delivery Configuration permission lets you:

1. Access the Ticket Projects page under Settings
2. View all imported ticket projects
3. Create new or edit existing ticket configurations

Note: Manage Delivery Configuration permission doesn't let you access the integrations list or integration details. You can't import additional ticket projects or delete ticket projects that have already been imported.

Configuring a ticket project

Once you've imported the projects, set each project's ticket configurations. Flow uses these configurations to calculate the ticket metrics.

To get to the configuration wizard, either:
Go to the **Ticket projects** page and click **Edit configuration** in the **Configure** column.

From the **Integrations** page, click your ticket integration. Find the project you want to configure in the **Tickets** tab, then click **Edit configuration**.

**Note:** It may take a few minutes after importing a project for **Edit configuration** to show up. Wait until the **Configuration status** column says **Configured** or **Automatically configured** and the **Configure** column has an **Edit configuration** button before trying to configure your project.

In the configuration wizard, there are four steps to setting configurations for tickets:

1. Set ticket type assignments.
2. Map your ticket statuses.
3. Set up metric preferences.
4. Set up custom mapping for investment layers and story points.

**Set ticket type assignments**

Categorize tickets into the following three categories:

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.

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.

Next, set up the **Work type allocation** for each ticket type.

This determines how tickets appear in the work type sections of Investment profile. Set your ticket types as either Excluded, Feature, Defect, or Maintenance. Any ticket types not allocated to a work type show as Unassigned in Investment profile.

**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 ticket 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 canceled 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. 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 canceled state toggles to update the substates 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 canceled toggle indicates that ticket resolution wasn't deployed to production. Tickets in the canceled substate are excluded from Retrospective report metrics.

3. Use the plus icon on the far right of the page to add needed columns. Place the new column in the desired location by clicking on the grid in the upper left corner of the column, then dragging it to the new location.

The **Unmapped status** column contains statuses that haven't been mapped. These statuses 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 up metric preferences**

Once statuses are mapped, set the weight for specific event types. Setting the weight assigns a level of
importance for that event type for that team's/project's workflow and work habits. These weights are used to calculate Jitter, which shows the level and severity of activity occurring on a ticket.

**Weight** is measured on a scale of zero to five. Zero carries no weight and indicates the event type doesn't have any impact on the project. Event types with a weight of zero won't be used to calculate Jitter. Five has the most weight and indicates the event type has a large impact on the ticket.

Next, set comment robustness. Comments can be trivial, regular, or robust. Regular and robust comments count differently toward Jitter.

To distinguish robust comments from regular comments, 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 are counted as robust comments for Jitter. Comments with fewer than 20 words are counted as regular comments.

Set up custom mapping for Investment layers and story points

Finally, set up your custom Investment layer category and custom story point mapping.

For Custom investment layers, use the dropdown menu to select the field in your ticket vendor where you store your investment layers. If you don't select a field, Flow can’t categorize your work for the investment layers section of Investment profile. Learn more about configuring Investment profile.

**Note:** To bulk edit your investment layer selection across multiple ticket projects, visit the integration details page for your ticket integrations. Learn more about bulk editing investment layers.
Use the Custom story points dropdown menu to select the field in your ticket vendor where you store your story point data. Only make a selection if you don't use one of the default story point fields in your ticket project.

If you use a default story point field, Flow will ingest your story point data without any customization needed. Select None in the dropdown menu.

Once you've finished these configurations, click Finish. Once configurations are finished, Flow reprocesses your ticket data. It may take several hours for any changes to take effect.

If you need help, please contact Pluralsight Support.