Investment profile helps directors, engineering managers, and leaders see how their work is allocated. Investment profile has two main sections: Work types and Investment layers.

Who can use this?

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How do I view Work types and Investment layers?

To access Investment profile, go to Reports, then click **Investment profile** under **Reporting trends**.

Work types shows how work is balanced across your teams by grouping work into three ticket categories: Feature, Defect, and Maintenance. Are some teams only doing maintenance work, while others are doing only feature work? Is the balance what you expect?

Investment layers shows how work is balanced across your organization’s initiatives by grouping them across configurable categories. Are your priorities getting the right amount of engineering effort?

Use the Work types and Investment layers sections of Investment profile to make sure your understanding of how your team is spending their time aligns with what the ticket data says. Toggle between these views using the **Display** section of the settings on the left of the page.
How do I configure the Investment profile report?

To see accurate data in this report, you first need to configure your ticket projects.

Configuring Work types

When configuring your ticket projects, use the Work type allocation section to correctly assign your ticket types to one of the three investment profile categories.

The three Work type categories include:

- **Feature work** is any work that promotes the growth of your company. By default, Flow groups tickets labeled with Epic, Story, Feature, Task, and Sub-task into the Feature work category.

- **Defect work** is any work that resolves customer problems. By default, Flow groups tickets labeled with Bug and Issue into the Defect work category.

- **Maintenance work** is any work that improves a product’s architecture or cleans up technical debt. By default, Flow doesn’t auto-assign any ticket types into the Maintenance work category.

For Work types, Flow auto-configures your ticket projects and assigns one of these categories to ticket types.
Double-check that all assignments match how your data should look. Use the dropdown menus on the right to assign the appropriate category to your ticket types.

If the ticket type isn’t recognized, it’s placed in the unassigned category. You know your ticket data is correctly configured for the Investment profile report if no ticket types fall into the unassigned category.

If you see unassigned tickets when looking at Work types, go back to your ticket configurations to make sure all ticket types are assigned to a category.

**Configuring Investment layers**

The Investment layers filter categorizes work by custom fields set in the user’s ticket vendor. Tickets are categorized based on a field ingested from Jira or ADO. Tickets can be categorized with an investment layer at an Epic level or an individual ticket level. Currently, this report only uses Epics as the highest level of ticket type.

**Note:** Tag and label fields in Jira and ADO can’t be used to configure Investment layers since there isn’t a limit on how many tags or labels can be in a field. If your organization uses tags or labels to track capitalization information, we recommend bulk editing tickets in the ticket vendor to have a field categorizing work for this report.

If your organization categorizes tickets by Epics, only Epics need to have investment categories set in the ticket vendor. If the investment category isn’t set at the ticket level, Flow assigns the ticket to its parent ticket’s Investment layer category.

If your organization doesn’t use Epics, investment categories must be set at the ticket level.

If your organization or a team has a lot of unassigned Investment layer work, it could mean the associated ticket project isn’t configured to ingest an Investment layer field, or a ticket field was missed during ticket creation.

**Note:** If your organization is new to ticket categorization, we recommend that you categorize the previous year’s worth of Epics to provide historical context for allocated work.
Once you’ve assigned categories to your ticket types in your ticket vendor, navigate to the ticket project in Flow settings. Select the field you want Flow to ingest. Flow only ingests data from one field.

If you use both Jira and ADO, make sure your Custom investment layers fields are named consistently across both integrations. If there are differences in a category's name between Jira and ADO, Flow may create duplicate categories.

After you set this unique categorization, Flow re-ingests a year's worth of data from the ticket project. You can change this field as often as you need to on a per-project basis.

Once configured, Flow automatically captures the assigned field as it ingests tickets.

If you need to make changes to Investment layers for multiple ticket projects at once, bulk edit Investment layers from the Integrations page. You can only bulk edit configured or auto-configured ticket projects. Learn more about bulk configuring investment layers.

What's the difference between Work types and Investment layers?

The Work types filter provides a quick glimpse of what types of work an organization is working on categorized by ticket-type categories. It groups tickets into four default categories: Feature, Defect, Maintenance, and Excluded. Flow automatically configures these categories to provide immediate value and allows users to further configure the report to fit their needs.

Investment layers shows how users' work is split across different types of work. Tickets are categorized based on a user-assigned field ingested from Jira or ADO. This report is built to provide an organization the means to understand how and when their resources are being allocated against strategic initiatives.

Work types and Investment layers can be used separately or together to give a complete picture and help make better data-informed decisions. For example, a CTO or VP of Engineering might get more out of the Investment layer view, while a team could benefit more from knowing what tickets make up the work on an Epic.

**Note:** The number of tickets associated with the Investment layers and Work types views may not match. If you set the Work type allocation for any ticket types to Excluded when you configure your ticket projects, those tickets won't count toward the Work type view, but will still count toward the Investment layer view. Tickets set as Excluded in the Ticket type assignment are excluded from both Work types and Investment layers views.
How do I use Work types?

Use this view to view the proportion of your teams’ work as it relates to Feature, Defect, and Maintenance work.

Use Work types for a top-level view of how work is split up across your organization.

First, use the filters at the top of the report to select what team and timeframe you want to view data for.

Team: Users on teams, Nested teams: Included, Timeframe: Last quarter

The Team filter shows data about tickets currently assigned to members of the team. The Timeframe filter shows only tickets moved to a Done state during that timeframe.

Based on the ticket configurations and filters on the report, work allocation shows a donut chart breakdown of your work by category. Sort this by Tickets or Story points or filter by ticket completion status.

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>% OF TOTAL</th>
<th>TICKETS</th>
<th>CONTRIBUTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feature</td>
<td>91%</td>
<td>30</td>
<td>7</td>
</tr>
<tr>
<td>Unassigned</td>
<td>6%</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Defect</td>
<td>3%</td>
<td>1</td>
<td>1</td>
</tr>
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The % of total column shows the percentage of work a category makes up. The tickets column shows how many tickets are in each category. The contributors column shows how many contributors are assigned to tickets in a category when those tickets are in the selected state.

The stacked bar chart contains the same information from the donut chart, broken down for all nested teams or individual members of the selected team.

Compare investment profile proportions across your teams to see whether the information is different at a holistic or detailed view.

For example, your organization as a whole may have work allocated how you want it, but specific teams’ data might break down differently. This could tell you if a team is struggling to focus on the right work and could use help getting back on track.
How do I use Investment layers?

Investment layers helps an organization understand how work is allocated across your organization’s priorities. Tickets are categorized based on fields ingested from Jira or ADO.

Use this view to see what initiatives your teams or organization are focused on. For example, a team lead can use information from this report to drive better working habits and ensure their team is focused. A VP or CTO can use this report to see how their R&D resources are being allocated across their entire org, then drill down to specific teams if needed.

At the top of the report in Flow, select the teams and time frame you’d like to view on the report.

Investment layers shows a donut chart breakdown of work by category based on the report’s ticket configurations and filters. This report, including the Teams and Epics tabs, can be sorted by Tickets or Story points as well as filtered by ticket completion status.

When filtering by Active tickets, Investment profile only shows currently active tickets created during your chosen date range.
The % of total column shows the percentage of work a category makes up. The tickets column shows how many tickets are in each category. The contributor's column shows how many contributors are assigned to tickets in a category when those tickets are in the selected state.

Hover over a section of the donut chart to show a pop-up with detailed information and a link to the tickets in that category. Click on a listed category or section of a chart in the report to highlight everything on the page that corresponds to that category.

In addition to the overall view, there are three tabs below the pie chart: Teams, Epics, and History.

The Teams tab contains stacked bar charts displaying the same data as the overall view, split up by team and contributor. Users can use this view to compare what Epics different teams are spending their time on.

Sort these charts alphabetically or by number of tickets. You can also search for specific teams or contributors.

Click any section of a stacked bar graph to highlight everything on the page that corresponds to that section. Click the View link that appears underneath a team's name to pull up that team's ticket log with all associated tickets.

Check the Show percentages box to display percentages next to the stacked bar charts. An asterisk instead of a number value represents work that made up five percent or less of your allocation. Check this box to give context when screenshotting report data for use outside of Flow.

The Epics tab lists Epics next to a visual of their Investment layers breakdown. If the tickets filter is selected, a
tickets column lists the number of tickets for each Epic. If the story points filter is selected, a points column lists the number of story points for each Epic. The contributors column lists the total number of engineers who have ever worked on work assigned to each Epic.

Use the Epics tab for a zoomed-in view of work done sorted by Epic. Use this tab to see if high-priority projects are getting the focus they need, or to understand what Epics your team is working on at a given time.

Users can search for Epics or filter by Epic.

If you have any tickets not assigned to an Epic, those tickets appear in the Non-epic work Epic in this tab.

The History tab shows stacked bar charts displaying an overall view for different periods of time compared to the selected time period. Use this to get context, find trends, and help keep teams consistent.

Check the Show percentages box to display percentages next to the stacked bar charts. An asterisk instead of a number value represents work that made up five percent or less of your allocation.

If you need help, please contact Pluralsight Support.