

1 TABLE OF CONTENTS

1	TABLE OF CONTENTS.....	2
1.1	Introduction.....	3
1.2	Functionality.....	3
2	PREREQUISITES.....	4
3	SETUP STEPS.....	4
3.1	Step 1: Create a space in Jira Cloud.....	4
3.2	Step 2: Create SAP-related fields.....	5
3.3	Step 3: Enable time and cost tracking.....	7
3.4	Step 4: Define when data is sent to SAP.....	7
3.5	Step 5: Set up automation (no coding).....	7
3.6	Step 6: What happens after transfer.....	8
4	EXAMPLE USE CASE (SAP CATS + CONTROLLING).....	8
5	FLEXIBILITY AND ALTERNATIVES.....	8

1.1 Introduction

JIRA2SAP™ can be integrated with any SAP ERP module. Customer Service, Plant Maintenance, Quality Management, Cross-Application Time Sheet, SolMan, Production Planning, Materials Management, Human Capital Management, etc. It automates business processes, provides advanced analytics based on Jira and SAP data, and facilitates effective use of enterprise resources.

Unlike the SAP CATS Template for Jira Data Center, which is a free downloadable Jira template for our JIRA2SAP™ ([SAP integration kit for Jira](#)) that connects with the SAP Cross-Application Time Sheet module and provides data synchronisation between Jira and SAP, this template should be created manually in Jira Cloud.

In Jira Cloud:

- You do not install a template's .jar file
- You set up a Space with SAP-related fields
- Jira automatically sends data to JIRA2SAP
- JIRA2SAP forwards the data to SAP
- Updates flow back to Jira Cloud

1.2 Functionality

SAP CATS Template for Jira is a demo of how to create a cross-application time sheet project at the touch of a button.

It shows one of the many ways you can use our JIRA2SAP™ product, including specific SAP related fields and an example workflow. For example, it can transfer a Jira issue to your SAP landscape via our connector if you select this option in the custom SAP field in the CATS template for Jira.

2 PREREQUISITES

Before you start, make sure:

- You have a Jira Cloud instance
- JIRA2SAP is available and connected to your SAP system
- You have permission to:
 - Create Spaces
 - Create custom fields
 - Configure automation rules

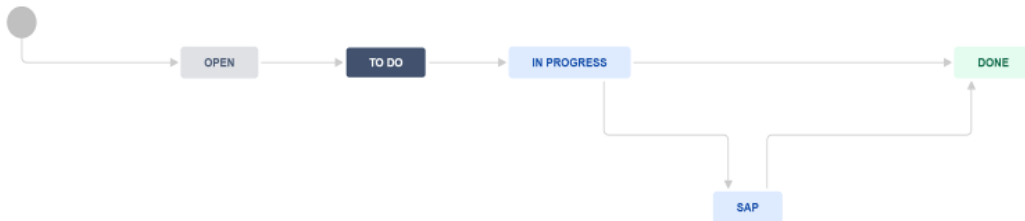
No software installation in Jira Cloud is required.

3 SETUP STEPS

3.1 Step 1: Create a space in Jira Cloud

Create a new Space:

1. Choose a simple workflow (for example: Open → To Do → In Progress → Done)



2. Define a Work type (for example: “CATS Work”)

Add work type

Name *

Description

Work type scheme

An optional work type scheme to associate the work type to

Type *

Standard work type (Level 0)

Subtask work type (Level -1)

Add Cancel

3. This Space will represent your SAP CATS project.

← Space settings

SAP-CATS Project
Software space

Details
Summary
People
Permissions
Notifications
Automation
Features
Toolchain
Workflows
Work Items
Types
Layout
Screens
Fields
Advanced Forms
Collectors

Spaces / SAP-CATS Project / Project settings

Work types

SAP: Scrum Issue Type Scheme

Keep track of different types of work items, such as bugs or tasks. Each work type can be configured differently.

The work type scheme defines which work types apply to this project. To change the work types used, you can select a different work type scheme, or modify the currently selected scheme.

Work Type	Description	Workflow	Field configuration	Screen
Story	Created by Jira Agile - do not edit or delete. Issue type for a user story.	Software Simplified Workflow for Project SAP	Default Field Configuration	SAP: Scrum Default Screen Scheme
Bug	A problem or error.	Software Simplified Workflow for Project SAP	Default Field Configuration	SAP: Scrum Bug Screen Scheme
CATS		Software Simplified Workflow for Project SAP	Default Field Configuration	SAP: Scrum Default Screen Scheme
Epic	A collection of related bugs, stories, and tasks.	Software Simplified Workflow for Project SAP	Default Field Configuration	SAP: Scrum Default Screen Scheme
Task	A small, distinct piece of work.	Software Simplified Workflow for Project SAP	Default Field Configuration	SAP: Scrum Default Screen Scheme
Sub-task	A small piece of work that's part of a larger task.	Software Simplified Workflow for Project SAP	Default Field Configuration	SAP: Scrum Default Screen Scheme

3.2 Step 2: Create SAP-related fields

Create custom fields in Jira Cloud that correspond to SAP CATS and SAP Controlling.

Typical examples:

- SAP Project / Order
- WBS Element
- Activity Type
- Work Date
- Number of Hours
- Hourly Rate
- Cost Object

← Jira admin settings

Switch settings
Work items

New work item search tr...

Work types
Work type hierarchy
Work types
Work type schemes
Sub-tasks

Workflows
Workflows
Workflow schemes

Screens
Screens
Screen schemes
Work type screen sche...

Fields
Fields
Field configurations

Fields

ⓘ We're making some big changes to Jira

Active fields Deleted fields

Order Can be used in Field type category Columns

Showing 1 field

Name	Field type	Description	Date last used	Actions
Order	Custom formula		None	...

- Edit field
- Add field to screen
- Spaces using this field
- View field configuration schemes
- Contexts and default values
- Translate field
- Delete

Work items

Translate custom field 'Order'.

Choose Language

Field Name

Description

Style B I U A

Important:

- Use clear, SAP-like field names.
- This makes mapping to SAP easy and understandable.

Add these fields to layouts:

- Create Work screen
- Edit Work screen
- View Work screen

← Space settings

SAP-CATS Project
Software space

Details
Summary
People
Permissions
Notifications
Automation
Features
Toolchain
Workflows
Work items
Types
Layout
Screens
Fields
Advanced Forms
Collectors
Security
Versions

Spaces / SAP-CATS Project / Space settings / Work item layout

Work item layout for "SAP: Scrum Bug Screen"

Drag fields to choose where to show them in the work item for the below work types in this space.
[Learn how your fields appear in the work item.](#)
To add more fields, or configure field tabs for this screen, go to ["SAP: Scrum Bug Screen"](#)

Story Sub-task CATS Bug Task Epic

Summary
Description
Environment

Context fields

→ Status
Assignee
Reporter
Development

Give feedback Discard Copy work item layout Save changes

Fields

Search all fields
order
1 result match your search

Other fields
Order

Can't find a field?
[Go to custom fields](#)

3.3 Step 3: Enable time and cost tracking

In the Space:

- Allow users to log time
- Allow entry of hourly rates (if required)

This data will later be transferred to SAP CATS.

3.4 Step 4: Define when data is sent to SAP

To control when a Work is transferred to SAP, create a simple field such as:

- “Send to SAP” (Yes / No)

This gives users full control and avoids accidental transfers.

3.5 Step 5: Set up automation (no coding)

Create an **Automation Rule** in Jira Cloud:

Trigger

- When a Work is created

or

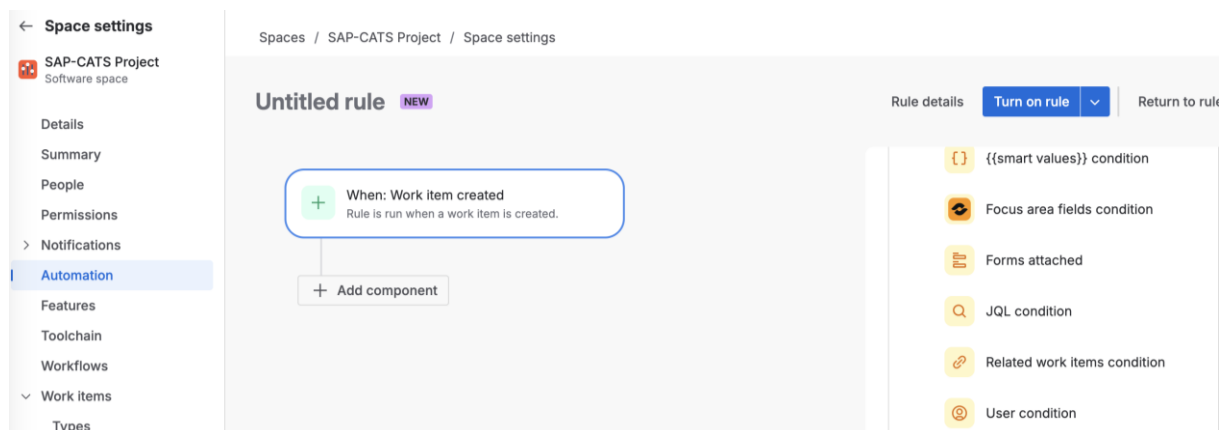
- When a Work is updated

Condition

- “Send to SAP” is set to “Yes”

Action

- Send the Work data to the JIRA2SAP connector



At this point:

- Jira Cloud sends the data

- JIRA2SAP processes it
- SAP CATS receives it

3.6 Step 6: What happens after transfer

Once a Work is sent:

- It is created or updated in SAP CATS
- SAP identifiers can be returned to Jira
- Changes in SAP can update the Jira Work
- Time and cost data stays synchronized

This creates bidirectional communication between Jira Cloud and SAP.

4 EXAMPLE USE CASE (SAP CATS + CONTROLLING)

A user creates a Work in Jira Cloud

1. SAP-related fields are filled in
2. Time and hourly rate are logged
3. "Send to SAP" is enabled
4. The Work is transferred to SAP CATS
5. Updates remain synchronized

This is one example – other configurations are possible.

5 FLEXIBILITY AND ALTERNATIVES

This setup is not limited to:

- One Space
- One workflow
- One time-logging method

You can also:

- Use Jira's built-in time tracking
- Combine with other Jira Cloud features
- Extend the process with additional rules