



# 1 TABLE OF CONTENTS

1	TABLE OF CONTENTS.....	2
1.1	Introduction.....	3
1.2	Functionality.....	3
2	PREREQUISITES.....	3
3	SETUP STEPS.....	4
3.1	Step 1: Create a space in Jira Cloud.....	4
3.2	Step 2: Create SAP-related fields.....	4
3.3	Step 3: Enable service planning and execution tracking.....	9
3.4	Step 4: Define when data is sent to SAP.....	9
3.5	Step 5: Set up automation (no coding).....	9
3.6	Step 6: What happens after transfer.....	10
4	EXAMPLE USE CASE (SAP CS).....	10
5	FLEXIBILITY AND ALTERNATIVES.....	11

## 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 CS 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 Customer Service 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 CS Template for Jira is a demo of how to create a customer service project.

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 CS 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: "SAP CS")

#### Create work type

Name \*

Description

Icon



3. This Space will represent your SAP CS project.

#### 3.2 Step 2: Create SAP-related fields

Create custom fields in Jira Cloud that correspond to SAP Customer Service.

Typical examples:

- **Meldungsstatus / Notification Status** (Field type: Select List (single choice)) – status of the service notification in SAP
- **Auftraggeber / Customer** (Field type: Text Field (single line) or Select List) – customer requesting the service
- **Ansprechpartner / Contact Person** (Field type: Text Field (single line)) – contact person for the service request
- **Meldender / Reporter** (Field type: Text Field (single line), Select List or User Picker) – person reporting the issue or request
- **Bestellnummer / Purchase Order Number** (Field type: Text Field (single line)) – customer purchase order reference

Technical object fields:

- **Technischer Platz / Functional Location** (Field type: Text Field (single line) or Select List) – technical location in the SAP system
- **Equipment / Equipment** (Field type: Text Field (single line) or Select List) – equipment number in SAP
- **Baugruppe / Assembly** (Field type: Text Field (single line)) – component or assembly related to the service case

Execution-related fields:

- **Gew. Beginn / Planned Start** (Field type: Date Picker) – planned start date of the service activity
- **Gew. Ende / Planned End** (Field type: Date Picker) – planned completion date of the service activity
- **Zuständige Abteilung / Responsible Department** (Field type: Select List) – department responsible for the service work
- **Verantwortlicher / Responsible Person** (Field type: Text Field (single line), Select List, or User Picker) – person responsible for handling the service case
- **Datum / Date** (Field type: Date Picker) – date of the notification or service request

Example of a layout with custom fields

Add the SAP-related fields to the Jira Work layout in logical groups, for example:

General

- Summary
- Meldungsstatus / Notification Status

Ansprechpartner / Contact

- Auftraggeber / Customer
- Ansprechpartner / Contact Person
- Meldender / Reporter
- Bestellnummer / Purchase Order Number
- Datum / Date

Bezugsobjekt / Reference Object


- Technischer Platz / Functional Location
- Equipment / Equipment
- Baugruppe / Assembly

Ausführung / Execution

- Priority
- Gew. Beginn / Planned Start
- Gew. Ende / Planned End
- Zuständige Abteilung / Responsible Department
- Verantwortlicher / Responsible Person


**Fields**

 [Create new field](#)

 We're making some big changes to Jira


[Active fields](#) Deleted fields

Showing 1 field

Name	Field type	Descri	Actions
Purchase Order Number	 Short text (plain text ...		...

**Spaces: Purchase Order Number** 

1 space use this field

 **Customer Service**  
Team-managed space

**Configure fields**

Select the fields that you want to see on your work item

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> Summary                | <input checked="" type="checkbox"/> Notification Status |
| <input checked="" type="checkbox"/> Customer               | <input checked="" type="checkbox"/> Contact Person      |
| <input checked="" type="checkbox"/> Purchase Order Number  | <input checked="" type="checkbox"/> Functional Location |
| <input checked="" type="checkbox"/> Equipment              | <input checked="" type="checkbox"/> Assembly            |
| <input checked="" type="checkbox"/> Planned End            | <input checked="" type="checkbox"/> Planned Start       |
| <input checked="" type="checkbox"/> Responsible Department | <input checked="" type="checkbox"/> Responsible Person  |
| <input checked="" type="checkbox"/> Description            | <input checked="" type="checkbox"/> Fix versions        |
| <input checked="" type="checkbox"/> Assignee               | <input checked="" type="checkbox"/> Labels              |
| <input checked="" type="checkbox"/> Parent                 | <input checked="" type="checkbox"/> Due date            |
| <input checked="" type="checkbox"/> Team                   | <input checked="" type="checkbox"/> Start date          |

**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

### Create Customer Service



Required fields are marked with an asterisk \*

Space \*

 Customer Service (CS) ▼

Work type \*

 Customer Service ▼

[Learn about work types](#)

Status

To Do ▼

This is the initial status upon creation

Summary \*

Notification Status

Create another

Cancel

Create

### Create Customer Service



Notification Status

Customer

Contact Person

Purchase Order Number

Functional Location

Equipment

Create another

Cancel

Create

### 3.3 Step 3: Enable service planning and execution tracking

In the Space:

Configure fields that allow users to plan and track service activities.

Typical examples include:

- Planned start date (Gew. Beginn / Planned Start)
- Planned end date (Gew. Ende / Planned End)
- Responsible department (Zuständige Abteilung / Responsible Department)
- Responsible person (Verantwortlicher / Responsible Person)
- Notification status (Meldungsstatus / Notification Status)

These fields help structure service activities and ensure that all required information is available before the data is transferred to SAP.

This information will later be processed by SAP CS when the service notification or service order is created.

### 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

The screenshot shows the Jira Automation interface for a rule titled "When parent is completed -> then close all the child work items present". The rule is configured with the following steps:

- When:** Work item transitioned To Done
- Branch:** For: Children
- Status does not equal:** 10004
- Then:** Transition the work item to **DONE**

The right-hand panel shows the "Rule details" section, including the rule name, description, and scope (Customer Service).

At this point:

- Jira Cloud sends the data
- JIRA2SAP processes it
- SAP CS receives it

### 3.6 Step 6: What happens after transfer

Once a Work is sent:

- A corresponding service notification or service order is created or updated in SAP CS.
- SAP identifiers (for example notification or order numbers) can be returned to Jira.
- Updates in SAP CS can be synchronized back to the Jira Work.
- Status changes, planning information, or other updates may remain aligned between both systems.

This creates bidirectional communication between Jira Cloud and SAP Customer Service.

## 4 EXAMPLE USE CASE (SAP CS)

A user creates a Work in Jira Cloud.

1. SAP-related fields are filled in (customer, contact person, equipment, etc.).
2. The relevant technical object (for example equipment or functional location) is specified.
3. Service planning fields such as planned start and planned end dates are entered.
4. "Send to SAP" is enabled.
5. The Work is transferred to SAP CS.

In SAP:

- A service notification or service order can be created.
- Responsible departments and personnel can process the request.

- Updates in SAP may be synchronized back to Jira.

This allows teams to manage service activities in Jira while maintaining full integration with SAP Customer Service processes.

## 5 FLEXIBILITY AND ALTERNATIVES

This setup is not limited to:

- One Space
- One workflow
- One service request type

You can also:

- Use different Jira workflows for service management
- Extend the process with additional automation rules
- Add more SAP-related fields depending on your SAP CS configuration
- Combine this setup with other Jira Cloud features or service management processes

The Jira Cloud template demonstrates one possible configuration of JIRA2SAP™ for SAP Customer Service.

Other configurations may be used depending on business requirements and SAP system setup.