

# SAP QM Template for Jira

## User manual



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## 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 QM 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 Quality Management 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 QM Template for Jira is a demo of how to create a quality management 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 QM 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

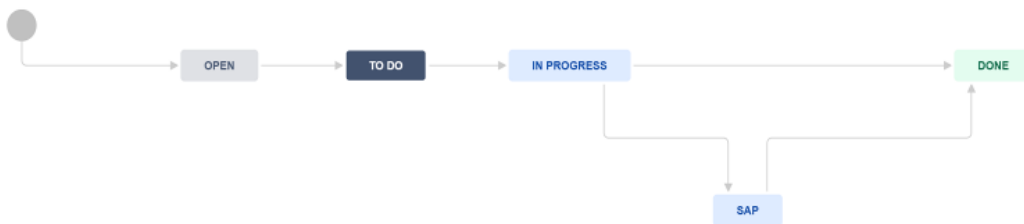
No software installation in Jira Cloud is required.

## 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: "QM 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 QM project.

☰ Quality Management 0 • Default Issue Type Scheme ...  
• SAP: QM Issue Type Screen Scheme

## 3.2 Step 2: Create SAP-related fields

To support SAP Quality Management notifications, several custom fields must be added to the issue screen.

Typical examples:

### Notification fields

- **Meldung / Notification Description** (Field type: Text Field (multi-line)) – description of the quality issue or defect reported.
- **Meldungsstatus / Notification Status** (Field type: Select List (single choice)) – status of the quality notification in SAP.
- **Datum / Date** (Field type: Date Picker) – date when the quality issue was reported.

### Customer and reporting fields

- **Auftraggeber / Customer** (Field type: Text Field (single line) or Select List) – customer associated with the complaint or issue.
- **Meldender / Reporter** (Field type: Text Field (single line), Select List, or User Picker) – person reporting the issue.
- **Bestellnummer / Purchase Order Number** (Field type: Text Field (single line)) – customer purchase order related to the complaint.

### Technical object fields

- **Equipment / Equipment** (Field type: Text Field (single line) or Select List) – equipment number in SAP associated with the issue.
- **Serialnummer / Serial Number** (Field type: Text Field (single line)) – serial number of the affected equipment or product.
- **Material / Material** (Field type: Text Field (single line) or Select List) – material number of the affected product.

### Defect description fields

- **Schadensbild / Damage Pattern** (Field type: Text Field (single line) or Select List) – description of the defect type.
- **Text / Additional Description** (Field type: Text Field (multi-line)) – detailed explanation of the problem.

### Execution-related fields

- **Gew. Beginn / Planned Start** (Field type: Date Picker) – planned start date for the investigation or corrective action.
- **Gew. Ende / Planned End** (Field type: Date Picker) – planned completion date for the investigation or corrective action.

The screenshot shows the Jira admin interface. On the left is a navigation menu with categories: Work types, Workflows, Screens, and Fields. The 'Fields' section is selected. The main content area shows 'Active fields' with a search bar and filters. A table lists fields, with one entry: '2. Additional information' of type 'Custom formula'. An actions menu is open for this field, showing options like 'Edit field', 'Add field to screen', and 'View translations'. Below this, the 'Work items' translation configuration screen is shown for the field 'Zusatzdaten' in German (Germany). It includes a 'Field Name' field and a rich text editor for the 'Description'.

Example of a layout with custom fields

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

Allgemein / General

- Summary
- Meldung / Notification Description
- Meldungsstatus / Notification Status

#### Kundenadresse / Customer

- Auftraggeber / Customer

#### Zusatzdaten / Additional Data

- Meldender / Reporter
- Bestellnummer / Purchase Order Number
- Datum / Date

#### Bezugsobjekt / Reference Object

- Equipment / Equipment
- Seriennummer / Serial Number
- Material / Material

#### Ausführung / Execution

- Priority
- Gew. Beginn / Planned Start
- Gew. Ende / Planned End

#### Position / Defect Details

- Schadensbild / Damage Pattern
- Text / Additional Description

#### 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 Quality Management — ↗ ⋮ ✕

Required fields are marked with an asterisk \*

**Space \***

Quality Management (QM)
▼

**Work type \***

Quality Management
▼

[Learn about work types](#)

---

**Status**

To Do
▼

This is the initial status upon creation

**Summary \***

**1. Customer address**

---

Create another Cancel Create

### 3.3 Step 3: Enable quality investigation and resolution tracking

In the Space:

Configure fields that allow users to track quality incidents and corrective actions.

Typical examples include:

- Planned start date (Gew. Beginn / Planned Start)
- Planned end date (Gew. Ende / Planned End)
- Notification status (Meldungsstatus / Notification Status)
- Damage pattern (Schadensbild / Damage Pattern)
- Equipment (Equipment / Equipment)
- Serial number (Serialnummer / Serial Number)

These fields help structure the quality investigation process and ensure that all required information is available before the data is transferred to SAP.

This information will later be processed by SAP Quality Management (QM) when the quality notification or defect record is created in SAP.

### 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

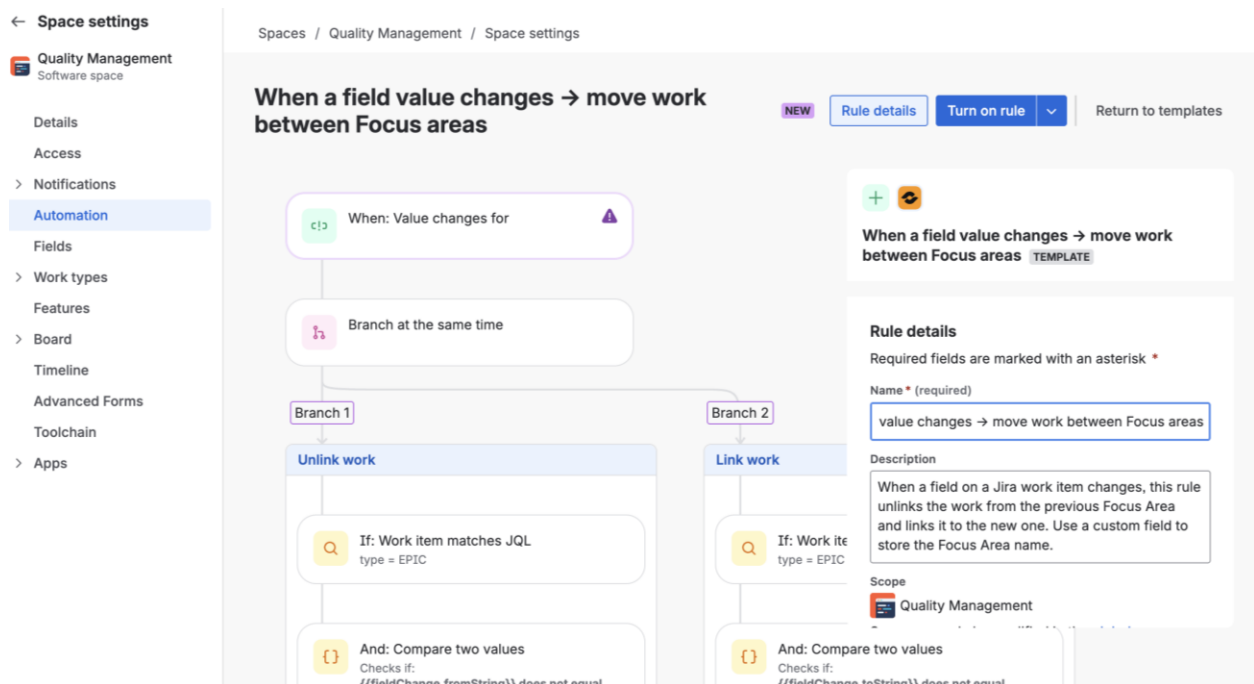
- When a Work is updated

#### 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 QM receives it

### 3.6 Step 6: What happens after transfer

Once a Work is sent:

- A corresponding quality notification is created or updated in SAP Quality Management (QM).

- SAP identifiers (for example the quality notification number) can be returned to the Jira issue.
- Updates in SAP QM can be synchronized back to the Jira Work.
- Status changes, defect information, or other updates may remain aligned between both systems.

This creates bidirectional communication between Jira Cloud and SAP Quality Management, allowing quality notifications to be tracked and updated consistently in both systems.

## 4 EXAMPLE USE CASE (SAP QM)

A user creates a Work in Jira Cloud

1. SAP QM-related fields are filled in (e.g. notification details, customer, equipment, defect description)
2. The Work is structured using the predefined tabs (General, Customer, Reference Object, etc.)
3. “Send to SAP” is enabled
4. The Work is transferred to SAP QM as a quality notification
5. Updates remain synchronized between Jira and SAP

This is one example – other configurations and mappings are possible depending on your SAP QM setup.

## 5 FLEXIBILITY AND ALTERNATIVES

This setup is not limited to:

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

You can:

- Use different Jira workflows for quality processes (e.g. defect management, customer complaints, internal quality issues)
- Extend the solution with additional SAP QM fields (e.g. defect codes, cause codes, tasks, activities)
- Adapt the structure depending on your SAP QM notification types (e.g. Q1, Q2, Q3)
- Configure different field sets for different quality scenarios or business units
- Add more automation rules to support approval workflows, escalation processes, or corrective actions
- Combine this setup with other Jira Cloud features (e.g. dashboards, reports, or service management processes)

The Jira Cloud template demonstrates one possible configuration of JIRA2SAP™ for SAP Quality Management.

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