SAP PM Template for Jira

User manual

This user manual applies to JIRA2SAP:
the product of ALPEIN Software SWISS AG

1 TABLE OF CONTENTS

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 PM 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 (Project) 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

The SAP PM Template for Jira demonstrates how to manage maintenance notifications and maintenance requests in Jira.

It includes:

- SAP-specific fields for Plant Maintenance
- A structured issue layout aligned with SAP PM
- Integration with SAP via JIRA2SAP

Jira issues can be transferred to SAP as:

- Maintenance notifications
- (Optionally) maintenance orders, depending on configuration.

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

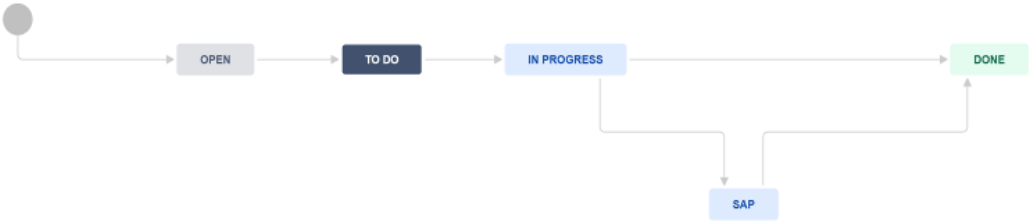
No software installation in Jira Cloud is required.

3 SETUP STEPS

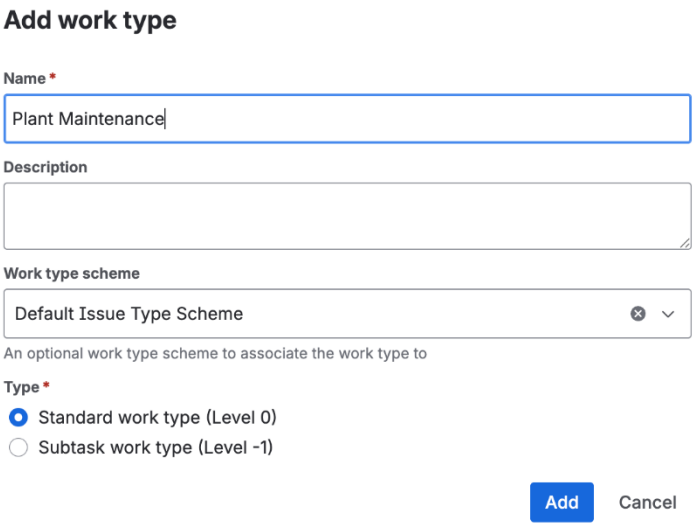
3.1 Step 1: Create a space in Jira Cloud

Create a new Space:

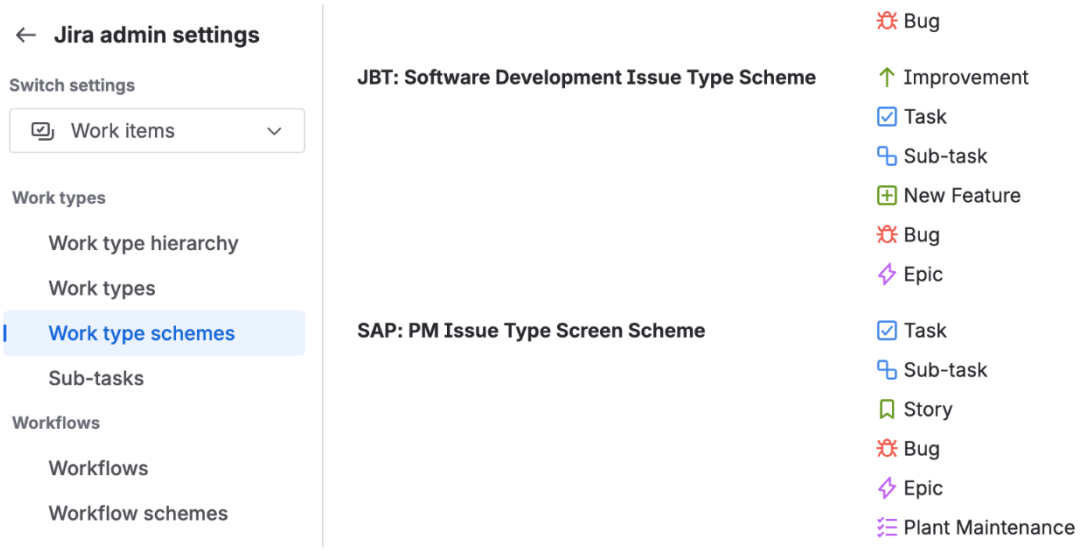
1. Choose a simple workflow (for example: Open →To Do → In Progress → Done)



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



3. This Space will represent your SAP PM project.



3.2 Step 2: Create SAP-related fields

Create custom fields in Jira Cloud that correspond to SAP Plant Maintenance notifications.

Typical examples:

Notification fields

- Meldung / Notification Description (Field type: Text Field (multi-line)) – description of the maintenance issue
- Meldungsstatus / Notification Status (Field type: Select List (single choice)) – status of the maintenance notification in SAP
- Datum / Date (Field type: Date Picker) – date of the notification

Maintenance and order reference fields

- Auftrag / Order (Field type: Text Field (single line)) – maintenance order number (if applicable)
- Beschreibung / Description (Field type: Text Field (multi-line)) – additional description of the maintenance task

Technical object fields

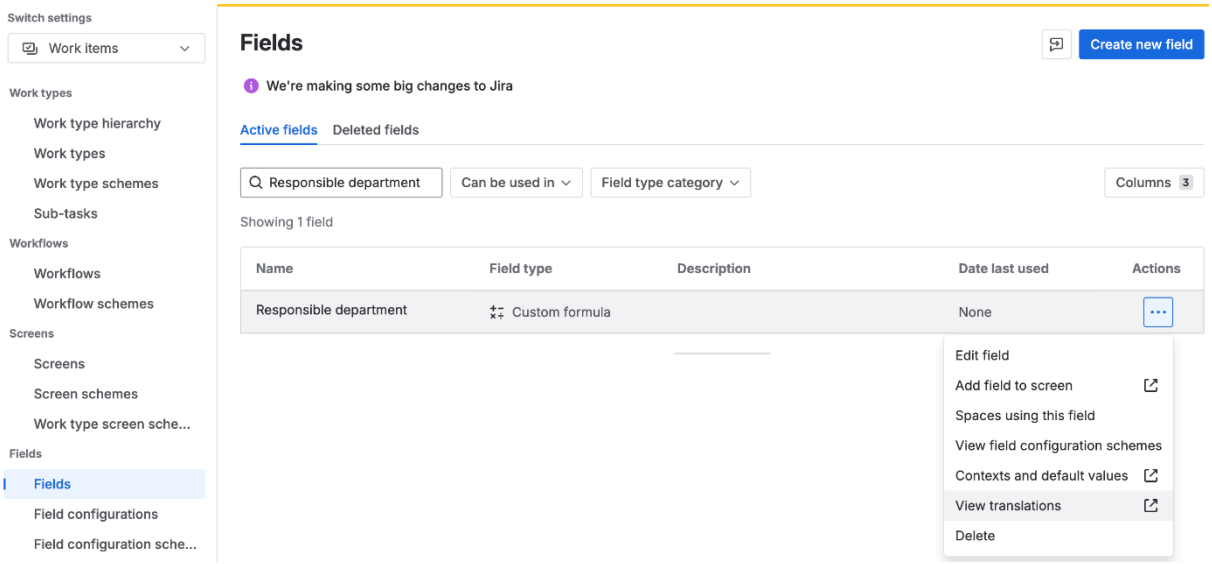
- Technischer Platz / Functional Location (Field type: Text Field (single line) or Select List) – technical location in SAP
- Equipment / Equipment (Field type: Text Field (single line) or Select List) – equipment number
- Serialnummer / Serial Number (Field type: Text Field (single line)) – serial number of the equipment
- Material / Material (Field type: Text Field (single line) or Select List) – related material
- Baugruppe / Assembly (Field type: Text Field (single line)) – component or assembly involved

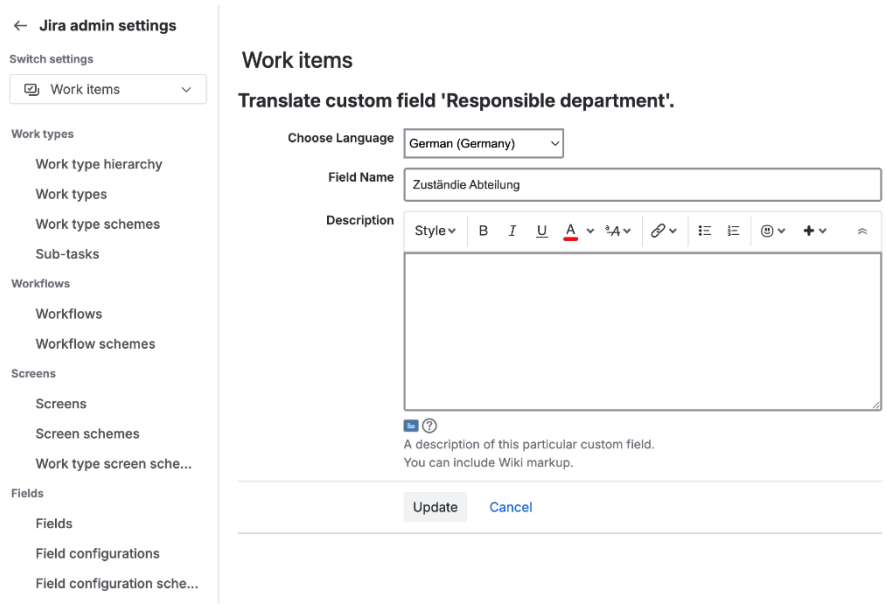
Classification / coding fields

- Codierung / Coding (Field type: Text Field (single line) or Select List) – classification or damage coding
- Baugruppe / Assembly (Field type: Text Field (single line)) – technical grouping of the defect

Execution-related fields

- Gew. Beginn / Planned Start (Field type: Date Picker) – planned start of maintenance work
- Gew. Ende / Planned End (Field type: Date Picker) – planned completion date
- Verantwortlicher / Responsible Person (Field type: User Picker or Text Field) – responsible technician
- Zuständige Abteilung / Responsible Department (Field type: Select List) – responsible maintenance team





Example of a layout with custom fields

Structure the Jira layout in logical groups:

Allgemein / General

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

Zusatzdaten / Additional Data

- Datum / Date
- Beschreibung / Description
- Auftrag / Order

Bezugsobjekt / Reference Object

- Technischer Platz / Functional Location
- Equipment / Equipment
- Serialnummer / Serial Number
- Material / Material
- Baugruppe / Assembly

Klassifizierung / Classification

- Codierung / Coding
- Baugruppe / Assembly

Ausführung / Execution

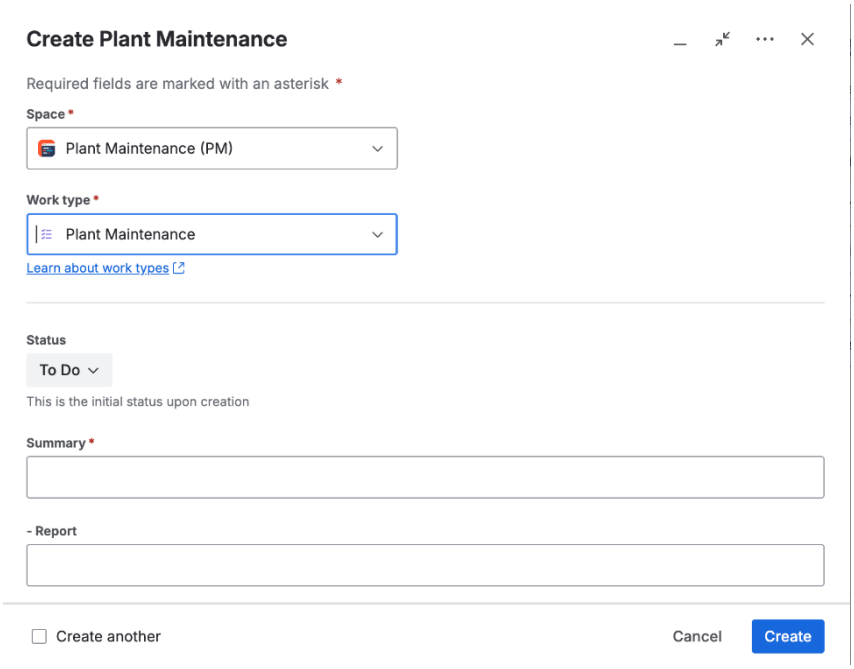
- Priority
- Gew. Beginn / Planned Start
- Gew. Ende / Planned End
- Verantwortlicher / Responsible Person
- Zuständige Abteilung / Responsible Department

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



3.3 Step 3: maintenance planning and execution tracking

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

Typical examples:

- Planned start (Gew. Beginn)
- Planned end (Gew. Ende)
- Responsible person (Verantwortlicher)
- Responsible department (Zuständige Abteilung)
- Notification status (Meldungsstatus)

These fields ensure that all required maintenance information is captured before transfer to SAP.

This data is later processed in SAP PM notifications or maintenance orders.

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

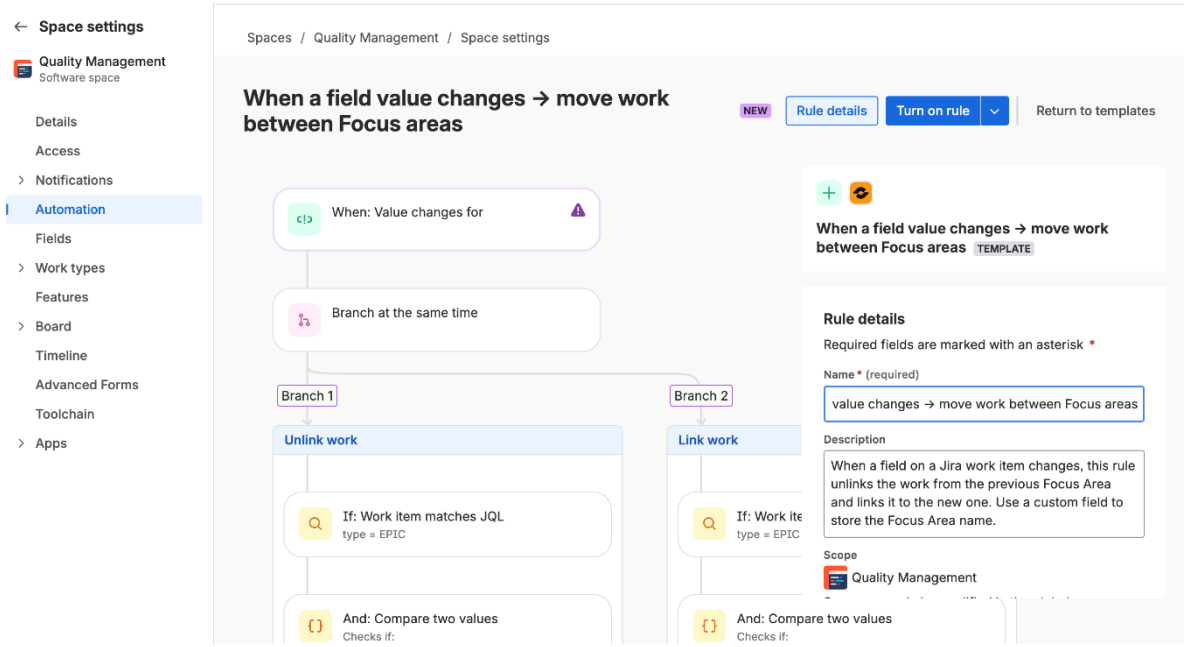
- When a Work is updated

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 PM receives it

3.6 Step 6: What happens after transfer

Once an Issue is sent:

- A corresponding maintenance notification (or maintenance order) is created or updated in SAP PM
- SAP identifiers (e.g. notification or order number) can be returned to Jira
- Updates in SAP PM can be synchronized back to Jira
- Status changes, technical updates, or planning data remain aligned

This creates bidirectional communication between Jira Cloud and SAP Plant Maintenance.

4 EXAMPLE USE CASE (SAP PM)

A user creates an Issue in Jira Cloud:

1. SAP PM-related fields are filled in (equipment, functional location, defect, etc.)
2. The technical object (e.g. equipment or functional location) is specified
3. Maintenance planning data is entered (planned start/end, responsible person)
4. “Send to SAP” is enabled
5. The Issue is transferred to SAP PM

In SAP:

- A maintenance notification is created
- A maintenance order may be generated
- Maintenance teams process the issue

Updates in SAP can be synchronized back to Jira.

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:

- Extend with additional SAP PM fields (e.g. damage codes, cause codes)
- Integrate with maintenance planning workflows
- Combine with other Jira Cloud features
- Extend the process with additional rules