

SAP CS AI for Jira

User manual



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1.1 Introduction

JIRA2SAP (SAP integration kit for Jira) can be integrated with different SAP ERP modules, including Customer Service, Plant Maintenance, Quality Management, Cross-Application Time Sheet, Production Planning, Materials Management, Human Capital Management and others. It connects Jira and SAP business processes, enables bidirectional data exchange and helps make SAP information available within Jira-based workflows.

The JIRA2SAP AI-Powered Customer Service solution (SAP CS AI Kit for Jira Cloud) extends the traditional SAP Customer Service integration with an enterprise knowledge and AI layer developed and operated by ALPEIN Software SWISS AG.

SAP Customer Service can contain years of valuable information about customers, equipment, machines, notifications, service orders and completed service activities. At the same time, important technical knowledge may exist outside SAP in manuals, schematics, service bulletins, PDFs, attachments and other enterprise documents.

JIRA2SAP brings these sources together in an AI-supported service process.

In this setup:

- SAP remains the system of record for customer, equipment and service objects
- Jira Service Management remains the service workspace
- Selected SAP CS information and approved enterprise documents are made available to the JIRA2SAP AI knowledge layer
- A RAG (Retrieval-Augmented Generation)/LLM-based AI agent combines historical knowledge with the current SAP context
- Service employees receive relevant information and recommendations directly in Jira
- Approved actions can be transferred back to SAP through JIRA2SAP
- Changes in relevant SAP objects can trigger selective updates of the AI knowledge base

The AI and RAG functionality is developed and operated by ALPEIN Software SWISS AG as part of the JIRA2SAP solution. The customer does not need to provide a separate AI agent or RAG platform.

This creates a continuous Service Knowledge & Action Loop between SAP, enterprise knowledge, AI and Jira.

1.2 Functionality

JIRA2SAP AI-Powered Customer Service demonstrates how an existing SAP CS and Jira Service Management integration can be extended with AI-assisted knowledge retrieval and service support.

The solution can combine:

- Current SAP CS information
- Historical service notifications and completed cases
- Equipment and machine history

- Customer and material information
- Service reports
- Manuals and technical documentation
- Schematics and service bulletins
- Other approved enterprise documents

A RAG (Retrieval-Augmented Generation)-based AI agent searches the available knowledge and combines it with the context of the current service request.

Depending on the available information, the agent can provide:

- Relevant historical cases
- Likely causes
- Recommended checks
- Suggested troubleshooting steps
- Possible resolutions
- Relevant documents and sources
- Suggested next actions

AI supports the service process but does not replace human decision-making. Critical or write-enabled actions remain controlled and can be reviewed and approved before JIRA2SAP transfers them to SAP.

2 PREREQUISITES

Before starting the implementation, the following prerequisites should be available:

- A Jira Cloud instance with Jira Service Management
- A suitable SAP Customer Service (SAP CS) environment
- Access to the SAP CS data required for the agreed use case
- The relevant service data and enterprise knowledge sources have been identified, for example:
 - Historical SAP service cases
 - Service notifications and service orders
 - Equipment and machine information
 - Service reports
 - Technical manuals and schematics
 - Service bulletins
 - PDFs, attachments and other relevant documentation
- The customer has defined which SAP data and enterprise documents may be used for the AI-powered service process

- Appropriate access and permissions to Jira, SAP and the relevant knowledge sources can be provided for the implementation
- Responsibilities for reviewing AI recommendations and approving business-critical or SAP write-back actions have been defined

ALPEIN Software SWISS AG performs the customer-specific implementation and configuration of JIRA2SAP and its AI components. This includes connecting the relevant SAP and Jira processes and configuring the AI-powered knowledge and retrieval functionality according to the agreed use case.

The AI functionality and RAG-based knowledge processing are part of the JIRA2SAP solution developed and operated by ALPEIN Software SWISS AG. A separate AI agent or RAG platform therefore does not need to be provided by the customer.

During implementation, the exact configuration, data mappings, knowledge sources, synchronization processes and permitted SAP actions are defined according to the customer's SAP landscape, Jira environment, business requirements and security requirements.

3 SETUP STEPS

Unlike a standard Jira Cloud template that can largely be reproduced through manual configuration, JIRA2SAP AI-Powered Customer Service requires a customer-specific implementation by ALPEIN Software SWISS AG.

The following steps describe the typical implementation process and resulting configuration.

3.1 Step 1: Define the Customer Service use case

First, the customer-specific service process is defined.

This includes determining:

- Which service requests should be handled in Jira
- Which SAP CS objects are involved
- Which SAP information should be available in Jira
- Which historical information should become AI-searchable knowledge
- Which enterprise documents should be included
- Which AI recommendations are required
- Which actions may be transferred back to SAP
- Which actions require human review or approval

This scope forms the basis for the JIRA2SAP and AI configuration.

3.2 Step 2: Configure the Customer Service workspace in Jira

Jira Service Management acts as the central workspace for the AI-supported service process.

Depending on the agreed use case, the Jira configuration can include:

- Service request Work types
- Customer Service workflows
- SAP-related custom fields
- AI recommendation fields or panels
- Approval steps
- Automation
- Service queues
- Relevant permissions

A typical workflow could include:

Open → In Analysis → AI Recommendation Available → Under Review → In Progress → Resolved → Closed

The exact Jira configuration is adapted to the customer's existing Jira environment and service processes.

3.3 Step 3: Configure SAP-related context

JIRA2SAP is configured to connect a Jira service request with the relevant SAP CS business context.

Depending on the process, this may include:

Customer information

- Customer
- Customer Number
- Contact Person

Technical object information

- Equipment
- Serial Number
- Material
- Functional Location

Service information

- SAP Notification Number
- SAP Service Order
- Service Status
- Error or Problem Description

These fields and mappings allow JIRA2SAP to identify the relevant SAP object and provide the required business context to Jira and the AI functionality.

The exact fields depend on the customer's SAP configuration and agreed use case.

3.4 Step 4: Define approved enterprise knowledge sources

Together with the customer, the information that may be used by the AI knowledge layer is defined.

Typical knowledge sources include:

- Completed SAP CS notifications
- Historical service cases
- Service reports
- Known failure causes
- Previous resolutions
- Equipment and machine history
- Technical manuals
- Schematics
- Service bulletins
- PDFs and attachments
- Other approved enterprise documentation

Only data and documents approved for the customer-specific use case should be included.

3.5 Step 5: Prepare the initial knowledge base

ALPEIN Software configures the initial processing of the agreed SAP CS information and enterprise documents for the JIRA2SAP AI knowledge layer.

Depending on the use case, the information may include:

- Historical service notifications
- Completed service activities
- Equipment references
- Failure information
- Resolution information
- Service documentation
- Relevant document content
- SAP business metadata

Relevant SAP metadata can be preserved to improve context-aware retrieval, for example:

- Equipment
- Serial number

- Material
- Customer
- Failure code
- Service object
- Notification type
- Completion status

This allows the AI to retrieve information based not only on semantic similarity, but also on relevant SAP business context.

3.6 Step 6: Connect current SAP context with AI knowledge

Not every piece of SAP information needs to become permanent historical knowledge.

JIRA2SAP can combine:

Current SAP context, such as:

- Current customer information
- Equipment
- Serial number
- Material
- Current service status
- Active notifications
- Current service order information

with **historical enterprise knowledge**, such as:

- Similar solved cases
- Previous failure causes
- Previous resolutions
- Service reports
- Manuals
- Schematics
- Technical instructions

This allows the AI agent to analyze a current service case using both operational SAP information and accumulated enterprise knowledge..

3.7 Step 7: Configure AI-supported service analysis

The JIRA2SAP AI functionality is configured for the agreed Customer Service use case.

A typical process is:

1. A service request is created or updated in Jira.
2. JIRA2SAP identifies the corresponding SAP context.
3. Relevant current SAP information is provided.
4. The JIRA2SAP AI agent searches the approved knowledge base using RAG.
5. Relevant historical cases and documentation are retrieved.
6. The AI agent prepares a recommendation.
7. The result is made available within the Jira service process.

Depending on the configuration and available knowledge, the result can include:

- A summary of the problem
- Similar historical cases
- Possible causes
- Recommended diagnostic steps
- Suggested resolution
- Relevant sources or documents
- Suggested next actions

3.8 Step 8: Configure human review and approval

AI recommendations are intended to support the service team rather than independently make critical business decisions.

The Jira process can therefore include defined review and approval steps.

For example:

- AI proposes a likely cause and solution.
- A service employee reviews the recommendation.
- The proposed resolution is accepted, rejected or adjusted.
- Where required, an SAP-related action is approved.
- JIRA2SAP processes only the defined and approved action.

This keeps critical decisions under human control.

3.9 Step 9: Configure approved SAP write-back

Depending on the customer-specific implementation, selected information can be transferred back to SAP through JIRA2SAP.

This may include:

- Status information
- Technical notes
- Resolution information
- Service documentation
- Defined updates to an SAP service notification
- Other agreed SAP actions

The exact write-back functionality and authorization are defined during implementation.

SAP continues to manage the relevant business and service objects, while Jira remains the workspace for service activities, communication, AI recommendations and approvals.

3.10 Step 10: Configure delta knowledge updates

After the initial knowledge base has been created, the complete historical data set does not need to be processed again whenever something changes.

Where configured, JIRA2SAP can initiate selective delta updates:

- A relevant SAP CS object is created, changed or completed.
- JIRA2SAP detects the relevant change.
- A delta trigger or queue entry is created.
- Only the affected information and associated documents are processed again.
- The corresponding knowledge is updated or versioned.
- The new or changed information becomes available to the AI agent.

This creates a continuously updated knowledge process while avoiding unnecessary reprocessing of unaffected information.

4 TYPICAL SERVICE WORKFLOW

A typical AI-supported Customer Service process can work as follows:

1. A customer or service employee creates a request in Jira Service Management.
2. The request contains information such as an error description, equipment reference, serial number or machine information.
3. JIRA2SAP connects the request with the corresponding SAP customer, equipment or service context.
4. Current SAP information relevant to the case is made available.
5. The AI agent searches historical SAP service knowledge and approved enterprise documentation.

6. Relevant previous cases, technical information and documentation are retrieved.
7. The AI agent provides possible causes, recommended checks and a suggested resolution.
8. A service employee reviews the recommendation and decides on the appropriate action.
9. Defined and approved information or process steps can be transferred to SAP through JIRA2SAP.
10. After the case is resolved, relevant new knowledge can become available for future cases through the configured delta process.

The resulting process can be summarized as:

SAP service history → JIRA2SAP knowledge layer → RAG → AI agent → Jira Service Management → Human decision → JIRA2SAP → SAP → Updated knowledge

5 EXAMPLE USE CASE

A customer reports a malfunction of an installed machine.

1. A service request is created in Jira Service Management with the machine's serial number and an error description.
2. JIRA2SAP identifies the corresponding equipment and customer information in SAP CS.
3. Current equipment and service information is made available to the service process.
4. The AI agent searches the approved knowledge base for historical cases involving the same or similar equipment and problems.
5. Relevant service reports, manuals and technical documentation are retrieved.
6. The AI agent proposes likely causes and recommended troubleshooting steps.
7. The service employee reviews the recommendation and determines the appropriate solution.
8. Approved resolution information and defined service updates can be transferred back to SAP through JIRA2SAP.
9. Once the service case is completed, relevant new knowledge can be included in subsequent delta updates.

In this way, existing SAP service history and enterprise documentation become reusable service intelligence.

6 DATA AND KNOWLEDGE MODEL

The JIRA2SAP AI solution distinguishes between historical enterprise knowledge and current operational SAP context.

Historical knowledge

Information suitable for the AI knowledge layer can include:

- Completed service cases
- Historical notifications
- Known failure causes
- Previous resolutions
- Service reports
- Manuals
- Technical documentation
- Schematics
- Service bulletins

Current SAP context

Information required for the current case can be obtained through JIRA2SAP, for example:

- Current service order
- Current notification status
- Customer information
- Current equipment information
- Current master data

This approach allows the AI agent to combine long-term enterprise knowledge with the current state of a specific service case without requiring all operational SAP information to be permanently included in the AI knowledge base.

7 HUMAN-IN-THE-LOOP APPROACH

The purpose of the AI functionality is to improve access to existing knowledge and support service employees in making informed decisions.

AI can:

- Find similar historical cases
- Retrieve relevant documentation
- Identify possible causes
- Suggest diagnostic steps
- Propose possible resolutions
- Prepare recommended actions

However, AI-generated information may be incomplete or inaccurate and should therefore be treated as decision support.

Critical decisions remain with the responsible service team.

Where SAP write-back functionality is configured, only predefined and permitted actions are processed through JIRA2SAP according to the customer-specific workflow and authorization model.

8 BENEFITS

JIRA2SAP AI-Powered Customer Service can help organizations:

- Make existing SAP CS knowledge easier to access
- Reduce time spent searching through SAP transactions and document repositories
- Provide relevant historical cases directly within the Jira service process
- Combine structured SAP context with unstructured technical documentation
- Preserve service knowledge accumulated over many years
- Reduce dependency on individual experienced employees
- Support faster diagnosis and resolution
- Keep SAP as the system of record
- Keep critical decisions under human control
- Continuously incorporate new service experience into the available knowledge

9 FLEXIBILITY AND CUSTOMER-SPECIFIC IMPLEMENTATION

JIRA2SAP AI-Powered Customer Service is not a fixed, one-size-fits-all configuration.

The implementation can be adapted according to:

- The customer's SAP CS landscape
- Existing Jira Service Management processes
- Available SAP data
- Available enterprise documentation
- Service request types
- Required AI use cases
- Required approval processes
- SAP write-back requirements

- Internal authorization and security requirements

The solution is not limited to:

- One Jira Service Management Space
- One SAP CS process
- One service request type
- One knowledge source
- One set of SAP objects

Depending on the agreed scope, the solution can be extended with:

- Additional SAP service objects
- Additional SAP modules
- Additional document and knowledge sources
- Different knowledge categories
- Specialized service workflows
- Additional approval processes
- Additional AI-supported scenarios
- Different levels of SAP write-back functionality

ALPEIN Software SWISS AG performs the customer-specific integration and configures the JIRA2SAP AI functionality according to the agreed technical and business requirements.

10 DESIGNED FOR

The solution is particularly suitable for:

- Machine and equipment manufacturers with a large installed base
- Customer Service and Technical Service teams
- Field Service and After-Sales organizations
- SAP CS and SAP-centric service processes
- Jira Service Management teams
- Organizations with extensive equipment and service histories
- Organizations with large collections of manuals, schematics and service documentation
- Service organizations facing knowledge loss through employee turnover or retirement
- Organizations seeking to combine enterprise AI with controlled SAP business context