

How Coupa Uses Workato to Streamline Incident Management

by Kristine Colosimo - Tuesday, September 19, 2017

<https://blog.workato.com/2017/09/coupa-incident-updates-itops-devops/>

Coupa Software (NASDAQ: COUP) is a leading cloud-based spend management software company used by companies like Staples, Salesforce, H&R Block and more. As a Forbes Cloud 100 software company, seamless IT and DevOps are crucial to Coupa's success. Hans Gustavson, the senior site reliability engineering director wanted to find a powerful yet flexible solution to streamline communication between apps and decrease menial tasks for the engineers. "We're responsible for performance and making sure the site is up and available, as well as how we manage and interact with the platform and services," says Gustavson. "It's important to allow the engineers to focus on triage and resolution of issues instead of going back and forth between different tools to create tickets."

Gustavson was looking for a solution that allowed the team to rapidly build and deploy automations across a variety of SaaS services. "We're developers and we can certainly write our own integrations but we felt like there were solutions that are better suited for handling this type of orchestration instead of doing it in-house. We looked at a variety of products and ultimately chose to evaluate Workato. What we really liked is the ability of a recipe—the workflow is intuitive and it doesn't require a deep expertise in coding or development," explains Gustavson. "There are a lot of use cases and scenarios where we want to introduce bots or automation using Workato to help us manage a particular activity."

Related: [3 IT automations that deliver significant business results](#)

Manual Incident Updates in VictorOps, JIRA, HipChat and Cachet

Coupa's first order of business was streamlining communication and alerts for the engineers between VictorOps, JIRA, HipChat and Cachet. Coupa's workflow for incident management kicks off when their monitoring tool alerts VictorOps to an issue. VictorOps then pages the group of engineers responsible for acknowledging it.

Before using Workato, the next step was logging into JIRA and creating a JIRA incident ticket so they could track its progress as they worked on the issue. They also needed to enable communication between everyone involved with that specific issue by creating a dedicated HipChat room, where the on-call members could talk.

Throughout the entire process, JIRA's incident management workflow had to remain accurate and up-to-date. As the issue progressed through JIRA's workflow system (from Open, Investigating, and Identified to Fixed, Watching, and eventually Resolved), those updates also had to manually be changed in their Cachet status dashboard.

Related: [2 approaches for automating incident management](#)

Keeping Incident Updates Automatically in Sync with Workato

This process was efficient, but Gustavson knew it could be even better: “We realized we needed to make this process less burdensome to the engineer. We wanted to make it simpler and invisible.”

Now, when an engineer acknowledges the issue in VictorOps, Workato automatically creates a new JIRA incident ticket. Workato also opens a new HipChat room for that incident and automatically invites everyone who is on-call into the HipChat room.

Once the engineers start working on the issue, a new set of Workato recipes keep JIRA and their status dashboard in Cachet in sync. The incident travels through 6 different JIRA statuses as it gets worked on: Open, Investigating, Identified, Watching, Fixed, Resolved. Workato watches the issue in JIRA and triggers when the status changes, updating it in Cachet. “Essentially, the entire scenario facilitates communication of the alert status and helps people stay on top of what’s happening,” Gustavson says.

Easier Reporting and Increased Reliability

Coupa also uses Workato to enable better DevOps analytics. On an hourly basis, a recipe pulls issues from JIRA into a Google Sheet for analysis; a similar recipe aggregates alerts from VictorOps. This way, Gustavson’s team can pick up on evolving incident patterns—without doing any manual data entry.

Gustavson explains that Workato allows Coupa to leverage their tools to the fullest capacity and get more value out of those apps. With that leverage comes consistency; Gustavson credits Workato with improving the usability of his team’s apps. “We’re getting more reliable use out of our apps—without the engineer needing to be an expert in each one,” he says.

It’s Workato’s flexibility that proved the ultimate benefit for Coupa, Gustavson says. “There was never just one use case. There are more use cases coming up every day. Workato’s flexible framework allows us to easily solve for them—quickly.”

Implementing An Agile Solution in <1 Month

Gustavson points out that, in many cases, solving an integration problem became the responsibility of the person who needed the integration. “It often falls on the shoulders of the individual engineer, who might be caught between a communications tool and an orchestration tool. But we want the engineer to work on

what's most important: resolving incidents.”

[YouTube Video](#)

For this reason, the company wanted a solution that would be quick and easy to deploy, while powerful enough to handle all their potential use cases. Workato fit the bill. “We were up and running with our first integrations in roughly a month, but it could have been done even faster if I had more time to spend on it,” says Gustavson. “Now, I can make meaningful integrations incredibly quickly on Workato - a day and I'd have recipes ready.”

While using best-of-breed apps ensures you can choose the best tool for your team, it also leaves you with gaps between them. Coupa, however, has proved that you don't have to live with this fragmentation. “Workato allows us to leverage our tools to the fullest capability and to get more value out of those apps,” Gustavson concludes.

Want to streamline your company's incident management?

[See a Demo](#)