



# The ABCs of Process Automation

## **What Is Process Automation & What Is It Used For?**

Process Automation is the use of technology to automate a repeatable, rules-based task in a software application. There are several key technologies available to automate a task, and they're often capable of automating the same process, but in different ways.

As the saying goes, all roads lead to Rome. Some roads are just better suited than others, depending on your objectives.

Understanding available automation technologies is the first step in building an effective corporate automation strategy. All automation technologies have their purpose. Effectively and efficiently automating your business processes might require some or all of them.

# What Are the Different Types of Automation?



## Integrated Automation

Integration platforms focus on connectivity from one application to another. These solutions often have features that extend past simple data extraction and transformation into process orchestration, notification, validation, and more.

### STRENGTHS

Efficiently sends data from point A to point B, which is a crucial step in many automation designs.

### WEAKNESSES

This technology is not designed to automate a specific business process. It requires custom configurations to be built around its capabilities.



## Robotic Process Automation (RPA)

RPA platforms were created with the sole purpose of making automation so easy that an individual with zero programming experience could place automation over an existing User Interface (UI).

### STRENGTHS

RPA companies were not created to automate any particular business function. Rather, they were designed to automate anything and everything.

Their flexibility means they can be leveraged for many business applications with proper configuration.

### WEAKNESSES

RPA is like pulling out a Swiss Army Knife when starting construction on your new house. It will be very useful in many situations, but it doesn't replace the need for tools designed for specific tasks.

While it's useful for automation, RPA is ineffective if it doesn't have a platform with functionalities to automate.



## Process Automation Platform

Process Automation software focuses on automating very specific business functions.

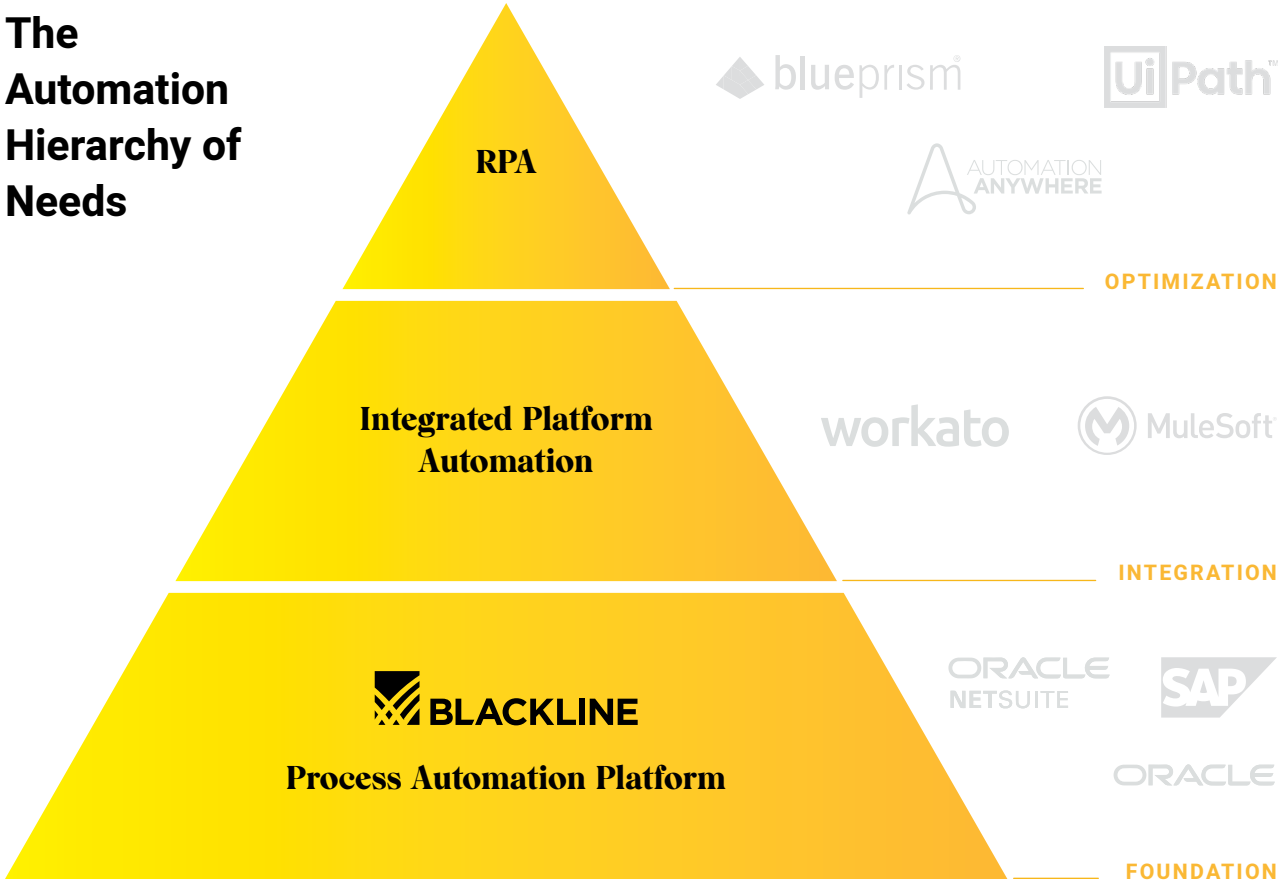
### STRENGTHS

These solutions are extremely stable and have the unique ability to easily scale for all users involved in the process.

### WEAKNESSES

The software requires basic configuration to align with an organization's unique data structure.

# The Automation Hierarchy of Needs



## FOUNDATION

The foundation for a sound automation strategy starts with a platform designed to solve a specific problem and help everyone involved in the process.

At BlackLine, we build our solutions to solve fundamental challenges in the accounting organization: reconciliations, journal entries, transaction matching, intercompany accounting, tasks, etc. All of our solutions are extremely stable because they all function together, within the BlackLine Accounting Cloud.

## INTEGRATION

The integration layer effectively enables the automation foundation even further.

Now that you have the toolset, integration will connect the pieces of the foundation you need to get the job done. Integration platforms are excellent at connecting to other applications and transacting essential data across platforms, but they were never intended to automate a specific business function alone.

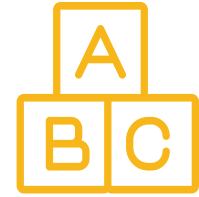
These systems rely on APIs and are a very stable and secure means to orchestrate data.

## OPTIMIZATION

Lastly, we reach the optimization layer—the most fragile step in an organization’s automation journey.

Consider which tasks couldn’t be automated in the foundation, and what data couldn’t be retrieved in the integration layer. Automating this final list of tasks is where RPA shines.

Pull out the Swiss Army Knife for processes that require work across multiple tools, for when integrations don’t exist or are inflexible, or for when a platform is difficult to automate. But, don’t build your house with a multi-purpose tool. It will fall down.



## How Do We Use Automation?

Corporate automation strategies should consider—and use—a plethora of automation technologies depending on goals, budget, resource availability, organizational appetite for change, as well as timeline and alignment with corporate goals.

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**Applying the right technology to a problem might seem like a daunting task, but if you focus on building a strong foundation and avoid looking for a single tool to save the day, everything else will fall into place.**

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### About BlackLine

Companies come to BlackLine, Inc. (Nasdaq: BL) because their traditional manual accounting processes are not sustainable. BlackLine's cloud-based solutions and market-leading customer service help companies move to modern accounting by unifying their data and processes, automating repetitive work, and driving accountability through visibility.

BlackLine provides solutions for financial close management, accounting automation, and intercompany governance, helping large enterprises and midsize companies across all industries do accounting work better, faster, and with more control.

More than 3,000 companies trust BlackLine to help them close faster with complete and accurate results. Based in Los Angeles, BlackLine also has regional headquarters in London, Singapore, and Sydney. For more information, please visit [blackline.com](https://blackline.com).