



Digital Workflows at EWU

A Guide to Choosing the Right Tool for Your Team

Instructional Technology & Web Services



What is a Workflow?

- A workflow is a way to organize how tasks get done, step-by-step, to reach a goal.
- It acts as a map for getting work done from start to finish, making sure everything goes to the right person at the right time.
- Today, workflows are taking advantage of digital technologies and are being built as applications using web-based technologies.



What Makes a Good Workflow Tool?

A reliable workflow system should be able to:

- Easy to use
- Clear and simple
- Data Handling
- Work with existing tools
- Follow privacy rules
- Maintain organization branding
- Manageable by departments



Five Workflow Systems at EWU

Eastern Washington University currently has five different workflow tools available to support business processes:

1. WordPress Gravity Workflow
2. SoftDocs Etrieve
3. SurveyMonkey
4. Freshservice
5. Ellucian Workflow v2 (ProcessMaker)



At-a-Glance Comparison

Here is how the tools rate on a 1-5 scale (5 = excellent) across key criteria:

Tool	▼	Presentation & Branding	▼	Document Retention	▼	Ease of Use	▼	Self Support	▼
Gravity Workflow			5		2		4		4
SoftDocs Etrieve			3		5		3		3
SurveyMonkey			4		2		5		5
Freshservice			2		3		4		3
Ellucian Workflow			2		4		2		2

Quick Recommendations

Best for Public-Facing Branded Forms:
Gravity Workflow with WordPress.

Best for a Managed Ticketing System:
Freshservice.

Best for Document Retention & Compliance:
SoftDocs Etrieve.

Use with Caution:
Avoid Ellucian Workflow v2 unless deep integration is required, and be wary given future migration plans.

Best Ease-of-Use & Low Support Needs:
Freshservice or SurveyMonkey depending on the workflow type.



WordPress Gravity Workflow

Overview: A plugin for WordPress that automates tasks by taking form submissions and routing them for approval or sending notifications.

Strengths:

- It runs right inside WordPress, so there's no need to learn a separate system.
- It's fairly easy to use, even for non-tech-savvy users.
- Excellent for workflows that need a polished, public-facing look.

Weaknesses:

- Complex workflows can be challenging and may require technical help.
- It lacks strong reporting and analytics.
- It doesn't handle data management well.





SoftDocs Etrieve

Overview: A document management and workflow tool built for universities to digitize paperwork, manage forms, and track official documents.

Strengths:

- Excels at organizing and storing documents, supporting retention policies.
- The interface is reasonably user-friendly.
- Keeps documents secure, private, and compliant.

Weaknesses:

- Branding options are a recent and still somewhat limited addition.
- Complex configurations often require a lot of effort.
- Some approval features can feel awkward or clunky.



Survey Monkey

Overview: A leading online platform for creating and distributing surveys to collect feedback and conduct research.

Strengths:

- Its biggest advantage is its ease of use.
- The interface is intuitive, making it accessible for users with no background in survey design.
- Surveys can be created and shared quickly.

Weaknesses:

- Limited when it comes to advanced survey customization and complex logic.
- Data is stored internally and will likely need to be exported to be retained.



Freshservice

Overview: A cloud-based service management tool created for internal IT support, which has expanded to other departments like HR and finance.

Strengths:

- Relatively easy to set up and use.
- The built-in self-service portal allows users to submit requests and view progress.
- Suitable for teams that want to centralize internal requests without relying heavily on technical staff.

Weaknesses:

- Limited visual branding and UI customization.
- Customizing complex workflows may not be intuitive for non-technical users.
- Reporting tools are limited in lower-tier versions.





Ellucian Workflow v2.0

Overview: A cloud-based workflow solution for higher education institutions that supports process automation for administrative functions.

Strengths:

- Performs well with data management, particularly within the Ellucian Ethos ecosystem.

Weaknesses:

- The interface can be confusing for both end users and developers.
- Routine configuration often requires significant developer involvement.
- Support resources are difficult to navigate.

Future Outlook: Ellucian has announced plans to retire Workflow 2.0 and replace it with a new platform: Intelligent Processes





Summary & Key Takeaways

For Public-Facing Forms:

**Use WordPress Gravity
Workflow**

For Official Records & Retention:

Use SoftDocs Etrieve

For Simple Surveys:

Use SurveyMonkey

For Internal Ticketing:

Use Freshservice.

For Deep Integration (with caution):

Use Ellucian Workflow



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