



# 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.



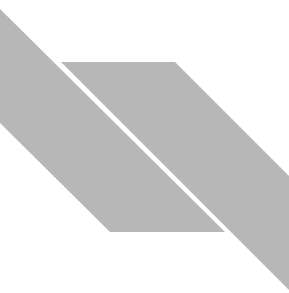
# Freshservice

**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.
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# 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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