



Accessing Ironclad and Basic Navigation

Overview

Ironclad is a contract lifecycle management system (CLM) that assists in review, negotiation, and execution of funded and unfunded contracts. A Workflow is where a contract template is generated, along with all the business processes needed to execute it, such as approvals and signatures.

Workflows generally follow this process: Launch, Review and Collect Approvals, Collect Signatures, Archive Agreement.

This job aid includes the following sections:

- Accessing Ironclad through eRPM
- Signing into Ironclad
- Dashboard Overview
- Workflow Overview

Ironclad Terminology

Activity Feed: Tracks all the actions that take place in a workflow. Users can view real-time progress, updates, and communicate with other participants in the Activity Feed.

Dashboard: Central landing page for navigating past, current, and new workflows. Users navigate, manage, and prioritize their contract workflow from the dashboard. The dashboard is customizable and allows users to search, filter, and sort workflows.

Turn-tracking: Allows users to signal and filter which party—University of Michigan or Counterparty—is reviewing the agreement.

Workflow: Consists of an agreement and all the business processes needed to execute it, such as approvals and signatures. Workflows generally follow this process: Launch, Review and Collect Approvals, Collect Signatures, Archive.

Workflow Owner: The user who initiates and submits the launch form and manages the agreement workflow.

Accessing Ironclad Workflows through eRPM

Through eRPM, users can see the status of their agreement and access the agreement record directly from a link in the eRPM.

For PAFs & UFAs: the Ironclad link is located on the **Main** tab.

For Awards: the Ironclad link is located on the **ACR/MOD** tab.

Information about the Ironclad Agreement, like workflow status, approvers status, and last updated date can all be found from this view.

1. Click on the link under **Friendly Ironclad ID** to access the agreement workflow.

For more information about navigating the agreement workflow, see the [Workflow Overview](#) section of this guide.

Ironclad Workflows

Access to Ironclad is limited to the PI(s) and the Primary Research Administrator on active workflows.

CLM ID	Workflow Owner	Workflow Type	Workflow Status	Status of Approvers	Status of Signers	Last Refreshed
IC-14857		Other Sponsored Activity	Review	in_progress	not_started	9/18/2025

Signing into Ironclad Directly

Ironclad and user dashboards can also be accessed by using the following link:

<https://ironcladapp.com/signin>

Note: First time users, use the Sign In button located in the initial email you received from Ironclad to create a password and sign in.

Enter your University of Michigan email address and click **Continue**. You will be directed to the standard U-M SSO sign in.

Sign in to Ironclad


Enter your email

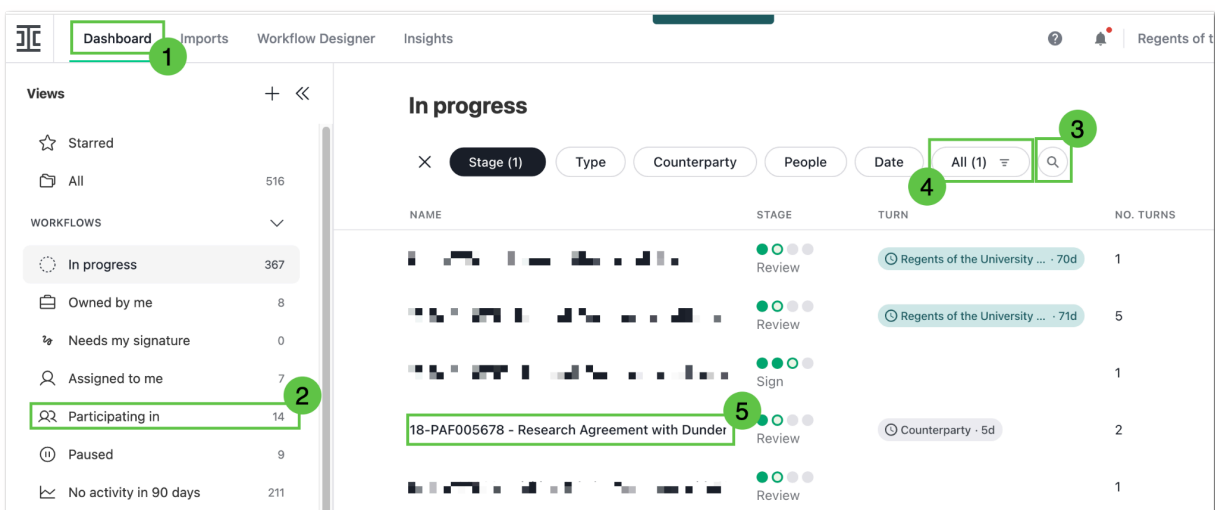
Remember me

Continue

Dashboard Overview

The Ironclad dashboard allows you to search, filter, and sort through workflows you have access to by using all available contract properties.

1. Upon logging into you will see your Ironclad **Dashboard**.
2. The **Participating In** view shows all of the workflows to which you have been added.
3. Click on the **Magnifying Glass**  icon to perform a basic search.
4. Customize your search by clicking **All** and adding additional filters.
5. Click on the **Name** of the agreement to slide in the preview pane for that specific agreement workflow.

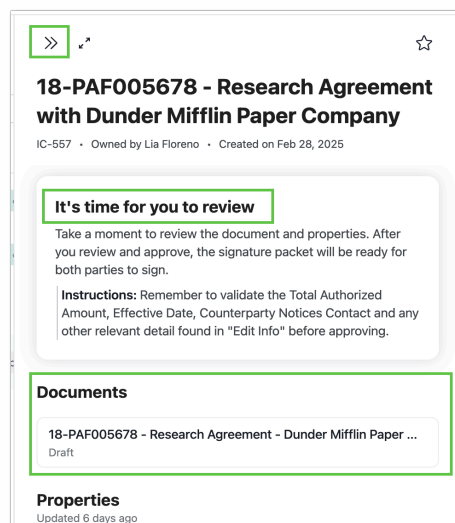


The screenshot shows the Ironclad Dashboard interface. The top navigation bar includes 'Dashboard' (highlighted with a green box and '1'), 'Imports', 'Workflow Designer', and 'Insights'. On the left, the 'Views' sidebar shows 'Participating in' (highlighted with a green box and '2') selected. The main area displays 'In progress' workflows. At the top of this area, there are filter buttons: 'Stage (1)', 'Type', 'Counterparty', 'People', and 'Date'. The 'Date' filter is expanded to show 'All (1)' (highlighted with a green box and '4') and a search icon (highlighted with a green box and '3'). Below the filters is a table with columns: NAME, STAGE, TURN, and NO. TURNS. The table lists several workflows, with the one '18-PAF005678 - Research Agreement with Dunder' (highlighted with a green box and '5') selected. The table data is as follows:

NAME	STAGE	TURN	NO. TURNS
[Redacted]	Review	Regents of the University ... - 70d	1
[Redacted]	Review	Regents of the University ... - 71d	5
[Redacted]	Sign		1
18-PAF005678 - Research Agreement with Dunder	Review	Counterparty - 5d	2
[Redacted]	Review		1

Workflow Preview

The Workflow preview allows you to see information about the agreement (e.g. next steps, documents) without accessing the full workflow. To collapse the preview pane, click the **arrows** in the top left corner.



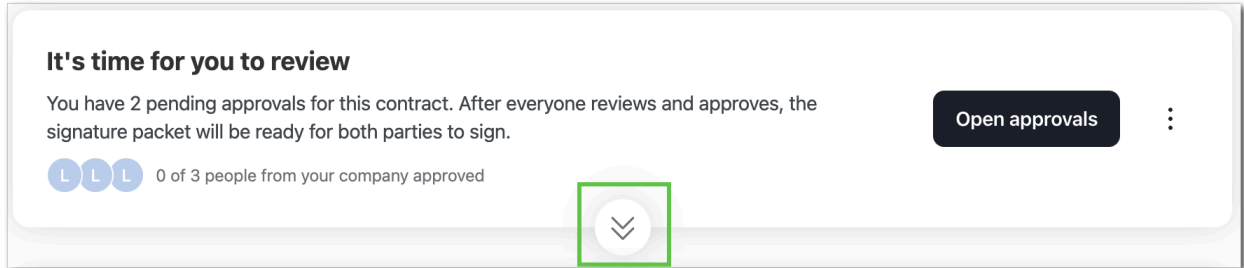
The screenshot shows the Workflow Preview for '18-PAF005678 - Research Agreement with Dunder Mifflin Paper Company'. The preview pane is expanded, showing details for the selected workflow. The top left corner has a collapse icon (two right-pointing arrows) highlighted with a green box. The main content includes:

- It's time for you to review**: A notification box with instructions to review the document and properties.
- Documents**: A list of documents, including '18-PAF005678 - Research Agreement - Dunder Mifflin Paper ...' (Draft).
- Properties**: A section for workflow properties, updated 6 days ago.

Workflow Overview

The workflow consists of the agreement and all the business processes needed to execute it, such as approvals and signatures. Information about approvers, turn-tracking, and activities related to the agreement can be found here.

The first section may vary depending on which step of the workflow the agreement is in currently (e.g. Review, Signature). To expand the workflow and see the Review and/or Signature sections click the down arrows.



Turn-Tracking

Turn tracking is found in the **Documents** section of the agreements workflow. To access turn tracking click the **clock icon**. The name next to the icon indicates who's turn it is to review the agreement—The University of Michigan or Counterparty—and how long the agreement has been with them. Turn tracking can be viewed by **Turns** or **Time**.



Turn-Tracking by Turns

1. Turn-tracking by Turns can be filtered by **Day, Week, Bi-weekly,** or **Monthly** view.
2. Display of **total turns** for both parties.



Turn-Tracking by Time

3. Turn-tracking by Time displays the **total days** and percentage of time the agreement has been with both parties.



Accessing the Agreement

To access the agreement document, under **Documents**, click on the agreement name.

Note: As updated versions are saved, they will be stored in the documents section.



Review Section

The next section of the agreement workflow is the **Review** section where users can add their approval to the agreement. The Workflow Owner will always display as an approver for the agreement. Additional approvers, like those from central offices will also appear here when applicable.

The screenshot shows a 'Review' section with a progress indicator '0 of 3 approved' in the top right. It is divided into two main sections: 'Review in order' and 'Review at any time'. Under 'Review in order', there are two entries: 1. 'Innovation Partnerships' (LF) with instructions: 'You have been added as an Approver by ORSP. Please review the ta...' and a 'Mark as approved' button. 2. 'Workflow Owner' (LF) with instructions: 'Remember to validate the Total Authorized Amount, Effective Date, ...' and a 'Not your turn' status. Under 'Review at any time', there is one entry: 'ORSP Approval' (LF) with a 'Mark as approved' button.

Activity Feed

The last section of the Agreement Workflow is the **Activity Feed**. The Activity Feed tracks all the actions that take place in a workflow. Users can view real-time progress, updates, and communicate with other participants in the Activity Feed.

1. Users who have access to the agreement workflow to send **messages** for others and utilize the Ironclad **@mention** feature..
2. The **search** functionality in the activity feed allows users to search all actions taken on an agreement. Searches can be filtered by categories like user, role, workflow step, and document.
3. Additionally, the activity feed can be **filtered** so the user only sees Discussions and emails, Documents, Properties, or Approvals.

The screenshot shows the Activity Feed interface. Callout 1 points to a 'Message your team' input field with a right arrow. Callout 2 points to search and notification icons. Callout 3 points to a dropdown menu for filtering activity, with options: 'All activity', 'Discussion', 'Documents', 'Properties', and 'Approvals'. The feed itself shows three activity items: 1. 'switched turn for review to Regents of the University of Michigan.' (22 min ago). 2. 'assigned themselves to ORSP Approval.' (28 min ago). 3. 'added [user] to review on behalf of ORSP Approval.' (28 min ago) with a 'View user details' link.