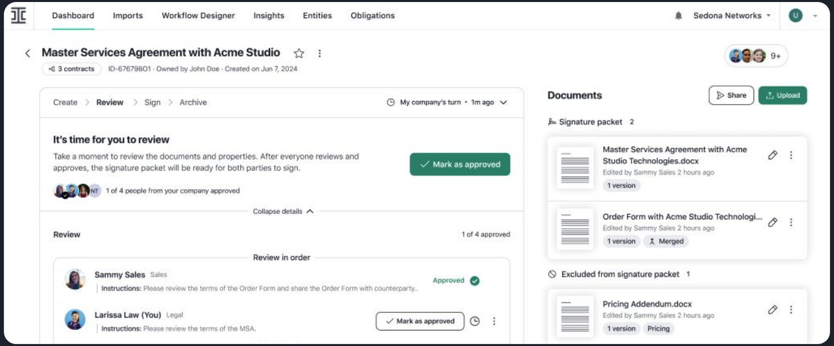
Updated Ironclad Workflow Page

We're updating the Workflow Page to make it faster and easier for users to see the workflow's and get to the right documents & actions needed to shepherd a contract to completion. These are visual and layout improvements only—underlying workflow behavior, permissions, and actions remain the same.



Change Summary

1. Updated look and feel to allow for more focus on documents
2. Turn Tracking moved into Progress Banner
3. Contract stage progress steps are moved into the Progress Banner
4. Expand "Expanded Details" by default
5. Removed the large thumbnail image from the Documents area, but added one to each document
6. Progress Banner is hidden on completed workflows
7. "Refresh from source" button is always displayed when there are integrations
8. Update what archivers and non-archivers see in progress banner in Workflow and Dashboard for clearer calls to action

What you need to know

WHY THIS MATTERS

These changes are a direct response to customer feedback on the prior Workflow Page redesign, particularly around **difficulty finding documents**, understanding **overall workflow progress**, and knowing **where to act next**.

This helps users to:

- **Easily find out the status and turn of the contract**
- **Easily find the contract documents, so that I can do my tasks as quickly as possible.**

We co-designed these updates with customers who escalated usability concerns and validated that this direction improves the experience. This release is **one step in an ongoing series of usability improvements** to the Workflow Page.

WHAT IS STAYING THE SAME

There are **no changes to workflow functionality**—only how information is displayed.

- **All actions remain where users expect them**, except for **Turn tracking**, which has been intentionally moved into the Progress banner for better visibility.
- The update is **included for all CLM customers at no additional cost**, and will be enabled across all production stacks (Demo, NA1, EU1).

Benefits of this change

Clearer, at-a-glance status

- The **stage progress tracker** and **turn tracking** are now surfaced in the at the top of the Workflow Page.
- The **Progress banner is hidden on completed workflows**, so completed workflows feel cleaner and less “in progress.”
- Status copy in the banner at **Archive** has been updated to be clearer and more descriptive.
- On **canceled workflows**, the high-level **Contract Status** label (e.g., “Active”) is hidden to avoid confusion.

Docs & integrations are easier to work with

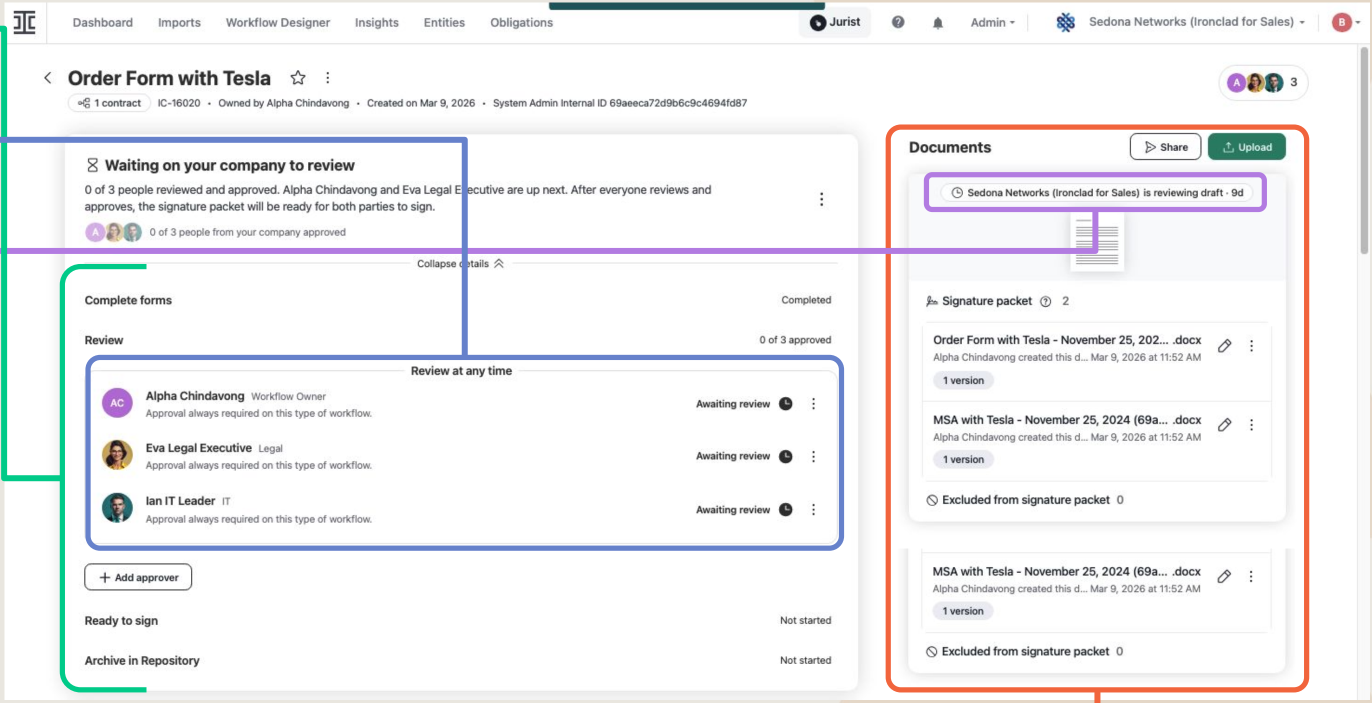
- Each document now has its **own thumbnail** and **per-document shadowing**, instead of a single large tile, so it’s easier to recognize the right file at a glance.
- When a workflow is connected to external systems, the **“Refresh from source”** button is **always visible** whenever integrations are present.

Cleaner layout for key details & activity

- **Expanded Details** now opens **expanded by default**, so users see important process details without needing extra clicks.
- Shadows have been **removed from the Progress banner, Expanded Details, and Activity Feed**, reducing visual noise and keeping focus on key content and documents.

Existing Workflow Page Key

1. Track what workflow step you are in
2. Take the next action: approve, sign, or archive
3. Activate, review, & change who holds the pen
4. Review signature packet and ancillary documents



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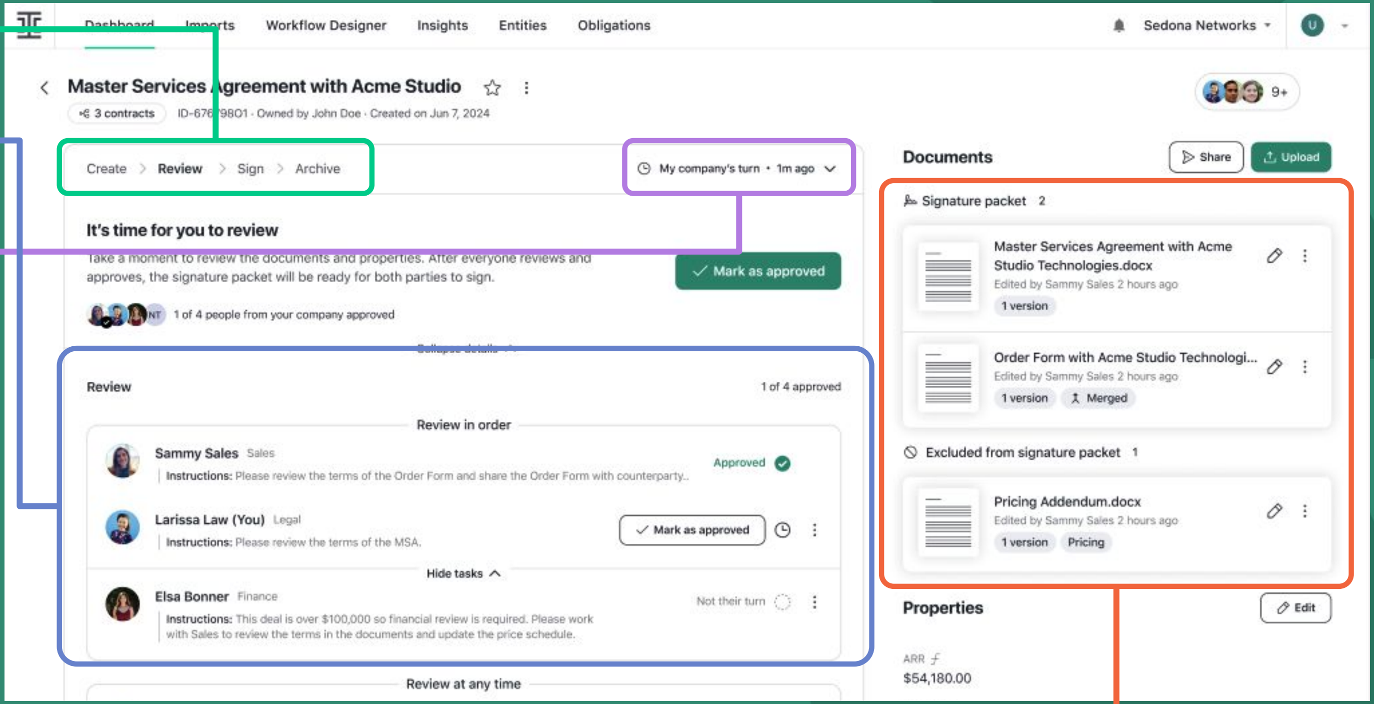

Detailed Side-by-side Comparison

Area	Current experience	Updated experience	Customer benefit
Turn tracking	Turn tracking appears as a control above the Documents section on the right side of the page, separate from overall status and stage information.	Turn tracking is moved into the **Progress banner** at the top of the page, alongside other status details.	Users see **who owes the next turn** in the same place they check status, reducing hunting between panels and making next actions more obvious.
Stage progress tracker	The stage progress tracker lives inside **Expanded Process Details**, which may be collapsed, so users must open that section to understand where they are in the workflow.	The stage progress tracker is **relocated into the Progress banner**, visible immediately on page load without needing to open Expanded Details.	Users get **instant, at-a-glance visibility** into workflow progress, helping them orient quickly and decide next steps.
Expanded Details behavior	Expanded Details may be collapsed by default, hiding some contextual information until the user expands it.	**Expanded Details is expanded by default**, surfacing process context without extra clicks.	Reduces clicks and makes **key process information more discoverable**, especially for less frequent users.
Progress banner on completed workflows	Completed workflows still show a large banner section (“This workflow is completed”) across the top of the page, taking up vertical space.	The **Progress banner is hidden** when the workflow is completed; users instead see a clean header with the workflow name and a “Completed” state in the breadcrumb area.	Completed workflows feel **lighter and more archival**, while still clearly marked as completed, making it easier to focus on final documents and records.
Document thumbnails & focus	Documents are grouped in a single tile with shared shadowing; individual files are less visually distinct at a glance.	Each document displays its **own thumbnail** with **per-document shadowing**, drawing focus to the document list as the primary working area.	Users can **recognize and select the right document faster**, improving task speed and reducing mis-clicks.
Visual emphasis (shadows)	Shadows are applied to the Progress banner, Expanded Details, and Activity Feed, adding more competing areas of emphasis.	Shadows are **removed** from the Progress banner, Expanded Details, and Activity Feed, while being focused on the Documents section instead.	Creates a **cleaner layout** and directs attention toward documents and key actions instead of background containers.
Contract Status on canceled workflows	On canceled workflows, the Contract Status label (e.g., “Active”) is still displayed, which can be confusing against the canceled state.	The Contract Status label is **hidden for canceled workflows**, reducing conflicting signals in the header.	Users see a **single, clear state** (canceled) instead of mixed signals, improving trust and clarity in status.
Progress banner copy at Archive	Existing copy on the Archive progress banner is less explicit about what has happened and what the user can do next.	Banner copy at Archive is **updated for clarity**, making it easier to understand that the workflow has been archived and what that means.	Reduces confusion for users reviewing **archived agreements**, especially those returning to workflows after long gaps.
Integrations	The **“Refresh from source”** button may not always be visible, depending on context, which can make syncing with integrated systems less discoverable.	Whenever integrations are configured, **“Refresh from source” is always displayed**, so the sync action is consistently available.	Users can more reliably **sync the latest data from connected systems** without searching for the control.
Underlying functionality	Existing Workflow Page functionality and actions are fully available today.	All functionality remains the same; this release focuses solely on **visibility, layout, and copy improvements**.	Minimizes change management risk while delivering **better usability and faster task completion**.
Availability & pricing	N/A – baseline experience.	Updates are **enabled for all CLM customers** across Demo, NA1, and EU1 and are **included at no additional cost**.	Simple rollout with **no extra purchase required**; admins only need to adjust internal guides or training content as needed.