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1 Smart card authentication

Relativity supports smart card authentication, such as the use of a personal identity verification (PIV) card. This two-factor authentication option is also called client certificate authentication. It uses a certificate stored on a smart card and a PIN. When logging in to Relativity, the user inserts a PIV card into the card reader, clicks a PIV login button, selects the appropriate certificate on the PIV card, and then enters a PIN.
2 Smart card authentication prerequisites

Before you configure users for smart card authentication, complete the following tasks:

- Obtain admin access to your Relativity installation.
- Verify a valid server certificate is configured on web server hosting Relativity.
- Make sure that each user who you want to set up for smart card authentication is issued a PIV card that contains a certificate signed by the appropriate issuer. See Configuring a user for smart card authentication on page 6.
3 Configuration value for smart card authentication

To enable smart card authentication in your Relativity environment, you must update the configuration called UseSmartCardAuthenticationCaption. When you update this settings, you enter the text that you want displayed on the button used for smart card authentication on the Login dialog. If you leave this configuration value blank, then the External Login section containing this button won’t be displayed. For more information, see the Configuration Table Guide.

You can now configure users for smart card authentication by updating their profiles through the User tab.
4 Configuring a user for smart card authentication

Within Relativity, you configure smart card authentication at the user level. Make sure that you have updated the configuration value for your Relativity environment. See Configuration value for smart card authentication on the previous page.

Before you begin, obtain the value in the Subject Alternative Name field of the certificate generated for a user. Contact your system or other administrator responsible for generating these certificates in your organization for this information. See Smart card authentication prerequisites on page 4.

The procedure is different depending on the version of Relativity 9.2.

4.0.1 9.2.600.19 and above

1. Log in to Relativity with system admin credentials.
2. Select Home from the user drop-down menu.
3. Click the Users tab.
4. Click the Edit link next to an existing username, or create a new user. See Users on the Relativity 9.2 Documentation site.
5. In the Login Method section, click New to open the Login Method Information form.
6. Select a Smart Card Provider.
7. In the Certificate Subject field, enter <Subject Alternative Name>. The Subject Alternative Name is associated with the certificate on the smart card used to login to Relativity.

For example, if the Subject Alternative Name is jsmithr@example, then you would enter jsmithr@example in the Certificate Subject field.
8. Click Save.
4.0.2 Version and below

1. Log in to Relativity with administrator permissions.
2. Select **Home** from the user drop-down menu.
3. Click the **Users** tab.
4. Click the **Edit** link next to an existing username, or create a new user. See Users on the Relativity 9.2 Documentation site.
5. In the User Information section, enter the value for **Subject Alternative Name** field on the user's certificate in the **Authentication Data** field. Make sure that the value entered in the Authentication Data field includes all the characters to the right of the equals sign (=) in the Subject Alternative Name field.

If you use a tool such as OpenSSL to generate certificates, use the string that appears after the characters **DNS Name=** as the value for the **Authentication Data** field. Depending on the tool used to create the certificate, the value of the Subject Alternative Name field may contain other characters than **DNS Name=** as used in the following screen shot.

For example, if the Subject Alternative Name field displays **DNS Name=jsmith@example.com**, enter **jsmith@example.com** in the **Authentication Data** field. See the following screen shot:
5 Logging in to Relativity with a smart card

You can log in to Relativity by inserting your PIV card into your smart card reader, selecting a certificate, and entering your PIN.

Use the following steps to log in to Relativity:

1. Insert your PIV card into the smart card reader for your computer.
2. Browse to your Relativity website with the URL provided by your Relativity admin.
3. Enter your email address in the Username box and click the button under the External Login heading. Your Relativity admin may have customized the label on the button for your Relativity application.

4. On the Select a certificate dialog, highlight the certificate used for logging in to Relativity. Click OK.
5. Enter your **PIN** for your smart card, and click **OK**.
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