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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 Instance setting for smart card authentication

To enable smart card authentication in your Relativity environment, you must update the instance setting called UseSmartCardAuthenticationCaption. When you update this setting, you enter the text that you want to appear on the button used for smart card authentication on the Login dialog. If you leave this instance setting value blank, then the External Login section containing this button won’t appear. For more information, see the Instance Setting Guide.
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 instance setting value for your Relativity environment. See Instance setting 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.

Use the following steps to configure a user for smart card authentication:

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 9.3 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.

The user can now use Smart Card authentication to log into Relativity.
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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