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1 Relativity's mobile experience

With the mobile application for Relativity, you can view and code documents on the go from an iPad application. You’ll be able to access views and saved searches from your iPad, code documents via layouts, and rest assured that all coding decisions reflecting instantly in Relativity.

The features in Relativity's app for mobile allow you to:

- **Review documents on the go.** Code documents on your commute or your couch with Relativity's secure and native mobile application.
- **Decisions reflect in Relativity.** The changes you make in the application are instantly reflected in Relativity. There will be no discrepancies between what you see on mobile and what your team sees in the office, creating a unified experience.
- **Keep your documents safe and secure.** We built this native application with security top of mind. The application requires both a 6-digit passcode (or Touch ID) as well as Relativity login credentials. The application supports two-factor authentication.
- **Productivity on the move.** Use a native mobile application to code documents in your on-premises or RelativityOne cases on the go.

1.1 Unified experience with Relativity

Relativity's mobile app works concurrently with Relativity to provide the best experience while on a computer or on the go with your iPad. This unified experience with Relativity lets you view and code documents with all the work instantly reflected in Relativity in order for the case team to act on. This works from Relativity One to mobile and mobile to Relativity One.

All that is needed for the unified experience is a Relativity account and Relativity's mobile app downloaded onto an iPad. The user’s security settings placed in Relativity are reflected in the application, right when they log in for the first time.

1.2 Device requirements

To start using Relativity's mobile app, you must have an iPad running iOS 10 or higher and no less than 2 GB of RAM. For more information on updating your iOS, visit [Apple support](https://support.apple.com).  

Download Relativity's mobile app from the App Store

1.3 Compatibility matrix

The following matrix illustrates which versions of Relativity support which versions of Relativity’s mobile app.
Using Relativity's mobile app

New documents have come to light and your Relativity administrator imports them into your workspace to be reviewed and coded as quickly as possible. The reviewer team is in the office, but you, the counselor, are traveling to another city. The team needs you to review their coding decisions and want you to see only the newly coded documents.

With Relativity's mobile app, your team back at the office can create a saved search that includes only the set of newly coded documents for you to review. The saved search will appear in the application right after the team runs it from the office. To view the documents in the search, tap on the saved searches icon in the left navigation and then choose the newly created search. Tap the first document and begin your review. Any of your coding revisions will be immediately reflected in your team's workspace in Relativity.

Back in the office, your decisions made while reviewing are reflected in Relativity. Your team can then redact images, if necessary, and then run a production on the documents. Once the production is complete, you can review the production set in mobile by tapping the Production sets icon before presenting the case.
1.4 Security

1.4.1 Security and Permissions

With Relativity's mobile app experience being unified with Relativity, instance permissions and workspace permissions will be set up in Relativity. For more information, visit Security and Permissions.

1.4.2 Working with MobileIron

Relativity's mobile app includes MobileIron integration for environments distributing iOS applications to devices through a MobileIron enterprise application store or iTunes store. Relativity's mobile app, secured by MobileIron, provides the following additional features:

- Remotely wipe Relativity's mobile app data through MobileIron.
- Pre-configure Relativity environment connection settings for Relativity's mobile app on your iPad.

For instructions on configuring your MobileIron policies, see MobileIron support.

1.4.2.1 Logging in with MobileIron integration

Logging in to Relativity's mobile app with MobileIron requires you to first enter your MobileIron passcode.

1. Tap Relativity's mobile app icon to open the application on your iPad.
2. Enter your MobileIron passcode on the Mobile@Work screen when prompted.
3. Enter your Relativity passcode.

1.4.2.2 Checking in to MobileIron

Your MobileIron client automatically checks in to your company's MobileIron server for authorization at a pre-configured interval. When the MobileIron client checks in with Relativity's mobile app running on your iPad, a MobileIron splash screen opens and quickly closes.

After the splash screen closes, continue working in Relativity's mobile app.

1.4.3 Security information

Relativity's mobile app incorporates the following additional security measures to protect your information from theft:

- Encrypts application data as it is sent over an SSL connection to and from Relativity.
- Encrypts all documents and document field information using data protection when the iPad is in a passcode locked state.
- Encrypts Relativity's mobile app 6-digit passcode and Relativity login credentials in the iOS keychain.
Note: Relativity's mobile app was created using the iOS 10 SDK. In iOS 10 Apple included new security restrictions called App Transport Security (ATS) that limit the device from communicating with certain insecure servers. Details on the new ATS restrictions can be found here under the heading "Requirements for connecting using ATS".

1.4.3.1 iOS data protection

The following are stored and encrypted using the Apple iOS keychain when you lock your iPad:

- Relativity's mobile passcode
- Relativity authentication token settings

When you lock your iPad, the keychain is locked. Unlocking the device unlocks the keychain.

Note: To enable iOS data protection, you must set a passcode on your iPad.

1.4.3.2 Improving iPad security

To enable iOS data protection on your iPad and further secure Relativity's mobile app, you must set a passcode and Touch ID on your device. We recommend following the passcode tips provided by Apple to maximize passcode security. See iOS: Understanding data protection published by Apple for recommended passcode tips.

1.4.3.3 Restoring iPad from iCloud and iTunes

When removing the application from your device, you will erase all application data along with it. Then, when opening Relativity's mobile app the first time after restoring your iPad from iCloud or iTunes, the application behaves similarly to the first time you opened the application following a new installation. The primary difference is you are required to enter your Relativity mobile passcode after a restore.

1.5 Getting started

1.5.1 Logging in

Relativity's mobile app offers several methods to log in. These methods are all supported – Username and password, RSA, Active Directory authentication, Integrated Windows, and OpenID Connect. The SAML method of logging in is not supported. For more information on these methods, see Logging in to Relativity.

1. Tap on Relativity's mobile app icon.
2. The login screen appears.
2. Enter your Relativity **Instance URL**.
3. Tap Next. A screen appears where you can enter your Relativity credentials.
4. Enter your username, and then tap Next.
5. Enter your password, and then tap Login.

The list of Relativity workspaces that are accessible to your credentials appears. Tap on a workspace to view the documents in it.

**1.5.1.1 Logging in with Touch ID**

Before logging in with Touch ID, you will have it set up on your device. To learn how to set up Touch ID in Relativity’s mobile app, see **Setting up Touch ID on page 11**.

1. Tap on Relativity's mobile app icon to open the application.
2. Tap the Use Touch ID button on the login screen.
3. Hold your finger on the iPad’s Home button.

The mobile application for Relativity will open to the workspace list after you log in successfully.
1.5.1.2 Exceeding password limits

If the login credentials are entered incorrectly three times, a countdown screen appears. This screen has a counter that counts back from 30 seconds. You will be able to log in again when the timer reaches zero.

If you do not remember your credentials, click the Yes button underneath where it says "Do you want to reset your passcode?" If you decide to click yes, you will be asked again if you want to reset your passcode. If you reset your passcode, all of your saved data and information on the device will be wiped.

After accepting, the next screen you will see is the resetting your password screen. Create a passcode that is over six characters. Enter the new passcode in the text box and click the Next button. You will have to re-enter the same passcode. Finally, log back into Relativity's mobile app.

1.5.2 Logging out

Tap the logo to expand the side panel, and then tap the Log out button to log out of the application. Logging out returns you to the Instance URL page.

Note: Force closing the application, or hitting the Home button while in Relativity’s mobile app, will not log out a user.
1.5.3 Instance URL

The Instance URL that you need to enter into the text box is the same URL that you use for Relativity. By default, HTTPS is provided, but not necessary.

When logging in, /Relativity will be added to the end of the Instance URL. If you have a custom Instance URL that does not include /Relativity at the end of it, it is necessary to update your REST API in the device’s settings. In settings, tap on Relativity’s mobile app icon and edit the REST location to fit your needs.

1.5.4 General navigation and icons

The workspace list screen always appears first when you open the mobile application. You can use column sorting, use the view selector, or use the text filters to find the workspace you want to view.

The following navigation and shortcut options are available:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workspace list icons</strong></td>
<td>Tap the Relativity logo at any place in the application to expand the side panel to access your workspace list, provide feedback, access user settings, or log out of the application.</td>
</tr>
<tr>
<td><img src="image" alt="Workspace list icons" /></td>
<td>In the expanded side panel, tap this icon to view your workspace list.</td>
</tr>
<tr>
<td><img src="image" alt="Workspace list icons" /></td>
<td>In the expanded side panel, tap this icon to view the document list for the selected workspace.</td>
</tr>
<tr>
<td><img src="image" alt="Workspace list icons" /></td>
<td>In the expanded side panel, tap this icon to open up the mobile documentation site.</td>
</tr>
<tr>
<td><img src="image" alt="Workspace list icons" /></td>
<td>In the expanded side panel, tap this icon to send your feedback about the application directly to the Customer Support team by email.</td>
</tr>
<tr>
<td><img src="image" alt="Workspace list icons" /></td>
<td>In the expanded side panel, tap this icon to manage your Relativity account(s), application security passcode, and user settings.</td>
</tr>
<tr>
<td><img src="image" alt="Workspace list icons" /></td>
<td>In the expanded side panel, tap this icon to log out of the application.</td>
</tr>
<tr>
<td><strong>Workspace icons</strong></td>
<td>Tap the Folders icon to expand the folder browser structure you have set up in your Relativity workspace, and then tap a folder to view documents within the folder you select.</td>
</tr>
</tbody>
</table>
1.6 User settings

1.6.1 Setting your passcode

Relativity's mobile app requires you to create a 6-digit passcode to secure the application prior to adding a Relativity account. The passcode must be all numbers.

You are prompted to enter the passcode anytime you open Relativity's mobile app after:

- The device logs you out
- The application timeout occurs
- iOS notifications push you out of the application

1.6.1.1 Setting up Touch ID

Touch ID is available with Relativity's mobile app, as long as it first set on your device. To set up Touch ID, you will need to navigate to your device's settings. In order for Touch ID to work properly, follow the instructions provided on the screen. For more information on setting up Touch ID on your iPad, visit Apple support.

After it is set up on your device, follow the next steps to enable it:

1. Tap Settings in the expanded left navigation menu
2. Tap the Off/On toggle at the bottom of the Passcode Management pop-up menu
1.6.2 Change your passcode

To change your passcode, you will need to be in the Workspaces view and have the left navigation open. Tap on the Settings icon to open the pop up. The Passcode Management screen in Settings appears. Once this screen is available, tap the Change your Passcode button.

Enter your current passcode into the text box and then tap Go on device’s keyboard. After entering the correct passcode, you will be prompted to enter in a new passcode that is more than 6 characters into the text box. To confirm that this is the passcode you want, you will have to re-enter your passcode to confirm. With a successful match, this will be the passcode used when logging into Relativity's mobile app.

1.7 Navigation

1.7.1 Opening a workspace

On the workspace list, you can perform the following actions to find the workspace you want:

- Sort the list in ascending or descending order by tapping on the column header.
- Filter a list by tapping on the search filter and typing in the name of the workspace. You can filter on fixed-length and long text fields along with decimal and whole number fields.
- Select a different workspace view from the View drop-down menu at the top to change the displayed fields, criteria, or sorting for workspaces.

Tap on the Name of any workspace to open it.

The document list displays for the selected workspace.
Note: At any place in Relativity’s mobile app, you can tap the Relativity logo to expand the side panel and tap Workspaces to view the workspace list.

1.7.2 Navigating your document list in a workspace

You can perform the following actions to find a document in your document list:

- **Sorting by document field column** – tap the column header to toggle between sorting the results for that column in ascending order and descending order.
- **Viewing more field columns** – swipe to the left in document table to view more field columns available in the view.
- **Infinite scroll** – swipe up with a finger to continue scrolling up until the end of the list of documents
- **Selecting a view** – tap the icon to expand the View drop-down menu, and then select the view that you want.
- **Using the folder browser** – tap the Folders sidebar icon to expand the document folder menu. See Using the Folder browser below.
- **Running a saved search** – tap the Saved Searches sidebar icon to expand the saved search folder menu to select a search. See Running a saved search on the next page.

1.7.2.1 Using the Folder browser

1. Tap the Folders icon to expand the folder browser menu.
2. Tap on a listed folder to view the document list showing the content of that folder (and any criteria applied by the selected view).

If a folder has subfolders, continue tapping on the folder to display the list of subfolders to the right. Tap the - icon to collapse the list of subfolders. When tapping on a root folder, the document list will update.

Note: Folders with security permission restrictions show up with a locked icon (🔒).
3. Tap on the hyperlink in the first column to open the document in the Viewer. See Document viewer navigation on the next page.

1.7.2.2 Running a saved search

1. Tap the Saved Searches icon to expand the saved search browser menu.
2. Tap on a saved search folder to view content within the folder.

- Saved folders display with the icon. Tapping on the folder displays the list of searches and any subfolders within that folder to the right. Tap the icon to collapse the list of subfolders. Tapping on a root folder does not update the document list.
- Saved searches display with the icon. Tapping on a saved search runs the saved search and displays the list of documents matching the search criteria.

**Note:** Saved search folders with security permission restrictions show up with a locked icon ( ).

3. Tap on the saved search you want to run.

A list of documents matching the search criteria appears.
4. Tap anywhere in the row in the first column to open the document in the Viewer. See Document viewer navigation below.

A saved keyword search needs to be created in Relativity before it can be run in Relativity's mobile app. For more information on creating a saved search, see Creating or editing a saved search.

**Note:** Keyword searches are the only type of saved search currently supported in Relativity's mobile app.

### 1.7.2.3 Pull to refresh

If at any time you would like to refresh the document list, place one finger anywhere in the list and pull down. Pull down far enough and take your finger off the screen. A loading image will appear and the document list will be updated. If the page was not pulled down far enough, the loading icon will not appear and the document list will not be updated.

Pull to refresh will not remove any filters or sorting selections that were made before refreshing the document list.

### 1.8 Document viewer navigation

#### 1.8.1 Navigating the document Viewer

After tapping on a document, the document opens up in the Viewer and for review and coding.

The document Viewer has three modes:

- **Viewer mode** – tap on the Viewer icon to view the text of the document.
- **Image mode** – tap on the Image icon to view an image of the document.
- **Production sets mode** – tap on the Production Set icon to view an image of the document.

Relativity's mobile app displays the following navigation options in the document Viewer:
### 1.8.2 Viewer mode

When you are in Viewer mode, you can view all documents in portrait and landscape orientation to perform the following actions:

- Coding documents below
- Zooming in a document on the next page
- Swipe to page on the next page

#### 1.8.2.1 Coding documents

Coding documents can be done when in Viewer mode. To code documents while in this mode, tap on the Coding icon on the top right of the screen to expand and collapse the Coding pane. For more information on coding documents in Relativity's mobile app, see [Coding documents on page 18](#).

**Document Skip & Propagation**

Propagation will need to be enabled from the Relativity instance on a desktop. For more information on setting up propagation in Relativity, see [Enabling document skip](#). Document skip and propagation...
in Relativity's mobile app provides more ease of use to code by letting users code documents efficiently.

Make your coding decisions in the coding layout. Once the coding decisions are made, click the **Save & Next** button to save the decisions, propagate the decisions to family or duplicate documents, and then move to the next document in the list.

1.8.2.2 Zooming in a document

In Viewer mode, zoom into a document with two fingers on the screen and move them away from each other. To zoom out, start with two fingers on the screen and pinch the fingers. If it is a multiple page project, only one document can be zoomed in or out at a time.

1.8.2.3 Swipe to page

At times, documents include more than one page. Swipe a finger to the left to move to the next page in the document and swipe to the right to go to the previous page.

1.8.3 Image mode

In Image mode, you can perform the following actions:

- Viewing an image below

1.8.3.1 Viewing an image

In Viewer mode, tap on the Image icon to load a read-only version image of the selected document in the viewer. If a document has more than one image, swipe to the left to see the next page in an image and to the right for the previous page in an image. To navigate to the next image, tap the **Next** button. Tapping **Next** or **Previous** will open the next document that has been imaged.

If the image has been redacted, Relativity's mobile app only displays the first markup set with no capability to switch between other markup sets. These visible redactions also cannot be edited and additional redactions cannot be made.

If the Image icon is unavailable, it will appear dimmed. An Imaging set will need to be created in Relativity. For information on creating an imaging set in Relativity, see [Imaging sets](#).

1.8.4 Production sets mode

In production mode, you can perform the following actions:

- Viewing a production set below

1.8.4.1 Viewing a production set

When viewing documents, tap on the production sets icon located on the left side of the page. Tapping on the icon switches the viewer mode to production mode, displaying documents that have been produced on Relativity. If there are more than one production set in your workspace, another side navigation will appear. In this, tap the radio button next to the production set you want to view.
To see how to create a production set in Relativity, see Production sets.

1.9 Coding documents

1.9.1 Selecting a coding layout

Layouts created in Relativity are immediately available in a rendered and optimized manner for the application. The available layouts in this list are indicative of the security permissions you have.

To select a coding layout:

1. Tap the Coding icon to expand the coding pane on the right. You can tap Coding again to collapse the pane.
2. Select a layout by tapping on the drop-down menu at the top of the coding pane, and then tap on the layout you want.

The selected layout displays below. You can proceed to Coding a document on the next page.

1.9.1.1 Multiple layout groups

Multiple groups in a layout can exist, as they do in Relativity. To view another group while coding a document, tap on the group name at the top of the layout. If all groups are not visible, swipe left to view the remaining groups. Tap to view the group when the group is visible.
1.9.2 Coding a document

To code a document:

1. Tap the **Coding** icon to expand the coding pane on the right. Tap the **Coding** icon again to collapse the pane.
2. Select a layout by tapping on the drop-down menu at the top of the coding pane, and then tap on the layout you want.
3. Tap the radio buttons, check boxes, or text fields to make your coding choices in the document for the available fields on the layout.
4. Tap Save or Save & Next at the bottom of the screen to save your coding choices.

1.9.2.1 Coding fields

Layouts consist of coding fields and Relativity's mobile app supports all coding fields. These coding fields can be required, optional, or read-only. Orange bars appear next to required fields. Optional fields don’t have an orange bar. Read-only fields, such as file field types, will be dimmed.
Choices and objects

In most instances, choices and objects appear as check boxes and radio buttons. When there is a small amount of choices, the choices can be selected in the layout itself. When there is a high number of choices, a pop up menu appears. Tap on your desired option and then tap the Update button.

Fixed-length and long text

Tap on the text box below the field name to being to update the field. Tapping on the text box will display a larger text box on your screen. Tap the text box when it is available to bring up the keyboard.

For voice-to-text, tap the microphone icon on the device's keyboard. If it is your first time using voice-to-text, a pop up menu will appear asking you if you would like to enable dictation. Tap Enable Dictation. If dictation is set up, begin to speak at a steady pace and the application will dictate what you say. To save the text, tap Done and then tap Update in the text box.

Decimal and whole numbers

Both decimal and whole numbers are supported in mobile layouts. To enter any number in a decimal or whole number field, tap on the text box. Once the text box is activated, the devices keyboard will appear in the number and symbols mode.

Date and time

Tap on the date fields to set the date and time. Tap the Set Date link, or the date that has already been selected, to open up the date and time selector. Swipe up or down in each column to select the appropriate date and time.

1.9.2.2 Propagation

The propagation function codes duplicate documents or documents in the same family. For example, if a document is coded Responsive, the documents in the family are also given the Responsive designation. This function improves your workflow by cutting back the amount of documents that need to be coded by you or members of your team.
Propagation can be activated by your Relativity system admin. For more information, see Applying propagation to documents. Talk to your system admin to set up propagation in your Relativity workspace.

1.9.2.3 Document skip

Document skip works concurrently with propagation. After propagation is enabled by you or your admin, the Next and Save & Next buttons will be propagating coding decisions to other documents. For example, when a document is coded Responsive and the next document is in the same family, that family document is skipped. All documents in the same family as the document that is originally coded Responsive will be skipped when using the Save and Next or Next buttons in the Coding layout.

Enabling document skip

To set up document skip, have a Relativity system administrator navigate to the user’s detail page. There are 3 settings that an admin can set for a user:

- **Enabled** - the switch is enabled by default and the user is able to switch between document skip and normal within the coding layout.
- **Force enabled** - the switch is enabled by default and the user is able to switch between document skip and normal. Document skip is the only option when coding documents.
- **Disabled** - the switch is disabled by default and the user is not able to change it within the coding layout.

1.9.2.4 Event Handlers

To run propagation and document skip, Relativity's mobile app supports certain Object Type event handlers.

Supported event handlers:

- **PreSave** - executes after a user changes field values and taps Save or Save & Next in the coding pane. For more information on PreSave event handlers, see PreSave event handlers.
- **PostSave** - executes after a user taps Save or Save & Next in a coding pane. For more information on PostSave event handlers, see PostSave event handlers.
- **PreLoad** - executes before the new, edit, or view page layouts load. For more information on PreLoad event handlers, see PreLoad event handlers.

Unsupported event handlers:

- Console
- PageInteraction
- PreCascadeDelete
- PreDelete
- PreMassDelete
For more information on event handlers, see Basic concepts for event handlers.
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