Relativity's mobile app Guide

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# Table of Contents

1 Relativity's mobile experience ................................................................. 4

1.1 Unified experience with Relativity ....................................................... 4

1.2 Device and system requirements ......................................................... 4

1.3 Compatibility matrix ............................................................................. 5

1.4 Security .................................................................................................. 6

1.4.1 Security and Permissions .................................................................. 6

1.4.2 Working with MobileIron .................................................................. 7

1.4.3 Working with AirWatch .................................................................... 8

1.4.4 Security information ........................................................................ 9

1.5 Getting started ....................................................................................... 10

1.5.1 Accessing Relativity's mobile app .................................................... 10

1.5.2 Logging in ......................................................................................... 10

1.5.3 Logging out ....................................................................................... 12

1.5.4 Instance URL ................................................................................... 13

1.5.5 General navigation and icons .......................................................... 13

1.5.6 Troubleshooting .............................................................................. 14

1.6 User settings ......................................................................................... 15

1.6.1 Setting your passcode ..................................................................... 15

1.6.2 Change your passcode ..................................................................... 15

1.7 Navigation ........................................................................................... 16

1.7.1 Opening a workspace ..................................................................... 16

1.7.2 Navigating your document list in a workspace ............................. 16

1.8 Document viewer navigation ............................................................... 19

1.8.1 Navigating the document Viewer .................................................. 19

1.8.2 Viewer mode .................................................................................. 20
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.8.3 Image mode</td>
<td>20</td>
</tr>
<tr>
<td>1.8.4 Production sets mode</td>
<td>21</td>
</tr>
<tr>
<td>1.9 Coding documents</td>
<td>21</td>
</tr>
<tr>
<td>1.9.1 Selecting a coding layout</td>
<td>21</td>
</tr>
<tr>
<td>1.9.2 Coding a document</td>
<td>22</td>
</tr>
<tr>
<td>1.10 Searching</td>
<td>25</td>
</tr>
<tr>
<td>1.10.1 Using search indexes</td>
<td>25</td>
</tr>
<tr>
<td>1.10.2 Searching in documents</td>
<td>28</td>
</tr>
</tbody>
</table>
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 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 and system 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).

The server that your device and Relativity instance must support Transport Layer Security (TLS) 1.2 or above. The connection ciphers must also provide forward secrecy and your certificates must be signed with SHA256, or better, with at least 2048 bits for RSA or 256 bits for Elliptic Curve keys. To test your SSL server, see [SSL Labs](https://www.ssllabs.com).

Download Relativity's mobile app from the App Store

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Relativity | Relativity's mobile app Guide - 4
1.3 Compatibility matrix

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

<table>
<thead>
<tr>
<th>RelativityOne</th>
<th>Relativity 9.5.xxx.x</th>
<th>Relativity 9.5.196.1-02</th>
<th>Relativity 9.5.162.1-11</th>
<th>Relativity 9.5.133.1-18</th>
<th>Relativity 9.5.133.1-35</th>
<th>Relativity 9.5.104.1-50</th>
<th>Relativity 9.5.89.7-6</th>
<th>Relativity 9.5.69.8-5</th>
<th>Relativity 9.5.41.8-7 &amp; below</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile 1.4.1</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Mobile 1.4.0</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
<td>X</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>Mobile 1.3.0</td>
<td>X</td>
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<td>X</td>
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<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Mobile 1.2.1</td>
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<td>Mobile 1.2.0</td>
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<tr>
<td>Mobile 1.1.1</td>
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<td>Mobile 1.1.0</td>
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<td>Mobile 1.0.1</td>
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<td>Mobile 1.0.0</td>
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</tr>
</tbody>
</table>

RAP file is installed by default

Not supported

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 the 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.

1.4.1.1 Setting workspace permissions

Permissions can be set by a workspace or system administrator at a workspace level within a workspace in Relativity. Edit the mobile workspace permissions using the Workspace Security dialog accessible from the workspace tab. Access the dialog using the following steps in a workspace:

1. Click the Administration tab follow by Workspace Details.
2. Click Manage Workspace Permissions located in the Relativity Utilities console.
3. Click the Edit Permissions button for a chosen user group within the Workspace Security pop up.
4. Navigate to the Object security tab
5. Locate the Workspace permission.
6. Click the Visible on Mobile check box to set group visibility.
7. Click Save.
Groups can still access Relativity on a desktop or laptop computer when Visible on Mobile is unchecked.

**Note:** Visible on Mobile will be on as default for groups that already exist in a workspace. For groups that are added to a workspace, the Visible on Mobile permission is set to Off by default.

### 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 Working with AirWatch

AirWatch mobile device management is completely integrated into Relativity's mobile app. With the AirWatch MDM, you can take full advantage of its management and security features within AirWatch Console and AirWatch Agent. To start managing Relativity's mobile app through AirWatch, you will need access to the AirWatch Console. For more information on accessing AirWatch Console, see [AirWatch’s online help](#).

1.4.3.1 Logging in with AirWatch Agent

In order for a device to have all of the features and functionality of the AirWatch mobile device management, the AirWatch Agent app will need to be installed on each device. To install AirWatch on a device, open the iOS App Store on the device and locate the [AirWatch Agent app](#). After installing and opening the app to the device, you will need to enroll that device when logging into Relativity's mobile app. When logging in for the first time, the AirWatch Agent will be displayed. If you are not enrolled with AirWatch Agent, you will need to follow the instructions below to enroll:

1. Select an authorization method on the Welcome to AirWatch screen (email, Group ID, or QR code).
   
   **Note:** Group ID numbers and QR code are provided by the your organization's administrator.
2. Enter your credentials on the next screen.
3. Tap **Install** when the Device Manager Settings screen appears.
4. Enter in your 6-digit passcode that you enter to open your iPad.
5. Tap the **Install** button to install the mobile device management profile.
6. Tap the **Trust** button.

For more information on logging in, see [Logging in on page 10](#).

1.4.3.2 Managing devices

When a device has AirWatch installed and enrolled, the device, the user, and the application are restricted by the AirWatch console settings. These settings are controlled by your system administrator through the AirWatch Console.

A device that does not have AirWatch Agent installed will be unmanaged. Relativity's mobile app can still be accessed, but the device, the user, and the application cannot be managed through the AirWatch Console.
Transitioning between managed and authorized states

**Managed**

A user or an admin can change the status of their management state by adding or removing AirWatch Agent from the device or by turning off the AirWatch Agent on the device. When a user moves from unmanaged to managed, the AirWatch authorization will be queried on the subsequent launch of Relativity’s mobile app. When a device transitions from managed to unmanaged, AirWatch restrictions will be ignored on the subsequent launch of Relativity’s mobile app.

**Authorization**

If a user is not authorized through the AirWatch Console and then you authorize the user and their device, Relativity’s mobile app will allow passcode entry and will connect to the Relativity instance on the subsequent launch. When a device transitions from authorized to unauthorized, all data, including the passcode, will be deleted. A warning screen displays, notifying the user of the unauthorized state. When in the unauthorized state, the user cannot enter a passcode nor access the application.

**1.4.3.3 Wiping a device**

At times, a mobile device needs to be wiped, meaning to permanently remove data from the user's device connected with AirWatch. In order to wipe a single device, you will first need the user’s email address. Next, navigate to the your AirWatch Console to locate the user that matches the email address. This is where you will click the wipe device option. Confirm that you want to wipe the device to finalize the wipe.

When a device is wiped, all application data will be deleted by the AirWatch Console. Depending on your configuration of the AirWatch Console, the entire device including all applications may be wiped. For more information, see [AirWatch's Device Management](#).

**1.4.4 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 iOS10 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".

**1.4.4.1 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.

### 1.4.4.2 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](https://support.apple.com/en-us/HT204411) published by Apple for recommended passcode tips.

### 1.4.4.3 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 Accessing Relativity's mobile app

To view a workspace in Relativity's mobile app, you will need a system or workspace administrator to set the Workspace - Visible on Mobile security permission. Visibility for groups already in workspace will be default. Groups that are new to workspaces will not have visibility to Relativity's mobile app.

When a workspace in Relativity's mobile app is not visible for a group, access to Relativity on their desktop or laptop computer will still be available. For more information, see [Setting workspace permissions](https).

#### 1.5.2 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](https).

1. Tap on Relativity's mobile app icon.
   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 user name, 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. If you are having trouble logging in, see Troubleshooting on page 14.

**1.5.2.1 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 15.

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.
1.5.2.2 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.

1.5.3 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.
1.5.4 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. If you are having trouble logging in, see Troubleshooting on the next page.

1.5.5 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></td>
</tr>
<tr>
<td>![Workspace icon]</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><strong>Side panel menu icons</strong></td>
<td></td>
</tr>
<tr>
<td>![Workspaces icon]</td>
<td>In the expanded side panel, tap this icon to view your workspace list.</td>
</tr>
<tr>
<td>![Documents icon]</td>
<td>In the expanded side panel, tap this icon to view the document list for the selected workspace.</td>
</tr>
<tr>
<td>![Documentation icon]</td>
<td>In the expanded side panel, tap this icon to open up the mobile documentation site.</td>
</tr>
<tr>
<td>![Support icon]</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>![Settings icon]</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>![Logout icon]</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></td>
</tr>
<tr>
<td>![Folders icon]</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>
Tap the Saved Searches icon to expand the saved search browser folder structure you have set up in your Relativity workspace to find the search you want, and then tap on the search to view the relevant documents.

Tap either of these icons to expand or collapse the document folder or saved search folder pane on the left.

This icon indicates the item is a saved search.

This icon indicates the item is a document folder.

This icon indicates the item is a saved search folder.

The lock icon on a folder indicates there are security permissions assigned.

### 1.5.6 Troubleshooting

If your device or server are not set up properly before logging in, you might be taken to an error page or the application will crash. For more information on device and system requirements, see Device and system requirements on page 4. If you receive any errors or warnings, troubleshoot them with the solutions in the table below:

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter instance URL and tap the Next button, a browser states &quot;Relativity encountered an error. Please contact your system administrator.&quot;</td>
<td>Ensure you have the Mobile OAuth2Client installed in your instance by looking for the object or tab. The easiest way is to install the Mobile ADS application.</td>
</tr>
<tr>
<td>When loading a document, the viewer is redirected to the login screen.</td>
<td>The relativity instance had has the ExplicitBrowserWhiteList Instance setting modified to allow iOS browsers.</td>
</tr>
<tr>
<td>The app crashed, but there isn't a Fatal event in the logs and a message that a JetsamEvent was left on your device.</td>
<td>Plug your device in, open iTunes, and sync your device. The device logs can be found in !/Library/Logs/CrashReport/MobileDevice/JSmith's iPad/ and look for a log from your crash. For more information on syncing your device, see Apple support.</td>
</tr>
</tbody>
</table>

```xml
Apr 27 15:06:42 Mobi-8 SpringBoard[53] <Warning>: Application 'UIKitApplication:com.kcura.relativity[0x601e]' was killed by jetsam.
Apr 27 15:06:42 Mobi-8 kernel[0] <Notice>: LwVM::_generateMappedExtentsList - failed to
```
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.

[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 on the next page.
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 below.

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 page 19.

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 search 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 on the next page.
   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:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document list icons</strong></td>
<td>Tap this icon to expand and collapse the search index pane where you can search through documents using a keyword index or a pre-built dtSearch index</td>
</tr>
<tr>
<td><strong>In-document icons</strong></td>
<td>Tap this search bar icon to perform an in-document keyword search.</td>
</tr>
<tr>
<td></td>
<td>Tap this icon to view the document in full screen mode.</td>
</tr>
<tr>
<td></td>
<td>Tap this icon to view the document in Image mode (if there is an image of the document).</td>
</tr>
<tr>
<td></td>
<td>Tap this icon to view the document in Viewer mode (default).</td>
</tr>
<tr>
<td></td>
<td>Tap this icon to view the document in Production mode (if there is a produced version of the document).</td>
</tr>
<tr>
<td></td>
<td>Tap this icon to expand and collapse the coding pane where you can code the document or make comments. See <a href="#">Coding documents on page 21</a>.</td>
</tr>
<tr>
<td>&lt; Previous</td>
<td>Tap <strong>Previous</strong> or <strong>Next</strong> buttons to navigate to the next document in the document list.</td>
</tr>
<tr>
<td>Save</td>
<td>Tap <strong>Save</strong> in the coding layout to save the coding decisions.</td>
</tr>
</tbody>
</table>
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 below
- Swipe to page below

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 the next page.

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 on the next page
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 below**.

### 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.

(Click to expand)

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 are 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 be 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 be 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](#).

1.10 Searching

Relativity's mobile app is your way to take your workspace on the go. While on the go, you can find those important documents by running a keyword search within a document, using Relativity's default search engine, or by using advanced search functionality to run a dtSearch.

The available search functionality within Relativity's mobile app is the same as a desktop Relativity instance. Indexes, search operators, alphabet lists, and other operators or configurations made in Relativity will be reflected in Relativity's mobile app. If there are updates made to Relativity's index searches or in-document search, they will be reflected on your mobile device.

1.10.1 Using search indexes

Relativity's mobile app has dtSearch index and keyword index search functionality enabled providing advanced search functionality within the app. Search through your documents by using the index searches available in the document list view.

1.10.1.1 Selecting a search index

You can select the keyword search index by default or the dtSearch index you built by opening up the index search menu by tapping the magnifying glass on the top right corner. Once you tap on the magnifying glass, a menu slides out from the right. In this menu the index drop down is on the top left of the menu. Once the drop down is open, tap on any of the search indexes available to begin searching. If a search index is not available in Relativity's mobile app, you will need to build the
search indexes in a desktop instance of Relativity. Once the index is built, it will be selectable in Relativity's mobile app. To learn how to build a search index, see Creating a dtSearch index.

### 1.10.1.2 Using keyword index

Keyword search (or SQL index search) is Relativity's default search engine and will be available in Relativity's mobile app by default. You can use a keyword search to query a full text index. The long text and fixed-length text fields included in this index vary by workspace. To use the keyword index, follow the steps below:

1. Tap the magnifying glass.
2. Tap inside the Search Terms text box.
3. Enter your keywords or phrase using the keyboard.
4. (Optional) Tap the Sort by Rank check box.
5. Tap the Search button.

Within the document list, you will see all of the documents that include the terms or phrases that you searched for. To clear the search, you can tap on the Clear Search button on the bottom of the search panel. For more information on search strings, operators, and stop words, see [Keyword search](#).

### 1.10.1.3 Using dtSearch index

To start using search within your mobile workspace, a dtSearch index will need to be created on a desktop instance of Relativity. For more information on creating a search index, see [dtSearch](#). Once the dtSearch index is built, it is available in Relativity's mobile app.

After a dtSearch index is built in your Relativity workspace, you can begin to use it in Relativity's mobile app. To use this feature, follow the steps below:

1. Tap the Search icon in the top left corner to make the search pop out.
2. Tap the search bar to pop up your keyboard.
3. Enter in your keywords by using the keyboard.

**Note:** Separate search terms with a new line.

4. (Optional) Select any available option - stemming, fuzziness, sort by rank.
5. Tap the Search button. To stop a long running search, click Cancel.

After running the a dtSearch, Relativity's mobile app will display the documents that include the terms in the document list. Click into any of those documents to see the contents of those documents.

(Click to expand)
Sort by Rank

Tap on the Sort by Rank check box beneath the search box to sort the results in order of the most relevance to your search terms. The most relevant documents are listed at the top of the results set, with the least relevant documents, or the documents with the smallest number of keywords, is at the end of the list.

Stemming

Tap the Enable Stemming check box while using a dtSearch index will return documents containing grammatical variations of a root word. For example, a search on "apply~" returns documents containing the words "apply," "applying," "applies," and "applied." Because stemming only works with the root word, it generally doesn't return irregular variations of a verb. For example, a stemming search on "run~" would not return "ran." Stemming is limited to English only.

After you perform a stemming search, grammatical variations of the root word aren't highlighted in the document result set. For example, the words "applied" or "applying" aren't automatically highlighted in the viewer. You can enter "applied" in the text box, and then click the Search icon to locate hits or grammatical variations. For more information on stemming, see Using dtSearch syntax options.

Fuzziness

Tap the plus (+) or minus (-) icons in the Fuzziness Level section to perform searches that return documents containing spelling variations of a specified term. You may want to use fuzzy searching when querying documents that contain misspelled terms, typographical errors, or have been scanned with Optical Character Recognition (OCR).

In the Fuzziness Level menu, you can select a value from 1 to 10 by tapping the plus (+) or minus (-) icons, which applies to all terms in the text box. Larger numbers return terms with more variation. We recommend using values between 1 and 3 for moderate error tolerance. The following table describes the expected results for sample settings.

<table>
<thead>
<tr>
<th>Fuzziness level</th>
<th>Description of search results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td>Only returns the entered term.</td>
</tr>
<tr>
<td>1</td>
<td>Returns slight variations of the entered term.</td>
</tr>
<tr>
<td>4</td>
<td>Returns multiple variations of the entered term.</td>
</tr>
</tbody>
</table>

For more information on fuzzy searches, see Using dtSearch syntax options.
1.10.2 Searching in documents

Finding keywords or phrases within a document is an important task in the discovery process. Saved searches can already be created, but when you're on the move something could come up and you have to search documents for a new word or phrase. Relativity's mobile app is able to use keyword search in documents view. When viewing a document, a search bar is visible above the document.

After tapping into the search bar, a search pop up window will be available. Follow the steps below:

1. Tap inside the search box to open up the keyboard.
2. Enter in search term or phrase.
3. Tap the Search button in your keyboard.

| Keywords | ▼ ▼ ▼ Cancel |

Note: Single term or phrase searches are supported for in-document search. It does not support multiple terms or phrases and is case insensitive.

When there are multiple instances of your keyword or phrase, arrow buttons appear next to the search box. Tap on the arrow buttons to see the previous or next keyword highlighted. The arrows will only go through the keywords within the document you are currently viewing, including documents with multiple pages. To go to the next document, tap the Next button below the document to continue your document search. To clear or stop the in-document search, tap the Cancel button next to the directional arrows.
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