Relativity Analytics Specialist Study Resources

RelativityOne

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Exam Structure

This exam is designed for individuals who are responsible for administering conceptual analytics and active learning during Relativity projects, and who advocate for Relativity analytics within their organization. This individual is primarily responsible for identifying the analytics requirements of a project and performing the required tasks, including creating and updating conceptual indexes, creating and running conceptual analytics tools, and setting, monitoring, and interpreting the results of active learning projects. This individual can effectively communicate the value and application of each Relativity analytics feature and consult on conceptual analytics and active learning workflows.

The exam tests on conceptual analytics and active learning topics equally.

You will receive up to 80 items on the test, which includes a number of unscored items. We do not disclose which items are scored and unscored. Unscored items are used to introduce new exam items and provide Relativity performance statistics on the new content, which influences the future content of the exam. Unscored items are not included in the topic breakdown report you receive after completing your exam and do not impact your overall score.

You have 75 minutes to complete the exam.

The Analytics Specialist exam currently tests on RelativityOne.

Part 1

The first part of the exam consists of three scenarios, each with five questions. After you submit the scenario section, you will **not** be able to return to it and your answers are locked. The workflows covered in the scenarios are below:

- Scenario 1 of 3: Using conceptual analytics indexes and concept searches
- · Scenario 2 of 3: Using categorization and active learning
- Scenario 3 of 3: Administering an active learning project

Part 2

The second part of the exam consists of up to 65 questions, covering all topics listed in the table below. Question types include multiple choice, multiple response, ordering, and hot spot. Within Part 2, you will be able to revisit questions and change your answers.

The following table outlines the various objectives or topics tested on the exam, along with their importance. The importance impacts the level of detail tested, as well as the number of questions presented on that topic in Part 2.

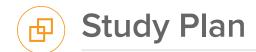
- The High importance topics require in-depth knowledge and hands-on experience.
 - High importance topics = 11-13% of Part 2
- The Medium importance topics require general understanding and some hands-on experience.
 - Medium importance topic = 7-9% of Part 2
- The Low importance topics require general knowledge.
 - Low importance topic = 3-4% of Part 2

Objective	Importance	
Solving review challenges using conceptual analytics		
Create and run conceptual indexes	High	
Use clustering and cluster visualization	Medium	
Create and run categorization sets	Low	
Use Concept search and Find Similar Documents	Low	
Set up and run repeated content identification	Low	
Keyword expansion	Low	
Active Learning Administration		
Set up an active learning project	Medium	
Manage active learning review queues	High	
Monitor active learning projects	High	
Run active learning project validation	Medium	

Exam Updates

The exam tests on RelativityOne and remains up-to-date based on RelativityOne releases. Review the <u>Exam Update</u> <u>Schedule</u> for upcoming exam changes. Plan accordingly when studying for the exam.

To view changes made to the exam from one version to the next, review the Change Log.



The purpose of this study plan is to provide guidance on how to most efficiently review all information covered on the Relativity Analytics Specialist exam. Documentation to help you review each exam topic is listed below. Completing every item on this list is not indicative of your exam performance.

Instructions:

- Each table below is associated to an exam topic.
 - Each row indicates a documentation page. Click on the link to navigate straight to the documentation.
 - If there is a bullet listed below a documentation page, you only need to study that section on the specified documentation page. If no bullet is listed, read the documentation page linked in its entirety.
 - As you review each exam topic, refer to the on-demand videos and tutorials on the <u>Relativity Analytics Specialist</u>
 <u>Study Resources</u> page associated to that topic.
- The tables are laid out by week and are intended to be completed within a three-month time period. However, these can be completed at your own pace based on your exam date.
- You may use the right column to mark activities complete as you go.

Before you begin your studies:

- Attend Relativity Analytics and Active Learning instructor-led training.
 - This training is optional, and is recommended for a full understanding of Relativity Analytics.
- Register for your exam on the <u>Relativity Community site</u>.
 - Learn more about exam registration, taking an exam online, the exam environment, and online exam system compatibility in the <u>Certification FAQs</u>.
- Understand topic importance. Topic importance indicates the required level of learning for the exam, and is listed with each table.
 - High: Requires in-depth knowledge and hands-on experience.
 - Medium: Requires general understanding and some hands-on experience.
 - Low: Requires general knowledge.
- Create a flashcard set.
 - While not required, we recommend you create a flashcard set to help test your knowledge of the exam topics. You can create your flashcard set virtually online, or with physical cards whichever you prefer. Be sure to add additional terms and concepts to this set as you learn more each week.
 - Do not use any existing flashcard sets you may encounter online or obtain from team members. Create your own for best learning and memorization value and to ensure accuracy.

WEEK	CREATE AND RUN CONCEPTUAL INDEXES	HIGH		
1	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.			
	Conceptual Analytics Overview			
	<u>Analytics Indexes</u>			
	Overview			
	Using Analytics indexes			
	Creating an Analytics index			
	Data source and training data source considerations			
	Analytics index console operations			
	Best practices for updating a conceptual index			
	Linking repeated content filters to a conceptual index			
	Quick Reference Guides			
	Analytics index quick reference guide (PDF)			
	On-demand training videos and tutorials			
	Listed on the <u>Analytics Specialist Study Resources</u> page.			
	Total expected hours: 3			
WEEK	USE REPEATED CONTENT FILTERS	LOW		
2	Repeated content filters			
	On-demand training videos and tutorials			
	Listed on the Analytics Specialist Study Resources page.			
	Total expected hours: 1			
WEEK	USE CLUSTERING AND CLUSTER VISUALIZATION	MEDIUM		
3	Clustering			
	<u>Cluster visualization</u>			
	Solutions Knowledge base			
	Cluster visualization QC workflow			
	On-demand training videos and tutorials			
	Listed on the <u>Analytics Specialist Study Resources</u> page.			
	Total expected hours: 2			
WEEK	USE CONCEPT SEARCH/FIND SIMILAR DOCUMENTS/RUN KEYWORD EXPANSION	LOW		
4	<u>Concept searching</u>			
	Find similar documents			
	Keyword expansion			
	On-demand training videos and tutorials			
	Listed on the <u>Analytics Specialist Study Resources</u> page.			
	Total expected hours: 2			

WEEK	CREATE AND RUN CATEGORIZATION SETS	LOW		
5	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.			
	<u>Categorization sets</u>			
	Quick Reference Guides			
	Conceptual analytics setup basics (PDF)			
	On-demand training videos and tutorials			
	 Listed on the <u>Analytics Specialist Study Resources</u> page. 			
	Total expected hours: 1			

WEEK	SET UP AN ACTIVE LEARNING PROJECT	MEDIUM
6	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.	
	Active learning - Basic Active Learning Overview	
	Active learning performance baselines	
	Creating an active learning project	
	Reviewer access	
	Reusing trained models	
	Quick Reference Guides	
	Active learning quick reference guide (PDF)	
	Community Knowledgebase Articles	
	Active learning: Large projects considerations	
	Active learning: Considerations around Suppress Duplicates	
	On-demand training videos and tutorials	
	Listed on the Analytics Specialist Study Resources page.	
	Total expected hours: 4	

WEEK	MANAGE ACTIVE LEARNING REVIEW QUEUES	MEDIUM
7	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.	
	Choosing an active learning review queue	
	Running prioritized review	
	Running coverage review	
	Solutions Knowledge base	
	Active learning to QC previously coded data	
	On-demand training videos and tutorials	
	 Listed on the <u>Analytics Specialist Study Resources</u> page. 	
	Total expected hours: 2	

WEEK	MONITOR ACTIVE LEARNING PROJECTS	HIGH
8	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.	
	Monitoring an active learning project	
	Review statistics	
	<u>Automated Workflows - Actions</u>	
	On-demand training videos and tutorials	
	 Listed on the <u>Analytics Specialist Study Resources</u> page. 	
	Total expected hours: 2	

WEEK	RUN ACTIVE LEARNING PROJECT VALIDATION	HIGH		
9	Project validation and elusion testing			
	Project validation statistics			
	Solutions Knowledge base: Recipes			
	How to handle suppressed duplicates at the end of your project			
	On-demand training videos and tutorials			
	Listed on the <u>Analytics Specialist Study Resources</u> page.			
	Total expected hours: 2			

WEEKS FINAL REVIEW

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Relativity Analytics Specialist Exam Practice Exercise

- · Complete the hands-on practice exercise with the sample data available on the Community.
- Review the answer key and your results.
- Note: A practice environment is not provided for this exercise.

Relativity Analytics Specialist Exam Sample Questions

- Use the sample questions to familiarize yourself with the types of questions that will appear on the exam
- Note: Sample questions are not inclusive of exam content, and should not be used to predict exam performance.

Ensure you meet the technical and physical requirements for your online exam.

Total expected hours: 3

WEEK TAKE THE EXAM

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Review the **Certification FAQs** for answers to all exam-related questions.

Schedule your Exam

Click the Schedule the Exam button in the Relativity Community.

Total expected hours: 2

Practice Exercise

The below exercise is meant to simulate a real-world scenario, and to help you think through how you might use Analytics in your job role. The goal is to provide a hands-on study tool to help familiarize yourself with the exam content, provide context as to when and how Relativity Analytics is used, and test your understanding of various Analytics features.

Read the exercise and complete the requested tasks. As you go through each step, think through what you need to do in order to accomplish the request and how each step you take can affect the outcome. Sample data for this exercise is provided on the Relativity Community. **As a reminder, there is no hands-on component of the Analytics Specialist exam.**

The Certification team does not provide a Relativity environment to practice this exercise. You are encouraged to use only a practice or sandbox workspace with Analytics installed. Please note you may be billed for Analytics usage outside of any practice or sandbox workspaces. If you do not have access to a sandbox workspace, think through how you would complete the exercise.

After completing the exercise, check your understanding using the answer key provided. There are multiple ways to accomplish many of the tasks in the exercise - the answer key only outlines one method. If you have questions on this exercise or the sample data, email certification@relativity.com.

Exercise: Counting on your reputation as an expert in Relativity Analytics, your colleague Mike approaches you about a project that is underway. He has created a conceptual index in this workspace, but his results are not coming back properly. He needs your assistance with fixing the index to make sure it is performing properly.

There are some emails being associated with each other incorrectly, presumably due to some boilerplate disclaimers in the emails. Mike also explains that your client showed concern that the word **film** keeps coming back when he runs expansions, and he wants this word ignored. You need to create a new conceptual index to handle all of these concerns.

Mike has created a cluster called "All Docs" for the client using the default settings. The client is unhappy that there are so many levels of clusters and the clusters are so small. They have requested that you create a new cluster with settings that do not have sub-clusters.

The client has requested that you supply some information about the new index. Include the following:

- Number of Data Source Documents
- Number of Training Data Source Documents
- Number of documents excluded from training
- Average Document Size in Words
- Unique Words per Document

Mike is tasked with creating an active learning project for his client. Help Mike by building a classification index in the workspace. Then, create an active learning project so the client can begin their review process.

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Practice Exercise - Answer Key

Paragraph 1: Troubleshooting a conceptual index

To remove large disclaimers in the emails, you'll need to run repeated content identification, and add a stop word to the conceptual index. Then, you'll need to link the repeated content filter to the conceptual index, and populate the index.

Remove large email disclaimers:

- 1. Create and run a new structured analytics set for repeated content identification.
 - a. The sample data provided is an abbreviated set. To accommodate, change the **Minimum Number of Occurrences** field to 20 to ensure accurate results for your repeated content identification. You can find more information on how to properly set the number of occurrences in our documentation for <u>Creating a structured analytics set</u>.
 - i. Note: Structured analytics is not tested on the Analytics Specialist exam, but repeated content filters are covered at a high level on the exam.
- 2. Mark any repeated content filters that contain the word "confidential" or "WARNING" in the **Configuration** column with **Ready to Index** = Yes.

Ignore the word "film" in the index:

- Create a new conceptual index.
 - a. Expand the **Advanced Settings** tab.
 - b. Add the word "film" to the **Stop words** section.
 - c. Save the index.

Link repeated content filters to the index:

- 1. From your conceptual index, scroll down to the **Repeated Content Filters** section.
- 2. Link the filters selected in Step 1 to your index.

Populate the conceptual index:

3. Click the Run button on the Analytics Index console, then choose Full.

Paragraph 2: Clustering

Create a new cluster set with no sub-clusters.

Create a new cluster with no sub-clusters:

- 1. From the Folders Browser, select all documents.
- 2. Select the **Cluster** mass operation.
- 3. Cluster Options: Create New Cluster
 - a. Name: All Docs
 - b. Select the conceptual index you just created.
 - c. Advanced options:
 - Maximum Hierarchy Depth: Change to 1 this controls the amount of sub-clusters.
- 4. Click Submit for Clustering.

Paragraph 3: Index information

Pull the following information from the conceptual index you just built. Numbers can vary depending on the data used. Numbers below are based upon the Sample Data provided on the Community site.

Supply index information to the client:

- · Number of Searchable Documents
- · Number of Training Documents
 - These can both be found in the conceptual index under the **Document Breakdown** section:
 - Data Source: 605
 - Training Data Source: 573
- · Number of documents excluded from training:
 - In the Analytics Index console, click the **Show Population Statistics** link:
 - Excluded: 32
 - You can also use the **Field Tree** on the Documents tab to find this answer.
- · Average Document Size in Words
- · Unique Words per Document
 - In the Analytics Index console, click the **Show Index Statistics** link:
 - Average Document Size in Words: 148.03
 - Unique Words per Document: 36.99

Paragraph 4: Active learning

Create a classification index. Create an active learning project. Specify a Review Field and a Positive Choice. Create an AL Permission Group (to be able to add a Reviewer to a Review Queue card). They need to ensure that the users have the proper permissions to view the AL Document List. Start the Prioritized Review with a Reviewer in the Queue Card.

Create a Classification Index:

- 1. Select the **Indexing & Analytics | Analytics Indexes** tab.
- 2. Click the **New Analytics Index** button.
- 3. The Analytics Index Information form appears. Complete the following fields on the Analytics Index Information form:
 - a. Name: Mike's Classification Index
 - b. Index type: Classification
 - c. Data Source: Saved search including all of the documents on which you want to perform any Analytics function. Only documents included in the data source are returned when you run clustering, categorization, or any other Analytics feature. See <u>Data source considerations</u> for more information on creating an optimized data source.
- 4. Click Save.
- 5. When you save the new index, the Analytics Index console becomes available. Click the **Run** button on the Analytics Index console, then choose **Full**.

Create an active learning project:

- 1. Create and save a field for your Review Field:
 - a. Object Type: Document
 - b. Name: AL Designation

- c. Field Type: Single choice
- 2. Create two choices, positive and negative, for your AL Designation field named Responsive and Non-responsive.
- 3. Create a reviewer group, named AL Review Group, with the users you want to access the active learning review queue.
 - a. You can add or remove users from the group at any time. The users in this group are not automatically added to the active learning project. You must grant each individual access to the Review queue.
 - b. Add yourself to this group to test permissions.
- 4. Grant the review group at least the following **security permissions**:

Object security	Tab visibility	Other settings
Document - View, Edit	Documents	Browsers - None or Folders and/or
		Field Tree and/or Clusters

- a. If browser permissions are set to only Advanced & Saved Searches, reviewers can't access the Reviewer page.
- 5. From your workspace, navigate to Assisted Review | Active Learning Projects.
- 6. Click the **New Active Learning Project** button.
- 7. Complete the following **fields** on the Active Learning Project layout:
 - a. Project Name: Mike's AL Project
 - b. Analytics Index (Classification): Mike's Classification Index
 - c. Review Field: AL Designation
 - This field must have exactly two choices and is not available for any other active learning project. You can edit these choices after project creation.
 - d. Positive Choice: Responsive
 - e. Suppress Duplicate Documents: **Select No if planning to use the prioritized review queue. Select Yes if planning to use the coverage review queue.**
 - Selecting this option stops active learning from serving documents that are textually similar to other coded documents to another reviewer (this does not consider word order). This option reduces the total number of documents that need to be reviewed. Since these are not exact duplicates, you will most likely need to review suppressed documents after the project is complete.
 - f. Reviewer Group: AL Review Group.
- 8. Click Save.

Sample Quiz Questions

This sample scenario and sample question set are examples of the types of questions you may see on the Analytics exam. Use these sample questions to familiarize yourself with the various question types. After reviewing each question, review the study source to further your knowledge on each topic. Check your answers using the Answer Key.

Questions below are not inclusive of exam content and are only a small sample. Please review all other study resources before sitting for the exam. Your performance on these questions is not indicative of your exam performance.

Scenario: Conceptual Index

One million mostly English electronic documents were indexed before you were assigned to a matter. Another 25 scanned, handwritten documents were OCRed in an effort to make them searchable.

Your client has reported some problems with the current conceptual index. You are assigned to address these issues.

- The data source and training data source saved searches return the Extracted Text of all documents.
- · No additional filters were applied to the index.
- The account name, WorldCom, occurs too many times in the resulting cluster titles.
- What should you do to resolve the problem with the client name, WorldCom?
 - a. Add the client name to the Concept Stop Word list.
 - b. Run a keyword expansion on the client name.
 - c. Enable the email header filter on the conceptual index.
 - d. Re-run the cluster set including all documents.

Study Source

- What acceptable actions can you take to properly handle the OCRed documents? (Select all that apply.)
 - Exclude the OCRed documents and handle them manually.
 - b. Include the OCRed documents in the data source only.
 - Include the OCRed documents in the data source and training data source.
 - Include OCRed documents in the training data source only.

Study Source

- 3. Some of the document text had poor-quality OCR, and has now been overlaid. How can you update the index to reflect this new text?
 - a. Run an incremental build of the index
 - b. Run a full build of the index.
 - c. Add new repeated content filters.
 - d. Cluster the documents.

Study Source

Conceptual indexes

- 4. What does setting Optimize Training Set to Yes on a conceptual index remove from the training data source search? (Select all that apply.)
 - a. Lists that contain a significant amount of numbers.
 - b. Lengthy email conversations.
 - c. A list of words from the dictionary.
 - d. System files (EXE, DLL, etc.).

Study Source

Repeated content filters

- 5. List the following tasks in the proper order for filtering repeated content from a conceptual index.
 - a. Evaluate and tag desired filters.
 - b. Run repeated content identification.
 - c. Click Run on the index and select Full.
 - d. Apply filters to the Analytics index.

Study Source

- After what action must you run a full build of your conceptual index? (Select all that apply.)
 - a. Adding new documents to the workspace.
 - b. Removing documents from the data source.
 - c. Editing the extracted text of a document.
 - d. Adding a regular expression filter to the index.

Study Source

Concept search and find similar documents

- 7. What is possible with a concept search? (Select all that apply.)
 - a. The search returns no documents.
 - b. The search returns empty documents.
 - c. The search returns documents that share no terms with the data source.
 - d. The search returns documents that are **not** in the data source of the index.

Study Source

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- 8. You highlight text in your document, right-click the text and select Concept search, but you do **not** get any hits. Why might this be?
 - a. The text includes jargon that is **not** generally understood by a dictionary.
 - b. The text consists of **only** stop words.
 - c. The text is written using Traditional Chinese characters, which are **not** supported by conceptual indexes.
 - d. You highlighted too many words, and Analytics is unable to compute results for performance reasons.

Study Source

Analytics categorization sets and clustering

- 9. What Relativity Analytics feature involves classifying documents into conceptually similar groups based on user examples?
 - a. Concept searching
 - b. Clustering
 - c. Categorization
 - d. Find similar documents

Study Source

- 10. What can you submit for clustering? (Select all that apply.)
 - a. Documents returned in a saved search.
 - b. Documents located in a specific folder.
 - c. All documents in the workspace.
 - d. Documents loaded into custom objects.

Study Source

Active learning project setup

- 11. What field does the active learning application create after you set up your project? (Select all that apply.)
 - a. Project Name Reviewer:: User
 - b. Project Name: Classification
 - c. Project Name: Prioritized Review
 - d. Project Name: Project Validation

Study Source

- 12. Prior to creating an active learning project, the review team coded 100 documents Responsive and 150 documents Not Responsive on the project review field. What happens when the project is created? (Select all that apply.)
 - The pre-coded documents are used to update the model and rank scores.
 - b. The pre-coded documents are treated as skipped for the purposes of the project
 - The Responsive pre-coded documents are reflected in the relevance rate in the Prioritized Review Progress chart
 - d. The pre-coded documents are included in the count of manually-selected documents.

Study Source

Active learning review queues

- 13. Until the first model is built and the documents are ranked, what does the Prioritized Review queue serve up?
 - a. No documents (i.e. it cannot be enabled).
 - b. Random documents.
 - c. Documents with the largest extracted text size.
 - d. Documents with the lowest Artifact ID.

Study Source

- 14. What best describes the Coverage Queue in active learning? (Select all that apply.)
 - Serves up documents that are most likely to be relevant with a small set of documents included for index health.
 - Serves up documents that are optimal for training the model.
 - c. Quickly separates documents into positive choice and negative choice categories.
 - d. Gets a large percentage of relevant documents to the reviewers.

Study Source

Active learning project validation

- 15. What happens when you update the responsive cutoff value when starting Project Validation?
 - a. Only the Project Validation cutoff value is updated.
 - b. Only the update ranks cutoff value is updated.
 - Both the Coverage Review queue and Prioritized Review queue are updated.
 - d. Both the Project Validation and Update Ranks cutoff value are updated.

Study Source



Sample Questions - Answer Key

Scenario: Conceptual Index

- 1. a
- 2. a, b
- 3. b

Conceptual indexes

4. a, d

Repeated content filters

- 5. b, a, d, c
- 6. c, d

Concept search and find similar documents

- 7. a, c
- 8. b

Analytics categorization sets and clustering

9. c

10. a, b, c

Active learning project setup

11. a, c, d

12. a, d

Active learning review queues

13. b

14. b, c

Active learning project validation

15. d



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Change Log

1. December 20, 2023 - Posted document. Updated exam version to RelativityOne 2024. No major updates.