Relativity Analytics Specialist Study Resources

RelativityOne 2024.3

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Relativity®
ANALYTICS SPECIALIST

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Exam Structure

This exam is designed for individuals who are responsible for administering AI-powered workflows during Relativity projects and those who advocate for Relativity analytics within their organization. This individual is responsible for identifying the analytics requirements of a project and the administration of conceptual analytics and Review Center projects. This individual can effectively consult on and communicate the value of each Relativity analytics feature.

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: Use conceptual analytics indexes and concept searches
- Scenario 2 of 3: Set up your Review Center workflow
- Scenario 3 of 3: Interpret Review Center results

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 and multiple response. 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 = 13-16% of Part 2**
- The Medium importance topics require general understanding and some hands-on experience.
  - **Medium importance topic = 7-10% of Part 2**
- The Low importance topics require general knowledge.
  - **Low importance topic = 2-5% of Part 2**

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Objective	Importance
Solving review challenges using conceptual analytics	
Create and run conceptual indexes	High
Use clustering and cluster visualization	Medium
Use Concept search and Find similar documents	Medium
Set up and run repeated content identification	Low
Run keyword expansion	Low
Create and run categorization sets	Low
Review Center Administration	
Set up a Review Center queue	High
Monitor review progress	High
Run review validation	High
Manage a Review Center queue	Medium

Exam Updates

The exam tests on RelativityOne and remains up-to-date based on RelativityOne releases. Review the Exam Update Schedule 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.

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Study Plan

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 or an on-demand video or tutorial. Click on the link to navigate straight to the resource.
  - If there is a bulleted list below a documentation page, you only need to study that section(s) on the specified documentation page. If there is no list, read the documentation page in its entirety.
- 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

- Register for your exam on the Relativity Community.
  - Learn more about exam registration, taking an exam online, the exam environment, and online exam system compatibility in the Certification FAQ.
- 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 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 the best learning and memorization value and to ensure accuracy.

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WEEK 1	CREATE AND RUN CONCEPTUAL INDEXES	HIGH
	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.	
	Relativity Documentation	
	Conceptual Analytics Overview	
	Analytics Indexes	
	• Overview	
	• 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	
	On-demand training videos and tutorials	
	Conceptual Analytics Foundations: Creating & Using a Conceptual Analytics Index	
	Total expected hours: 4	

WEEK 2	CREATE AND RUN CATEGORIZATION SETS	LOW
	Relativity Documentation	
	Analytics categorization sets	
	Quick reference guides	
	• Conceptual analytics setup basics	
	Total expected hours: 1	

WEEK 3	USE CLUSTERING AND CLUSTER VISUALIZATION	MEDIUM
	Relativity Documentation	
	Clustering	
	Cluster visualization	
	Relativity Community Knowledgebase	
	Cluster Visualization QC Workflow	
	Total expected hours: 2	

WEEK 4	SET UP AND RUN REPEATED CONTENT IDENTIFICATION	LOW
	Relativity Documentation	
	Repeated content filters	
	On-demand training videos and tutorials	
	Repeated Content Identification Foundations: Running a Set	
	Total expected hours: 1	

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WEEK 5	USE CONCEPT SEARCH AND FIND SIMILAR DOCUMENTS/RUN KEYWORD EXPANSION	MEDIUM
	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.	
	Relativity Documentation	
	Concept searching	
	Find similar documents	
	Keyword expansion	
	On-demand training videos and tutorials	
	Find Similar Documents & Concept Search Introduction	
	Total expected hours: 2	

WEEK 6	SET UP A REVIEW CENTER QUEUE	HIGH
	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.	
	Relativity Documentation	
	Review Center Overview	
	Creating a Review Center queue	
	Review Center security permissions	
	Quick reference guides	
	• Review Center - Admin	
	On-demand training videos and tutorials	
	Review Center Foundations: Key Functionality & Workflows	
	Review Center Foundations: Create/Edit Queue Templates and Manage Queues	
	Total expected hours: 5	

WEEKS 7 - 8	MANAGE A REVIEW CENTER QUEUE/MONITOR REVIEW PROGRESS	HIGH
	Note: This topic has an associated exam scenario. Scenarios test on application knowledge of a real-life workflow.	
	Relativity Documentation	
	Monitoring a Review Center queue	
	Reviewing documents using Review Center	
	Total expected hours: 3	

WEEK 9	RUN REVIEW VALIDATION	HIGH
	Relativity Documentation	
	Review validation	
	Review validation statistics	
	Total expected hours: 3	

WEEKS 10 - 11	FINAL REVIEW	
	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 to take your exam.	
	Total expected hours: 1	

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WEEK 12	TAKE THE EXAM	
	Review the Certification FAQ for answers to all exam-related questions.	
	Schedule your Exam	
	• Click the Schedule the Exam button in the Relativity Community.	
	Total expected hours: 2	

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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 OCR'd 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.

1. 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

2. What acceptable actions can you take to properly handle the OCR'd documents? (Select all that apply.)
   a. Exclude the OCR'd documents and handle them manually.
   b. Include the OCR'd documents in the data source **only**.
   c. Include the OCR'd documents in the data source and training data source.
   d. Include OCR'd 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

6. 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

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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

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

Managing a Review Center Queue

11. What documents are listed in the Documents panel in the viewer when in a Review Center queue?
   a. Documents the queue will serve next to this logged in user.
   b. Documents the queue will serve next to one of the reviewers in the queue.
   c. Documents the logged in user has reviewed in the queue.
   d. Documents the logged in user has coded inside or outside the queue.

Study Source

Review Center queue setup

12. What items does Review Center create upon setting up a new queue?
   a. Queue templates
   b. Coding pivots
   c. Permissions group
   d. Queue label

Study Source

13. Prior to creating a Review Center queue, the review team coded 100 documents Responsive and 150 documents Not Responsive on the review field. What happens with those documents when the project is created?
   a. The outside coded documents are used to update the model and rank scores.
   b. The outside coded documents are treated as skipped.
   c. The Responsive outside coded documents are treated as neutral.
   d. The outside coded documents are included in the Reviewed Documents table.

Study Source

Review Center queue use cases

14. 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. Documents with the largest extracted text size.
   c. Documents with the lowest Artifact ID.
   d. Random documents.

Study Source

15. What best describes coverage mode in Review Center?
   a. Serves up documents that are most likely to be relevant.
   b. Serves up documents that are optimal for training the model.
   c. Focuses on documents least likely to be responsive to train the model.
   d. Gets a large percentage of relevant documents to the reviewers.

Study Source

Review Center validation

16. What additional validation metric is calculated if you set a cutoff?
   a. Precision
   b. Recall
   c. Elusion Rate
   d. Richness

Study Source

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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

Managing a Review Center Queue

11. c

Review Center queue setup

12. a
13. a

Review Center queue use cases

14. d
15. b

Review Center validation

16. a

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Change Log

1. December 20, 2023 - Posted document. Updated exam version to RelativityOne 2024.
2. August 20, 2024 - Updated exam version to RelativityOne 2024.3. Active Learning removed and Review Center added to the exam.

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