

# Relativity Project Management Specialist Study Resources

RelativityOne 2025

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# Exam Information

The Project Management Specialist is designed for individuals who oversee all aspects and processes through the lifecycle of an eDiscovery project in Relativity. This individual is primarily responsible for organizing the end-to-end solution and configuration for a Relativity project. This individual can efficiently leverage the full range of Relativity capabilities in a case workflow, anticipate the needs of the client, and consult on creative solutions to data challenges.

## Exam Structure

You will receive up to 85 items on the exam, 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 will have 75 minutes to complete the exam.

### Part 1

The first part of the exam consists of seven 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 7: Managing data before and after loading
- Scenario 2 of 7: Performing early case assessment and culling
- Scenario 3 of 7: Preparing your workspace for review
- Scenario 4 of 7: Performing linear review
- Scenario 5 of 7: Running a Review Center queue
- Scenario 6 of 7: Preparing and executing a production
- Scenario 7 of 7: Case management and post-production workflows

Part 1 typically takes more time than Part 2. Consider this as you are preparing for and taking your test.

### Part 2

The second part of the exam consists of up to 50 questions. Question types include multiple choice and multiple response. Part 2 will consist of questions that test your ability to recall information as well as questions that require you to understand scenarios and apply your knowledge to determine the correct response.

Within Part 2, you will be able to revisit questions and change your response.

The following table outlines the objectives tested on the exam in Part 2, along with their importance. The level of importance impacts the number of questions presented on that objective.

- The High importance objectives make up 13 - 15% of Part 2
- The Medium importance objectives make up 8 - 10% of Part 2
- The Low importance objectives make up 3 - 5% of Part 2

Objective	Importance
Running a review workflow	High
Searching in Relativity	High
Running productions	High
Using Relativity Analytics (includes Review Center)	High
Importing data	Medium
Using Relativity Collect	Medium
Using Relativity Processing	Medium
Exporting data	Medium
Understanding the RelativityOne platform	Low
Using Case Dynamics	Low
Working with the Transcripts application	Low

## Exam Updates

The Relativity Project Management Specialist exam tests on RelativityOne and will remain 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](#).



# Study Plan

The purpose of this study plan is to provide guidance on how to most efficiently review all information covered on the Relativity Project Management Specialist exam. Completing all recommendations is not indicative of your exam performance.

## Instructions

- Follow the [Relativity Project Management Specialist Study Plan](#) on Relativity Learning.
  - The plan is laid out by week and is intended to be completed within a three-month time period. However, it can be completed at your own pace based on your exam date and level of experience.
  - Each week is associated with an exam topic. You can view the topic importance and estimated time to complete in each week's description.
  - Each week has a course that lists all applicable documentation pages. If there is a bulleted list below a documentation page, you only need to study that section(s). If there is no bulleted list, study the documentation page in its entirety.
  - If there are self-paced learning courses that are applicable to an exam topic, you will see them in the associated week.

## Before you begin your studies

- Register for your exam on the [Relativity Community site](#).
  - 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. You must understand all available functionalities, where to use each product in a workflow, and how you can leverage each throughout a case.
  - Medium: Requires general understanding and some hands-on experience. You must understand basic functionality and how you can leverage each product throughout a case.
  - Low: Requires general knowledge. You must understand basic functionality and how you can leverage each product throughout a case.
- 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.



# Sample Quiz Questions

These sample questions are examples of exam questions. The exact questions will **not** appear on the 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 only serve as a small sample. Review all study resources before sitting for the exam. Your performance on these questions is not indicative of your exam performance.

## Sample scenario: Running a review

You loaded documents into a workspace and created a dtSearch index using default values. Your client now wants to do the following:

- Run a search terms report (STR) on the documents.
  - Include the following STR terms: In n Out Burger, Chipotle, Five Guys
- Highlight key terms and then create a report to identify the most important terms.
- Begin reviewing in Review Center, keeping families together.
- Review documents from the following custodians in this order: Simon, Houston, Frank, Arnold.

1. What action should you take on the dtSearch index in order to prepare it for searching the terms requested? (Select all that apply.)
  - a. Update the noise words list.
  - b. Update the alphabet file.
  - c. Run an incremental build.
  - d. Run a full build.

[Study Source](#)

2. What should you do prior to setting up persistent highlighting for the key terms? (Select all that apply.)
  - a. Create a search terms report.
  - b. Update the dtSearch index.
  - c. Add terms to the search terms report.
  - d. Synchronize highlights to markup sets.

[Study Source](#)

3. What should you do when creating the review queue?
  - a. Select a relational field.
  - b. Turn coverage mode on.
  - c. Select a saved search that only has documents with families.
  - d. Edit the queue display.

[Study Source](#)

4. What condition should you set on a view to see **only** documents that have not been coded on the Designation field and are **only** for the current reviewer? (Select all that apply.)
  - a. User Status | is logged in user
  - b. Designation | is not set
  - c. Review Center Coding::Reviewed By
  - d. Reviewed | is not set

[Study Source](#)

5. The client wants to see how many documents are tagged Responsive for each search term. How can you present this information?
  - a. Create a Pivot widget for Designation by STR - Key Terms.
  - b. Run a Tally operation on the Designation field.
  - c. Export a list of Responsive documents with key terms.
  - d. Take a sample of Responsive documents with key terms.

[Study Source](#)

## Importing

6. What can you schedule to run automatically? (Select all that apply.)
  - a. Automated Workflows
  - b. Processing
  - c. Integration Points
  - d. Collect

[Study Source](#)

## Review

7. What report types are available with the Transcript Report mass action? (Select all that apply.)
- a. Annotation Digest
  - b. Key Terms
  - c. Word Index
  - d. Highlights

### [Study Source](#)

8. How can you import short message data into Relativity?
- a. Create an RSMF file of the data and use Processing to ingest it.
  - b. Create an RSMF file of the data and use Import/Export to import it.
  - c. Use Import/Export to create and import an RSMF file.
  - d. Use Relativity Processing to create an RSMF file and import it with Import/Export.

### [Study Source](#)

## Searching

9. Using dtSearch, what syntax returns documents containing grammatical variations of the root word **stop**?
- a. stop~
  - b. stop%
  - c. stop?
  - d. stop\*

### [Study Source](#)

## Analytics

10. An attorney coded several documents with various issues and wants to find other documents that likely have the same issue. What feature can help best identify those documents?
- a. Review Center
  - b. Search terms report
  - c. Clustering
  - d. Categorization

### [Study Source](#)

11. You identify several relevant documents during a review of priority documents. The case team has a limited amount of time to review the remaining documents and would like to use Review Center. What must be done prior to creating the queue? (Select all that apply.)
- a. Set up the index.
  - b. Set up the reviewer group.
  - c. Create a review field and a rank output field.
  - d. Create a saved search.

### [Study Source](#)

## Production

12. After staging a production, you are alerted that documents in your production set are also in your production restriction search for privileged documents. What is the quickest way to remove these documents from the production?
- a. Ask outside counsel to update privilege coding.
  - b. Delete and create a new production set.
  - c. Mass edit documents to remove the privileged coding value.
  - d. Click Remove Conflicts to remove the documents from the production set.

### [Study Source](#)

13. What production numbering types are available for a production set? (Select all that apply.)
- a. Document level numbering
  - b. Document field numbering
  - c. Native File numbering
  - d. Existing production numbering

### [Study Source](#)

## Platform

14. What is an essential step to becoming technically ready for RelativityOne? (Select all that apply.)
- a. Open ports for data transfer.
  - b. Confirm browser compatibility.
  - c. Understand the purpose and usage of Structured Analytics sets.
  - d. Configure user authentication.

### [Study Source](#)



# Answer Key

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## Sample scenario: Review and Batching

1. a, d
2. a, b, c
3. a
4. b, c
5. a

## Importing

6. a, c

## Review

7. a, b
8. a

## Searching

9. a

## Analytics

10. d
11. b, c, d

## Production

12. d
13. a, b, d

## Platform

14. a, b, d





# Content Distribution Disclaimers

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# Change Log

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1. December 20, 2023 - Posted document. Updated exam version to RelativityOne 2024. The Relativity Desktop Client (RDC) is no longer tested on the exam. Import/Export is now tested on the exam.
2. November 4, 2024 - Updated exam version to RelativityOne 2024.4. Active Learning is no longer tested on the exam, and Review Center is now tested on.
3. December 5, 2024 - Weekly study plan moved to Relativity Learning.
4. December 20, 2024 - Posted document. Updated exam version to RelativityOne 2025.