RCA Exam Study Resources

RelativityOne 2024

Last modified: February 16, 2024

Contents

Exam Information

Exam Details

The Relativity Certified Administrator (RCA) exam is designed for individuals who are primarily responsible for administering their organizations' instances and workspaces, and understand the full suite of Relativity's end-to-end features and capabilities. They are seen as an advanced Relativity professional within their team or organization.

Prerequisites

RCA exam eligibility is based on the following prerequisites:

- Attended training in Relativity (either from Relativity, your own company, or on-the-job).
    - If Relativity training, we recommend attending Relativity 101, Relativity Admin Essentials I
    - Recommended experience: One year of industry experience and six months of instance and workspace management experience with Relativity.
- The number of study hours varies depending on how much experience you have with Relativity, as well as your job function. Most people spend about 40 hours studying for the RCA exam.

Exam Information

Exam Updates

The RCA exam is updated based on RelativityOne releases. New content may be added to the exam quarterly. Plan accordingly when attending trainings and studying.

Relativity Practice Environment

Registered RCA attendees automatically receive access to a version-specific environment within three business days of exam registration if you do not already have an environment. You have 12 weeks of usage time in the environment. This time begins immediately upon receiving access to the environment.

In this environment, you can create your own workspaces to practice the Practice Project using the provided Sample Data on the Community site. For more information on how to use the prep environment, please review the **RCA Prep Environment Access** document.

Exam Format

Exam Format

All aspects of Relativity case administration, including structured analytics, data transfer, and processing are covered on the exam. Conceptual analytics and Relativity Legal Hold are not on the exam.

The exam is delivered in one part:

- Introduction and instructions - 15 minutes

- Online quiz, 75 questions - 75 minutes

The quiz may include 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.

Study materials and documentation are not permitted.

Exam Scoring

The RCA exam uses scaled scoring and requires a 700 or higher to pass. For more information on scaled scoring, please see the **Certification FAQs**.

Subject matter experts develop, test, and participate in standard setting to determine the minimum level of knowledge required to achieve the RCA certification. Please read the **How is the RCA exam scored?** knowledge article for more details about exam scoring.

You are required to accept an Exam Terms and Conditions agreement. If you do not accept, your session will end and you will forfeit the examination fee. You may access and review the Terms and Conditions **here**.

RCA Exam Blueprint

All questions on the quiz are weighted equally.

The following table outlines the various topics tested on the quiz portion of the exam, along with their importance. The importance determines the number of questions you will receive and the depth of understanding you must have on that topic. High importance topics include more questions, and low importance topics include fewer questions.

The High importance topics require in-depth understanding and extensive hands-on experience.
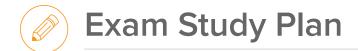
- **High importance topics = 7-11% of the quiz**

The Medium importance topics require general understanding and some hands-on experience.

* **Medium importance topics = 4-5% of the quiz**

The Low importance topics require general knowledge.

Objective	Importance
Setup and Management	
Set up and manage security and permissions	High
Create workspaces and manage instance objects	Medium
Install and configure applications	Medium
Create and modify workspace objects	Medium
Set up automated workflows	Low
Manage audits	Low
Demonstrate knowledge of repository workspaces	Low
Data Manipulation and Interaction	
Configure and run OCR	High
Run mass operations	High
Create dashboards	Medium
Set up and run imaging	Medium
Use Relativity Short Message Format (RSMF) files and the Short Message Viewer	Medium
Run scripts	Low
Search and Analytics	
Run searches	High
Create and modify indexes	High
Set up and run structured analytics sets	High
Use Review Center	Medium
Create search terms reports	Medium
Data In and Out	
Use data transfer applications	High
Manage productions	High
Prepare data post-review	High
Use Import/Export	High

Objective	Importance
Data In and Out (cont.)	
Run processing	Medium
Use case strategy tools	Low
Use Simple File Upload	Low
Use transcripts	Low

Exam Study Plan

The purpose of this study plan is to provide guidance on how to most efficiently review all information covered on RCA Exam quiz. Completing every item on this list is not indicative of your exam performance.

Instructions:

- The **RCA Study Plan** contains a week-by-week guide of which topics to study.
    - Each week contains links to multiple documentation pages. Click on the links to navigate straight to 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, refer to the documentation page linked in its entirety.
- The study 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 experience.

Before you begin your studies:

- Attend the following instructor-led trainings:
    - *Trainings are optional and recommended for a full understanding of Relativity case administration.*
        - **Relativity Admin Essentials I**
        - **Data Loading and Productions**
- Review and register for upcoming relevant **Ask the Expert** webinars.
- 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 FAQs**.
- Understand topic importance. Topic importance indicates the required level of learning for the exam.
    - High: Requires in-depth understanding of all aspects 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.

Sample Questions

This sample question set is an example of the types of questions you may see on the RCA 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 sample. Please review all other study resources before sitting for the exam. Your performance on these questions is not indicative of your exam performance.

Set up and manage security and permissions

1. **How can you restrict a group's access to a set of documents?**
   a. Apply object security to a document folder.
   b. Apply user-level security to a user.
   c. Apply object security to the Folders browser.
   d. Apply group-level security to a group.

   Study source

2. **What can members of the workspace admin group do? (Select all that apply.)**
   a. Edit script permissions.
   b. Manage queues.
   c. Add groups to the workspace.
   d. Edit permissions for groups in the workspace.

   Study source

3. **What admin operation permissions is necessary to view another user's private saved searches?**
   a. View Private Searches
   b. View Another User's Personal Items
   c. View Another User's Saved Searches
   d. Preview Security

   Study source

Run searches/Create and modify indexes

4. **Match the dtSearch operators to their associated functionality.**

Operator	Functionality
1. *	a. Matches an exact word or phrase.
2. ?	b. Returns documents containing spelling variations.
3. %	c. Returns documents containing grammatical variations of a root word.
4. ~	d. Matches any number of characters.
5. " "	e. Matches any single character

   Study source

5. **You run a saved search for all documents coded Responsive that were sent on October 21, 2001. You include family documents in the saved search. What documents are returned in the search?**
   a. All documents coded Responsive and all their family documents.
   b. Documents coded Responsive that were sent on October 21, 2001, and only their family documents that were also coded Responsive.
   c. Documents coded Responsive that were sent on October 21, 2001 and all their family documents.
   d. All documents coded Responsive that were sent on October 21, 2001.

   Study source

6. **How do you modify your dtSearch index to search for company names that include the period (.) or ampersand (&) characters?**
   a. In the Alphabet section, remove the characters from the spaces list and add them to the searchable characters list.
   b. Select the auto-recognition checkbox and add the characters to the noise words list.
   c. Put a ## sign in front of each character and compress the index after a full build.
   d. The period (.) and ampersand (&) characters cannot be made searchable in a dtSearch index.

   Study source

Run processing

7. **What stage of processing flattens files, captures metadata, extracts text, and copies the original file to storage?**
   a. Inventory
   b. Discovery
   c. Decryption
   d. Publish

   Study source

8. **What does processing do? (Select all that apply.)**
   a. Ingests raw data directly into a workspace.
   b. Identifies data that can be deduplicated.
   c. Records all item level metadata.
   d. Creates production sets directly from processed native files.

   Study source

Set up and run structured analytics sets

9. What information is displayed when you hover over an email icon in email thread visualization? (Select all that apply.)

    a. A list of the email's attachments.

    b. The email's Responsive designation.

    c. A list of entities and aliases included in the email.

    d. The date the email was sent.

Study source

10. Where do you find documents that were automatically excluded from your email threading set? (Select all that apply.)

    a. Show Document Errors button in the Error Handling section of the structured analytics set

    b. Field Tree Browser

    c. Saved Searches Browser

    d. Email Threading summary

Study source

11. When analyzing a document, what header information does name normalization take into consideration? (Select all that apply.)

    a. Subject

    b. CC

    c. From

    d. To

Study source

Create workspaces and manage instance objects

12. What non-document object is copied to a new workspace when using a template? (Select all that apply.)

    a. Matters

    b. OCR profiles

    c. Choices

    d. Views

Study source

Create and modify workspace objects

13. What do views control? (Select all that apply.)

    a. Fields to display.

    b. Criteria used to return documents.

    c. Number of items displayed per page.

    d. Default sort order.

Study source

14. What option is available for displaying multiple choice field values in a layout? (Select all that apply.)

    a. Checkboxes

    b. Pop-up pickers

    c. Drop-down lists

    d. Radio buttons

Study source

15. You created a fixed-length text field, but then determine the field should be a long text field. What must you do to change the field type?

    a. Edit the field and change it to long text.

    b. Run a script to change the field type.

    c. Create a new field and perform a mass replace.

    d. Create a new load file with the long text field.

Study source

Sample Questions - Answer Key

Set up and manage security and permissions

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

Run searches/Create and modify indexes

4.
    1. d
    2. e
    3. b
    4. c
    5. a
5. c
6. a

Run processing

7. b
8. a, b, c

Set up and run structured analytics

9. a, d
10. a, b
11. b, c, d

Create workspace and manage instance objects

12. b, c, d

Create and modify workspace objects

13. a, b, d
14. a, b
15. c

Practice Project

Practice Project Instructions

The RCA Practice Project is designed to help you assess your understanding of Relativity and your preparedness for the exam. This exercise helps you study by assessing your ability to apply your knowledge of Relativity to a new series of requests. Use this resource to test your ability to analyze and adapt to new situations in Relativity - the more you rely on analysis, and the less you rely on muscle memory, the better you'll do on the exam.

Before completing the Practice Project, review the following instructions and tips for success.

Project Instructions:

1. Download the **RelativityOne Sample Data** for the RCA Exam Workbook and Practice Project from the Relativity Community. You will use this data on the Practice project.

   - A global data set is also available on the Community. The same resources are available in that set for you to use on the Practice Project exercise

2. Before you begin, **create a new workspace** in the prep environment. Use your assigned **Practice_Project** template.

   - When selecting a template for your new workspace, be sure to find and use the Practice_Project template workspace assigned to you. Your assigned workspace name will include your first name and the initial of your last name.

3. Complete all tasks in your newly-created **Practice Project workspace** in your environment.

4. After you complete the project, review the **Practice Project: Worksheet**. Use this worksheet to review your work, and think about your performance and areas of improvement.

If you have general questions about this resource and how to use it, please email certification@relativity.com.

Practice Project

☐ If you haven't already, download the RelativityOne Sample Data for the **RCA Exam Workbook and Practice Project** from the Relativity Community.

☐ Create a new workspace using your assigned **Practice_Project template** for this exercise.

Project Tasks:

☐ In the Practice Project workspace, load the **saltvpepper.dat** using Import/Export. Map all load file fields and fix any errors.

☐ A member of your team, Shane Erver, is a member of the First Level Reviewers group and lets you know he is unable to complete his required tasks in the workspace. Update permissions for Shane's group based on the **PracticeProjectPermissions.txt** file in the **Practice Project Data and Resources** folder.

☐ To organize documents for review, use the **Default** Analytics profile to create and run an email threading structured analytics set for all documents in the workspace.

   – Create an email threading view to display your results.

☐ You just received a list of key terms in the matter. Run a report to find all documents containing the terms listed in the **PracticeProjectTerms.txt** file in the **Practice Project Data and Resources** folder.

   – Calculate unique hits, include family as a relational group, and ensure the results are saved to a field.

   – Ensure the saved search used as the searchable set cannot be accessed by **First Level Reviewers** in the workspace.

☐ Code all documents that contain the term **crude** as **Responsive** on the existing **Designation** field.

   – Create and run an imaging set of all Responsive documents sent in **October 2001**.

☐ Create a new dashboard named **Department Dashboard**.

   – Code documents and configure the new dashboard based on the requirements in the **PracticeProjectDashboard.txt** in the **Practice Project Data and Resources** folder.

   – Once configured, export the new dashboard to the desktop.

☐ The case team wants to see the production information for produced documents in the Viewer.

   – Create a view on the Production Information object that includes the following fields: Name, Production Type, Begin Bates, End Bates.

   – Share this new view on the **QC Layout**.

☐ Create and run a new production set that contains all documents coded **Responsive**, or any documents that contain any of the terms listed in the **PracticeProjectTerms.txt** file. Produce documents according to the specifications in the **PracticeProjectProduction.txt** file.

After you complete the Practice Project, use this worksheet to check your work and analyze your performance in a meaningful way. Answer the following questions to review the steps you took to accomplish each task.

☐ In the Practice Project workspace, load the **saltvpepper.dat** using Import/Export. Map all load file fields, and fix any errors.

- **When loading this file, you encountered errors caused by incorrect configuration of the Author field and Date Created field in the workspace. You also encountered an error in line 5. Make sure you resolve these errors before you import data to ensure you correctly load all metadata fields from the load file.**

- **While loading data, you may have noticed some load file field names (such as Email CC) did not match workspace field names exactly (such as CC). These fields do not Automap. You must map these fields manually in order to load the metadata.**

- **From the Documents tab, check that you have 688 total documents. Click into a document to verify the document natives, extracted text, and all other metadata loaded correctly.**

☐ Update permissions for Shane's group based on the **PracticeProjectPermissions.txt** file in the **Practice Project Data and Resources** folder.

- **To QC permissions, use the Preview Security feature for the First Level Reviewers group to ensure the group can accomplish all necessary tasks in the workspace.**

- **For additional practice with permissions, use the PracticePermissions.txt file available in the Project Sample Data set.**

☐ To organize documents for review, use the **Default** Analytics profile to create and run an email threading structured analytics set for all documents in the workspace.

- Create an email threading view to display your results.

  - **On the Practice Project, the Default Analytics profile and relational fields required for email threading are already created for you. What steps would you need to complete in order to run email threading if these objects were not already configured in your environment?**

  - **How did you configure your email threading view? What conditions, fields, and other settings did you select? How might you modify this view to include family documents?**

☐ You just received a list of key terms in the matter. Run a report to find all documents containing the terms listed in the **PracticeProjectTerms.txt** file in the **Practice Project Exam Data and Resources** folder.

- Calculate unique hits, include family as a relational group, and ensure the results are saved to a field.

- Ensure the saved search used as the searchable set cannot be accessed by **First Level Reviewers** in the workspace.

  - **If done correctly, your Search Terms Report will have 19 total hits, with 35 total hits including family.**

  - **What saved search did you use as a data source? How can you ensure you are only indexing the fields necessary?**

  - **How did you configure your dtSearch index? Think about any modifications you had to make to the noise words or alphabet file on the index, and any other types of modifications you may need to make on exam day.**

  - **What workspace settings did you have to modify to include family?**

  - **What does it mean to "ensure the results are saved to a field"? What other implications does this setting have?**

  - **How can you secure an individual folder from a specific group? How does this process change if you were to secure an individual field or view?**

  - **The number of terms in the PracticeProjectTerms.txt file is representative of the number of search terms you can expect to see on the exam. For additional practice with search terms, use the PracticeTerms.txt file available in the Project Sample Data set.**

- ☐ Code all documents that contain the term **crude** as **Responsive** on the existing **Designation** field.
  - – Create and run an imaging set of all Responsive documents sent in **October 2001**.
    - - **To code these documents, you had to create a new choice on the Designation field. If done correctly, you will code 128 documents Responsive, and image 23 documents.**
    - - **Because a specific imaging profile was not specified, you could use either the Basic or Native imaging profile. It's important to make sure your imaging set completed, and all documents were imaged. Consider what imaging errors or skipped documents might mean, and how you might resolve those issues should you encounter them.**

- ☐ Create a new dashboard named **Department Dashboard**.
  - – Code documents and configure the new dashboard based on the requirements in the **PracticeProjectDashboard.txt** in the **Practice Project Data and Resources** folder.
  - – Once configured, export the new dashboard to the desktop.
    - - **Consider when you would create a Pivot Profile as opposed to saving your current view as a dashboard.**
    - - **If the field(s) you want to include are not available in the Pivot drop-down, how can you enable these fields to be used in a pivot?**

- ☐ The case team wants to see the production information in the Viewer for the document you are viewing.
  - – Create a view on the Production Information object that includes the following fields: Name, Production Type, Begin Bates, End Bates.
  - – Share this new view on the **QC Layout**.
    - - **How can you modify the QC layout to be able to access the linked Production Information without going to the Production Sets tab?**
    - - **What are some other Objects to link to the layout that would make document review more efficient?**

- ☐ Create and run a new production set that contains all documents coded **Responsive**, or any documents that contain any of the terms listed in the **PracticeProjectTerms.txt** file. Produce documents according to the specifications in the **PracticeProjectProduction.txt** file.
    - - **How did you configure your production data source? If done correctly, the production includes 146 documents.**
    - - **The type of requirements in the PracticeProjectProduction.txt file are representative of the type of requirements you can expect to see on the exam.**

Helpful Documentation

The following links direct you to helpful documentation and knowledge base articles for the Practice Project and your studies. Please refer to documentation for clarification.

In addition to the links below, be sure to review the **Certification Knowledge Articles** on the Community site to find answers to commonly-asked questions about the RCA exam.

Set Up and Management

- Update **User Settings**
- **Copy** group permissions
- **Workspace Security**
- **Secure** items
- **Parse** date and time metadata into separate fields
- Create and edit **fields**
- Configure the **Track Document Field Edits by Reviewer** solution

Data Manipulation and Interaction

- Run **OCR** on documents
- Create a **dashboard**
- Create an **image set**

Search and Analytics

- **Create** a Review Center queue
- **Highlight** search terms
- Use **dtSearch syntax options**
- Search for **symbols** and special characters
- Run **Name normalization** on only the **email header fields**
- Set up and run an **email threading structured analytics set** and create a **view**
- Create a **report** to find all documents containing **Personally Identifiable Information** (PII)
- Complete a **conflict check**

Data In and Out

- **Import documents** using Import/Export, and resolve the errors using Import
- **Errors to Desktop Client**
- Overlaying **translated text**
- **Produce** documents
- **Import Entities**
- Upload a **transcript** and add **designations**

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Change Log

1. December 5, 2023 - Minor formatting updates; RCA Prep environment access updated to 12 weeks.
2. December 20, 2023 - Updated exam version to RelativityOne 2024. No major updates.