RCA Exam Workbook

RelativityOne 2024

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Relativity®
CERTIFIED ADMINISTRATOR

Contents

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About the Exam

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. Candidates for this exam should have at least one year of industry experience and six months of instance and workspace management experience with Relativity.

The exam consists of a 75-question quiz. Administrative training from Relativity or on-the-job training from your organization is required prior to registering for the exam. Experience with the software is also necessary to pass this exam. It is recommended that you have a minimum of six months of Relativity instance and workspace management experience and spend at least 40 hours preparing for this certification.

To learn more about the exam, please refer to the Relativity Certified Administrator Certification web page.

How to Use this Workbook

This workbook is divided into five parts and offers step-by-step instructions for a series of scenarios to solidify your understanding of several important RCA exam topics This workbook is designed as a reference tool to provide general guidelines and tips. Use this workbook in conjunction with the RCA Exam Study Resources document. Each part's Overview section lists relevant topics covered in the practice project and quiz. Along with this workbook, it is very important to be familiar with the Relativity documentation. **Not every exam topic has an associated exercise. You will need to reference Relativity documentation, the Relativity Training Center, and other study resources to supplement your knowledge of all exam topics, like:**

- Admin Guide
- Quick reference guides
- Solutions Knowledge base

You will also need to reference the documentation to answer the Knowledge Check questions located at the end of each part of the workbook. To best study for the RCA exam, use this workbook along with the other available RCA study resources on the Relativity Community site.

Conventions Used in this Workbook

Icon	Description
	Scenario/Task - Work request task.
	Pre-Exercise Checklist - Items to be completed on your own before the exercise. **Exercise -** Hands-on tasks with step-by-step instructions.
STOP	**Stop -** The end of an exercise.
	Resources - Additional materials to help you learn more about the subject.
	Note - Important topic information.
	Knowledge Check - Review questions related to section topics.

RCA Prep Environment

You will receive access to an RCA Prep Environment within three business days of exam registration. To study, use this workbook with the Prep Environment and RCA Sample Data, which you can download from the Relativity Community. Do not use this workbook to study in a production environment.

Prep Environment Policy

1. To practice for the exam, all RCA exam candidates will be granted access to a shared RelativityOne instance. Your user is configured with the following access in the environment:
   - You only have access to use and modify the workspaces assigned to you, and any workspaces you create. You cannot access any other user's workspaces.
   - You will automatically be added to a group created specifically for you. This group will be set as the Workspace Admin group for all of your assigned workspaces.
   - You will not have access to view or edit any instance-level objects, including users and groups.
2. You will gain access upon registration for the exam, if you do not already have workspaces. Your prep environment account will automatically delete after 12 weeks.
3. See the following **Using the Prep Environment** section for instructions on creating workspaces.
4. If you run into any technical issues with your environment, email certification@relativity.com providing the following information:
   - Name of the workspace where you encounter the error.
   - The operation you were performing when you encountered the error.

Using the Prep Environment

Follow these steps to log into the prep environment and create workspaces from templates:

1. Navigate to https://rcaprep.relativity.one.
2. **Log in**.
   - Username: The email address you used to register for the exam.
   - Password: Welcome123!@#
3. Upon logging into the environment for the first time, you will be prompted to change your password. Choose a secure password. You will use this password any time you log into the environment. Relativity does not have visibility to your password. Three password resets are allowed.
4. Two workspace templates are created for you in the environment. Your assigned workspace templates will by in your Workspaces view, listed with your first name and last initial in the Name field (ex: Elizabeth Shoe would be ElizabethS). You can ignore the two numerical identifiers (ex. 20230613-**ElizabethS** 1031317_RCA_Workbook_2023) in the workspace name.

5. You are assigned the following workspaces upon getting access to the prep environment, and we recommend you use the workspaces in the following order:
    a. **RCA_Workbook:** Use this workspace as a template to complete the exercises in the RCA Exam Workbook.
    b. **Practice_Project**: Use this workspace as a template to complete the RCA Practice Project.
6. Click the **New Workspace** button to create a new workspace. Select your assigned RCA_Workbook workspace to use as the template for your new workspace.

The workspace templates provided are designed to be used as <u>templates</u>. To begin studying, we recommend you create new workspaces for the workbook and practice project, using your assigned workspace template. <u>If you accidentally edit or delete the provided workspace templates, you will not be provided with additional templates to use.</u>

Workbook Activities

The following scenarios represent a work request during a matter. The practice contain a series of tasks that may require intermediary steps to achieve the required results. This workbook arranges tasks in sequential order and walks you through the steps required to complete the work request. You will be asked to complete intermediary steps on your own before you start a particular exercise.

PART 1 - DATA IN AND OUT - IMPORTING

1. You are notified by your team that your newest client, Pepper Corporation, is being sued. Your firm has collected documents and a transcript from Pepper Corporation related to the dispute. The file metadata and full text from most documents has been extracted and provided as a document-level load file. As the firm's admin, you are responsible for loading the necessary data.

PART 2 - SETUP AND MANAGEMENT

2. The firm's lead attorney requests that Ann O'Tation, a Review Manager, receive additional access in the workspace. Grant Ann's group the necessary permissions. Preview Ann's permissions to ensure they are correctly assigned.

PART 3 - SEARCH AND ANALYTICS

3. You would like to identify and tag any documents containing personally identifiable information (PII) to redact later. Configure a customized dtSearch index and use a regular expression to find PII in your data set. Use automated workflows to identify PII in new documents as they are added to the workspace.
4. The review team wants to speed up the workflow for reviewing emails while also ensuring that coding is consistent across related groups of emails.

PART 4 - DATA MANIPULATION AND INTERACTION

5. Your team asked you to image all workspace documents coded Yes on the Responsive field so reviewers can add redactions and annotations. Image the documents and secure the imaging set so only System Admins can access it.

PART 5 - DATA IN AND OUT - PRODUCTION AND EXPORTING

6. The review team completed its review of the workspace documents. Now that the team has applied redactions to the privileged data, the documents can be produced and submitted to opposing counsel.
7. You have been instructed to OCR any documents in your Responsive production set that are redacted so that the opposing counsel's review team can search through these documents without viewing the privileged information.
8. Your case team asked you to provide the opposing counsel with a .ZIP file of the production set. The file must contain all the images and natives, as well as a load file, so the opposing counsel can load the production into their system.

Part 1

Data In and Out - Importing

Where Are We?

PART 1 - DATA IN AND OUT - IMPORTING

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1.1 Overview

The RCA exam tests your understanding of the following Data In and Out topics. Part 1 walks you through exercises on several, but not all, of the import-related topics in the Data In and Out topic. Use the materials in the Resources section, as well as the Knowledge Check questions, to ensure you understand each topic.

- Use data transfer applications (Import/Export, Relativity Integration Points, Transcripts, and ARM)
- Run Processing
- Use Transcripts
- Use Simple File Upload

1.2 Work Request

1.2.1 Loading Data

Scenario: You are notified by your team that your newest client, Pepper Corporation, is being sued. Your firm has collected documents. The file metadata and full text from most documents has been extracted and provided as a document-level load file. As the firm's admin, you are responsible for loading the necessary data.

Task: Using Import/Export with Express Transfer, load the saltvpepper.dat file. Create required fields and fix any errors. Then, perform a quality check to ensure that all data was imported correctly and resolve all errors.

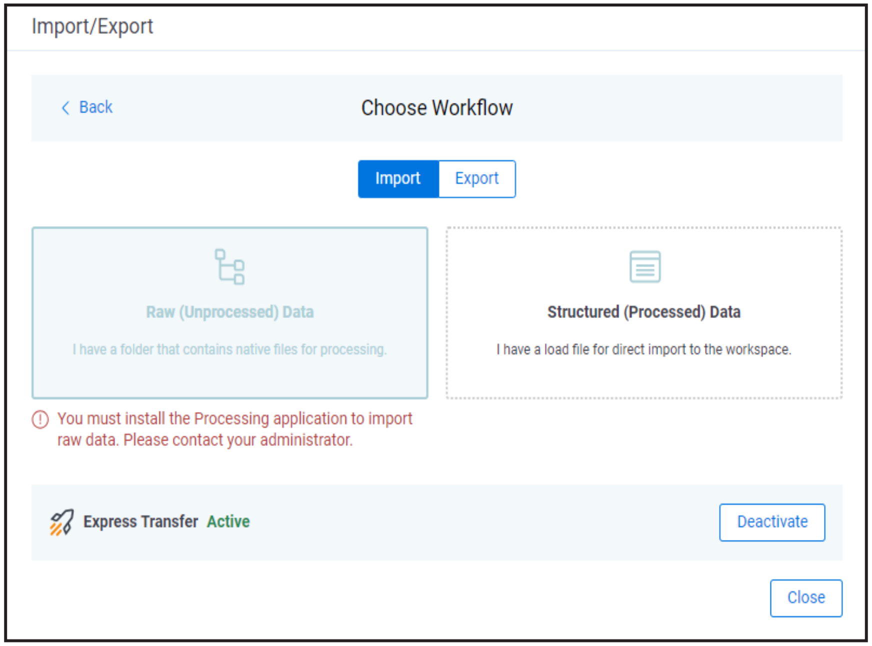
On your own, complete the following pre-exercise checklist now:

- ☐ Create a new workspace to complete the workbook exercise. Select your assigned RCA_Workbook template as your template workspace.
- ☐ Download the **Relativity - RCA Exam Sample Data - RelativityOne 2024** (or Global data set) dataset from the Relativity Community site I Certification Tracker.

Complete the exercise using these step-by-step instructions.

1. Log in to RelativityOne.
2. Find and **select your workspace**.
3. Create a **Staging** folder.
4. Click on the **More** I **Import/Export Job** tab.
    a. Optionally, you can use tabs or the Quick Nav bar to navigate to the Import/Export Job tab.
5. Click the **New Import/Export Job** button.
6. If Express Transfer is not already installed on your device, download the application by selecting either **Windows** or **MacOS** at the bottom of the dialog box.
7. Once downloaded, install the application on your device. Then, click **Activate** to run Express Transfer. The application will open and **Active** will now appear in green next to **Express Transfer.**
8. On the **Choose Workflow** dialog, the Import button is selected by default. Click the **Structured (Processed) Data** workflow box to import a document load file.

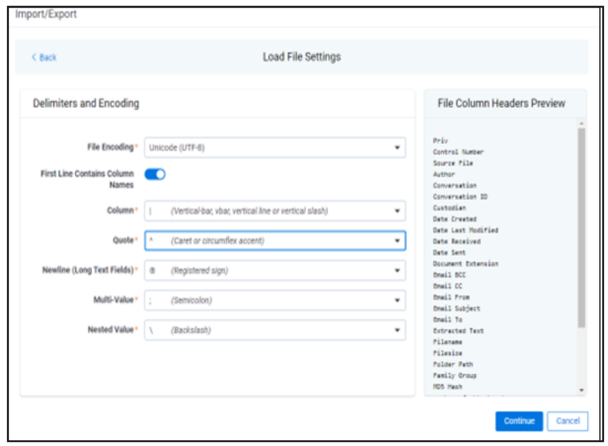
NOTE: A warning message appears on the Choose Workflow dialog under Raw (Unprocessed) Data: "You are not allowed to import data. Please contact your Relativity administrator" because Processing is not installed in this environment. You do not need Processing installed to import Structured Data in this exercise.



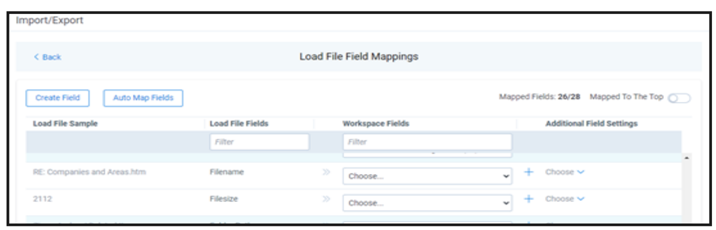
9. On the **Choose The Load File Type** dialog, click **Document** to import a document load file to your workspace.
10. On the **Select data to Import** dialog, select the **Relativity - RCA Exam Sample Data - RelativityOne 2024** parent folder after extracting it from your download.
11. On the **Choose Load File and Location** dialog, complete the following fields:
    - Job Name: **Salt v Pepper**
    - Destination Folder: **Staging folder**
    - Profile: **leave as default**
    - Regional Settings (Date and Time): **leave as default** (the default date and time importing format is "English (United States)," which is MM/DD/YYYY and HH:MM:SS AM/PM.)
    - Load File: **saltvpepper.dat**
12. Click **Continue**.

13. On the **Load File Settings** dialog, select the delimiters and encoding values of the document load file. The **File Column Headers Preview** pane on the right will help you choose the proper settings. In the Delimiters and Encoding section, change the settings in the corresponding drop-down fields to match the following:
    a. Column: **| - vertical-bar, vbar, vertical line or vertical slash**
    b. Quote: **^ - caret or circumflex accent**
    c. Newline: **leave as default**
    d. Multi-Value: **leave as default**
    e. Nested Value: **leave as default**

NOTE: As you select encodings, the File Column Headers section displays the fields in the load file. The column headers in the file should display as a vertical list.



14. Click **Continue**.
15. Click **Auto Map Fields** to map load file fields to workspace fields. Fields from the load file will be mapped to any existing fields of the exact same name in the workspace. Any fields without a match will display "Choose…" in the Workspace Fields column, which means the field is not named identically or it doesn't yet exist in the workspace. Choose the similarly-named field to map the *Email BCC*, *Email CC*, *Email From*, *Email To*, *Filename*, *Filesize*, and *Priv* fields.



16. Use the chart below to create new workspace fields that do not exist yet.
    a. To create new fields, click the **+ (plus) sign** next to the Workspace Fields column, as this will map the newly created field automatically. When you've finished creating new fields and mapping existing fields, you'll see the Mapped Fields count is now 28/28.

Name	Field Type	Additional Setting
Conversation ID	Long Text	N/A
Date Last Modified	Date	Formatting: Date
Document Extension	Fixed-Length Text	Maximum Length: 255
Email Subject	Fixed-Length Text	Maximum Length: 255
File path	Fixed-Length Text	Maximum Length: 270
Folder path	Fixed-Length Text	Maximum Length: 255
Source File	Long Text	N/A

17. In the **Additional Field Settings** column, click **Choose** for the following fields:
    a. Extracted Text: **Set Field As: Text File**
        i. File Encoding: **Unicode (UTF-8)**
    b. FILE_PATH: **Native File**
    c. Folder Path: **Folder Information Column**
18. Click **Continue**.

19. On the **Import Settings** dialog, leave **Start Line** as 0 as this will import the entire load file.
20. Select **Append Only** as you are loading this data for the first time.
21. Click **Save Settings** to save your settings prior to importing or resolving errors.
22. Click **Precheck Load File** if you want to check for errors prior to importing. All detected errors are displayed in the Precheck window. Click the down arrow to the right of any error message to view its details. In this data set you will encounter one file with a date error. Resolve the date error by correcting the format.
23. You may take one of the following steps to resolve errors:
    a. To solve errors after import:
        i. Click the **Import** button to start importing the load file with the errors. An Express Transfer pop-up will inform you when the upload has completed.
        ii. Once the import is complete, the **Overview** tab will state **687** records imported successfully and **1** error was found. You can view this error on the **Errors** tab. To resolve, click the **Download Error Load File** button, open the file, and manually correct the detected error.
        iii. On the **Importing** screen, then click **Select** next to **New Load File** and select the corrected load file.
        iv. Click **Import** to finish importing the corrected file.
    b. To solve errors before import:
        i. Click **Cancel** to discontinue importing so that you can correct the errors in the load file and then repeat the importing steps.
24. All **688** documents should now be imported successfully. The **History** tab on the Express Transfer application will also show the completed import. Click **Close** to close the dialog.

STOP EXERCISE COMPLETE

1.2.2 Loading Transcripts & Exhibits

Scenario: The lead attorney delivered a copy of the deposition from the defendant in the form of a transcript and exhibit files. Some of the statements made during the deposition conflict with statements made in certain emails sent by the defendant.

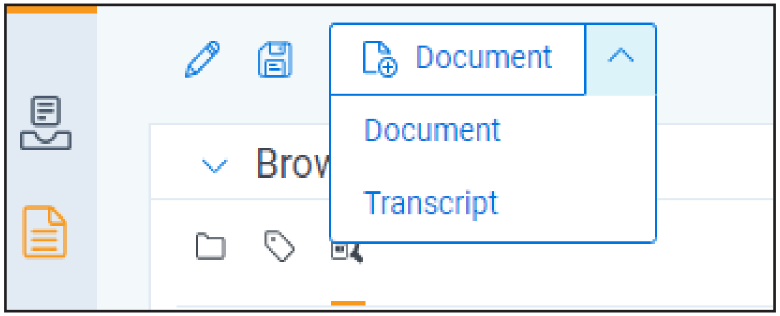
Task: Load the transcript and associated exhibits as a bundle of files into Relativity so that the lead attorney can prepare for cross examination.

On your own, complete the following pre-exercise checklist now:

- ☐ Confirm you are still working in your workspace.

Complete the exercise using these step-by-step instructions.

1. Navigate to the **Documents** tab.
2. Click the arrow on the right side of the Simple File Upload icon to open a drop-down menu, and then select **Transcript**. A pop-up appears.



3. Click **Select File** and select the Clemente, Roberto.txt file in your sample data. You can also drag and drop the file to upload.
4. Fill out the following fields:
    a. Deponent Name: **Clemente, Roberto**
    b. Upload Files: click **Select File** and choose the **Exhibit21.pdf** to bundle with the transcript.
    c. Deposition Date: The transcript's deposition date is added to this field automatically. You can also update this field if necessary.
5. Click **Upload**.

You can use Simple File Upload to add individual documents to a workspace. Simple File Upload functions similarly to the transcripts application. On your own, use the SimpleFileUpload.pdf to practice uploading a single document to your workspace.

EXERCISE COMPLETE

1.3 Knowledge Check

Before moving on, perform this knowledge check to test your knowledge of workspace setup and data loading. You can find an answer key in the appendix.

Data In and Out

Use data transfer applications • Run Processing • Use Transcripts • Use Simple File Upload

1. You can change a field's type after you create the field. True or false?
2. What image types can be imported into Relativity? (Select all that apply.)
   a. Multi-page PDFs.
   b. Single-page JPGs.
   c. Multi-page TIFs.
   d. Single-page, Group IV TIFs.
3. The Password Bank is required to process data. True or false?
4. What is the limit on the number of passwords you can add to the Password Bank?
   a. 10
   b. 50
   c. 200
   d. There is no limit.
5. What stage of the processing workflow makes documents available to review?
   a. Inventory.
   b. Publish.
   c. Discovery.
   d. Report.
6. What report can you use to identify any differences in the number of files discovered and the number of files published?
   a. Inventory Details.
   b. Data Migration.
   c. Text Extraction.
   d. File Size Summary.
7. You can replace a document in the viewer using Simple File Upload. True or False?
8. Where can you access the Transcripts application in your workspace?
9. What tool should you use to most efficiently move documents from one Relativity workspace to another?

Part 2

Setup and Management

Where Are We?

PART 1 - DATA IN AND OUT - IMPORTING

1. You are notified by your team that your newest client, Pepper Corporation, is being sued. Your firm has collected documents and a transcript from Pepper Corporation related to the dispute. The file metadata and full text from most documents has been extracted and provided as a document-level load file. As the firm's admin, you are responsible for loading the necessary data.

PART 2 - SETUP AND MANAGEMENT

2. The firm's lead attorney requests that Ann O'Tation, a Review Manager, receive additional access in the workspace. Grant Ann's group the necessary permissions. Preview Ann's permissions to ensure they are correctly assigned.

PART 3 - SEARCH AND ANALYTICS

3. You would like to identify and tag any documents containing personally identifiable information (PII) to redact later. Configure a customized dtSearch index and use a regular expression to find PII in your data set. Use automated workflows to identify PII in new documents as they are added to the workspace.
4. The review team wants to speed up the workflow for reviewing emails while also ensuring that coding is consistent across related groups of emails.

PART 4 - DATA MANIPULATION AND INTERACTION

5. Your team asked you to image all workspace documents coded Yes on the Responsive field so reviewers can add redactions and annotations. Image the documents and secure the imaging set so only System Admins can access it.

PART 5 - DATA IN AND OUT - PRODUCTION AND EXPORTING

6. The review team completed its review of the workspace documents. Now that the team has applied redactions to the privileged data, the documents can be produced and submitted to opposing counsel.
7. You have been instructed to OCR any documents in your Responsive production set that are redacted so that the opposing counsel's review team can search through these documents without viewing the privileged information.
8. Your case team asked you to provide the opposing counsel with a .ZIP file of the production set. The file must contain all the images and natives, as well as a load file, so the opposing counsel can load the production into their system.

2.1 Overview

The RCA exam tests your understanding of the following Setup and Management topics. Part 2 walks you through exercises on several, but not all, of these topics. Use the materials in the Resources section, as well as the Knowledge Check questions, to ensure you understand each of these topics.

- Create workspaces and manage instance objects
- Set up and manage security and permissions
- Create and modify workspace objects
- Configure applications
- Manage audits
- Demonstrate knowledge of repository workspaces

2.2 Work Request

2.2.1 Setting Permissions

Scenario: The firm's lead attorney requests that Ann O'Tation, a Review Manager, receive additional access in the workspace. Grant Ann's group the necessary permissions. Preview Ann's permissions to ensure they are correctly assigned.

Task: Set permissions for Ann. Ensure she can code, redact, and highlight documents; mass edit; add choices from a layout. Then, Preview Security for the Review Managers group to ensure permissions are correct.

Complete the exercise using these step-by-step instructions.

1. Navigate to the **Admin** > **Workspace Details** tab and click the **Manage Workspace Permissions** link in the Relativity Utilities console.
2. Click **Edit Permissions** to set permissions for the Review Manager group. Ensure the group can create batches; check batches in and out; assign batches to other reviewers; add choices on-the-fly; code documents. First, try setting permissions on your own. Then, check your permissions against those outlined in the following steps. Use the Preview Security functionality to ensure the group can see and do what is needed for required tasks.
3. Did you set permissions correctly? Ensure the Review Manager group has the following permissions:
   a. Object security:
      - **Batch - Edit, Add**
      - **Batch Set - Edit, Add**
      - **Choice - Add**
      - **Document - Edit**

   b. Tab Visibility:
      - **Documents**
      - **Review > Review Batches**
      - **Review Management > Batch Sets**

   c. Other Settings:
      - **Assign Batches**

When assigning permissions in an exam context, only assign the specific permissions necessary to accomplish the task as it is explicitly written in the case. For example, if you are assigning permissions to run a production, you should not also assign permissions to create or edit saved searches.

Once you've set permissions, review permissions for the Review Manager group to ensure they can accomplish the necessary tasks in the workspace:

4. From the **Admin > Workspace Details** tab, click the **Manage Workspace Permissions** link in the Relativity Utilities console.
5. Click **Preview** for the Review Managers group.
6. Ensure you can create and edit batch sets, and assign batches to other users. Also ensure you can code documents and add choices from a layout.
   - Note: You cannot check batches in and out when using the Preview Security feature.

If you perform a job while previewing a user's security settings, the audited action is credited to your username, and not to the user whose security you are previewing.

STOP EXERCISE COMPLETE

2.3 Knowledge Check

Before moving on, perform this quick knowledge check to test your knowledge of Setup and Management. You can find an answer key in the appendix.

Setup and Management

Create workspaces and manage instance objects • Set up and manage security and permissions • Create and modify workspace objects • Configure applications • Manage audits • Demonstrate knowledge of repository workspaces

1. How do you secure an individual layout?
2. When a group's permissions are copied, all individual object-level security permissions are also copied. True or False?
3. What workspace permission exposes the Manage link option on choice fields so that group members can add new choices to a field on a layout?
4. What conditions should you set on a view to direct a reviewer to only his or her in-progress checked-out batches?
5. The Project Manager wants a quick way to see the issues of a case using a view. What conditions should you apply for this view?
6. By default, all fields are available to Pivot On. True or False?
7. You can import data into a Relativity Dynamic Object. True or False?
8. What report shows how deleting an object affects its child and associative objects?
9. What Relativity objects are clients directly associated with?
10. You can grant groups permission to import an application from the Application Library. True or False?

Part 3

Search and Analytics

Where are we?

PART 1 - DATA IN AND OUT - IMPORTING

1. You are notified by your team that your newest client, Pepper Corporation, is being sued. Your firm has collected documents and a transcript from Pepper Corporation related to the dispute. The file metadata and full text from most documents has been extracted and provided as a document-level load file. As the firm's admin, you are responsible for loading the necessary data.

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3. You would like to identify and tag any documents containing personally identifiable information (PII) to redact later. Configure a customized dtSearch index and use a regular expression to find PII in your data set. Use automated workflows to identify PII in new documents as they are added to the workspace.
4. The review team wants to speed up the workflow for reviewing emails while also ensuring that coding is consistent across related groups of emails.

PART 4 - DATA MANIPULATION AND INTERACTION

5. Your team asked you to image all workspace documents coded Yes on the Responsive field so reviewers can add redactions and annotations. Image the documents and secure the imaging set so only System Admins can access it.

PART 5 - DATA IN AND OUT - PRODUCTION AND EXPORTING

6. The review team completed its review of the workspace documents. Now that the team has applied redactions to the privileged data, the documents can be produced and submitted to opposing counsel.
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3.1 Overview

The RCA exam tests your understanding of the following Search and Analytics topics. Part 3 walks you through exercises on several, but not all, of these topics. Use the materials in the Resources section, as well as the Knowledge Check questions, to ensure you understand each of these topics.

- Run searches
- Create and modify indexes
- Set up and run structured analytics sets
    - Email threading
    - Email thread visualization (ETV)
    - Language identification
    - Textual near duplicate identification
    - Name normalization
    - Repeated content identification

3.2 Work Request

3.2.1 Search Terms Report

Scenario: You would like to identify and tag any documents containing personally identifiable information (PII) to redact later. Configure a customized dtSearch index and use a regular expression to find PII in your data set. Use automated workflows to identify PII in new documents as they are added to the workspace.

Task: Create a dtSearch index and make the necessary modifications to the Alphabet file to ensure the index can read regular expressions. Create a search terms report using a RegEx string, and ensure results are tagged and saved to a field. Finally, create an automated workflow that identifies PII in new documents as they are added to the workspace.

On your own, complete the following pre-exercise checklist now:

- [ ] Create a saved search for all documents in the workspace, including only the **Extracted Text** field in the search. Name the search: **All documents - Extracted Text.**

Complete the exercise using these step-by-step instructions.

1. Navigate to the **Search Setup** > **Term Searching** > **Search Indexes** tab and create a new dtSearch index with the following information:
   a. dtSearch Index Information:
      - Name: **dtSearch - PII**
      - Order: **20**
      - Searchable set: **All documents - Extracted Text**

   b. Advanced Settings:
      - Leave all as default.

Just like when creating a classification index, when creating a dtSearch index, it is best practice to only index the fields you need to search on.

2. Modify the alphabet file to make hyphens (-) searchable.
   a. In the **Alphabet** section, delete the hyphen (-) from the **[Hyphens]** list.

   b. Enter the following value under **[Letters] // Original letter, lower case, upper case, unaccented:**
      i. [Space][-][Space][-][Space][-][Space][-]

ii. You must have a leading space. You cannot have a trailing space.

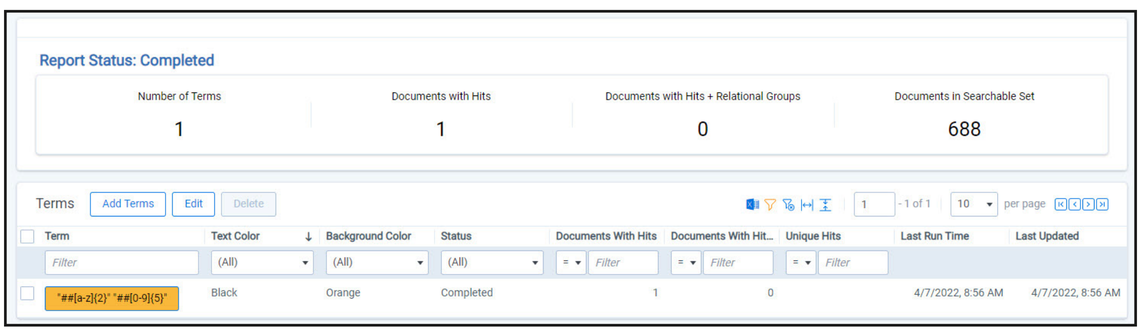
3. Click **Save**.

You must make hyphens searchable in the dtSearch index in order to search using the regular expression provided. To prepare for the exam, review the list of common dtSearch RegEx examples and review what modifications you may need to make to your index for each string.

4. From the dtSearch Index console, click **Build Full Index** to index the documents. The Full Build confirmation dialog box appears. Ensure the checkbox for **Activate this index upon completion** is selected and click **Yes**.
5. Once the index is active, navigate to the **Search Setup > Term Searching > Search Terms Reports** tab.
6. Click **New Search Terms Report**.
7. Configure the following settings:
   a. Name: **PII STR**
   b. Index: **dtSearch - PII**
   c. Searchable set: **All documents - Extracted Text**
   d. Leave all other settings as default.
8. Click **Save**.
9. Click **Add Terms**.
10. Copy and paste the following RegEx string to search for United States postal codes. Be sure to include the quotation marks: **"##[a-z]{2}" "##[0-9]{5}"**

You do not need to memorize RegEx strings for the exam. Any regular expressions you need for the exam will be provided.

11. Click **Add**.
12. In the Search Terms Report console, click **Run All Terms.** Then click **Accept**.
13. When the operation is complete, confirm your results match the following:



Next, build an automated workflow that updates the PII STR each time new documents are loaded into the workspace.

1. Navigate to the **Admin > Automated Workflows** tab.
2. Click **New Automated Workflow**.
3. Configure the following workflow information:
    a. Name: **New Documents - dtSearch - STR PII**
    b. Description: **Build the dtSearch - PII index and run the PII STR each time new documents are added to the workspace to identify documents with PII.**
    c. Active: Leave toggled on.
4. Configure the automated workflow:
    a. Click **Add Action** beneath the existing New Documents Added trigger and select **Build dtSearch Index.**
    b. Select the **dtSearch - PII** index you created earlier from the drop-down menu.
    c. Click **Add Action** > **Run Search Terms Report**.
    d. Select the **PII STR** search terms report you created earlier from the drop-down menu.
    e. Click **Save** and **Activate**.

Your automated workflow will automatically run the next time documents are loaded into the workspace.

STOP EXERCISE COMPLETE

3.2.2 Email Threading

Scenario: The case team wants to reduce the time and complexity of reviewing emails for the matter. They would like all forwards, replies, and reply-all messages gathered together so they can easily identify email relationships during review.

Task: Create and run an email threading structured analytics set. Then create a new view to display the email threading results.

On your own, complete the following pre-exercise checklist now:

- ☐ Ensure you have a saved search of all documents in the workspace (the Extracted Text search will suffice).
- ☐ Create two new relational fixed-length text fields for Email Thread Group and Email Duplicate ID (any icon will suffice for each field).
- ☐ Navigate to the Default Analytics profile to see that the proper fields are mapped, including the Parent Document ID field.

In order to properly thread and visualize attachments, you need to map the Parent Document ID in the selected Analytics profile.

Complete the exercise using these step-by-step instructions.

1. Navigate to the **Search Setup > Structured Analytics Set** tab.
2. Click **New Structured Analytics Set**.
3. Fill out the following fields for Structured Analytics Set Information:
    a. Name: **Email Threading Set**
    b. Prefix: **SAS01**
    c. Operations to run: **Email threading**
    d. Data source: **<select your saved search containing all documents>**
    e. Analytics profile: **Default**
    f. Use email header fields: Leave as **Yes**
    g. Destination Email Thread Group: select the new relational field you created for **Email Thread Group**
    h. Destination Email Duplicate ID: select the new relational field you created for **Email Duplicate ID**
    i. Leave all other settings as their default values.

4. Click **Save**.
5. Click **Run** on the Structured Analytics Set console.
6. Leave the pop-up settings as default and click **Run**.

The set may take up to six minutes to complete analysis in the prep environment. To view the results of the email threading structured analytics set, create an Email Threading view for the structured analytics set on the Documents tab.

7. Create a new view on the **Document** object.
8. Complete the fields on the **Information** tab specific to your view.
9. Click the **Other** tab and complete the following settings:
    a. Group Definition: **Email Thread Group**
    b. On the **Fields** tab, add the following fields to your view:
        i. <SAS01>::Email Threading Display
        ii. <SAS01>::Email Thread Group
        iii. <SAS01>::Email Threading ID
        iv. <SAS01>::Inclusive Email
        v. <SAS01>::Inclusive Reason
    c. On the **Conditions** tab, add the following condition:
        i. <SAS01>::Email Thread Group : is set
    d. On the **Sort** tab, sort the following fields in ascending order:
        i. <SAS01>::Email Thread Group
        ii. <SAS01>::Indentation
        iii. <SAS01>::Email Threading ID
10. Click **Save**.
11. Navigate to the **Documents** tab and select the new view from the drop-down. Did you create your view correctly? Check that your view looks like the one in the image on the next page.

#		SAS01::Email Threadi...	SAS01::Email Thread ...	SAS01::Email Threadi...	SAS01::Inclusive Email	SAS01::Inclusive Reason
		Filter	Filter	Filter	(All)	(All)
1	☐	2 Forster David <David. RE: Companies and A	A00000001	A00000001-0000+	Yes	MESSAGE
2	☐	2 Forster David <David. RE: Companies and A	A00000002	A00000002-0000+	Yes	MESSAGE
3	☐	1 Beck Sally <Sally.Becl EOL Team Connectior	A00000003	A00000003+	Yes	MESSAGE
4	☐	3 Piper Greg <Greg.Pip RE: EOL Team Connec	A00000004	A00000004-0000-0000+	Yes	MESSAGE
5	☐	2 Piper Greg <Greg.Pip FW: Recommended O	A00000005	A00000005-0000+	Yes	MESSAGE
6	☐	1 Boyd Justin <justin.b Recommended Offer I	A00000006	A00000006+	Yes	MESSAGE
7	☐	2 Piper Greg <Greg.Pip RE: Recommended Of	A00000007	A00000007-0000+	Yes	MESSAGE
8	☐	1 Slagle Carrie <Carrie. FW: NomLogic Simula	A00000008	A00000008+	Yes	ATTACHMENT; MESSAGE
9	☐		A00000008	A00000008+	No	
10	☐		A00000008	A00000008+	No	

The blue line between rows separates distinct email threads.

STOP EXERCISE COMPLETE

3.3 Knowledge Check

Before moving on, perform this quick knowledge check to test your knowledge of Search and Analytics. You can find an answer key in the appendix.

Search and Analytics

Run searches • Create and modify indexes • Set up and run structured analytics sets

1. In order for reviewers to view email thread visualization, what permissions do they need?
2. Attachments are optional in an email threading structured analytics set. True or False?
3. You run language identification and want to find documents where English is the language with the highest percentage of use in each document. What field should you use?
4. If the Parent Document ID field is not mapped properly on your Analytics Profile when you run email threading, what is the impact?
5. Which dtSearch operator should you use to search for single words within a certain proximity of each other? What are the operators for finding words at the beginning and words at the end of a document?
6. Persistent highlighting using a Terms source understands the following syntax in the Terms box. True or False?

   Trade~

7. The lead attorney is working in the document list view with email duplicates relational items selected. How can they take a sample of these records?
8. If you select both the Email Threading and Textual Near Duplicate Identification operations for your structured analytics set, what documents get a thread group ID?
9. You leave the Attachment Name field unset on the Analytics Profile used by an email threading structured analytics set. What effect does this have on the results?

Part 4

Data Manipulation and Interaction

Where Are We?

PART 1 - DATA IN AND OUT - IMPORTING

1. You are notified by your team that your newest client, Pepper Corporation, is being sued. Your firm has collected documents and a transcript from Pepper Corporation related to the dispute. The file metadata and full text from most documents has been extracted and provided as a document-level load file. As the firm's admin, you are responsible for loading the necessary data.

PART 2 - SETUP AND MANAGEMENT

2. The firm's lead attorney requests that Ann O'Tation, a Review Manager, receive additional access in the workspace. Grant Ann's group the necessary permissions. Preview Ann's permissions to ensure they are correctly assigned.

PART 3 - SEARCH AND ANALYTICS

3. You would like to identify and tag any documents containing personally identifiable information (PII) to redact later. Configure a customized dtSearch index and use a regular expression to find PII in your data set. Use automated workflows to identify PII in new documents as they are added to the workspace.
4. The review team wants to speed up the workflow for reviewing emails while also ensuring that coding is consistent across related groups of emails.

PART 4 - DATA MANIPULATION AND INTERACTION

5. Your team asked you to image all workspace documents coded Yes on the Responsive field so reviewers can add redactions and annotations. Image the documents and secure the imaging set so only System Admins can access it.

PART 5 - DATA IN AND OUT - PRODUCTION AND EXPORTING

6. The review team completed its review of the workspace documents. Now that the team has applied redactions to the privileged data, the documents can be produced and submitted to opposing counsel.
7. You have been instructed to OCR any documents in your Responsive production set that are redacted so that the opposing counsel's review team can search through these documents without viewing the privileged information.
8. Your case team asked you to provide the opposing counsel with a .ZIP file of the production set. The file must contain all the images and natives, as well as a load file, so the opposing counsel can load the production into their system.

4.1 Overview

The RCA exam will test your understanding of the following Data Manipulation and Interaction topics. Part 4 walks you through exercises on several, but not all, of these topics. Use the materials in the Resources section, as well as the Knowledge Check questions, to ensure you understand each of these topics.

- Use Relativity Short Message Format (RSMF) files and Short Message Viewer
- Set up and run imaging
- Run mass operations
- Run scripts

4.2 Work Request

4.2.1 Imaging

Scenario: Your team asked you to image all workspace documents coded Yes on the Responsive field, so that reviewers can add redactions and annotations. Image the documents and secure the imaging set so only System Admins can access it.

Task: Create and run an imaging set of documents coded on the Responsive field. Secure the imaging set from all groups in the workspace.

On your own, complete the following pre-exercise checklist now:

- ☐ Create a Single Choice **Responsive** field on the **Document** object.
- ☐ Create choices on the **Responsive** field for: **Yes** and **No**
- ☐ Add the **Responsive** field to the **Default** coding layout.
- ☐ To simulate a real review, code 15-20 documents **Yes** on the **Responsive** field. Include both Excels and non-Excels.
- ☐ Create a saved search for all documents coded **Yes** on the **Responsive** field.

Complete the exercise using these step-by-step instructions.

1. Navigate to the **Imaging & Production** > **Imaging Sets** tab**.**
2. Create a new **Imaging Set** using the **Responsive Documents** saved search and the Basic Default imaging profile.
3. From the Imaging Set console, click **Image Documents**. Do not Hide Images for QC Review.
4. Wait until the imaging status displays **Completed** and note the documents successfully imaged.
5. To secure the imaging set from all groups in the workspace, click **Back**.
6. Add the **Security** field to the **Imaging Sets - All** view.
7. Click the open **Padlock** icon.
8. Toggle Override Inherited Security to **On**.
9. Click **Add/Remove Groups** and remove all groups from the **Groups in Workspace** column.
10. Click **Save**, then **Close**.

In the Imaging Sets - All view, you should now see the padlock icon has changed from open to closed, indicating object-level permissions have been applied.

STOP EXERCISE COMPLETE

4.3 Knowledge Check

Before moving on, perform this quick knowledge check to test your knowledge of Data Manipulation and Interaction. You can find an answer key in the appendix.

Data Manipulation and Interaction

Use Relativity Short Message Format (RSMF) files and Short Message Viewer • Set up and run imaging • Run mass operations • Run scripts

1. What are the different ways you can image a document?
2. How many documents can you mass image at a time?
3. If a document with images is included in a new imaging set, the original document image will be replaced once the imaging set is run. True or False?
4. Admins have permissions to run scripts by default. True or False?
5. How can you install a script into a Relativity workspace?
6. You want to only review short messages sent in a specific date range. What is the best way to quickly locate these messages using Short Message Filtering?
7. What does the Mass Convert mass operation do?
8. You can undo a mass delete operation using Audit. True or False?
9. When using the Export to File mass action, before the files export, you are prompted to select values for the fields on the Exporting Documents form. True or False?
10. Why should you perform certain mass operations at off-peak times?

Part 5

Data In and Out - Production and Exporting

Where Are We?

PART 1 - DATA IN AND OUT - IMPORTING

1. You are notified by your team that your newest client, Pepper Corporation, is being sued. Your firm has collected documents and a transcript from Pepper Corporation related to the dispute. The file metadata and full text from most documents has been extracted and provided as a document-level load file. As the firm's admin, you are responsible for loading the necessary data.

PART 2 - SETUP AND MANAGEMENT

2. The firm's lead attorney requests that Ann O'Tation, a Review Manager, receive additional access in the workspace. Grant Ann's group the necessary permissions. Preview Ann's permissions to ensure they are correctly assigned.

PART 3 - SEARCH AND ANALYTICS

3. You would like to identify and tag any documents containing personally identifiable information (PII) to redact later. Configure a customized dtSearch index and use a regular expression to find PII in your data set. Use automated workflows to identify PII in new documents as they are added to the workspace.
4. The review team wants to speed up the workflow for reviewing emails while also ensuring that coding is consistent across related groups of emails.

PART 4 - DATA MANIPULATION AND INTERACTION

5. Your team asked you to image all workspace documents coded Yes on the Responsive field so reviewers can add redactions and annotations. Image the documents and secure the imaging set so only System Admins can access it.

PART 5 - DATA IN AND OUT - PRODUCTION AND EXPORTING

6. The review team completed its review of the workspace documents. Now that the team has applied redactions to the privileged data, the documents can be produced and submitted to opposing counsel.
7. You have been instructed to OCR any documents in your Responsive production set that are redacted so that the opposing counsel's review team can search through these documents without viewing the privileged information.
8. Your case team asked you to provide the opposing counsel with a .ZIP file of the production set. The file must contain all the images and natives, as well as a load file, so the opposing counsel can load the production into their system.

5.1 Overview

The RCA exam will test your understanding of the following Data In and Out topics. Part 5 walks you through exercises on several, but not all, of these topics. Use the materials in the Resources section, as well as the Knowledge Check questions, to ensure you understand each of these topics.

- Use data transfer applications (Import/Export, Relativity Integration Points, Transcripts, and ARM)
- Run Processing
- Use Transcripts
- Use Simple File Upload
- Prepare data post-review

5.2 Work Request

5.2.1 Production

Scenario: The review team completed review of the workspace documents. Now that the team has applied redactions to the responsive data, you can produce documents and submit them to opposing counsel.

Task: Create a production set that defines parameters for the production numbering, the markup set for redactions, and document sort order. All records should include images except Excel files. Produce Excels as native and include the default placeholder.

On your own, complete the following pre-exercise checklist now:

☐ For the purposes of this exercise, we will treat email headers as confidential information. Using the Primary markup set, apply a white box redaction to the email headers of two emails coded Responsive.

Complete the exercise using these step-by-step instructions.

1. Navigate to the **Imaging & Production | Production Sets** tab and create a new production with the following settings:
    a. Name: **Responsive Doc Production**
    b. Date Produced: **<Today's date>**
    c. Leave all other Basic Settings as default.
2. In the Numbering section, set the production numbering. The number preview should look like **RESP000001_0001**. First, try setting the numbering on your own. Then, check your settings against the number preview and the following steps:
    a. Production Numbering: **Document Level**
    b. Prefix: **RESP**
    c. Start number: **1**
    d. Number of digits for document numbering: **6**
    e. Include page numbers: **Yes**
    f. Document Page Separator: **_ (underscore)**
    g. Number of digits for page numbering: **4**
    h. Start numbering on second page: **No**

3. Set the Attachment Relational field to **Family Group**.
4. In the Branding section, add the **Production Bates Number** as the Right Footer.
5. In the Sorting section, set the Production Numbering Sort Order to **Control Number | Ascending**
6. Click **Save**.
7. In order to produce all Responsive documents as images and natives, but Excels as native with a custom placeholder, you must modify the Responsive saved search you created from a previous exercise by creating one saved search that includes only Excels and another saved search that excludes Excels. Navigate to the Saved Searches browser and select the **Responsive** saved search.
8. Copy the Responsive search and modify the search information:
    a. Name: **Responsive (Excels)**
    b. Owner: **Public**
    c. Add the following condition: **Relativity Native Type | is like | Excel**
    d. Add the following fields to the search: **Edit, File Icon, Control Number, Family Group, Relativity Native Type**

NOTE: You must create public saved searches in order for the searches to populate in the Available Items list when adding a data source to a production set.

9. Click the **Save & Search** button. Notice that only Responsive Excels are returned, confirmed by the Relativity Native Type field and not just the File Icon.
10. Because you do not want to produce Excels with images, perform a **mass delete** action to delete only images from the documents.
11. Repeat step 8 to create another search to return all non-Excel, Responsive documents:
    a. Name: **Responsive (Non-Excels)**
    b. Owner: **Public**
    c. Add the following condition: **Relativity Native Type | is not like | Excel**
    d. Add the following fields to the search: **Edit, File Icon, Control Number, Family Group, Relativity Native Type**
12. Click the **Save & Search** button. Notice that no Excels are returned.
13. We now have our two data sources for the production set. Navigate to the **Responsive Doc Production Set** you created.
14. Scroll down to the Production Data Source section and add a new data source:
    a. Name: **Responsive Non-Excels**
    b. Production Type: **Images**

c. Document Source: **Responsive (Non-Excels)**

d. Use Image Placeholder: **Never Use Image Placeholder**

e. Burn Redactions: **Yes**

f. Markup Set: **Primary**

15. Click **Save**. Add the next source:

    a. Name: **Responsive (Excels)**

    b. Production Type: **Images and Natives**

    c. Document Source: **Responsive (Excels)**

    d. Use Image Placeholder: **When No Image Exists**

        i. Select the **Default** placeholder

    e. Burn Redactions: **No**

16. Click **Save**.

17. From the Production console, click **Stage and Run Production**.

18. Wait until the Production Status is **Produced**. Review the information in the Production Summary section - you can use this information to review your production data.

EXERCISE COMPLETE

5.2.2 OCR

Scenario: You need to OCR responsive documents with redactions so the opposing counsel's review team can search them without viewing privileged information.

Task: Create an OCR set. Only OCR documents containing redactions.

On your own, complete the following pre-exercise checklist now:

- ☐ Create a long text field to hold the OCR text and ensure the field is available in the viewer. Name the field OCR Text.

Complete the exercise using these step-by-step instructions.

1. Navigate to the **Imaging & Production > OCR Sets** tab and create a new OCR set with the following settings:
   a. Name: **OCR Set**
   b. Email notification recipients: **Leave blank**
   c. OCR Profile: **[Default] Standard**
   d. Destination Field: **OCR Text field**
   e. Production: **Responsive Doc Production**
   f. Only OCR Production Documents Containing Redactions: **Yes**
2. Click **Save.**
3. Next, click **OCR Documents** from the OCR Set console to process the OCR set.
4. A message appears stating that the selected Destination Field will be overwritten. Click **Yes.**
5. Once your job is complete, click the **Control Number** link of a document you OCRed to open it in the viewer.
6. Select the **Long Text** radio button which will automatically default to the Extracted Text field in the drop-down. Note the original version of the document.
7. From this drop-down, select the **OCR Text** field. You can see how the redaction that was applied to the email header was burned into the document when you ran OCR. The text under the redaction is now omitted and the opposing counsel can search the document without viewing potentially privileged information.

EXERCISE COMPLETE

5.2.3 Exporting

Scenario: Your case team asked you to provide the opposing counsel with a .ZIP file of the production set. The file must contain all the images and natives, as well as a load file, so the opposing counsel can load the production into their system.

Task: Use Import/Export to export the production set to your desktop.

Complete the exercise using these step-by-step instructions.

1. Open the **Import/Export Job** tab within your workspace.
2. Select **New Import/Export Job.**
3. Select **Export** on the **Choose Workflow** pop-up and then choose the **Production Set** option. Ensure **Express Transfer** is Active.
4. Name the job **Production Export** and then select the production you just created from the Production drop-down. Leave **Profile** as **None**.
5. Change **Export Location Type** to **Download to Local Disk**.
6. Click **Continue**.
7. Choose the folder into which you prefer to download your export.
8. Leave the **Data File Format** as **.dat (Concordance)** and change the **Data File Encoding** to **Western European (Windows)**.
9. Click **Continue**.
10. Move the following **Workspace Fields** into the **Selected Fields** column.
    a. **Production::Begin Bates**
    b. **Production::End Bates**
    c. **Control Number**

NOTE: Only the fields in the Selected Fields column will be exported when you export your documents.

11. Click **Continue.**
12. Toggle on **Export Native Files** and **Export Images.** Leave all settings as default.
13. Click **Continue**.
14. Leave **Control Number** and **File Type** as the preselected options in the **Files and Folders** dialog box.
15. Click **Continue.**

16. Toggle on **Export Text Field as Files**. Change **Text File Encoding** to **Western European (Windows)**.
17. Under **Text Fields Precedence**, add both the **OCR** and **Extracted Text** fields, making sure **OCR** is listed on top.
18. Click **Continue**.
19. Leave **Set Custom Information** toggled off.
20. Click **Continue**. Review the **Export Summary** to ensure all settings are correct**.** You can save the export settings by clicking **Save Settings**.
21. Finally, click **Export**.
22. Once the export is completed, navigate to your **Downloads** folder to verify that the production exported successfully. Open the .dat and .opt files to see how they were produced. Navigate to your images and notice your custom placeholder and how your production set specifications impacted the produced Excels and non-Excels.

STOP EXERCISE COMPLETE

5.3 Knowledge Check

Before moving on, perform this quick knowledge check to test your knowledge of the Data In and Out topic. You can find an answer key in the appendix.

Data In and Out

Use data transfer applications • Run Processing • Use Transcripts • Use Simple File Upload • Prepare data post-review

1. You can use Relativity Integration Points to export data directly into another workspace within Relativity. True or False?
2. Where do you set a production restriction?
3. You can import externally created productions into Relativity. True or False?
4. What field type does an OCR set require for the Destination Field?
    a. Fixed-length
    b. Long text
    c. Yes/No
    d. Single choice
5. Relativity will automatically re-OCR new documents with redactions that are added to an existing production set. True or False?
6. The Password Bank is required to process data. True or False?
7. What stage of the processing workflow makes documents available to review?
    a. Inventory.
    b. Publish.
    c. Discovery.
    d. Report.
8. What report can you use to identify any differences in the number of files discovered and the number of files published?
    a. Inventory Details.
    b. Data Migration.
    c. Text Extraction.
    d. File Size Summary.

Part 6

Appendix

6.1 Answer Key

Part 1 - Data In and Out - Importing

1. False
2. a. Multi-page PDFs, b. Single-page JPGs, d. Single-page, Group IV TIFs
3. False
4. d. There is no limit.
5. b. Publish
6. b. Data Migration
7. True
8. Documents tab
9. Relativity Integration Points (RIP)

Part 2 - Setup and Management

1. Apply item-level security to the layout from the Layouts tab.
2. True
3. Object security | Fields | Add field choice by link
4. Required condition: Batch :: Assigned To | Is logged in user.
   Optional condition: Batch :: Status | is any of these | In Progress
5. Issues (field) | Is set
6. False
7. True
8. Dependencies report
9. Users, matters, groups, and workspaces
10. False

Part 3 - Search and Analytics

1. Required permissions: **Other Settings:** Email thread visualization
   Optional permissions: **Object security**: Color Map - Edit; **Other Settings**: Mass Edit
2. False
3. Primary Language
4. Email attachments will not be threaded with their parent emails, and some parent emails may not thread at all.
5. W/#; xfirstword, xlastword
6. False
7. Save the records as a list, create a search based on the list, and take a sample of the records.
8. Emails and their attachments
9. The Email Threading Display field does not display the attachment name for attachments.

Part 4 - Data Manipulation and Interaction

1. Mass image; image-on-the-fly; imaging sets
2. 10,000
3. False
4. True
5. Navigate to the Scripts tab in a workspace and pull it from the instance's script library.
6. Filter on the Start and End Date ranges
7. Mass convert pre-converts a large set of documents into HTML5 format before review to eliminate document load time in the viewer.
8. False
9. False
10. Some mass operations can temporarily lock down the document table and prevent users from coding documents.

Part 5 - Data In and Out - Production and Exporting

1. True
2. Admin > Workspace Details > Advanced Settings > Production Restrictions
3. True
4. b. Long text
5. False
6. False
7. b. Publish
8. b. Data Migration

6.2 Change Log

1. December 5, 2023 - Updated to reflect 12 weeks of RCA Prep Environment access.
2. December 20, 2023 - Updated exam version to RelativityOne 2024. No major updates.
3. February 28, 2024 - Active Learning exercise removed, topic no longer tested on exam.