

# OS-200: OneStream Certified Professional (OCP) - Lead Architect Exam

Exam Study Guide v1.6



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### **Exam Description**

Candidates can validate their technical knowledge and competency by becoming a OneStream Certified Professional (OCP) – Lead Architect based on their specific area of expertise on OneStream 6.x. To achieve this level of certification, candidates must pass this online, proctored exam that is based on a combination of OneStream training material, commonly referenced product documentation, and real-world scenarios. This hybrid exam is a combination of traditional multiple-choice items and hands-on, performance-based situations.

This exam targets IT professionals using OneStream in a Lead Architect role. This certification exam measures candidate knowledge and skill covering the following topics:

- Consolidation and Planning Concepts
- Data Integration and Mapping
- Reporting
- Dashboard
- Security
- Rules
- Metadata and Dimensionality

### **Recommended Experience**

- 2-3 years of experience in the field
- 1+ years working with OneStream, with multiple projects being completed and live.
- Experience with VB.net
- Experience in areas of Accounting, Finance, and Information Technology

If candidates do NOT have prior experience with this product, it is recommended that they complete training. Although, training alone will not provide a candidate with the knowledge and skills required to pass the exam. If a candidate has experience with OneStream, they may find an online course equivalent to be sufficient. Be cautioned that attendance in a training course does NOT guarantee passage of a certification exam. A combination of training and successful, on-the-job experience are critical to providing candidates with the knowledge and skills needed to pass the exam.



### What to Expect While Taking an Exam

The exam will be online and remotely proctored through video.

With the freedom to take a remotely proctored exam, it is the candidate's responsibility to ensure they have the necessary hardware (e.g., computer, large enough monitor, built in webcam or external USB webcam, power cords) and stable internet connectivity. Note that if a candidate chooses to use an external monitor instead of a laptop monitor, the candidate is responsible for providing their own external webcam for use during exam remote proctoring.

To aid in a successful testing experience, candidates should take these important steps to be sure that they will be able to take the test:

- 1. Confirm that your system meets the **Technical Requirements** for taking this exam.
- 2. Perform an Examity system requirements check for remote proctoring.
- 3. Verify both **GoToMeeting** and **Zoom** run by using these sample meetings.
- 4. Verify your sound, camera, and microphone all function in both sample meetings.
- 5. Use a supported browser: Chrome, Firefox, or Edge. (NOTE: Safari and Internet Explorer are unsupported.)
- 6. Verify you can complete this **5-question quiz PRIOR** to exam day.
- 7. Turn off your popup blocker. (Day of exam if you may forget on the day of the exam, turn it off now while you are performing checks.). If test-takers have their pop-up blocker enabled, there could be a delay when launching the exam session. When candidates select Connect to Proctor, that button initiates the screen share application. If that does not launch properly or immediately, it can feel as though the proctor is not available, though they are in the screen share session.
- 8. For best results, test on a non-work computer. There may be security configurations on your work computer that could affect exam performance.
- 9. If you experience issues using a company computer or sitting at work, ask your IT department to follow the instructions in **this guide**, which may resolve the issues.

Familiarize yourself with the exam platform by watching the video: What to Expect While Taking An Exam.



### **Study References**

#### **OneStream Training**

#### **Recommended Courses and Webinars**

- OneStream Architecture: Designing an Application
- OneStream Essentials: Implementing OneStream
- OneStream Essentials: Building Basic Reports
- OneStream Essentials: Configuring Core Application Security
- OneStream Navigator Recordings: OneStream Certified Professional (OCP) Lead Architect Exam Prep Webinars

To learn about current training opportunities, please submit a case form to the Training team via the **ServiceNow Support Portal**.

#### **Documentation**

- Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform
- OneStream Finance Rules and Calculations Handbook
- OneStream Design and Reference Guide
- BI Blend Design and Reference Guide
- OneStream Implementation Bulletin

#### **OneStream Websites**

- OneStream Training Website
- OneStream Certification Program Website

## **Exam Objectives**

The following tables list the OneStream Lead Architect exam objectives and how these objectives align to the corresponding OneStream Navigator course topics and any associated lab exercises and commonly referenced product documentation.

Candidates are encouraged to complete applicable exercises as part of their preparation for the exam.



# **Exam Section 1: Cube** (Weighting: 26%)

Exam Objectives	Applicable Course Content
200.1.1: Given a use case, identify the number and types of cubes that a Lead Architect should use in an optimal design.	Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Design and Build"
200.1.2: Given a situation with a constraint, identify the impact of that constraint on an account.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Applying Dimension Constraints</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Cube"</li> </ul>
200.1.3: Given a data model example, identify how to define and reduce data ur size.	<ul> <li>Course: OneStream Architecture: Designing an Application</li> <li>Section: Storing Data</li> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Rules and Calculations"</li> <li>Documentation: OneStream Design and Reference Guide, Chapters "Financial Model Guides", "Workflow Guides"</li> </ul>
200.1.5: Identify the function of each member of the Consolidation Dimension.	Documentation: OneStream Design and Reference Guide, Chapter "Financial Model Guides"
200.1.6: Identify the characteristics of aggregation and consolidation.	Documentation: OneStream Design and Reference Guide, Chapter "Financial Model Guides"
200.1.7: Given a Financial Model design situation, identify how a Lead Architect should configure Cube Integrations or Cub Dimensions.	Course: OneStream Architecture: Designing an Application     Sections: Data Unit Explained, Data Unit and Extensibility, Vertical and Horizontal Extensibility     Documentation: OneStream Design and Reference Guide, Chapters "Cube", "Data Collection Guides"
200.1.8: Given a metadata situation, design the extensible metadata. (performance test)	<ul> <li>Course: OneStream Architecture: Designing an Application</li> <li>Sections: Data Unit Explained, Data Unit and Extensibility, Vertical and Horizontal Extensibility</li> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Design and Build"</li> </ul>
200.1.9: Add members and set properties for a stated outcome. (performance test)	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Building simple Dimensions</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Cube"</li> </ul>



	Exam Objectives	Applicable Course Content
•	<b>200.1.10:</b> Given a Financial Model design, build the Cube(s). (performance test)	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Working with Cubes and Extensibility</li> <li>Documentation: OneStream Design and Reference Guide, Chapters "Financial Model Guides", "Cube"</li> </ul>
•	<b>200.1.11:</b> Given a situation, set up weekly time Application. (performance test)	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Creating a Custom Time Dimension</li> <li>Documentation: OneStream Design and Reference Guide, Chapters "System Business Rules", "Cube"</li> </ul>
•	200.1.12: Given a situation, determine the correct properties for the calculation settings for the cube properties. (performance test)	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Sections: Assigning Dimension to a Cube, Best Practices for Setting Up Cube Properties and Cube Dimensions</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Cube"</li> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your</li> </ul>
•	<b>200.1.14:</b> Given a Dimension hierarchy based on a Financial Model design, identify how to troubleshoot issues. (performance test)	<ul> <li>OneStream Platform, Chapter "Consolidation"</li> <li>Course: OneStream Architecture: Designing an Application         <ul> <li>Section: Metadata Design</li> </ul> </li> <li>Course: OneStream Essentials: Implementing OneStream         <ul> <li>Section: Adding Dimensions</li> </ul> </li> <li>Requires Real World Experience</li> </ul>

# Exam Section 2: Workflow (Weighting: 18%)

Exam Objectives	Applicable Course Content
200.2.1: Given a set of requirements, identify the most appropriate workflow design, including the journal process.	<ul> <li>Course: OneStream Architecture: Designing an Application</li> <li>Section: Workflow Design</li> </ul>
	Course: OneStream Essentials: Implementing OneStream
	Section: Workflow Design
	Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapters "Methodology and the Project", "Rules and Calculations", "Analytic Blend"
	Requires Real World Experience



Exam Objectives	Applicable Course Content
200.2.3: Given a situation, identify workflow security for data loading and journals.	<ul> <li>Course: OneStream Architecture: Designing an Application</li> <li>Section: Workflow Design</li> </ul>
	Documentation: Book: OneStream XF Foundation: The     Definitive Reference to Design, Configure and Support Your     OneStream Platform, Chapters "Data Integration", "Security"
	<ul> <li>Documentation: OneStream Design and Reference Guide, Chapters "Foundation", "Data Collection Guides", Workflow Guides"</li> </ul>
	<ul> <li>Course: OneStream Architecture: Designing an Application</li> <li>Section: Workflow Design</li> </ul>
200.2.4: Given a situation including loading	Course: OneStream Essentials: Implementing OneStream
data to a given workflow unit, identify what is cleared.	Section: Importing Data
wildt is tiedieu.	Documentation: OneStream Design and Reference Guide, Chapter "Workflow Guides"
200.2.5: Identify the primary purpose of BI blend.	Course: OneStream Architecture: Designing an Application     Section: Analytic Blend
	Documentation: OneStream BI Blend Design and Reference Guide, Chapters "BI Blend Overview", "Use Cases for BI Blend"
	Documentation: Book: OneStream XF Foundation: The     Definitive Reference to Design, Configure and Support Your     OneStream Platform, Chapter "Analytic Blend"
	Documentation: OneStream Design and Reference Guide, Chapter, "Data Collection"
200.2.7: Create confirmation rules to meet	Course: OneStream Essentials: Implementing OneStream
requirements for the situation (action	Section: Completing the Workflow
types, business rule capabilities, and when needed, thresholds). (performance test)	Documentation: OneStream Design and Reference Guide, Chapter "Workflow"
	<ul> <li>Course: OneStream Architecture: Designing an Application</li> <li>Section: Workflow Design</li> </ul>
	Course: OneStream Essentials: Implementing OneStream
200.2.8: Given a situation, build the workflow (task is organizational hierarchy).	Sections: Workflow Start, Importing Data, Data Entry, Completing the Workflow
(performance test)	Documentation: Book: OneStream XF Foundation: The     Definitive Reference to Design, Configure and Support Your     OneStream Platform, Chapter "Workflow"
	Documentation: OneStream Design and Reference Guide, Chapters "Workflow Guides", "Workflow"



### **Exam Section 3: Data Collection (Weighting: 17%)**

Exam Objectives	Applicable Course Content
200.3.1: Given source data requirements, identify how a Lead Architect should configure the matrix data source.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Importing Data</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Data Collection Guides"</li> </ul>
200.3.3: Identify the function of the Connector Data Source.	Documentation: OneStream Design and Reference Guide, Chapter "Data Collection Guides"
200.3.5: Given a Parser Business Rule situation, identify which function returns the value.	Documentation: OneStream Design and Reference Guide, Chapter "Application Tools"
200.3.6: Given an Excel template for data load, identify functions, prefixes, and source IDs.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Importing Data</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Data Collection Guides"</li> </ul>
200.3.9: Given a situation, identify     Transformation Rule types, names, and     examples that perform most efficiently.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Importing Data</li> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapters "Data Integration", "Performance Tuning I"</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Data Collection"</li> </ul>
200.3.10: Identify the order of operations of the Transformation Rules.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Importing Data</li> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapters "Data Integration", "Performance Tuning"</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Data Collection"</li> </ul>
200.3.11: Identify use cases when derivative rules can be used.	Documentation: OneStream Design and Reference Guide, Chapters "Foundation Guides", "Data Collection", "Application Tools"



Exam Objectives	Applicable Course Content
200.3.12: Given a sample outline (dimensional structure) with a member filter, identify the members that are expected to be seen in the results.	<ul> <li>Course: OneStream Essentials: Building Basic Reports</li> <li>Section: Building Financial Statements Through Cube Views</li> <li>Documentation: OneStream Design and Reference Guide, Chapter, "Cubes"</li> </ul>
200.3.13: Identify the steps to build a form template and when a Lead Architect should use it.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Data Entry</li> <li>Documentation: OneStream Design and Reference Guide, Chapters "Data Collection", "Presentation"</li> </ul>
200.3.14: Create a Data Source for the given file. (performance test)	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Importing Data</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Data Collection"</li> </ul>

# **Exam Section 4: Presentation (Weighting: 16%)**

Exam Objectives	Applicable Course Content
200.4.1: Identify repercussions of changing a point of view and the data that is seen and not seen.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Querying Data and Reporting</li> <li>Documentation: OneStream Design and Reference Guide, Chapters "Data Collection Guides", "Presentation Guides", Key Functions"</li> </ul>
that is seen and not seen.	Real World Experience: Understanding that using "WF"     Substitution Variable over forcing a user to change their POV every time they change WF periods.
200.4.2: Given a situation, identify the property in the cube view, that when enabled, does data sparse suppression.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Querying Data and Reporting</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Presentation Guides"</li> </ul>
200.4.3: Identify the correct order of operations to override a cube view format.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Querying Data and Reporting</li> <li>Course: OneStream Essentials: Building Basic Reports</li> <li>Section: Formatting a Cube View</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Presentation Guides"</li> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Reporting"</li> </ul>



Exam Objectives	Applicable Course Content
200.4.4: Identify what can and cannot be suppressed on a cube view.	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Querying Data and Reporting</li> <li>Course: OneStream Essentials: Building Basic Reports</li> <li>Section: Building Financial Statements Through Cube Views</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Presentation Guides"</li> <li>Documentation: Book: OneStream XF Foundation: The</li> </ul>
	Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Reporting"
• 200.4.10: Create a cube view. (performance test)	<ul> <li>Course: OneStream Essentials: Implementing OneStream</li> <li>Section: Querying Data and Reporting</li> <li>Course: OneStream Essentials: Building Basic Reports</li> <li>Sections: Building Financial Statements Through Cube Views, Formatting the Cube View, Creating Calculations and Cube Views, Parameters</li> <li>Documentation: OneStream Design and Reference Guide, Chapters "Foundation Guides", "Presentation Guides"</li> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Reporting"</li> </ul>
• 200.4.11: Create a member filter. (performance test)	<ul> <li>Course: OneStream Essentials: Building Basic Reports</li> <li>Section: Building Financial Statements Through Cube Views</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Presentation Guides"</li> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Reporting"</li> </ul>

# Exam Section 5: Tools (Weighting: 16%)

Exam Objectives	Applicable Course Content
200.5.1: Identify the characteristics and appropriate usage of dynamic calculations.	Course: OneStream Architecture: Designing an Application
	<ul> <li>Section: Rules Design</li> </ul>
	Course: OneStream Essentials: Implementing OneStream
	<ul> <li>Section: How to Run Calculations in OneStream</li> </ul>
	<ul> <li>Documentation: OneStream Design and Reference Guide, Chapter "Financial Model Guides"</li> </ul>



Exam Objectives	Applicable Course Content
200.5.2: Given a situation with a formula, identify the drill down formula.	Documentation: OneStream Design and Reference Guide, Chapter "Financial Model Guides"
	Course: OneStream Architecture: Designing an Application
	Section: Rules Design
200.5.3: Given a situation and the Data Unit Calculation Sequence (DUCS), identify the correct calculation order.	Documentation: OneStream Design and Reference Guide, Chapter "Financial Model Guides"
	Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Rules and Calculations"
200.5.4: Identify examples of rules that cause and do not cause data explosion.	Documentation: OneStream Design and Reference Guide, Chapter "Financial Model Guides"
200.5.5: Given a situation, identify the finance function type or finance function to use and why.	<ul> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Rules &amp; Calculations"</li> <li>Documentation: Design and Reference Guide, Chapters "Application Tools", "Financial Model Guides"</li> </ul>
,	Real World Experience: In OneStream itself, open a Business Rule

# **Exam Section 6: Security** (Weighting: 5%)

Exam Objectives	Applicable Course Content
	Course: OneStream Essentials: Configuring Core Application Security
	Section: Slice Security
200.6.1: Given a situation, identify the proper way to setup slice security.	Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Security"
	• <b>Documentation:</b> OneStream Design and Reference Guide, Chapters "Cube", "Foundation Guides".
	Requires Real World Experience: Tool Tips in "slice" when using filters.



Exam Objectives	Applicable Course Content
200.6.2: Identify the characteristics of application security roles.	<ul> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Security"</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Application Tools"</li> </ul>
	<ul> <li>Requires Real World Experience: Design and Build a Security Model During a Project.</li> </ul>
200.6.3: Identify the characteristics of application user interface roles.	Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Security"
	<ul> <li>Documentation: OneStream Design and Reference Guide, Chapter "Application Tools"</li> </ul>
	<ul> <li>Requires Real World Experience: Design and Build a Security Model During a Project.</li> </ul>
200.6.4: Given a security situation where a user does NOT have correct access, troubleshoot which security component(s) a Lead Architect needs to adjust to fix the user's access rights.	<ul> <li>Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Security"</li> <li>Documentation: OneStream Design and Reference Guide, Chapter "Application Tools"</li> </ul>

# **Exam Section 7: Administration (Weighting: 2%)**

Exam Objectives	Applicable Course Content
200.7.1: Given a situation, identify the server that will load the data.	Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapters "Performance Tuning I", "Application Server Roles".
	<ul> <li>Documentation: OneStream Design and Reference Guide, Chapters "Workflow Profiles", "Application Tools"</li> </ul>
	Documentation: BI Blend Design and Reference Guide, Chapters "Server Roles", "Optional Application Server"
200.7.2: Given a situation, identify issues that a Lead Architect needs to resolve related task activity.	Documentation: Book: OneStream XF Foundation: The Definitive Reference to Design, Configure and Support Your OneStream Platform, Chapter "Performance Tuning I"
	Documentation: OneStream Design and Reference Guide, Chapters "OnePlace Workflow", "Logging"
	Requires Real World Experience: Troubleshooting



For questions related to the certification process or exam, please submit a case form to the Certification team via the <u>ServiceNow Support Portal</u>.



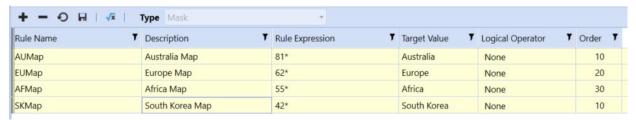
### **Sample Exam Questions**

Review the following sample questions prior to taking an exam to gain a better understanding of the types of questions that will be presented on the exam.

The sample exam allows candidates to see the type and format of questions that will be encountered in the actual exam. Sample exam results do NOT predict a candidate's actual test results.

- 1. Which Consolidation dimension member is the Lead Architect able to use for loading stage data?
  - A. Import
  - B. Local
  - C. Share
  - D. OwnerPreAdj
- 2. A Lead Architect has created the following Mask rules.

In which order are these rules executed during the transformation step?



- A. AUMAP, EUMAP, AFMAP, SKMAP
- B. AFMAP, AUMAP, SKMAP, EUMAP
- C. AUMAP, SKMAP, EUMAP, AFMAP
- D. AUMAP, AFMAP, EUMAP, SKMAP
- 3. A Lead Architect has been given a file from the customer that is separated by commas.

Which type of Data source should the Lead Architect create?

- A. Fixed
- B. Delimited
- C. Connector
- D. Data Management



Refer to the exhibits.

A Lead Architect has the following defined in their Point of View tab.



Which member filter should the Lead Architect use to display the following columns in a Cube View?



- A. T#WF-1, T#WF
- B. T#MonthPrior2(|WFTime|)
- C. T#PovPrior1.allpriorinyear, T#PovPrior1
- D. T#YearPrior1(|POVTime|)Month(|POVTime|).allPriorinyear

#### 5. In which OneStream Engine does the BI Blend Engine reside?

- A. Stage Engine
- B. Planning Engine
- C. Reporting Engine
- D. Consolidation Engine



#### 6. (SAMPLE PERFORMANCE-BASED ITEM)

#### Consider the following situation:

As part of a customer's close process, roll-forwards for PP&E (Plant, Property & Equipment) Balance Sheet accounts need to be completed. For this test case, the Lead Architect will add an additional confirmation rule to the profile that executes during the load of the trial balance file.

The Lead Architect will be able to access the following artifacts during the exam through the user directory.

- ABCityTB2020.txt main file
- ABCityTB2019M12.txt this file is required to seed the system
- Step 1: Login to OneStream
- Step 2: Update the Actual Import Validation
- Step 3: Load 2019 Balances
- Step 4: Set POV
- Step 5: Load Trial Balance File
- Step 6: Build out a confirmation rule
- Step 7: Perform the Confirm step

### **Sample Exam Answers:**

- 1. B, (A is not a consolidation dim member, C and D cannot be populated from a stage load.
- 2. C, (The rules will be saved grouped by ORDER and then grouped alphabetically by RULE NAME
- 3. B, (A is used for data in distinct columns, C is used for direct connections and D is used to bring in Cube data)
- 4. D, (A = T#WF-1 is not valid syntax, B would return 2019M12, C would return 2021M1 and 2021M2)
- 5. A, (The Bi Blend Engine resides in the Stage Engine and not the others)
- 6. SAMPLE PERFORMANCE-BASED ITEM