

Surpass (SecureClient)

Tips and Tricks

General

1. **Practise writing cases or answering MCQs without a mouse** if you are not planning to bring a wired mouse. As a reminder, the supplied laptops will be equipped with a numeric keypad.
2. **Report any IT issues that you encounter immediately to a proctor.** This ensures your issue will be documented and rectified in a timely manner, resulting in a better experience for the rest of the exam. Your provincial/regional CPA body cannot review or rectify issues that are reported after the exam has ended. As a reminder, any time spent resolving the issue will be added to your total writing time.
3. **A clock/timer will not appear in the software during your exam.** In the spreadsheet, you can type “ctrl + shift + semicolon” or use the “NOW” function to display the laptop’s current time in the spreadsheet. However, this is **not** the official clock used for the exam and the time displayed will not continue to update as time passes. Refer to the clock/time announcements provided in your exam centre.
4. **Use the provided rough notes paper booklet to take notes during your exam,** but be aware that you are not allowed to remove staples, tear apart, or otherwise alter the exam or rough notes paper booklets in a substantial way. Nothing from the exam booklet or rough notes will be marked.
5. **Additional resources are available on the [examination software webpage](#),** including an overview of the software’s word processor and spreadsheet functions as well as a practice examination that demonstrates how MCQs are presented in the software.

Case Writing

1. **Practise writing questions back-to-back** so you are comfortable stopping and moving on to the next question when your planned time is up for each question.
2. **Practise writing cases using only a laptop with no second screen**, similar to what you will be using to write the exam. You will be allowed one word processing document, one spreadsheet document (one sheet only) and access to the reference material via Knotia. It would also be beneficial to practise with a printed copy of the case, since that is what you will receive on the exam day (a digital copy of the case will not be provided).
3. **At the end of the exam, write your candidate number and the number of pages used at the bottom of the word processor document, along with your candidate number and the number of rows used at the bottom of the spreadsheet.** Do not do this at the beginning of the exam. It should be the last thing you type into your exam response, so that we know we have your last saved file as confirmed by your candidate number. Candidates should never enter their name on the exam response.
4. **For CFE only: SecureClient will contain a preloaded spreadsheet.** The main body of your response(s) should be written in the word processor file. All financial tables in the cases with ten lines or more have been preloaded into the spreadsheets that follow Sheet 1. These spreadsheets are in read-only mode. You can copy and paste the financial information from the respective tabs into your Sheet 1, if applicable, where you can then do all your calculations. Note that on Day 3 of the CFE, all cases will be entered into one word processor file and one spreadsheet tab, Sheet 1. All cases should be clearly labelled in your response.

Multiple-Choice Questions (MCQs) (only applicable for exams with MCQs)

1. **Utilize the grid view to navigate MCQs.** You can only click down through the list of questions. You cannot scroll. It is recommended that you utilize the grid view to navigate through the questions (available in the bottom-right corner of the screen).
2. **Striking out answer options does not mean you have answered the question.** You can right click on an answer option to strike it out, which can be helpful in eliminating options. Ensure you select an answer for each question. Eliminated answer options are not recorded in your final submission.
3. **Clear flagged MCQs before finishing the exam.** You can flag MCQs to return to later, but all flags must be cleared before finishing your exam.

Reference Material

1. **Practise using Knotia** when writing your practice cases.
2. **You will need to close the reference material when moving between the MCQs and cases.**
The reference material is linked to the specific sections (i.e., MCQ, Case 1, Case 2) of the exam, so it must be closed and re-opened when you move to a new section of the exam.
3. **The reference material opens to the main intro page each time you open it** (i.e., it does not save your spot).
4. **If your reference material is open and you click on the reference material button again the software will close your reference material and return you to the home page in the software.**
5. **Day 1 CFE candidates are provided a copy of the Capstone 1 case for reference only**, and will not be evaluated.

Word Processor

1. **Frequent copy and pasting from the reference material into the word processor may cause the software to slow down or freeze.**
2. **Do not cut and paste.** Always copy and paste and then go back and delete the content you were trying to move. If you cut, there is always the possibility of losing some of your response.
3. **Do not format large amounts of data.** Formatting large amounts of data at once may cause the software to freeze.

Spreadsheet

SecureClient uses an emulated version of Excel.

Do not select more than 20 column headers (A, B, C, D....) or use “select all” in the spreadsheets. If multiple items need to be selected that exceed 20 columns and/or 1000 rows, this can only be done by selecting **multiple cells** as follows:

- Option 1 - Using the mouse: Select the first cell and then drag the mouse cursor across multiple cells as needed, avoiding the column headers
- Option 2 - Using the keyboard: Select the first cell and press SHIFT and + the directional arrow keys to select multiple cells as needed, avoiding the column headers

Some features that you would typically see in Microsoft Excel have been either changed or been removed for security purposes. Below are some differences you should be aware of:

1. **AUTOSUM Function** - The AUTOSUM function within *SecureClient* does not highlight the likely range to create a final number. You need to use your mouse/track pad to highlight the range you wish to generate a sum for and then press **Enter**.

2. **SORT Function** - The SORT function within *SecureClient* does not allow you to specify a range of columns. To SORT within *SecureClient* you must:
 - Create a table of data.
 - Highlight the data in the table.
 - Click **Format as Table** within the Navigation Bar.
 - Specify the type of table appearance required.
 - Click **OK**.
 - At this point the data range is now considered a sortable table within *SecureClient*, and you can properly SORT multiple columns of data.

3. **Equal Sign**
 - Within *SecureClient*, formulas or calculations must start with "=", you cannot start a formula with "+". The "=" sign is also not automatically added.
 - Additionally, the arrow keys will not allow you to specify a range to calculate. Once you create "=SUM", you need to use your mouse/trackpad to highlight a range to calculate.

4. **Dollar Sign (\$)** - Within *SecureClient*, the default current is British Pounds. If you wish to format a range of data as Canadian dollars, you can either use the "Accounting" number format, or:
 - Highlight the range of data you wish to format.
 - Right-click the highlighted range and click **Format Cells**.
 - Choose the CURRENCY option under Category.
 - In the SYMBOL field, click the dropdown menu and choose "\$FRENCH (CANADA)" or "\$ENGLISH (CANADA)".
 - Click **OK**.

5. **Format Painter** - There is no format painter tool in *SecureClient*. You will need to use the format function.

6. **Alt-Tab Function** - The Alt-Tab function does not work if you want to navigate between programs (word processor, spreadsheet, reference material). Candidates should instead resize the window using the mouse.