

# Live Webcast on Remote working and office management

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Hosted by



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THE INSTITUTE OF CHARTERED ACCOUNTANTS OF INDIA**

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- Practising Chartered Accountant with specialisation in Information System Assurance
- A futurist who specializes in
  - IT Consulting, Information Systems Assurance
  - GDPR & Privacy Law
  - Data Analytics, Implementation and Testing of Internal Financial Controls
  - SOX and SOC (SSAE-16 and 18)
- IS Auditor and Advisor for various BFSI, Sporting Organisations, start-up entities, Tech companies and many more
- DISA & CISA Faculty
- Speaker at National & International Forums of IT
- Faculty for CA Course (IT, EIS, ISCA) at ICAI and at Apnacourse.com (Online)
- Author on the book titled: "Digitising CA practise"

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# Agenda

- Challenges to be Considered
- Counter Measures
  - Approach
  - Tools & Tips
- Security Considerations
- General Considerations

# Challenges To Be Considered



Do employees have adequate resources to enable working from home?



If all internal assets are over VPN, will it support the entire workforce connected at once?



How will employees communicate? Do all employees have access to web and audio conferencing accounts? Are chat programs in place?



Do you still use printers and need to file hard copies of documents?



Are you reimbursing any extra costs? What if an employee goes over their internet cap or cell phone usage?

## From CA Office perspective

Are internet speeds fast enough? Consider both download and upload speed



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graph TD; A[Are internet speeds fast enough? Consider both download and upload speed] --> B[What is the bandwidth cap and what is the cost of going over the limit?]; B --> C[Is there a good area at home to work from?];
```

What is the bandwidth cap and what is the cost of going over the limit?

Is there a good area at home to work from?

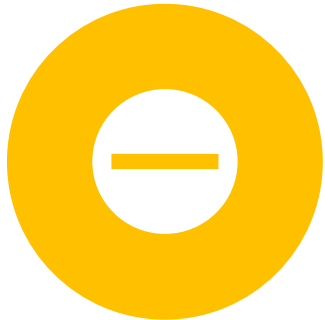
From the Employee's point of view



Is Anti-Virus and Malware detection being updated remotely?



Are the new 100% remote assets being scanned for vulnerabilities?



How are policies and hardening being enforced, and are new unapproved applications being installed on these assets?



What is the plan should assets become infected or get broken?  
Are there spares in place ready to be delivered or shipped?

## From a security point of view



# Counter Measures



Identify the Key Tasks for the next 2-3 weeks

Ex: GST Returns, Income tax Filing etc.



Identify the key resources required

Ex: Software, Laptop (on Rent), Files which are necessary, DSC  
Identify if personal laptops can be used



Assign tasks to office team based on the above



Prepare a Matrix / Chart to map the above



Identify methods to track tasks and manage official communication



Try with a few users and then slowly move to majority of them

# APPROACH

Tasks	Resources required	Solutions
GST filing	Accounting Data (Tally / Cloud)	Operate Tally on Remote Use Cloud based accounting tools
	GST Login credentials	Use Password Manager Apps & Cloud based spreadsheets
	Microsoft Office	Use Open Office / G Suite etc
	Software for Filing	Contact Vendor for Cloud / Remote Desk Feature

## CLEARLY SPECIFY THE PROBLEM STATEMENT

# APPS AVAILABLE FOR WORK FROM HOME

# VIDEO CONFERENCING



## Where to Use:

- Client Meetings
- Training Articles
- Internal Discussion
- Screensharing etc

# DISCUSSION & COLLABORATION



## Where to Use:

- Internal Discussion
- Track work wise Discussion etc



# SHARING & STORING FILES



## Where to Use:

- File Repository
- Can act as Backup
- Large files can be stored
- Can be accessed over the web, without downloading

# DOCUMENTS & SPREADSHEETS



POLARIS OFFICE

## Where to Use:

- Few can be accessed over the Cloud
- Cloud version of these tools can be tried



# TASK TRACKING & PROJECT MANAGEMENT



- These have good features to assign and update the status of tasks
- CA Practise Management software can also be used.
- Time tracking possible

# FEW APPS



Now You Can Assign Action Items in Google Docs, Sheets, & Slides

**ProCAAT**<sup>®</sup>  
Proactive Compliance & Assurance

Helps you to keep track of entire life cycle of management of all key processes in a professional & Enterprise office

**Trello**

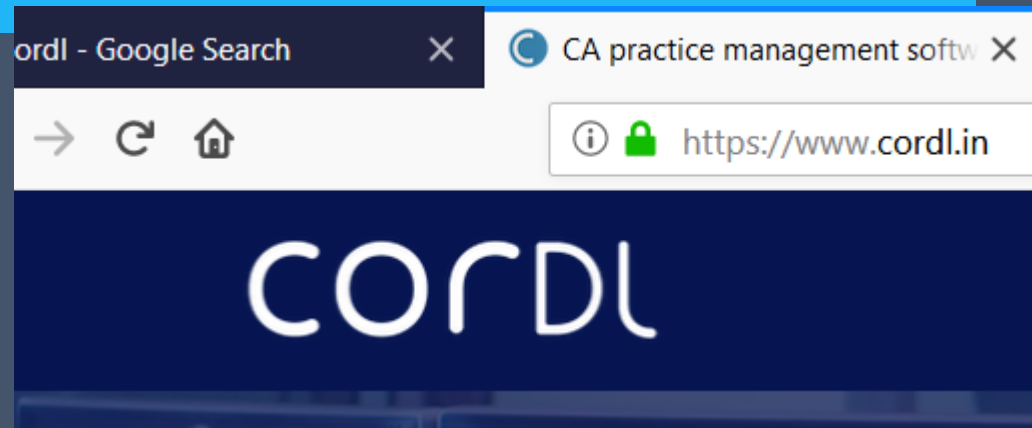
**Papilio**

Courtesy : ProCAAT (Wincer Infotech)  
[sales@wincaat.com](mailto:sales@wincaat.com)


Cordl  
[support@cordl.in](mailto:support@cordl.in)

Simplify Practise  
[support@simplifypractice.com](mailto:support@simplifypractice.com)

Papilio  
[info@papilio.co.in](mailto:info@papilio.co.in)



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# Get Microsoft Teams for free

That's right, free. As in \$0. Work together with features like chat, file sharing, and video calling.

[SIGN UP FOR FREE](#)

- Helps you edit online and in real-time



## Communicate more effectively

Get your team on the same page with group chat, online meetings, calling, and web conferencing.



## Work better together

Collaborate on files with built-in Office 365 apps like Word, Excel, PowerPoint, and SharePoint.



## Customize your workspace

Add in your favorite Microsoft apps and third-party services to keep the business moving forward.

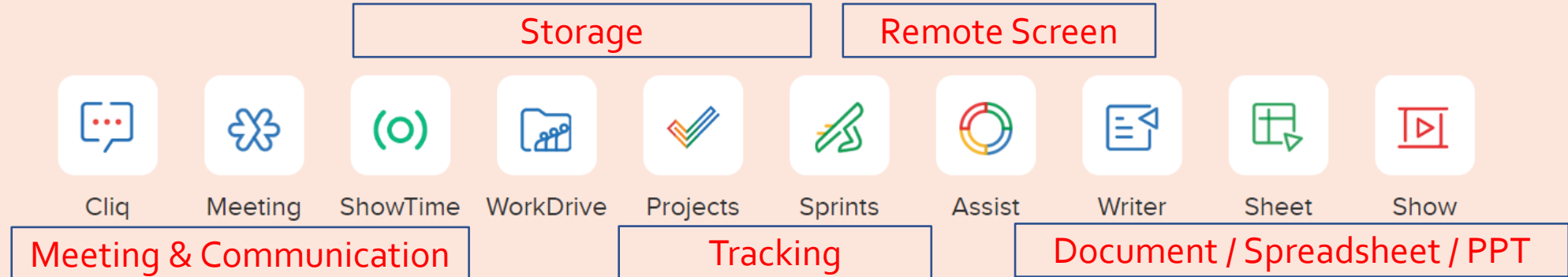


## Keep your team secure

Get end-to-end security, administrative control, and compliance—all powered by Office 365.

# SUITE OF REMOTE WORKING PRODUCTS

## APPS INCLUDED IN ZOHO REMOTELY



**NOTE:** Remotely will remain free till July 1, 2020 by which time we hope the Coronavirus crisis tides over. We wish this is of help to all teams.

# REMEMBERING PASSWORDS

## **Spikity**

**Spikity** uses 'military-grade' encryption to remember your passwords so you don't have to. Spikity automatically saves your passwords and then syncs them across all your devices, entering them on to websites when required. Spikity Premium costs \$4.99 per month.

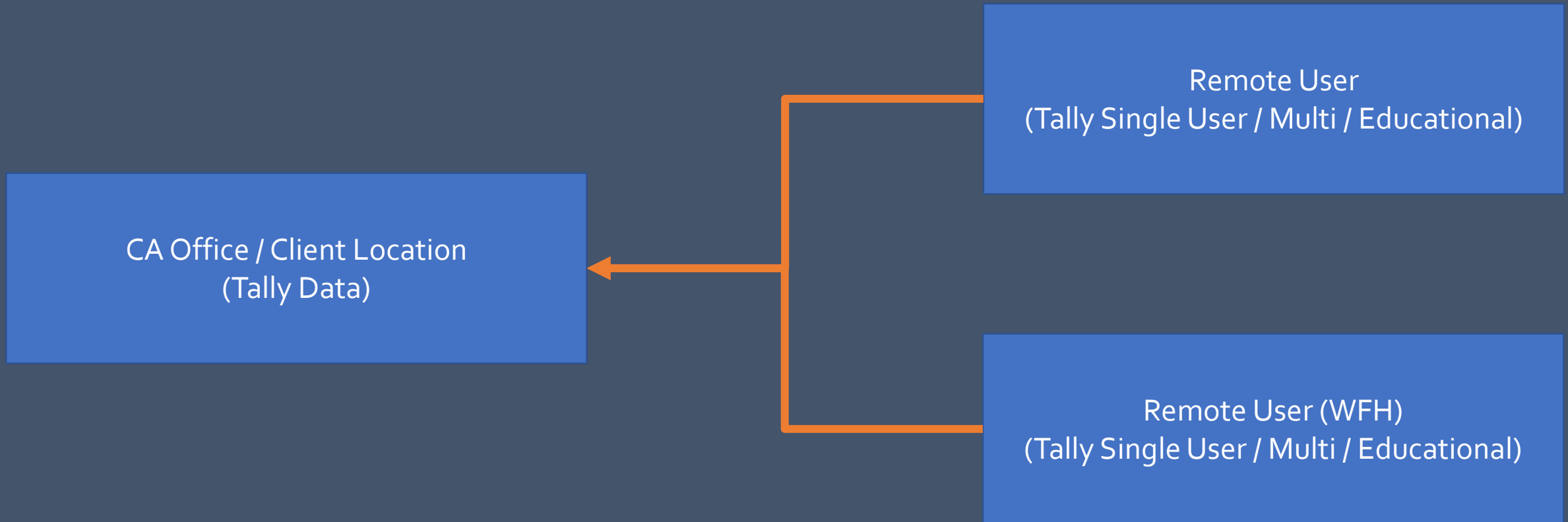
## **LastPass**

**LastPass** is a free password manager app that works on smartphones and desktops. LastPass automates passwords on websites. By saving passwords across different websites and applications, LastPass saves you time and effort as you no longer have to remember and fill in passwords.

# Remote Access in Tally

# Remote Access in Tally.ERP9

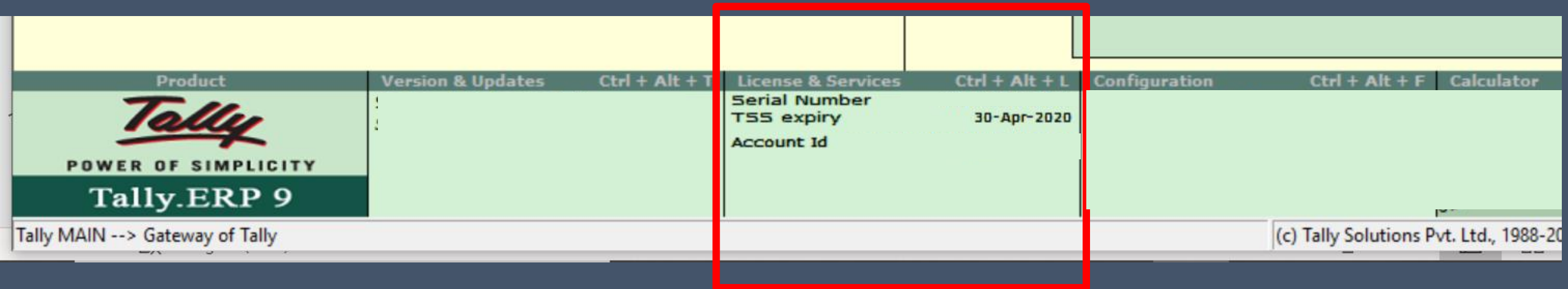
- The Remote Access capability in Tally.ERP 9 lets you access your business data even while you are away from your office.
- This is made possible by the Tally.NET framework which provides a secure connection through trusted Remote Access.
- Tally.NET which does not store any data, uses advanced encryption to ensure that it is not accessible to anyone outside the system.





# Pre-Requisites

- Check the Tally “TSS” Validity



### Login as Tally.NET User

Your Tally.NET ID :

Enter your .net ID

Your Tally.NET Password :

Press F5 if you have forgotten your Tally.NET password. You will receive an e-mail with a link to reset your password.

Product

**Tally**

POWER OF SIMPLICITY

**Tally.ERP 9**

Version & Updates

Ctrl + Alt + T

License & Services

Ctrl + Alt + L

Configuration

Ctrl + Alt + F

Calculator

Serial Number

TSS expiry

30-Apr-2020

Account Id

Account ID : ca.narasi23@gmail.com

**L : Licensing and Configuration**

**I : License Management**

**D : TDL Management**

*TDL management for one or more locations/sites.*

---

**J : Jobs and Recruitment**

*Search for people, publish your requirements, set online examinations to test knowledge of candidates.*

**E : Employee Assessment**

*Assess the knowledge and competency of employees.*

---

**A : Profile Management**

*Set and check details about the account.*

**U : User Management**

*Manage security and other aspects of all users including Tally.NET remote users.*

**C : Change Account Administrator**

*Change the account administrator.*

---

**N : Manage Data Sessions**

*Session-wise details of other users logged into this account.*

---

User Management

Test

Ctrl + M

User Management

Account ID : ca.narasi23@gmail.com

S.No.	Security Level	Tally.NET ID	Tally.NET User	Status
1	Standard User		Yes	Active
2	Owner		No	Active
3	Owner		Yes	Active

Gateway of Tally ....

## Company Info.

Select Company

CoNnect Company

SHut Company

Create Company

Create Group Company

Alter

Security Control

Change TallyVault

SPlit Company Data

Backup

Restore

Quit

Gateway of Tally ....

Company Info. ....

## Security Control

Users and Passwords

Types of Security

Password Policy

Quit

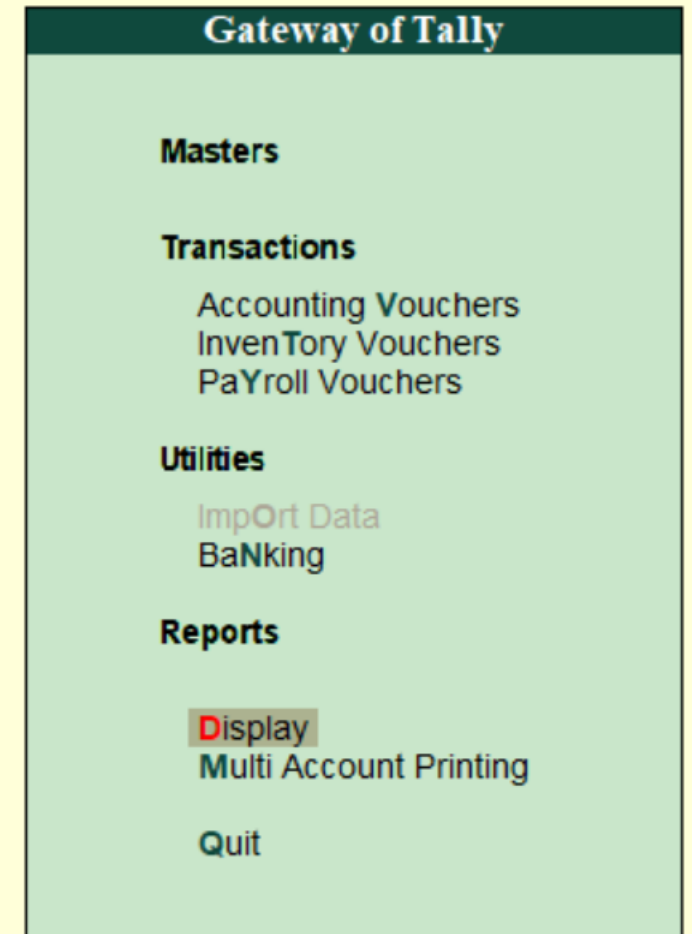
### List of Users for Company

Name: **Test**

Security Level	Username	Password (if any)	Allow Remote Access	Allow Local TDL Files	Allow SMS Access
Tally.NET User	xyz@gmail.com		No	No	No

# Challenges In Using Tally In Remote

- Heavy Load on CA Office Internet Connectivity
- Internet speed at remote location to be looked into
- Performance beyond 10 companies could be challenging
- Creating Ledgers / Masters not possible



# ALTERNATIVE OPTIONS

- Purchase Tally on Rental Option for a few months
- Microsoft Windows Remote Desk
- Install Firewall & VPN License (Ex: Fortigate)
  - Internet Connection with Static / Public IP (speak to ISP)
  - Cost starting from INR 25,000
- Use Remote Sharing Options -  
[https://help.tallysolutions.com/article/faqs/all\\_releases/5337.html](https://help.tallysolutions.com/article/faqs/all_releases/5337.html)



# FEW SUGGESTIONS & IDEAS

- Explain to Clients regarding the steps you are taking and how it may impact deliverables
- Identify tasks which cannot be done through “work from home”. E.g. Physical Verification of Inventory etc. and prepare suitable plans
- Educate everybody on need to be work together and meet this challenge
- Do no compromise on Security and PII of the data

# SECURITY CONSIDERATIONS

# SECURITY CONSIDERATIONS – FROM HOME

- Self Awareness:
  - Hackers Target persons rather than devices
  - They trick by creating a sense of urgency
  - Example calling in the name of software technical support
- Home network:
  - Every home network starts with wireless network controlled by router or wireless point
  - Change the default administrator password, giving access to people who you trust, Strong password

# SECURITY CONSIDERATIONS – FROM HOME

- Passwords:
  - Strong password with more characters
  - A passphrase is nothing more than a password made up of multiple words, such as “bee honey bourbon.”
  - Use a password manager specialized program that securely stores all your passphrases in an encrypted format
  - Two-step verification
- Updates
  - Cyber attackers are constantly looking for new vulnerabilities in the software your devices use
  - By ensuring your computers and mobile devices install these updates promptly, you make it much harder for someone to hack you

# SECURITY CONSIDERATIONS – FROM HOME

- Kids and guests:
  - Make sure Kids and family not use your work system
  - They can accidentally erase or modify information, or, perhaps even worse, accidentally infect the device.

# GENERAL CONSIDERATIONS

# As Employers

- Show your support to your employees and their families
- Educate employees about necessary precautions
- Implement more flexible working hours and relaxation on deliverables
- Sanitise and increase hygiene at the workplace
- Evaluate your group insurance policy to see if it covers COVID-19

# As IT Departments

- Place emphasis on security
- Enable VDI, Virtual machine, remote logins etc
- Consider relaxing a few information security policy requirements without compromising organisational security
- Obtain additional required equipment to enable workforce to be connected.



# As Employees

- Keep yourself away even if you are slightly sick
- Keep yourself clean and wash your hands regularly
- If working from home, use the time saved on commute productively
- If you feel lonely working from home try doing something outside of work that you are passionate about.

# As Millennials

- Share only accurate and valid information
- Keep yourself and your surroundings clean
- Follow guidance issued by the government
- Defer your social obligations and in-person meetings

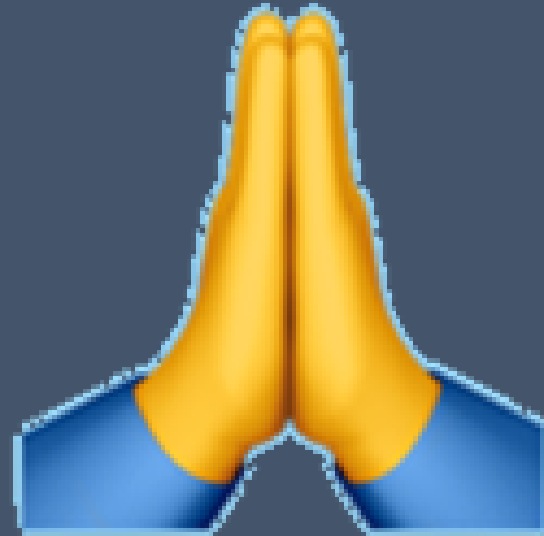


# TIPS FOR WORKING FROM HOME

# TIPS FOR WORKING FROM HOME

- Implement a work routine
- Speak / connect with team regularly and update
- Establish work-life boundaries.
- Ensure connectivity and back up option
- As Leaders, need to gear up new way of managing.

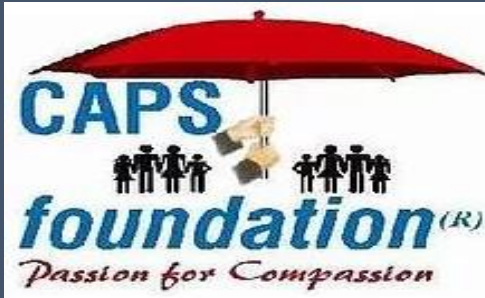
# MOVE ON FROM



**#StaySafe #StayProtected**

# Further Reading And Preparation

- My LinkedIn / Taxguru Article on “Are we ready to operate from Home”
  - <https://www.linkedin.com/pulse/we-ready-operate-from-home-narasimhan-elangovan>
- Remember these key contacts in case of help:
- **The Helpline Number for coronavirus (India): +91-11-23978046**
- **Helpline Numbers for State and Union Territory**
- (<https://www.mohfw.gov.in/coronavirushelplinenumber.pdf>)
- Business Pandemic Influenza Planning Checklist for large businesses (<https://www.cdc.gov/flu/pandemic-resources/pdf/businesschecklist.pdf>)
- Official Website of Ministry of Health & Family Welfare, Government of India (<https://www.mohfw.gov.in/>)
- Kids, Vayu & Corona – A comic for COVID-19 Awareness– ([https://www.mohfw.gov.in/Corona\\_comic\\_PGI.pdf](https://www.mohfw.gov.in/Corona_comic_PGI.pdf))



<https://www.capsfoundation.in/>

# Thank You! Questions?



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