remote working tools…

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Disclaimer

- All products / apps mentioned in this presentation are only suggestive.

- The objective of this presentation is not to promote any specific product or app but only share my thoughts on how to leverage using technology.
- Users are advised to take caution before choosing any of the applications.

- Presenter does not have any interest in any of the applications discussed except "CA Updates" android app and does not endorses any application.

- View expressed herein are mine and does not represent that of SIRC / ICAI.

- Am not an expert and am learning like you. I may just have explored a little more.

- There is no such thing as a stupid question. if you ask a question, it makes you look stupid for 5 minutes – but if you don't ask, you stay stupid for fifty years.

Evolution

Computers ???

- Networking
- Library
- Shop
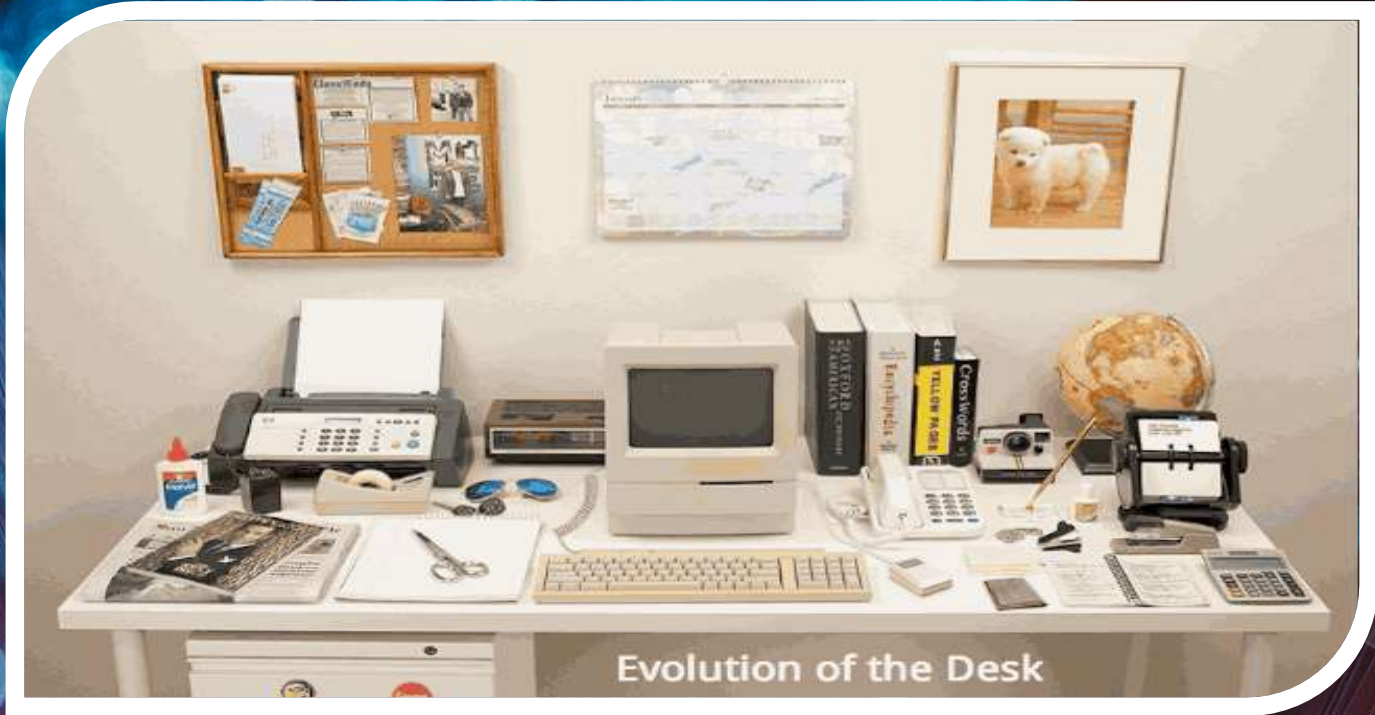- Doctor
- Personal Assistant
- Live Map
- Camera
- Music Player
- Phone Book
- Photo Album

- Calendar
- Alarm Clock
- Mail
- Flash Light
- Taxi Services
- Bills Payment
- Note Pads
- GPS
- Scanner
- Remote

- Video Recorder
- Game Player
- Newspaper
- Speaker
- Health Monitors
- Video Conf.
- Compass
- Timer
- Books
- Landlines

the journey…

Evolution of Desk

Evolution of the Desk

Key Strategy issues – for a Strategic Plan

1. Who are we as a firm?
2. What does our firm want to be known for?
3. Where are we now in our growth strategy?
4. Where do we want to be in future and why?
5. What needs to be done to get there and how?
6. How do we know when we get there?
7. How do we implement required processes and systems to deliver services to reach our goals?
8. What type of IT infrastructure and investment is required to empower the firm and its employees to achieve required services and at desired performance levels?
9. How well are we prepared to meet the challenges of the present and future to deliver services to our clients and what do we need to do be prepared?

Urgent vs. Important Priority Matrix

	Urgent	Not Urgent
Important	1) Deploying a work from home / anywhere technology 2) IT Security Solution etc.	1) Implementation of Task Tracking Tool 2)Deploying Data Analytics for improving quality of engagements etc
Not Important	1) Deploying an IT Solution which may be required for only one client engagement or for a one-off engagement.	1) Introducing an Asset / license tracking tool / preparing a solution for internal training, knowledge repository etc.

Data Management in CA office

- Desktop / Server

- LAN / Wifi

- Scanner & Printer

- MS Excel, MS Word & Tax Software

Challenges – Going tech

Communication – Staff, Clients

Access to licensed software – Limited / Nil

Tracing tasks

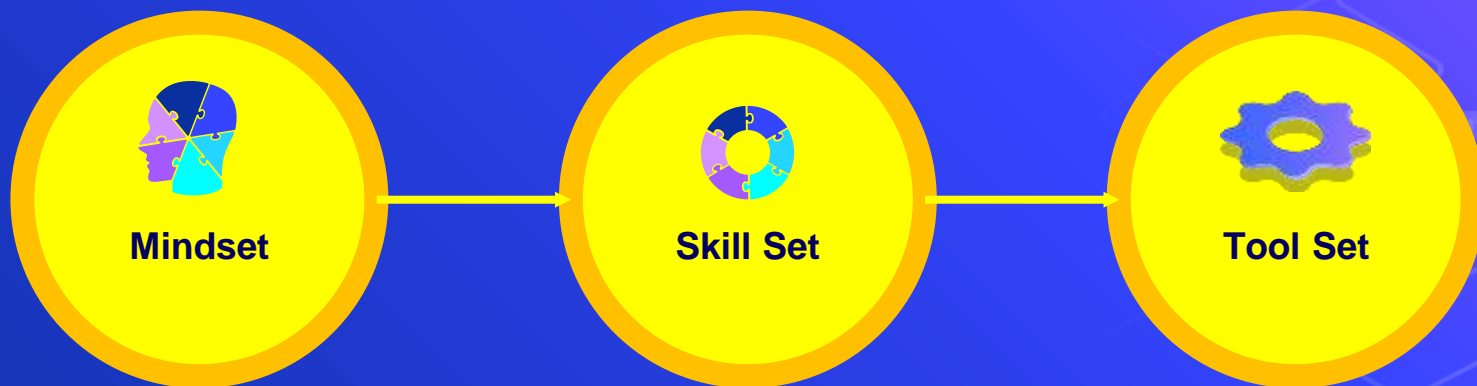Offline data

Why go tech ?

Increased output

Task tracking / scheduling

Structured data maintenance

Accessibility & Sharing – Data & resources

Improved time management

Adapting Technolgy…

Mindset

Skill Set

Tool Set

Tools

- 1 Computer System Structure
- 2 Document Management tools
- 3 Communication tools
- 4 Office Management tools
- 5 Productivity tools
- 6 Remote access tools
- 7 Others

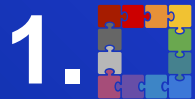# **Prevention is better than cure**

☂ **Precautions**

- Password Management
- Licenced Software
- Cyber threats
  - Anti Virus
  - Ransomware
- Personal Data Protection Bill

Be Careful, Be watchful !!!

- Passwords
- SIM Swap Fraud
- Juice Jacking
- OTPs
- Email / SMS - Phishing

- Permissions
- Photographs
- Google Maps
- Privacy

1.

Computer System Structure

Computer System Structure

- Offline Computing
    - Server
    - LAN / Wifi
    - NAS Disk
    - Any desk / Teamviewer / RDP
- Online Computing
    - Cloud Computing
    - Anywhere Access

Top 5 Cloud Service Providers

CLOUD COMPUTING

SYSTEM
- CLOUD COMPUTING

OPERATING SYSTEM
- LICENSED SERVER SOFTWARE COST INCLUDED

ADVANTAGE
- ✓CAPITAL COST reduced
- ✓NO UPS
- ✓DATA SECURITY
- ✓WORK FROM ANYWHERE
- ✓USER CONTROL

SERVICE PROVIDERS
- IBM CLOUD ETC . . SERVICES
- GOOGLE CLOUD PLATFORM
- AMAZON WEB SERVICE
- MICROSOFT AZURE
- RACKSPACE

Offline Vs. Online

	Offline	Online
Hardware	Inhouse	Hosted iin Service Provider Services, internet
Costs	Server, Systems, Networking, UPS, Licensing - High Cost	Systems, Wifi, Pay as per use for Cloud Computing Resources - Less cost
Security	Low / Medium	High
Flexibility	Less Flexible	Enable to work from anywhere
Backup / Recovery	On the firm	Service Provider
Software updation	Manual	Cloud Service Provider

Cloud Computing

- Rs. 6k to 10k per month
- Approx. 20 users / 7GB RAM
- Installation 1 to 2 hours
- Implementation & Training : 5 days
- Pay as you use
- 12 Months Free available
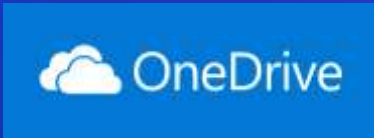
2.
Document Management tools

🧩 Document Management Tools

One Drive
5GB free space

Dropbox
2GB free space

Google Drive
15GB free space

Zoho Work Drive
No free space

3. Communication tools

Communication tools

- Zoom

https://zoom.us/pricing

- Microsoft Teams

https://www.microsoft.com/en-ww/microsoft-teams/free

- Google Meet

https://workspace.google.com/products/meet/

- Skype

https://www.skype.com/en/features/

- Zoho Cliq

https://www.zoho.com/cliq/pricing.html

Communication tools…

- ### Goto Meetings

  https://www.gotomeeting.com/en-in/meeting/pricing-ma

- ### Goto Webinar

  https://www.gotomeeting.com/en-in/webinar/pricing

- ### Cisco Webex

  https://www.webex.com/pricing/index.html

- ### Blue Jeans

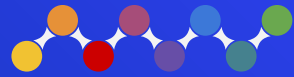 https://store.bluejeans.com/

4.

Office Management tools

Office Management tools

- Jamku
- Papilio
- Cordl
- Zoho Remotely
- Microsoft Teams
- Slack

Office Management tools - Offers

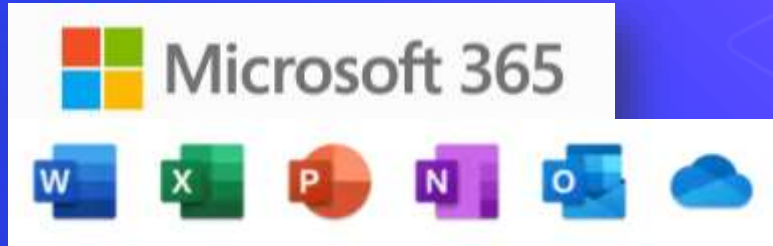- https://cmpbenefits.icai.org/

Short Poll

- http://bit.ly/mentiDC
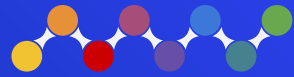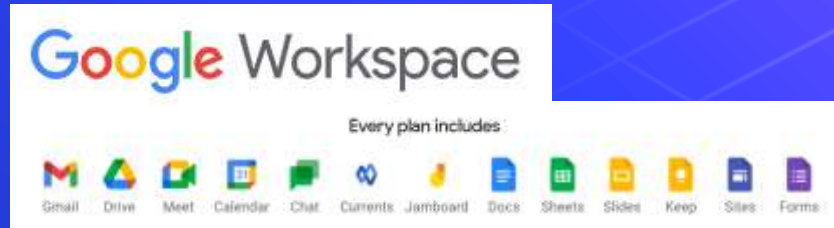
5. 💡 Productivity tools

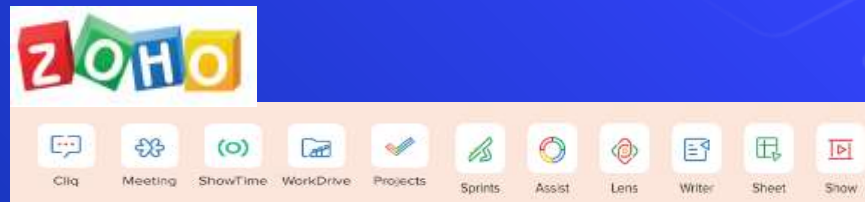# 💡 **Productivity tools**

- Microsoft 365

- Google workspace

  (formerly Gsuite)

- Zoho Assist

MS 365 Pricing

Microsoft 365 Business Basic
₹ 125.00 user/month
(annual commitment)
GST extra as applicable

Buy now

Or try free for 1 month [4]

Best for businesses that need easy remote solutions, with Microsoft Teams, secure cloud storage, and Office Online (desktop versions not included).

Web and mobile versions of Word, Excel, and PowerPoint included. [3]

Teams, Exchange, OneDrive, SharePoint

Microsoft 365 Business Standard
₹ 660.00 user/month
(annual commitment)
GST extra as applicable

Buy now

Or try free for 1 month [4]

Best for businesses that need full remote work and collaboration tools including Microsoft Teams, secure cloud storage, business email, and premium Office applications across devices.

Outlook, Word, Excel, PowerPoint, Publisher (PC only), Access (PC only)

Teams, Exchange, OneDrive, SharePoint

Microsoft 365 Business Premium
₹ 1,440.00 user/month
(annual commitment)
GST extra as applicable

Buy now

Or try free for 1 month [4]

Best for businesses that require secure, remote work solutions with everything included in Business Standard, plus advanced cyberthreat protection and device management.

Outlook, Word, Excel, PowerPoint, Publisher (PC only), Access (PC only)

Teams, Exchange, OneDrive, SharePoint, Intune, Azure Information Protection

Microsoft 365 Apps
Only includes apps

₹ 595.00 user/month
(annual commitment)
GST extra as applicable

Buy now

Or try free for 1 month [4]

Best for businesses that need Office apps across devices and cloud file storage. Business email and Microsoft Teams not included.

Outlook, Word, Excel, PowerPoint, Publisher (PC only), Access (PC only)

OneDrive

https://www.microsoft.com/en-in/microsoft-365/business/compare-all-microsoft-365-business-products

Google workspace Pricing

Choose your edition. Try it free for 14 days.

Google Workspace plans start as low as ₹125 per user per month for Business Starter, ₹672 per user per month for Business Standard, and ₹1260 per user per month for Business Plus.

Every plan includes

Gmail · Drive · Meet · Calendar · Chat · Currents · Jamboard · Docs · Sheets · Slides · Keep · Sites · Forms

Business Starter	Business Standard (MOST POPULAR)	Business Plus
₹125 INR	₹672 INR	₹1260 INR
₹210	₹840	
/user/month	/user/month	/user/month
Get started	Get started	Get started
✓ Custom and secure business email	✓ Custom and secure business email	✓ Custom and secure business email + eDiscovery, retention
✓ 100 participant video meetings	✓ 150 participant video meetings + recording	✓ 250 participant video meetings + recording, attendance tracking
✓ 30 GB cloud storage per user	✓ 2 TB cloud storage per user	✓ 5 TB cloud storage per user
✓ Security and management controls	✓ Security and management controls	✓ Enhanced security and management controls, including Vault and advanced endpoint management
✓ Standard Support	✓ Standard Support (paid upgrade to Enhanced Support)	✓ Standard Support (paid upgrade to Enhanced Support)

https://workspace.google.com/intl/en_in/pricing.html

34

Zoho assist Pricing

6.

Remote access tools

✴ **Remote access tools**

TEAMVIEWER

ANYDESK

REMOTE DESKTOP

Work specific software

TAX COMPLIANCE

COMPUTAX - COMPUWEB	CLEAR TAX	GEN SOFTWARE	WINMAN

ACCOUNTING / INVOICE SOFTWARE

TALLY	ZOHO BOOKS, INVOICE	QUICKBOOKS

TALLY FEATURE

AUDIT	TALLY TO EXCEL REAL TIME ACCESS	E2 TALLY SOFT
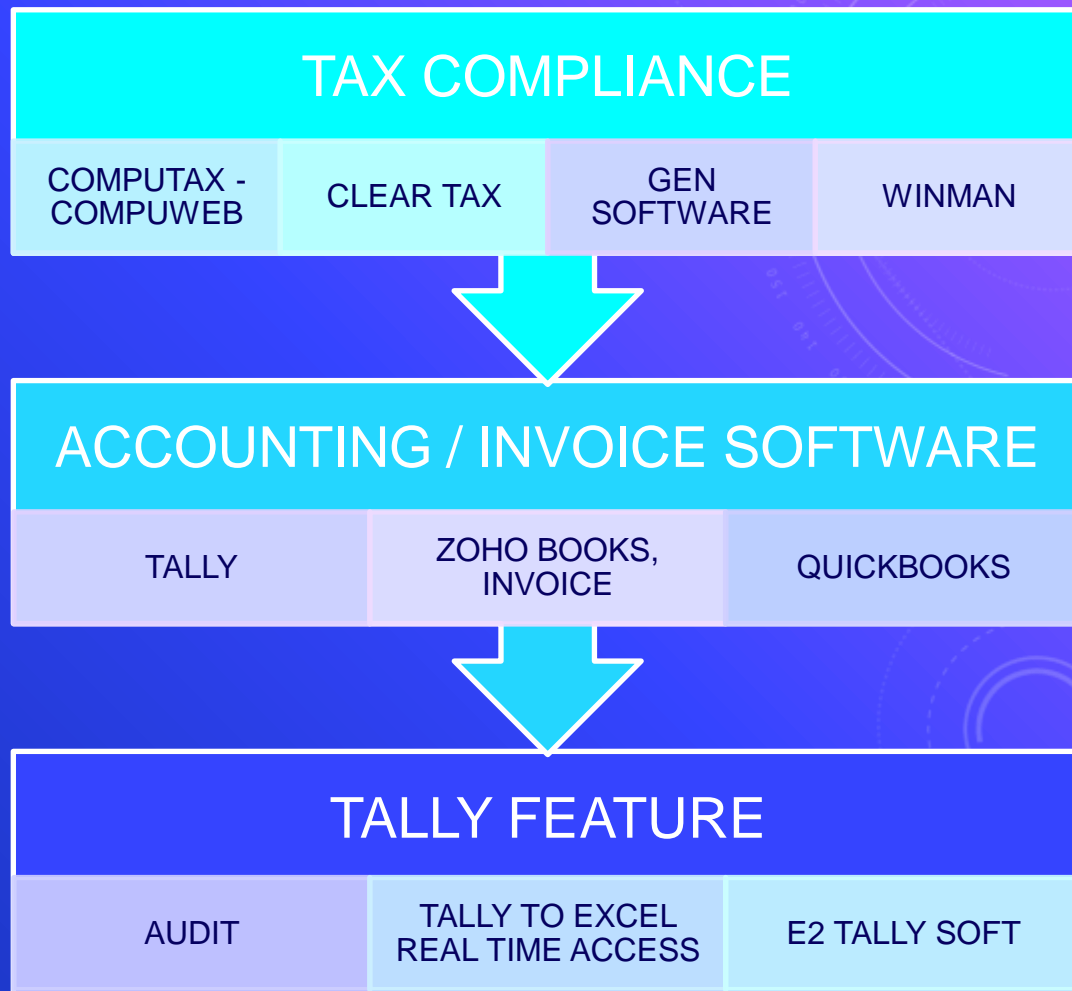
7.

Others

Office utility software

| FYLE	PERFIOS	CANVA	UPWORK	BULK SMS PACKAGE MSGCLUB	LASTPASS GOOGLE EXTENSION	LIGHTSHOT
INTELLIGENT EXPENSES MANAGEMENT UTILITY	BANK STATEMENT ANALYZER	DOCUMENT FRONT PAGE DESIGN NEWSLETTER DESIGN SOFTWARE	FIND SOFTWARE PROFESSIONALS		PASSWORD STORAGE RETRIEVAL UTILITY	SCREEN CAPTURE UTILITY Alt. Snipping tool Link to onedrive

Other tools

- Google Forms
- Google Sheet

⚛ **Profession related tools…**

Shortcuts / of website

○ IT - Aaykar Setu, IT Act
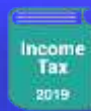
○ GST – CBECGST, GST Rate Finder

○ ICAI Now

○ SIRC App (coming shortly)

○ CA Updates (linked to www.cadcjain.in)

○ News – Economic Times, Business Standard,
The Hindu

⚛ **Others**

○ Network Printer

○ **Adobe Scan**
  - make anything scannable instantly
  - Proper Alignment
  - Scan any document and convert to PDF
  - Advanced image technology automatically detects borders, sharpens scanned content, and recognizes text (OCR).

○ Business Accounts – GST – Amazon Business

Organiser – Google Keep – Notes & lists

- Android | ios | web
- Note-taking - Save what's on your mind
- Things to do
- Change order with ease
- Collaborate – Share notes with specific persons

- Alt – Evernote, Any.do

Compressors

◇ PDF Comression

https://smallpdf.com/compress-pdf
https://pdfcompressor.com/

◇ Image Compression

https://squoosh.app/

Sharing is Caring…

- Push Bullet

- Mighty Text

- Shareit / Files by Google

- OTG (physical)

✳ **Simplifiers**

◯ QR Code Reader, Camera

◯ URL Shortener – bit.do, bit.ly

Assistance

- Google Assistant

- Haptik

- Text OCR Reader / Google Lens

- Photo Math, Hype Calculator

Knowledge

⬡ Magzter (Paid)
- World wide Magazines
- Can Share with 4 people

Explore Open Source stuff

- 7Zip
- Open office
- Linux – Ubuntu

- https://sourceforge.net/

DCMM 2.0

DCMM 2.0 Contents

https://resource.cdn.icai.org/57964daaab47265.pdf

DCMM 2.0 Evaluation – ICAI Digital Learning Hub

https://learning.icai.org/committee/irg/digital_insights/digital_competency_maturity_model_version_2.0/

Technology – Embrace it !!! or
Be embrassed !@#

"

TECHNOLOGY

Technology won't replace Chartered Accountants...

but

Chartered Accountants who use technology will
probably replace Chartered Accountants who do NOT...

Thanks!

Any questions?

dcjain@icai.org

Resources / Useful links

DCMM 2.0 Contents
https://resource.cdn.icai.org/57964daaab47265.pdf

DCMM 2.0 Evaluation – ICAI Digital Learning Hub
https://learning.icai.org/committee/irg/digital_insights/digital_competency_maturity_model_version_2.0/

ICAI Initiatives – Committee for members in Practice
https://cmpbenefits.icai.org/

Ebook - Strategic Road map for CA firms to operate as Virtual Firms
https://cmpbenefits.icai.org/wp-content/uploads/2021/02/Strategic-roadmap-for-CA-firms.pdf

Zoho offer for ICAI Members
https://www.zoho.com/lp/books/icai/