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I'm writing this article after finishing my second day as a concession stand volunteer at the PGA Open golf tournament at Oakland Hills Country Club in Birmingham, Michigan. And I got to thinking about the similarities between the food preparation process and the scanning process. Despite the fact that we were a group of inexperienced volunteers stumbling over ourselves, we successfully satisfied our patrons' needs by serving a quality food product. The analogy is that the higher the quality of your scanning images, the more successful the "scan, organize and populate" process will be in transferring data from your paper documents directly into your tax and accounting software.

This article is written as a supplement to Isaac O'Bannon's review of scan, organize and populate products (see www.cpatchadviser.com/go/2079 to help you optimize the scanning process with maximum quality and efficiency in creating the scanned images that those tools require. The objective is to help you develop a better understanding of what's important to look for in selecting your scanner equipment and provide some insight into "best practices" for establishing your scanning workflow.

Let's start with an explanation of the alternative types of scanners. The flatbed scanner was the original scanner configuration. As the name implies, the scanner is a flat unit that processes a single page at a time and requires a lot of inefficient paper handling, due to the need to move pages in and out by hand. Fortunately, some of the newer models do offer an optional automatic document feeder, but they are typically large devices designed for one-up or low-volume scanning operations. One key benefit of the flatbed scanner is that it may give you the ability to scan over-sized documents.

The sheet-fed scanner has automatic document feeding engineered into it as

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function

device.) These devices serve multiple functions: scanning, photocopying, printing and sometimes even faxing. Their most appealing feature is price, because the cost is allocated among all of the features. The biggest drawback to the MFD is that it requires you to get up from your desk and walk over to scan your documents. This may seem like a minor inconvenience, but in peak workloads it can create real inefficiencies. The bottom line is that if you have already invested in a MFD, you should try to leverage it as your first choice for scanning, but realize that you may want to switch gears as you begin to appreciate the benefits that come with a dedicated scanner.

On the topic of document feeders, two of the more important attributes to evaluate are the capacity of the document tray and the paper sizes that can be accommodated. In terms of size, the ability to handle small documents (i.e. credit card receipts, cash register receipts, checks, etc.) is more important than the ability to scan documents larger than 8 1/2 x 11. Ideally, the sheet feeder can process various paper sizes in a single batch in order for you to efficiently scan the multitude of document sizes that your 1040 clients typically present you with. The required capacity of your document feeder is relative to the volume of scanning you anticipate during peak periods and whether or not you plan to centralize the scanning function in your office. If you will be deploying a distributed scanner model where everyone is responsible for their own scanning (not something

I typically recommend), then you can get by with a 25 to 50 page feeder. If you establish a dedicated scanning function, which generally will result in a more efficient workflow, then you will want a feeder capacity of 100 pages or more.

The speed of the scanner is one of the key features to evaluate. The last thing

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individual desktop scanners will fall in the 20 to 40 ppm range and the departmental or workgroup category of scanners will operate in the 50 to 200 ppm range. When comparing the speed of different models, be sure you are comparing apples to apples by comparing simplex (single-sided) or duplex (dual-sided) document scanning

speeds. Some scanners will also scan color documents at a lower rate. In an accounting and tax practice, the focus is on scanning in black and white because that is the format for the overwhelming share of your documents.

The quality of the scanned image is important, but frankly, nearly every scanner is going to provide an acceptable level of quality for tax and accounting related documents. From a “best practice” perspective, you should scan your documents at either a 200 dpi (dots per inch) or 300 dpi level. The higher the resolution, the better the image quality will be, but at the expense of scanning speed and file size. If you are using the “populate” software, the resolution becomes even more important because you eliminate the step of having a human interpret the values on the scanned document. So the quality of the image has to be optimized. Many scanners allow you to establish the resolution at the time of scanning so that in those situations where you need a higher quality image you can increase the setting. By the way, don't hesitate to scan a sample batch of documents before you purchase a scanner, and don't be concerned about returning a scanner that doesn't meet your quality standards. It's typically not that big of a task to set up and configure a scanner.

On a more technical note, the two most popular scanner interfaces are ISIS (Image and Scanner Interface Specification) and TWAIN (Technology without an Interesting Name or “never the twain shall meet.”) Without getting too technical, suffice it to say that these are competing industry standards

that facilitate the interface between your scanning device and the various software

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the more popular option due to the widespread availability of USB connections in personal computers and the advances in the speed of the data transfer. The SCSI interface will usually require installing an SCSI controller card in your computer, but it may be the required connection mode for some of the advanced image processing software that is discussed below.

Image processing software, and sometimes hardware, is designed to take the image created by your scanner and further enhance its quality. This is much like the concept of photo touchups performed by professional photographers. In other words, it makes the image look better than it actually is. The most important role of this software is to perform optical character recognition (OCR) on the image, which makes the image contents both editable and searchable. This is a critical aspect of a document management system so that you can conduct context-based searches. Additional features of this software include automatic document rotation, blank page detection and deletion, automatic cropping of non-standard image sizes, de-speckling document images, and more. Some scanners include this software as part of a bundle, while others require you to purchase them separately. So when comparing features and costs of alternative scanners, make sure you are comparing apples to apples. Two of the more popular image processing applications are VRS (VirtualReScan) from Kofax and ABBYY FineReader OCR from ABBYY.

Last, but not least, cost is obviously one of the key factors driving your decision to select a particular scanner. The bottom line is that the market is very competitive. Therefore, you aren't likely to find wide variances in the pricing of comparably equipped scanners from two separate vendors. If there is a big discrepancy, it is probably the result of a different feature set. So be sure you understand what the key specifications are for each scanner before you buy. The biggest impact on price is the speed and capacity of the

scanner. Low-end personal/portable scanners will range from \$250 to \$500. Mid-

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software, Adobe Acrobat, or other software tools.

Hopefully, this article has achieved the objective of equipping you with the knowledge necessary to make the best scanner investment for your practice. The better the quality of your scanned images, the more effective the scan, organize and populate software covered here (www.cpatechadvisor.com/go/2079) will perform for you.

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