



## Agenda

November 6-8<sup>th</sup>, 2024  
Spring Hill Suites & Marriott  
Amelia Island, Florida

Day 1 Wednesday November 6, 2024- Workshops, Registration, & Sunset Cruise				
Time	Session	Description	Location	Presenters
10:00am - 1:00pm	Registration Open		Lighthouse Foyer	
11:00am - 1:00pm	Workshop-Query Building	In this workshop, GSA professionals will explore all aspects of query building and understanding the schema. A query sampling for all clients no matter what jurisdiction or suite of products you use in GSA, our experts will provide valuable tips and hints when using GSA's query builder.	Lighthouse C	Myra Crook & Claire Grysko-Gaudet
11:00am - 1:00pm	Workshop-Field Collection	In this workshop, learn to optimize field data collection in GSA's Field Collection Application. Please bring your tablet with you to this workshop.	Lighthouse B	Deborah Clark & Nandu Khobare
11:00am - 1:00pm	Workshop-Microsoft BI	In this workshop, you will be able to visualize your data and build powerful pages using Microsoft's state of the art technology.	Lighthouse A	Larry Zirbel & Matt Maloney
3:30pm-5:30pm	Sunset Cocktail Cruise		1 North Front St., Fernandina Beach, FL 32034	GSA Staff



## Day 2 Thursday November 7, 2024 –User Group Conference Sessions

Time	Session	Description	Location	Presenters
8:00am-11:00am	Registration Open		Lighthouse Foyer	GSA Staff
<b>8:00am - 9:00am</b>	<b>Breakfast-Provided by GSA</b>		<b>Lighthouse</b>	
9:00am - 10:00am	GSA Welcome & Progress, Success, Growth, Funding & Product Evolution	Founder and CEO Larry Zirbel Welcomes you to the first GSA User Group Conference!	Lighthouse	Larry Zirbel
10:00am - 11:00am	Assessment International Overview with IAAO Past President Pat Alesandrini	Join Past IAAO & FCIAAO President Pat Alesandrini & GSA CEO Larry Zirbel for exciting IAAO news and updates.	Lighthouse B	Pat Alesandrini & Larry Zirbel
10:00am - 11:00am	Tax Roll Extension-Moving tax bills from Cama Real Estate to Tax Collection	<p>This session will walk through all of the details for creating a tax roll. We will demonstrate in details each step of the process – including all of the data validations that should be executed.</p> <p>The most important steps that we will talk through are the confirmation of parcel counts before and after the creation of notice records and the option for parcel group summaries.</p> <p>Lastly, we will walk through the tax roll extracts (for your print vendors) and the Tax Roll Extension report.</p>	Lighthouse C	Mariann Matz & Gregg Ambrosi
11:00am - 12:00pm	Sales Ratio Analysis	Let GSA show you how to best use sales ratio to help determine land rates, building	Lighthouse B	Larry Zirbel & Mike Hickox



		rates and NH factors.		
11:00am - 12:00pm	Cashiering-An overview of the different payment methods	<p>This session will take a deep dive into all the aspects of taking payments in our cashiering application.</p> <p>We will show you:</p> <ul style="list-style-type: none"><li>- Different methods to add accounts to be paid</li><li>- Examples of multiple payment methods</li><li>- Bulk payments</li><li>- Options available in Payment Imports</li><li>- Miscellaneous Payment (Direct Payments) as well as Misc. Payment templates and Misc. payment imports</li><li>- Voids – an entire payment groups, a specific parcel in a group, NSF voids, Redo function</li></ul>	Lighthouse C	Mariann Matz & Gregg Ambrosi
12:00pm - 1:00pm	<b>LUNCH provided by GSA</b>		<b>Lighthouse</b>	
1:00pm - 2:00pm	Condos and Mixed Use Valuation Techniques	During this session, learn how to Create a new condo complex, condo units, and add structural elements using the GSA Condo application	Lighthouse B	Deborah Clark & Wendy Sapp
1:00pm - 2:00pm	AI Machine learning & Document Processing and Future Potential	How to get documents filtered from the Clerk, how GSA processes them. How to research missing parcel numbers, how to organize workloads. How best to flag documents. Posting of the documents. How AI really works. What else can we do with it?	Lighthouse C	Chet Zema & Larry Zirbel



2:00pm - 3:00pm	Organization of Inspection Types and Assignments	In this session, explore with our GSA experts, different ways of organizing inspections, inspection rules, and tracking inspections. Learn how the system processes the rules to create inspection records and tracking to help with workloads.	Lighthouse B	Deborah Clark & Nandu Khobare
2:00pm - 3:00pm	Testing Tax Rate Changes	We will walk you through the complete process of: <ul style="list-style-type: none"><li>- Copying your production database to test version</li><li>- Updating the Tax Rates</li><li>- Important Reminders:<ul style="list-style-type: none"><li>o Cap Code</li><li>o Retaining codes with zero tax rate (for at least 3 years)</li><li>o Carve out Rate</li><li>o Redevelopment Percentages</li></ul></li><li>- Recalculating the database</li><li>- Reviewing the Recalc logs</li><li>- Running comparisons between you PROD and TEST databases</li></ul> Confirming and copying RE to PP	Lighthouse C	Mariann Matz & Gregg Ambrosi
3:00pm-4:00pm	Direct Cap, Discounted Cash Flow, & Possessory Interest	In this session, learn to utilize different income valuation methods in GSA.	Lighthouse B	Larry Zirbel & Ko Clifton & Cynthia South, Pueblo County, Colorado
3:00pm-4:00pm	Tax Apportionment & Distribution/Roundtable Discussion	This will be an interactive discussion about the different approaches for balancing your GSA Collections and Financial Systems. We will be looking to establish a 'GSA Best Practice' for this topic.	Lighthouse C	Mariann Matz & Gregg Ambrosi



## USER GROUP CONFERENCE 2024

		<p>Frequency Options:</p> <ol style="list-style-type: none"><li>1. Nightly close of Batches, create balance and export Batch Group</li><li>2. Daily close of Batches and Monthly of Batch Groups</li></ol> <p>Balancing Options:</p> <ol style="list-style-type: none"><li>1. Manual</li><li>2. GSA Export</li></ol> <p>Future Upgrades:</p> <ol style="list-style-type: none"><li>1. Refunds – including who the refund goes to and the address</li></ol> <p>Current Challenges:</p> <p>Open discussion</p>		
5:30pm-8pm	GSA Client Appreciation Cocktail hour & Dinner		Salt Life	

### Day 3 November 8, 2024 Friday User Group Conference Sessions

Time	Session	Description	Location	Presenter & Description
8:00am - 9:00am	Breakfast-Provided by GSA		Lighthouse	
9:00am - 10:00am	User and Security Management	<ol style="list-style-type: none"><li>1. We will walk people through all of the aspects of the GSA Security Module including:</li><li>2. Default permissions</li><li>3. Creating security Groups</li><li>4. Creating a user and assigning to a Group</li><li>5. Checking effective permissions for a user</li></ol>	Lighthouse B	Deborah Clark & Gregg Ambrosi



## USER GROUP CONFERENCE 2024

		<ul style="list-style-type: none"><li>6. Security Zones – walk through examples and options</li><li>7. Databases Settings</li></ul>		
9:00am-10:00am	Comp Sales & Equity	How to build models and establish automatic comparable sales to all properties as well as equity approaches.	Lighthouse C	Larry Zirbel & Claire Grysko-Gaudet
10:00am - 11:00am	Table Management	Get to know your tables in GSA with GSA experts! During this session, we will go through the tables, table settings, new table features, and how to best manage your tables to get the most out of GSA.	Lighthouse B	Deborah Clark & Myra Crook
10:00am - 11:00am	Tax Collection Cashiering Tips & Tricks	We will show you how to use Cashier to the max! Topics will include: <ul style="list-style-type: none"><li>○ Pushing groups of accounts from Collections</li><li>○ Launch Cashier into Postings from Collections</li><li>○ Searching for Payments<ul style="list-style-type: none"><li>○ Searching for Voids</li><li>○ Color coding</li><li>○ Export to Excel</li></ul></li><li>○ Searching for Batches<ul style="list-style-type: none"><li>○ Examples of empty batches</li></ul></li></ul>	Lighthouse C	Mariann Matz & Gregg Ambrosi
11:00am-12:00pm	Web portals and online forms	Web portals and online forms <ul style="list-style-type: none"><li>○ Overview – where does GSA’s web portal start and end, all static pages the content is County’s responsibility BUT GSA can format (style, color) and host all of that as well</li><li>○ Show a few options in terms of look and feel (Columbia, Douglas, Ector)</li><li>○ GSA public functionality – Universal search, individual module searches</li></ul>	Lighthouse B	Matt Maloney & Gregg Ambrosi



## USER GROUP CONFERENCE 2024

		<ul style="list-style-type: none"><li>Options for content in RE and PP – more and more are being moved into the Table Maintenance Portal Settings Table</li><li>Show RE, optional Eagleview</li><li>Show PP</li><li>Show Collections, show payment options (list payment vendors)</li><li>Advanced Search and Export options</li><li>PP Submissions</li><li>Appeal Submission</li><li>Homestead Application</li><li>Sales Questionnaire</li><li>*Change of Address submission</li><li>Other cool things:<ul style="list-style-type: none"><li>Print Record Card</li><li>Print Tax Bill</li></ul></li></ul> <p>Links to other sites (like Bld Permits)</p>		
11:00am-12:00pm	Protests	Whether you have simple protests or complex protests in your jurisdiction, in this session learn how to manage and track your protests.	Lighthouse C	Myra Crook & Deborah Clark
<b>12:00pm</b> <b>ADJOURN-Thank you for coming!</b>				