

**Citizen Access
Online Tutor
Lesson 8**

The recommended browser is Google Chrome.



9/28/2020

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Create a Collection is a feature of the **Citizen Access Portal** available to registered users. This feature enables the account owner, or one of his/her **Delegates**, to organize multiple records into a group (for example, records related to a specific project or work site) for the benefit of easy management of said records.

Click here to register for a **[Citizen Access Account](#)**.
Registering for an account is free and easy.

Creating a Collection

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After login, click the Home tab (#1), click My Records (#2), click My Records (#2). Click the arrow to the left of record-type category (#3). Click the box to the left of the records you want to include in your collection (#4). Click Add to collection hyperlink (#5).

The screenshot shows a web application interface with a navigation menu at the top. The menu includes 'Home' (marked with a red circle 1), 'Land Development', 'Building', and 'Fire'. Below the menu, there are links for 'Dashb...', 'My Records' (marked with a red circle 2), 'My Account', and 'Advanced Search'. The main content area is titled 'Land Development' and 'Building'. A table of records is displayed, with columns for 'Date', 'Record Number', 'Record Type', 'Description', 'Project Name', 'Address', 'Expiration Date', 'Created By', 'Status', 'Action', and 'Short Notes'. The table contains several rows of records, with the first three rows having checkboxes in the 'Date' column (marked with a red circle 4) and the 'Add to collection' link in the 'Action' column (marked with a red circle 5). The table also includes a pagination control at the bottom.

<input type="checkbox"/>	Date	Record Number	Record Type	Description	Project Name	Address	Expiration Date	Created By	Status	Action	Short Notes
<input type="checkbox"/>	09/24/2020	REP-MBR-APP20-33000750	Minor Building Repair Application		1901 ALAMO ST	1901 S ALAMO ST City of San Antonio, TX 78204		julius.casas@gmail.com	Under Review	Pay Fees Due Amendment	
<input checked="" type="checkbox"/>	09/22/2020	COO-APP20-37000734	Certificate of Occupancy Application		MONEY TREE LANE	MONEY TREE LANE City of San Antonio, TX 78252		julius.casas@gmail.com	Under Review	Amendment	
<input checked="" type="checkbox"/>	09/18/2020	TRE-APP-APP20-38000700	Tree Affidavit/Permit Application	test	Sept 17	MONEY TREE LANE City of San Antonio, TX 78252		julius.casas@gmail.com	Additional Info Required	Upload Plans Amendment	test
<input checked="" type="checkbox"/>	09/14/2020	COM-PRJ-APP20-39002805	Commercial Project Application		MONEY TREE LANE	MONEY TREE LANE City of San Antonio, TX 78252		julius.casas@gmail.com	Under Review	Upload Plans Amendment	
<input type="checkbox"/>	09/10/2020	RENEW-APP20-21000234	Renewal Application		CANEXDA	City of San Antonio, TX 78252		youfahad@	Fee Due	Pay Fees Due	
<input type="checkbox"/>	08/25/2020	COM-PRJ-APP20-38002586	Commercial Project Application			1901 s alamo san antonio, TX		julius.casas@gmail.com	Under Review	Upload Plans Amendment	
<input type="checkbox"/>	08/20/2020	COM-PRJ-APP20-39002524	Commercial Project Application			BURNING TRAIL City of San Antonio, TX 78247		julius.casas@gmail.com	Under Review	Pay Fees Due Amendment	

Home Land Development Building Fire
Dashboard My Records My Account Advanced Search

Land Development

Building

Showing 1-10 of 81 | Export results | Add to collection | Copy Record

Date Record Number

09/24/2020 REP-MBR APP20-35000750

09/22/2020 COO-APP20-37600734

09/17/2020 TRE-APP APP20-38800700

09/14/2020 COM-PRJ-APP20-3980280

Add to Existing Collection
--Select--

Create a New Collection
* Name:
Type Name for Collection

Description:
Type brief description here

Add Cancel

Project Name	Address	Expiration Date	Created By	Status	Short Notes
1901 ALAMO ST	1901 S ALAMO ST City of San Antonio, TX 78204		julius.caesar@gmail.com	Under Review	
MONEY TREE LANE	MONEY TREE LANE City of San Antonio, TX 78232		julius.caesar@gmail.com	Under Review	
Sept 17	MONEY TREE LANE City of San Antonio, TX 78232		julius.caesar@gmail.com	Additional	test
MONEY TREE LANE	MONEY TREE LANE City of San Antonio, TX 78232		julius.caesar@gmail.com	Under Review	

The Add to Existing Collection/Create a New Collection box displays (shown). Click radio button to the left of Add to Existing Condition to add a record to an existing collection (#1). Click radio button to the left of Create a New Collection to create a collection (#2). Type Name and description of New Collection (#3, 4). Click Add (#5).

The screenshot shows a web application interface. At the top, there is a navigation bar with links for 'Home', 'Land Development', 'Building', and 'Fire'. Below this is a secondary navigation bar with 'Dashboard', 'My Records', 'My Account', and 'Advanced Search'. The main content area starts with a greeting 'Hello, Julius Caesar'. A yellow callout box contains the text: 'Collections of records display on the account owner's dashboard upon login (shown)'. Below the greeting is a section titled 'My Collection (2)'. This section contains two collection items: 'Mordecai Project' with 3 records, last updated 09/27/2020, and 'Sidewalk and Curb' with 2 records, last updated 07/06/2020. Yellow arrows point to the right of each collection name. To the right of the collection list is a blue button labeled 'View Collections' with a red circle containing the number '1' next to it.

Collections display on the account owner's dashboard upon login (shown). Notice the collection information: number of records, name of collection and last update. To view collections, click the View Collections hyperlink (#1).

Click the Name link of the collection to manage your records (#1). To delete the collection entirely, click the Delete link (#2). Doing so does not delete the records, only the collection (#2).

Collections

This is a list of your collections. To manage a collection, click the link next to the collection name.

Showing 1-2 of 2

Date Modified	Name	Description	Number of Records	
09/27/2020	Mordecai Project	Mordecai Project Records September 2020.	3	Delete
07/06/2020	Sidewalk and Curb	This is a test	2	Delete

Click the Name of the collection hyperlink to manage the collection (#1). Click the Delete hyperlink to delete the collection (#2). Deleting a collection does not delete any of the records in it, only the collection.

Home Land Development Building Fire

Dashboard My Records My Account Advanced Search

Mordecai Project
 Mordecai Project Records September 2020.
 Total Records: 3 (3 Building)
 Inspections Summary: 0 (0 Scheduled, 0 Rescheduled, 0 Approved, 0 Denied, 0 Pending, 0 Cancelled)
 Fees Summary: \$0.00 Paid, \$0.00 Due

Brief history of the records in the collection displays.

Options to Rename Collection or Delete Collection.

Rename Collection Delete Collection

Building

Move to... | Copy to... | Remove | Export results | Copy Record

<input type="checkbox"/>	Date	Record Number	Record Type	Created By	Status
<input type="checkbox"/>	09/22/2020	COO-APP20-37600734	Certificate of Occupancy Application	julius.caesar@gmail.com	Under Review
<input type="checkbox"/>	09/17/2020	TRE-APP-APP20-38800700	Tree Affidavit/Permit Application	julius.caesar@gmail.com	Additional Inf
<input type="checkbox"/>	09/14/2020	COM-PRJ-APP20-39802805	Commercial Project Application	julius.caesar@gmail.com	Under Review

Click the box to the left of a record to move record to another collection, copy the record and move the copy to another collection or remove a record from the collection.

After Collection Name link is clicked, the collection management page displays (shown).

Announcements | Logged in as: Julius Caesar | Collections (2) | Account Management | Logout

Create an Escrow Account | Amend Escrow Account(s)

Home Land Development Building Fire

Dashboard My Records My Account Advanced

Search...

Welcome Julius Caesar
You are now logged in.

Mordecai Project Sidewalk and Curb

After login to your account, you may also view all collections by clicking the Collections drop-down menu arrow. All collection links display. Click the name of the collection to open the Collection management page.

A hyperlink to Collections is available on the top navigation bar (#1).

Click the drop-down menu arrow to display all collection hyperlinks. Click the name of a collection to open its Collection Management page.



A collection helps you to manage your records for a particular project or work-site easily and quickly.

If you have any questions about creating a collection or managing your collections, please call the Development Services Customer Call Center, (210) 207-1111, M-F, 7:45am to 4:30pm or email [DSD Call Center](#).

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This concludes the Collections tutorial.



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