How To Create and Embed Forms

Montana Data Portal

How To Create Forms

Log into your Montana Data Portal account on the Socrata Platform

Once logged in, the default profile page will display
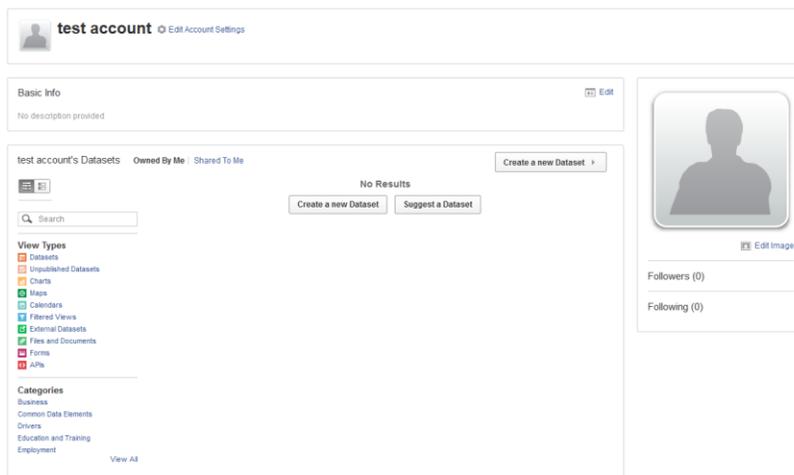
Decide the permissions that you would like for the form.

Private Dataset and Public Form: Allows you to keep your dataset private, and have a public form which will allow 'users' and the 'public' to input data.

Public Dataset and Public Form: The 'users' and 'public' will be able to see both the dataset and what was entered into the form.

Select a dataset and navigate to the Embed [Embed] button
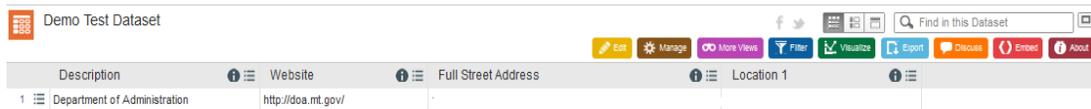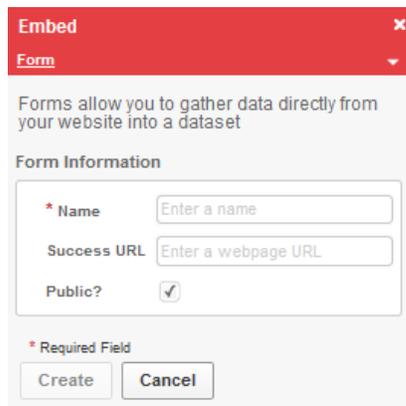
Select Form

- "Name": The name that will be used for your form. The form itself functions like a filtered view or visualization, so it'll be shown in your profile page and data catalog.
- "Success URL": This is an optional URL you can specify that visitors will be redirected to after they fill out your form. You can use this to provide a "Thank You" page that they'll be sent to after they've submitted their response.
- "Public": By default, your form will be public. This means that anybody can submit to your form. If you make it private, you'll need to explicitly share your form with others using the sharing tool in order for them to submit to it.

Select Create. If you would like to embed the form on your website, continue to the 'Embedding your Form' section.
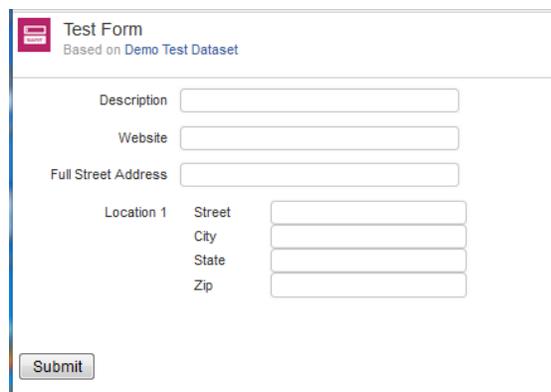
Please test your form once or twice to make sure it works.

How to Create and Embed Forms

Embedding Your Form

Select Social Data Player

- "Embed this Form as Plain HTML": This allows you to embed the form as raw HTML into your webpage. This gives you the greatest control over the layout of the form, since you can remove form fields and control how it is styled using CSS. However, if you later go change the fields in your form by changing the names or order of your columns, they will not automatically be reflected in the form, and you'll need to update your form code each time.
- "Embed this Dataset in a Frame": This allows you to embed the form inside an iFrame, much like the Socrata Data Player. Since the form is embedded in an iFrame, it will automatically update when you modify the columns in your dataset. However, you can't control the styling of the form using CSS.

There are two options to copy and paste the HTML into your website**: Plain HTML or Embedding the Form as a Frame.**

Customizing

There are additional customization options by selecting a size or defining a custom size

Select a Template

Select preview

Once completed, select done

Generating Emails for New Form Submissions

If you would like to updated every time details are entered into a form and submitted, navigate

to the upper right side, select the subscriber icon that looks like
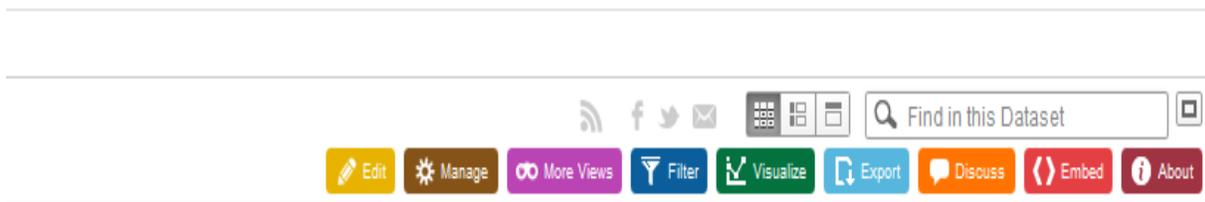
For more details, please reference 'Subscribing to a Dataset'