

# Office365 integration for Alchemer workflow

## Overview

Microsoft 365 (Office 365) is a cloud productivity platform used by organizations to manage email, files, documents, and collaboration across teams and applications.

The Alchemer integration with Office 365 supports Push Review Action PDF to OneDrive or SharePoint. The Alchemer Microsoft 365 (Office 365) integration allows Alchemer to securely send Review Action PDFs generated from surveys directly to Microsoft OneDrive or SharePoint. This enables organizations to automatically store, organize, and share survey-related documents within their Microsoft 365 environment, supporting downstream collaboration, approvals, and record-keeping workflows—without manual intervention.

## Common uses for the Alchemer Office 365 integration

- Automatic storage of Review Action PDFs
- Send Review Action PDFs generated from Alchemer surveys directly to Microsoft OneDrive or SharePoint for centralized, secure document storage.

## What can the Alchemer Office 365 integration do?

- Push Review Action PDF to OneDrive or SharePoint
- [Push file to OneDrive or SharePoint](#)

## You will need

- Office 365 API access
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
  - [Contact us](#) if you are unsure if your plan includes integrations.

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## Setup Alchemer Office 365 integration in workflow

## Office365 | Push Review Action PDF to OneDrive

# or SharePoint

## You will need:

- Valid Office 365 authentication (OneDrive or SharePoint)
- Fields containing a unique identifier for your review action value and name

## Configure your survey

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1. Create new or open an existing survey.
2. Add your questions to the survey.
3. Create a new page, click action and click to add the "Review" action.
4. Create another page after the review action to store the data in new [Hidden Value Actions](#).
  - One Hidden Value Action to capture the merge code from the review action.
  - One Hidden Value Action to capture a name to be used for the file sent to Lambda. It is recommended to use the [survey("session id")] merge code as it will always provide a unique value.

## Configure the action

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1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Microsoft Office 365 connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **Office365 | Push Review Action PDF to OneDrive or SharePoint**.
5. **Office365 | Authentication:** Select an existing authentication or [create a new authentication](#).
6. **Office365 | OneDrive or SharePoint:** Please select if the file you would like to use is on OneDrive or SharePoint.
7. **Office365 | Select SharePoint site:** If you chose SharePoint above, select your site within SharePoint that you would like to use to locate your file.
8. **Office365 | Select SharePoint drive:** If you chose SharePoint above, select the SharePoint drive you would like to use.

9. **Office365 | Folder path:** Please enter the folder path where your Excel workbook is located.
  - Example: /MyFolder/MySubFolder/
  - Use / for the root folder
  - Make sure to include a / at the end of the folder path
10. **Office365 | Select Datacenter:** Select your Alchemer datacenter.
11. **Office365 | PDF to push:** Select the fields in this workflow that contain the name of your Review Action PDF and the HVA where you are storing the Review Action PDF. [See video above for instructions.](#)
12. Save the action.

### Status codes

- 200: Outbound webhook was successfully sent
- 400: The external integration returned an error

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## Office365 | Push file to OneDrive or SharePoint

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### You will need:

- Valid Office 365 authentication (OneDrive or SharePoint)
- Field containing the public URL of the file you want to send

### Configure the action:

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the Microsoft Office 365 connection where you want the action to trigger.
3. In the connection box, click the pencil icon in the top right corner.
4. Select **Office365 | Push file to OneDrive or SharePoint**.
5. **Office365 | Authentication:** Select an existing authentication or [create a new authentication](#).
6. **Office365 | OneDrive or SharePoint:** Please select if the file you would like to use is on OneDrive or SharePoint.
7. **Office365 | Select SharePoint site:** If you chose SharePoint above, select your site within SharePoint that you would like to use to locate your file.
8. **Office365 | Select SharePoint drive:** If you chose SharePoint above, select the SharePoint drive

you would like to use.

9. **Office365 | Folder path:** Please enter the folder path where your Excel workbook is located.
  - Example: /MyFolder/MySubFolder/
  - Use / for the root folder
  - Make sure to include a / at the end of the folder path
10. **Office365 | Select URL:** Select the field in this workflow that contains the URL you would like to push to OneDrive or SharePoint. This URL must be publicly accessible.
11. **Office365 | File name:** You can set a file name, this is optional. The current UNIX timestamp will be used if no file name is set.
12. Save the action.

### Status codes

- 200: Successfully pushed file
  - 400: The external integration returned an error
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## Testing and Validation

### How to test

- Trigger the workflow and monitor individual runs in monitor tab in your workflow
  - Click on individual workflow runs to see metadata outputs
- Confirm the expected update or retrieval occurs in Office 365.
- Use metadata for verification and debugging.

### How to verify results

- Check the impacted record in Office 365.
  - Ensure retrieved or updated values match expectations.
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## Monitoring Integration Activity

### Where to find logs

- Go to Results → Monitor
- Select a the integration step you want to inspect.

### What logs display

- Input/Output

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# Troubleshooting

## Authentication issues

- Incorrect or expired credentials
- Missing permissions in Office 365

## Lookup failures

- Invalid identifier values
- No matching records

## Mapping errors

- Unsupported or invalid fields
- Incorrect formatting

## API errors

- Validation issues
- Endpoint restrictions

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## FAQs

### What permissions do I need?

Integration Manager in Alchemer and API permissions in Office 365. [More details in the authentication how-to guide.](#)

### When does the integration run?

When the workflow triggers and reaches the integration step.

### Can I use multiple Office 365 actions in one workflow?

Yes. Actions can work independently or together.

### Why isn't my data updating?

Check the Action Log for lookup issues, mapping problems, or API errors.

### What if I need additional functionality?

Contact Alchemer Support for enhancement requests.

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