SCIM Service for Alchemer Survey

Overview

Alchemer Survey is a survey and data collection platform used by organizations to gather feedback, conduct research, and collect structured data at scale.

The Alchemer Survey SCIM initiator lets your identity provider (IdP), such as Okta or Microsoft Entra ID, manage your Alchemer users and team membership automatically using SCIM 2.0. When someone is assigned to Alchemer, changed, moved between groups, or removed in your IdP, the IdP sends a request to the initiator. Each request starts a workflow run that makes the same change in Alchemer: it creates the user, updates their details or license, adds or removes them from teams, or deactivates them. Your IdP stays the single source of truth, so nobody has to manage Alchemer users or team members by hand.

Common uses for the Alchemer Survey SCIM initiator

- Automatically create Alchemer users when they are assigned to the Alchemer app in your IdP
- Keep names, email addresses, and licenses in Alchemer in sync with your IdP
- Keep Alchemer team membership in sync with groups in your IdP
- Automatically deactivate Alchemer users when they leave your organization or lose access in your IdP
- Reactivate returning users with their existing Alchemer account
- Assign Alchemer licenses from your IdP, for example by group

What can the Alchemer Survey SCIM initiator do?

- SCIM user provisioning
  - Create users
  - Update user details (name, email address, license)
  - Deactivate and reactivate users
  - Look up and import existing users
- SCIM team sync (groups to teams)
  - Link IdP groups to existing Alchemer teams
  - Add and remove team members as group membership changes
  - Look up and import existing teams

You will need

- An identity provider that supports SCIM 2.0 provisioning, such as Okta or Microsoft Entra ID, and admin access to it
- Available Alchemer license seats for the users you plan to provision
- The Alchemer teams you want to sync, already created in Alchemer (for team sync)

- An Alchemer plan that includes integrations with Workflow and the Integration Manager permission enabled.
    - Contact us if you are unsure if your plan includes integrations.

Setup Alchemer Survey SCIM initiator in Workflow

Alchemer Survey | SCIM user provisioning

Gives your IdP a secure SCIM endpoint so it can create, update, deactivate, and reactivate Alchemer users, and sync team membership.

You will need:

- A **default license** to give new users when your IdP does not send one
- A **default team** to add new users to (optional)

Configure the action

1. Open your workflow in **Workflow Builder**.
2. On the **Select Initiator** pop up, select the **Alchemer Survey** initiator.
3. Select **Alchemer Survey | SCIM user provisioning**, then click **Next** on the initiator overview screen.
4. **Alchemer Survey | Default license:** Select the license new users receive when your IdP does not send one.
5. **Alchemer Survey | Default team:** Optionally, select a team that new users are added to.
6. **Alchemer Survey | Team sync:** Turn on to let your IdP manage the membership of linked Alchemer teams.
7. Save the action.
8. **Alchemer Survey | SCIM base URL:** Copy the URL. You will paste it into your IdP in the next section.
9. **Alchemer Survey | Bearer token:** Copy the token. You will paste it into your IdP in the next section.

Note: Treat the bearer token like a password. Anyone who has it can manage your Alchemer users through this workflow. Store it only in your IdP, and do not share it by email or chat.

Connect your identity provider

Follow the steps for your IdP. Exact menu names may vary slightly with your IdP version.

Okta

1. In the Okta Admin Console, go to **Applications** > **Applications** > **Create App Integration**.
2. Select **SWA** or **SAML 2.0**, give the app a name such as **Alchemer**, and finish the wizard.
3. On the app's **General** tab, click **Edit** in **App Settings**, set **Provisioning** to **SCIM**, and click **Save**.
4. Go to **Provisioning** > **Integration** and click **Edit**.
   - **SCIM connector base URL:** paste the SCIM base URL.
   - **Unique identifier field for users: userName**
   - **Supported provisioning actions:** select **Import New Users and Profile Updates**, **Push New Users**, **Push Profile Updates**, and **Push Groups** (if you use team sync).
   - **Authentication Mode: HTTP Header**. Paste the bearer token into **Authorization**.
5. Click **Test Connector Configuration**, then **Save**.
6. Go to **Provisioning** > **To App**, click **Edit**, enable **Create Users**, **Update User Attributes**, and **Deactivate Users**, and click **Save**. Leave **Sync Password** off.
7. On the **Assignments** tab, assign the people or groups who should have Alchemer access.

Microsoft Entra ID

1. In the Microsoft Entra admin center, go to **Enterprise applications** > **New application** > **Create your own application**.
2. Enter a name such as **Alchemer**, select the non-gallery option, and click **Create**.
3. Open **Provisioning** and set **Provisioning Mode** to **Automatic**.
4. Under **Admin Credentials**, paste the SCIM base URL into **Tenant URL** and the bearer token into **Secret Token**.
5. Click **Test Connection**, then **Save**.
6. Under **Mappings**, keep user provisioning on. Turn group provisioning on if you use team sync, or off if you don't.
7. Under **Settings**, set **Scope** to **Sync only assigned users and groups**.
8. Assign the people or groups who should have Alchemer access under **Users and groups**, then set **Provisioning Status** to **On** and click **Save**.

Assign licenses from your IdP (optional)

By default, new users receive the default license you selected in the initiator. To control licenses from your IdP, add a **license** attribute to the Alchemer app.

- **Attribute name: license**
- **Namespace / schema: urn:ietf:params:scim:schemas:extension:alchemer:2.0:User**
- **Values:** an Alchemer license name, such as **Full Access** or **Professional**

- **Okta:** Go to **Provisioning** > **To App** > **Go to Profile Editor** > **Add Attribute**. Enter **license** as the variable and external name, and the namespace above as the external namespace. Leave **User personal** unchecked so you can set the license when you assign the app to a group.
- **Entra ID:** Under **Provisioning** > **Mappings** > **Provision users**, open **Show advanced options** > **Edit attribute list**, add **urn:ietf:params:scim:schemas:extension:alchemer:2.0:User:license**, then map a source attribute or constant value to it.

Note: A license is only applied if your Alchemer account has a free seat for it. If no seat is available, the change fails and the error appears in your IdP.

How users are matched and changed

- **Matching:** Users are matched by email address. If a user with that email already exists in Alchemer, the IdP links to them instead of creating a duplicate.
- **Name:** First and last name from your IdP are combined into the Alchemer user's name.
- **Deactivation:** Removing someone's access in your IdP **disables** their Alchemer user. Nothing is deleted, and reassigning them reactivates the same account.
- **Admin rights:** Account admin rights are never granted or changed through SCIM. Manage them in Alchemer.

Alchemer Survey | SCIM team sync

Links groups in your IdP to existing Alchemer teams and keeps each team's membership in sync with its group. Team sync is part of the SCIM user provisioning action and uses the same SCIM base URL and bearer token.

You will need:

- **Team sync** turned on in the initiator
- Each Alchemer team you want to sync already created in Alchemer, with the same name as the IdP group (not case-sensitive)
- A **default role** set on each team. New members receive the team's default role.

How groups and teams are linked

1. When you push a group, your IdP searches Alchemer for a team with the same name.
2. If a matching team is found, the IdP links the group to that team. From then on, the link uses the team's ID, so later name changes do not break it.
3. If no matching team is found, the push fails with an error. Create the team in Alchemer with the same name, then push the group again.

Push groups from Okta

1. Make sure **Push Groups** is selected under **Provisioning** > **Integration**.
2. Open the app's **Push Groups** tab and click **Push Groups** > **Find groups by name**.
3. Select the Okta group. When Okta finds the matching Alchemer team, choose **Link Group**.

4. Click **Save**. Okta pushes the group's current members to the team.

Sync groups from Entra ID

1. Under **Provisioning** > **Mappings**, make sure group provisioning is on.
2. Under **Users and groups**, assign the groups you want to sync.
3. Entra ID matches each group to an Alchemer team by display name during its next provisioning cycle. Use **Provision on demand** to sync a group right away.

How team membership is changed

- **Adding members:** When someone is added to a linked group, they are added to the Alchemer team with the team's default role. If they aren't an Alchemer user yet, they are provisioned first.
- **Removing members:** When someone is removed from a linked group, they are removed from the Alchemer team. Their Alchemer user stays active unless their access is removed in your IdP.
- **Roles:** Team roles you change in Alchemer are kept. Sync only adds and removes members and never resets an existing member's role.
- **Team names:** Renaming a group in your IdP does not rename the Alchemer team.
- **Creating and deleting teams:** Your IdP cannot create or delete Alchemer teams. Unlinking or deleting a group in your IdP stops the sync but leaves the team and its members in Alchemer.
- **Everyone team:** The **Everyone** team can't be linked or changed.

Testing and Troubleshooting

Testing and Validation

How to test

- Use the IdP's connection test (**Test Connector Configuration** in Okta, **Test Connection** in Entra ID) to confirm the URL and token work.
- Assign a test user to the Alchemer app in your IdP. In Entra ID, you can use **Provision on demand** to send that user right away.
  - Monitor the run in the **Monitor** tab and click it to view the input and output metadata.
- Change the test user's name or license in your IdP, then unassign and reassign them.
- For team sync, create a test team in Alchemer, create a group with the same name in your IdP, push or assign the group, then add and remove a member.

How to verify results

- Confirm the test user appears in Alchemer with the correct name, email address, and license.
- Confirm name and license changes in your IdP appear in Alchemer.
- Confirm the user shows as disabled after you unassign them, and active again after you reassign them.
- Confirm members added to or removed from the IdP group are added to or removed from the Alchemer team.

Monitoring Integration Activity

Where to find logs

- Go to **Monitor** in Workflow
- Check the individual workflow steps
- Check your IdP's provisioning logs (**Dashboard** > **Tasks** or **Reports** > **System Log** in Okta, **Provisioning logs** in Entra ID)

What logs display

- The request received from your IdP (create, update, deactivate, look up, import, or team membership change)
- The changes made in Alchemer
- The status code and message returned to your IdP

Troubleshooting

Connection issues

- Connection test fails with **401 Unauthorized**: the bearer token in your IdP doesn't match the initiator. Copy it again with no extra spaces.
- Connection test times out or returns **404**: the SCIM base URL is wrong, or the workflow isn't enabled.

User issues

- **User already exists (409):** a user with that email address is already in Alchemer. The IdP should link to the existing user. If it doesn't, check that the email in your IdP matches the Alchemer user exactly.
- **User not found (404):** the user was removed from Alchemer outside of your IdP. Unassign and reassign them in your IdP.
- **License not applied (400):** your Alchemer account has no free seat for that license, or the license name is misspelled.
- **Rate limited (429):** many changes were sent at once, for example during the first sync. Your IdP retries automatically, so large first syncs may take a while to finish.

Team issues

- **No matching team found:** no Alchemer team has the same name as the IdP group. Create the team in Alchemer, or rename it to match, then push the group again.
- **More than one matching team:** two Alchemer teams share the group's name. Rename one so the name is unique.
- **Team sync is turned off:** group requests are rejected if **Team sync** is off in the initiator. Turn it on, or turn off group push or group provisioning in your IdP.
- **Member not added:** the person isn't assigned to the Alchemer app in your IdP, or they couldn't be provisioned (for example, because no license seat is free).
- **Everyone team can't be linked:** the **Everyone** team is managed by Alchemer. Use a different team.

FAQs

What permissions do I need?
Integration Manager in Alchemer, and admin access to your IdP.

When does the integration run?
Each time your IdP sends a change. Okta sends changes as they happen. Entra ID sends changes on its provisioning schedule.

Which identity providers are supported?
Any IdP that supports SCIM 2.0 with bearer token authentication. These steps cover Okta and Microsoft Entra ID.

Does removing someone in my IdP delete their Alchemer account?
No. Their Alchemer user is disabled and can be reactivated by reassigning them in your IdP.

Do IdP group names have to match Alchemer team names?
Only when you first link them. The match isn't case-sensitive. After the group is linked, the link uses the team's ID, so renaming either one doesn't break it.

Can my IdP create or delete Alchemer teams?
No. Create teams in Alchemer, then link them from your IdP. Unlinking a group leaves the team and its members in place.

What role do synced team members get?
The team's default role. You can change a member's role in Alchemer, and sync won't reset it.

Can my IdP manage admin rights?
No. Account admin rights are managed in Alchemer.

What happens to users and teams that already exist in Alchemer?
Users are matched by email address and teams by name, so your IdP can import or link to them without creating duplicates.

Why isn’t my workflow triggering?
Check the Monitor tab, confirm the workflow is enabled, and confirm your IdP uses the correct SCIM base URL and bearer token.

What if I need additional functionality?
Contact Alchemer Support for enhancement requests.

Related Articles