

FAQs



Analyst Reports Migration

October 2024

Bazaarvoice is moving the Analyst Report functionality to Portal Reports. Migration criteria, new functionality, users and permissions, and PII access are covered in our FAQs.

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Migration criteria and notification

When the migration begins, if you have the Reports Administrator or Reports Contributor role in Portal, you can create, view, edit, and download custom reports. If you click **Create** in Workbench, you will be redirected to Portal reports.


Additionally:


- We will start migrating Analyst reports from Workbench into Portal.
- You will stop receiving report emails from Workbench - and start receiving them from Portal.
- You can still sign into Workbench to view your reports until March 31, 2025.


Can I view the list of reports to be migrated?

Yes. Reports that do not meet the migration criteria will display a label beneath the Download button in Workbench. If a report does not have this label, you can assume it will be migrated to the Portal.

We've also highlighted this in the Workbench report emails to encourage recipients to check the Workbench UI to see which reports will be migrated and which won't.

 **Test Report 2**
New Products in Feed Report

 Ratings & Reviews

 **Download** **13**

*** Will not be migrated**

What are the criteria for report migration?

The criteria are based on how recently a report has been used. Bazaarvoice will migrate any reports that were:

- Downloaded in the last year from an email or directly from Workbench
- Created or updated in the last quarter

Can I still access Workbench Analyst reports after the migration begins?

Once we begin migrating reports, we will no longer send you Workbench reports emails. However, you can still access and view your reports by signing into Workbench. We encourage you to start using Portal reports to take advantage of the new features and improved security.

Can I still create new reports in Workbench after the migration?

No, you will no longer have the ability to create new reports in Workbench. However, you will be able to create new reports in Portal.

How will I know when all my reports have been migrated over?

You'll begin seeing your report templates appear in your Portal Reports list. Not all report templates will show up immediately, it will take roughly a month to migrate all templates for all instances. Report names will change slightly. For example, if your report was named **Helpful answers** in Workbench and it was assigned the Q&A Key Metrics template when migrated to Portal, it will now be named **Q&A Key Metrics - Helpful answers**.

Will I be able to distinguish between the migrated reports and reports I've already created in Portal?

Yes. The migrated reports will follow a new naming pattern. For example, if your report was named Helpful answers in Workbench and it was assigned the Q&A Key Metrics template when migrated to Portal, it will now be named Q&A Key Metrics - Helpful answers.

Which fields are considered personally identifiable information (PII)?

- Asker Email Address
- Answerer Email Address
- Reviewer Email Address

Will I lose access to my Workbench reports after the migration?

Not immediately. We will turn off access to Workbench on March 31, 2025.

What if I don't have access to Portal?

We're auto-creating Portal accounts for existing Workbench users to provide an easy, hassle-free transition. However, if you add a new report recipient to an existing report, you'll need to ask your Account Administrator to add them as a Portal user first, as only Portal users can receive reports going forward.

Post-migration

What will happen when I try to add a non-Portal recipient post-migration?

- **Reports containing client data:** If a report contains client data, you can continue to add non-Portal users as recipients.
- **Reports containing 3rd-party data:** Post-migration new Portal users will need to be created by your Account Administrator. Note that automatic creation of non-Portal users was a one-time activity; it was part of the migration process.

What happens if a user forwards a client data report to someone that doesn't have the Report Viewer role?

If a report recipient forwards the email, the report can be downloaded by the additional person. At this point, this liability and responsibility sits with you.

Portal Reports

When will the new fields be available in Portal reports?

The new fields will be added incrementally in November 2024.

Will I still receive report emails?

Yes, you will receive report emails from Portal.

Is there a mapping document to help me find the field I'm used to using?

We will provide a full list of fields from Workbench and the fields that they map to in Portal on our Knowledge Base before the release.

Can I download my reports from the Portal Reports?

Yes. To learn how to download reports, refer to the [Knowledge Base](#).

Is there a training resource available for using Portal Reports?

Yes. Please refer to the [Knowledge Base](#) or BVU for comprehensive training resources on using Portal Reports.

What are the permissions for Portal reports?

- Reports Contributor
- Reports Administrator
- Reports Viewer ***New!***

How will Portal reports be delivered?

Portal reports will be delivered by email, or depending on your permissions, you can sign in to Portal to view reports. For more information, refer to Users and Permissions.

Why can't I see my reports in Portal?

Reports that did not meet our migration criteria were not automatically migrated. However, you can rebuild any report you need in Portal reports.

Users and Permissions

Why do some reports require recipients to have the Report Viewer role?

We have enhanced the security requirements for reports to meet current global security standards.

Bazaarvoice will categorize report templates into two groups:

- **Client owned:** recipients in this category do not require Portal access
- **3rd-party data:** recipients in this category require Portal access to protect data collected from 3rd parties

To facilitate this enhancement, we've created a **Report Viewer** role for any recipients of your current reports who *do not* have access to Portal but need access to Portal reports containing 3rd-party data. They will not have access to any other solutions in Portal. Recipients will

automatically receive a password reset email where they can set the password for their new account.

What templates are categorized as client data in Portal Reports?

Client data - data collected on or displayed on your own site

Templates include:

- R&R Key metrics
- Q&A Key metrics
- ReviewSource Native Impact
- Sampling Campaign Performance
- Conversion Impact Report e-Commerce
- Conversion Impact Report non-Commerce
- Download product catalog

What templates are categorized as 3rd-party data in Portal Reports?

3rd-party data - data collected by Bazaarvoice or syndicated through another site

Templates include:

- Multi-instance R&R Key metrics
- Multi-Instance Network Impact
- Vendor Scorecard
- Coverage Opportunity
- Message Engagement
- ReviewSource Impact on Destination Edges
- ReviewSource Impact on Destination Products
- Network content response efficiency
- Connections brand engagement
- Download reviews
- Download questions & answers
- Download network Q&A
- Download network R&R
- Download adverse and legally sensitive syndicated content

Can the Report Viewer role be managed in the same way in Portal as other accounts?

Yes. Refer to [Portal users and permissions](#) for more details.

What can the Report Viewer role do?

- Access a limited view of the Portal homepage
- Receive an email containing a report with client-owned and 3rd party data
- Download the report only from the email

When are the new Portal accounts being created for users migrating from Workbench to Portal?

We're auto-creating Portal accounts for existing Workbench users in December 2024. This will provide an easy, hassle-free transition.

How will users be notified about their newly created accounts?

Users will be informed through multiple channels:

- Users should check their current report emails sent from Workbench for any updates.
- We will send additional communication to the account's primary contact.
- New Portal users will receive an activation email with instructions to set up their Portal account and reset their password.

When will the Report Viewer role be available to Account Administrators?

Account Administrators can assign the Report Viewer role in December.

PII (Personally Identifiable Information)

I didn't need PII permission to view Workbench reports. Why is PII permission required for Portal reports?

Portal has enhanced security requirements for reports; to meet current global security standards. Bazaarvoice follows these standards and requires PII permissions to access consumer PII.

How can I obtain PII access permission?

Contact your Account Administrator for assistance. To see who's assigned the Account Administrator role within your company, sign in to [Portal](#) and go to your [profile page](#).

How do I know if my reports contain PII data?

If you don't have PII permissions, we will gray out PII fields and display a **PII-restricted** tooltip placeholder.

The following product and program performance reports may contain PII data:

- R&R Key metrics
- Q&A Key Metrics

The following data exports contain PII data:

- Download reviews
- Download questions & answers
- Download network Questions & Answers
- Download network Review & Responses

Note: These reports can still be created and run if you don't choose these fields.

What Portal Report fields are considered PII?

- Asker Email Address
- Answerer Email Address
- Reviewer Email Address

Support

What if I have more questions or need support?

Please create a [support ticket](#).