EZConvertBI Power BI Analyzer Agent

User Guide

AWS Transform Partner Agent

Wavicle Data Solutions

Version 2.0 | April 2026

Contents

1. Introduction

The EZConvertBI Power BI Analyzer Agent, developed by Wavicle Data Solutions, is a partner agent available on the AWS Transform platform. It automates the analysis and conversion of Power BI dashboards to Amazon Quick Sight, creating all required Quick Sight objects including data sources, data sets, calculated fields, analysis sheets, and dashboards. The Analyzer Agent dramatically reduces analysis time from hours or days of manual effort down to a matter of minutes.

1.1 About AWS Transform

AWS Transform is a cloud-based platform available through the AWS Console that helps organizations modernize their technology estates. Customers already use AWS Transform for mainframe modernization, .NET code modernization, and Windows modernization workloads. Starting April 2026, AWS Transform also supports BI migration through the Wavicle EZConvertBI product, enabling clients to analyze and convert Power BI and Tableau dashboards to Amazon Quick Sight, for AWS clients.

1.2 What Does the Analyzer and Converter Do?

The EZConvertBI product includes two complementary agents. Both Agents uses an agentic, conversational workflow to connect to both your Power BI Service and your Amazon Quick Sight environment. The Power BI Analyzer Agent performs a pre-migration analysis of your Power BI environment, producing a detailed assessment of report complexity, chart types, data sources, and rationalization opportunities.

The Power BI Converter Agent then takes individual reports and converts them to Quick Sight. After conversion, an engineer reviews the Quick Sight output for look-and-feel adjustments such as chart placement, colors, and formatting, then performs final validation testing. The bulk of the structural migration work is handled automatically by the agent.

While you can use the Converter Agent independently, Wavicle recommends running the Analyzer first. The Analyzer’s complexity scoring and conversion readiness assessment will help you prioritize which dashboards to convert and anticipate any charts or features that may require manual adjustment after conversion.

1.3 Who Should Use This Guide?

This guide is intended for BI analysts, data engineers, migration project managers, and IT administrators who need to convert Power BI dashboards to Amazon Quick Sight. No specialized coding or scripting knowledge is required.

2. Prerequisites

Before you begin, ensure you have the following:

- 64-bit Windows machine with Power BI Desktop installed.
- An active AWS account with access to AWS Transform.
- Power BI credentials (URL, personal access token, or username/password) are already configured as a Credential Provider in AWS Transform.
- Permission to access the Power BI Service and workspaces containing the reports you wish to convert.
- A modern web browser (Chrome, Edge, or Firefox recommended).

Note:
If your Power BI credentials or Amazon Quick Sight connector have not yet been configured, you will need to set these up in AWS Transform before running the Analyzer. Each connection only needs to be configured once and can be reused across multiple conversion jobs. Refer to the AWS Transform documentation for instructions on creating Connectors and Credential Providers.

2.1 How to configure credential providers:

[placeholder]

Permissions needed for creating credential providers.

Configure credential provider - Amazon Bedrock AgentCore

3. Understanding the Interface

The Analyzer Agent operates within a three-panel interface inside AWS Transform. Understanding how these panels work together will help you navigate the workflow efficiently.

3.1 The Three-Panel Layout

- **Job Plan (left panel):** Displays the step-by-step workflow as an ordered list. Each step shows a status indicator such as “Awaiting user input,” “In-progress,” or “Completed” with green check marks. Clicking a step in the Job Plan activates it and may open a corresponding form on the right.
- **Chat Interface (center panel):** Your primary conversational interface with the agent. You can type responses, read status updates, view the conversion summary, and access download links here. The agent uses an agentic workflow, meaning it autonomously creates and follows a plan based on your initial prompt.
- **Form / Detail Panel (right panel):** Displays dropdown menus, selection forms, and configuration options that correspond to the active Job Plan step. You can use this panel as an alternative to typing in the chat window.

Dual-input interaction: Throughout the workflow, you always have two ways to provide information: type your answers directly in the chat window, or use the dropdown forms on the right-hand side. Both methods are equally valid and produce the same result.

Note:

Occasionally there may be a brief lag between the three panels synchronizing after a step completes. This is normal and does not affect the conversion. Wait a few seconds and all panels will update.

4. Power BI Service Hierarchy

To use the Analyzer effectively, it helps to understand how content is organized within Power BI Service. The agent will ask you to navigate through each level of this hierarchy during setup:

- **Tenant/Account:** The top-level instance. Your organization may operate one or more Power BI Instances. The Analyzer supports connecting to multiple instances, each configured as a separate Credential Provider.
- **Workspace:** A container for reports and datasets. You will select the workspace containing your reports.
- **Folders** act as an organizational layer within a workspace, allowing you to group related artifacts rather than having a single flat list.
- **Report:** Each workspace contains reports. Report is a collection of related pages and visuals. You will select a specific report for analysis.
- **Page/Visual:** A report contains one or more pages. The agent analyses each page and visuals.
- **Apps**: The distribution layer, pushing finalized reports/dashboards to consumers.

5. Getting Started

Step 1: Open AWS Transform and Select a Workspace

Navigate to the AWS Transform console in your web browser. You will land on the Workspaces tab. A workspace is a container for creating jobs, storing artifacts, and collaborating with your team on transformation workflows.

Select an existing workspace or click “Create workspace” to set up a new one. If you create a new workspace, you may need to configure Connectors for both your Power BI Service and Amazon Quick Sight before proceeding.

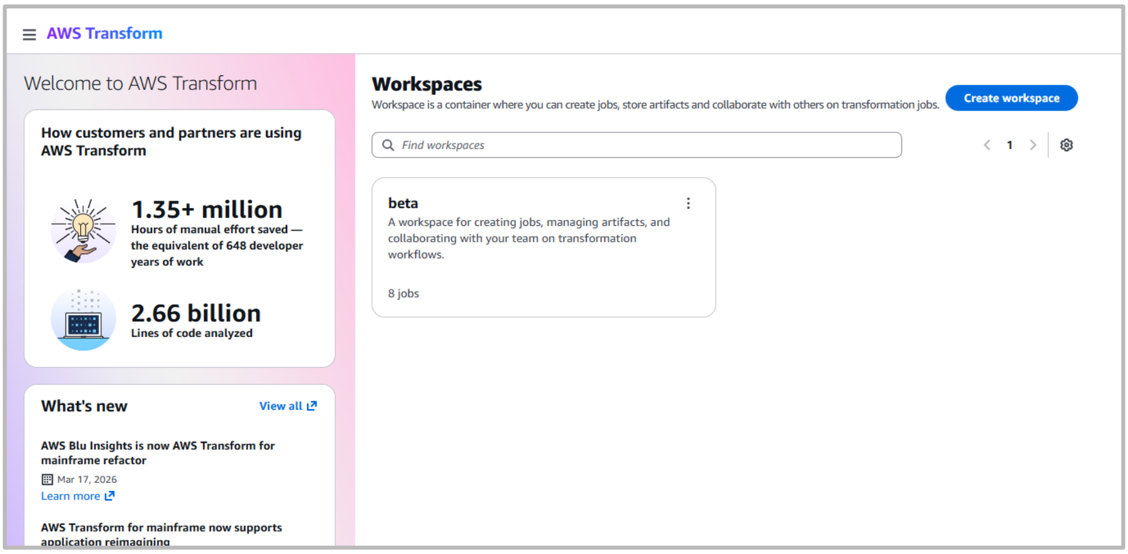

Figure 1: AWS Transform Workspaces tab showing available workspaces.

Step 2: Create a New Job

Once inside your workspace, locate the chat pane at the bottom of the screen. Click the “Create a job” button to begin. The chat pane is your primary interface for interacting with the Converter Agent.

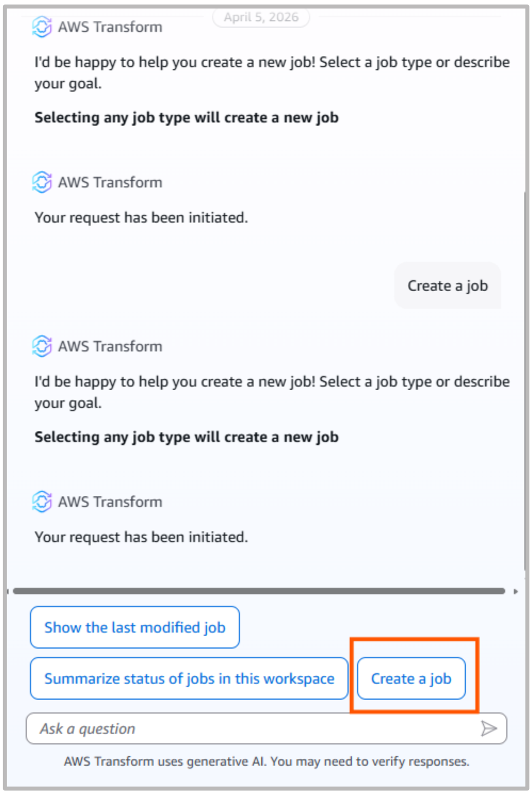

Figure 2: Select Create a job.

Step 3: Select the Power BI Analyzer Agent

After clicking “Create a job,” you will be presented with a list of available job types. Select “BI Migration” and then choose “MarketPlace Wavicle Power BI Analyzer Agent”

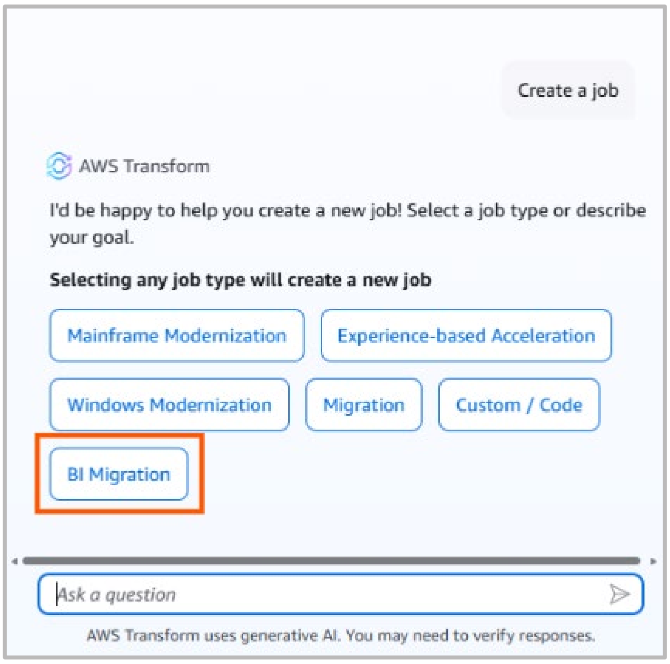

Figure 3: Selecting BI Migration job type.

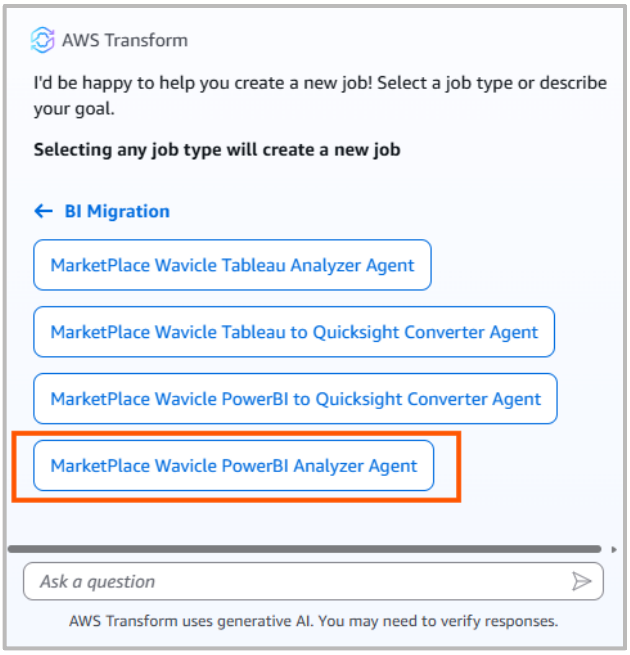

Figure 4: Selecting the Wavicle Power BI Analyzer Agent.

In the chat window that appears, type a prompt such as "Help me analyze reports from Power BI" to instruct the agent to create a Job Plan. The agent will automatically determine all the steps required, from connecting to your Power BI service through to generating the analysis summary. This Job Plan is created in a matter of seconds.

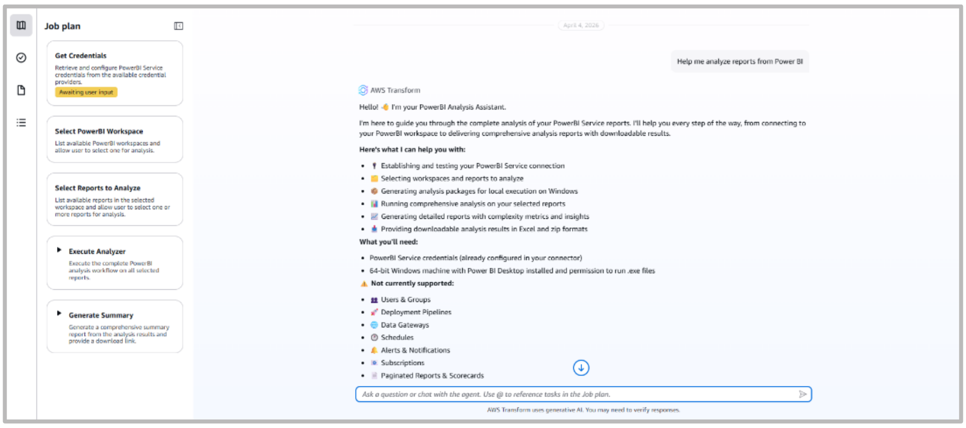

Figure 5: The Job Plan showing all analyzer steps from credentials through to summary generation.

Tip:

Throughout the workflow, you have two ways to interact with the agent: type your answers directly in the chat window, or click the corresponding step in the Job Plan panel on the left and use the form that appears on the right-hand side. Both methods are equally valid.

6. Running the Analyzer

Once the Job Plan is created, it will appear as a series of steps in the left-hand panel. The agent will guide you through each step in sequence. A step will display a status indicator such as “Awaiting user input,” “In-progress,” or “Completed” to show its current state.

Step 4: Provide Credentials

The first step in the Job Plan is “Get Credentials.” You need to provide connection details for Power BI.

You can either type the connector names in the chat window or click “Get Credentials” in the Job Plan. When you click the Job Plan step, a form will appear on the right-hand side with dropdown menus listing your available credential providers.

For example, you might type: *“Use the Power BI connector ending in 33v94.”* or Choose a credential provider from dropdown and click submit.

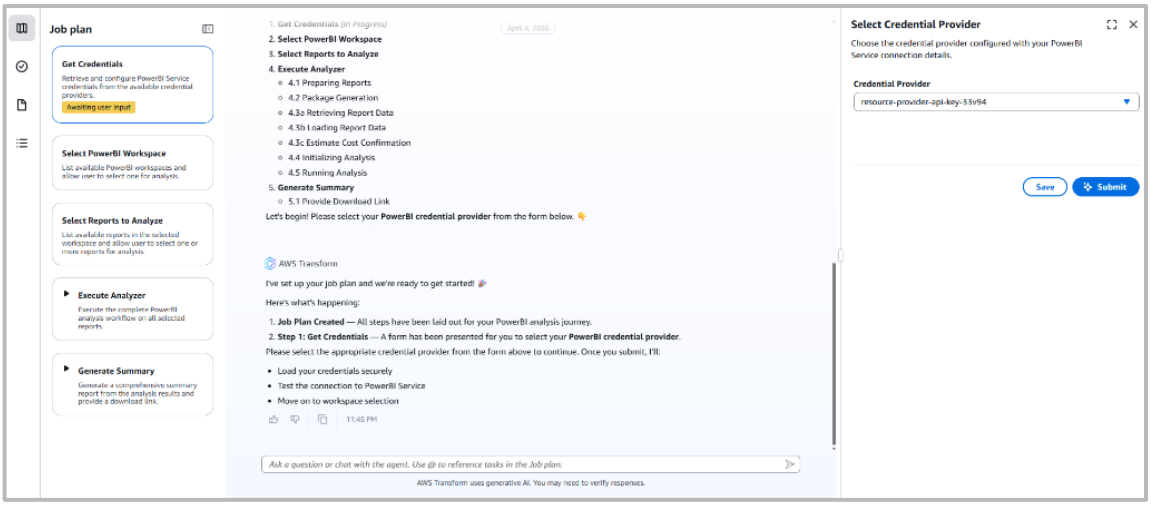

Figure 6: The Job Plan with the Get Credentials step active and the credential selection form on the right.

Once the credentials are validated and the agent confirms it can connect to Power BI Service, the “Get Credentials” step will show a “Completed” status (green check mark) in the Job Plan.

Step 5: Select Power BI workspace, and Report

After credentials are validated, the agent walks you through selecting the Power BI content to analyze. This is a multi-step process:

5a. Select Workspace: The agent retrieves all workspaces available on the connected Power BI service. Type the workspace name in the chat window or use the dropdown on the right-hand side.

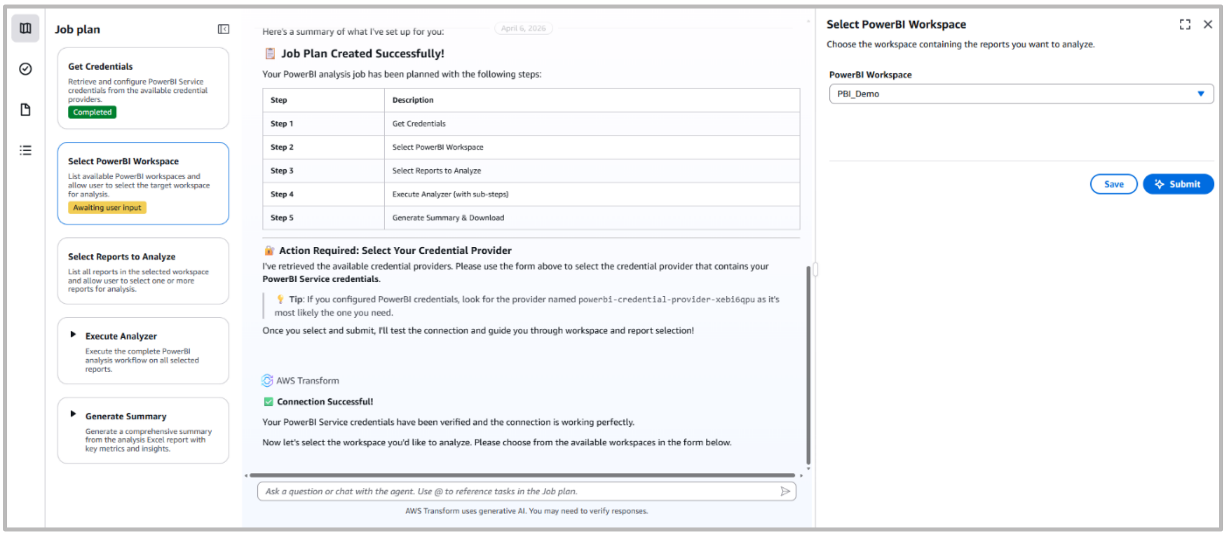

Figure 7: Select a workspace from the available list.

5b. Select Reports: The agent retrieves all reports within the selected workspace and prompts you to choose to analyze.

After you select the report(s), the agent runs an analysis step to inventory the dashboards and their components (sheets, calculated fields, data sources). This analysis may take a moment to complete.

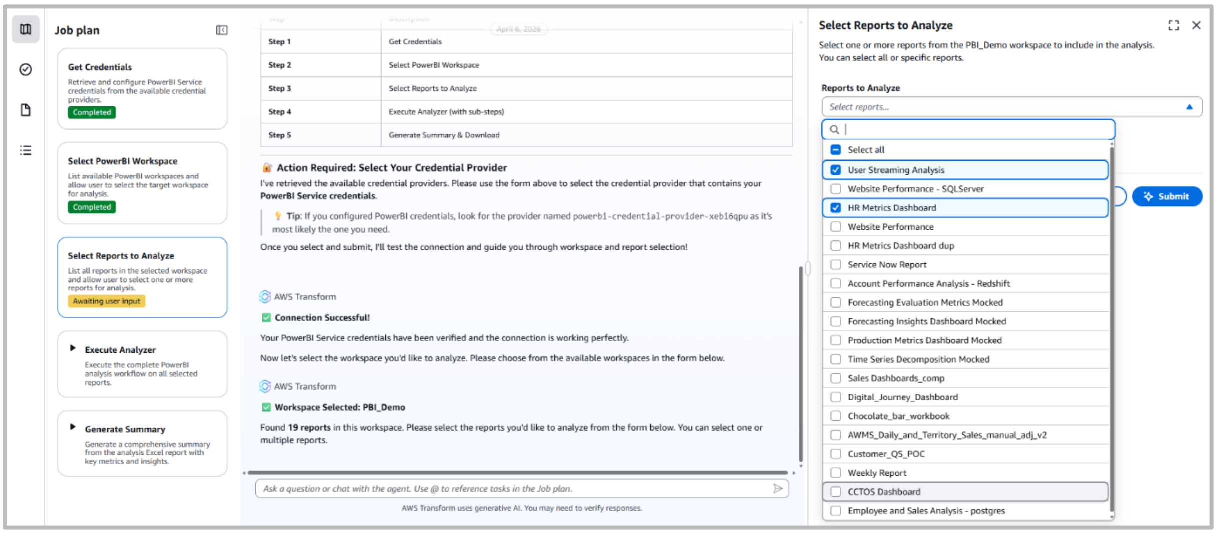

Figure 8: Select workbooks from the available list.

Step 6: Automatic Analysis

After report selection, the agent automatically proceeds through the remaining Analyzer steps. You will see status updates in the chat and the Job Plan as the agent:

6a. Preparing Reports: The Analyzer will download the chosen reports and prepare them for analysis.

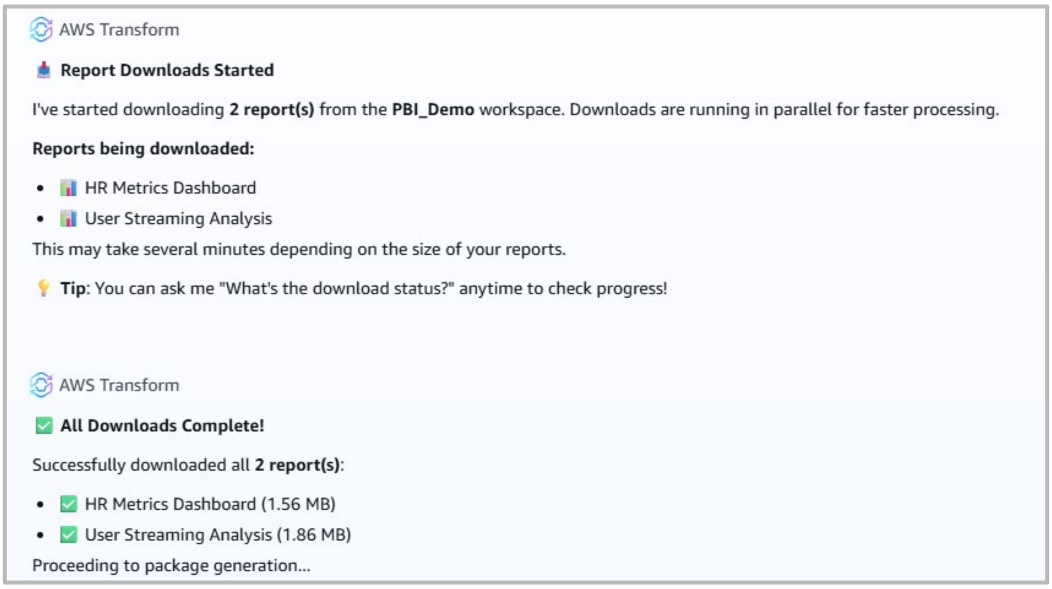

Figure 9: Preparing Reports.

6b. Package Generation: The Analyzer creates a package to download. Follow the instructions shown in the chat interface.

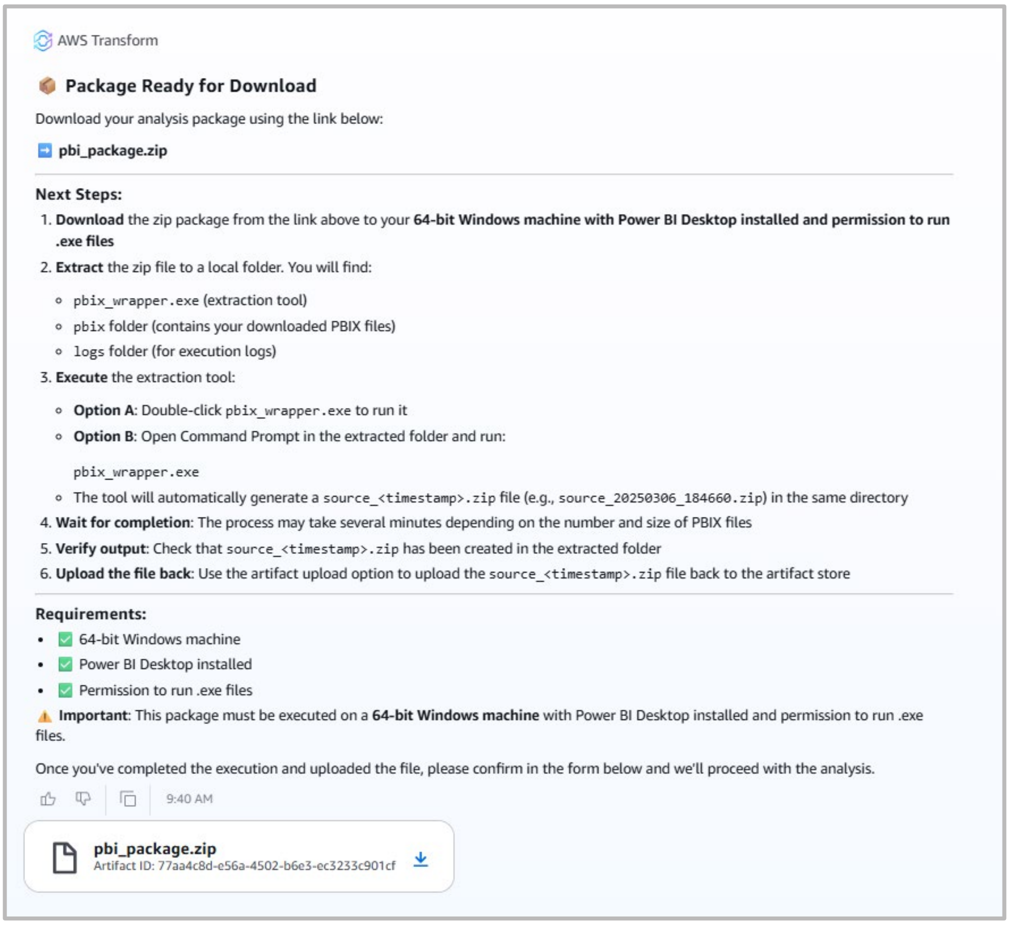

Figure 10: Package Generation.

6c. Download the zip file, extract, and double-click on pbix_wrapper.exe to initiate the extraction tool.

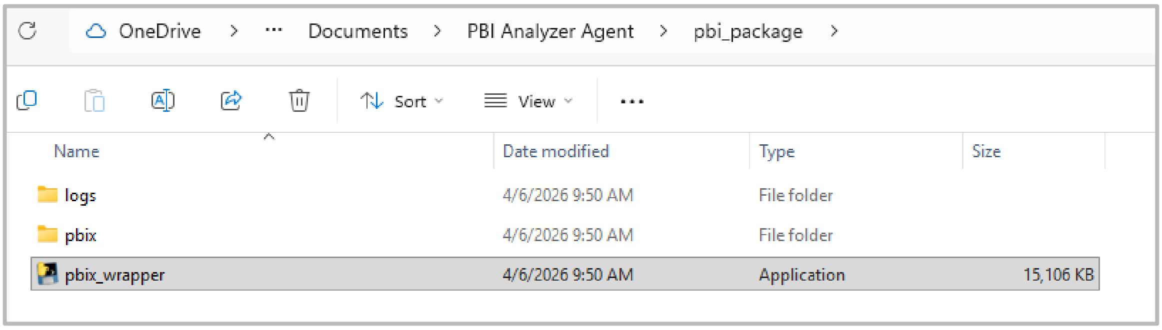

Figure 11: Extracted pbi_package zip file

Tip:
If you encounter a "Windows protected your PC" message from Microsoft Defender SmartScreen when launching the application, you can manually unblock the file to proceed.

Steps to Unblock the File:

1. Navigate to the downloaded .exe file.
2. Right-click the file and select Properties.
3. In the General tab, locate the Security section at the bottom.
4. Check the box labeled Unblock.
5. Click Apply, then OK.
6. Re-run the application.

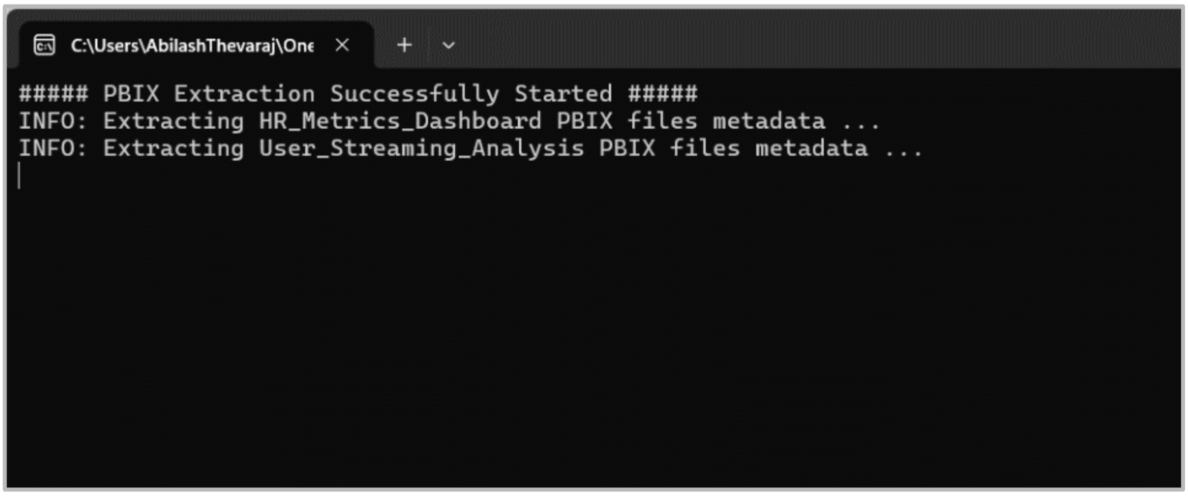

Figure 12: Execution of .exe file

6d. After completion (which may take several minutes depending on the number and size of pbix files), verify the **source_<timestamp>.zip** file is generated in the extracted folder.

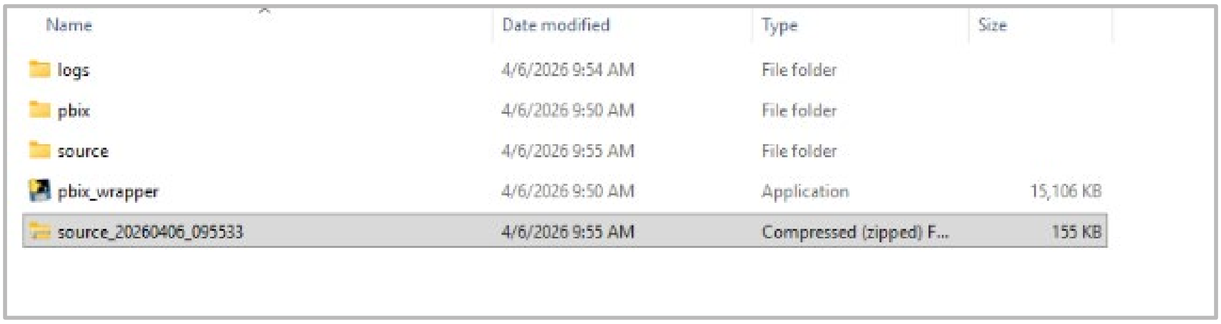

Figure 13: Generated source zip file

6e. Upload the source_<timestamp>.zip file back: Use the artifact upload option to upload the zip file back to the artifact store. Click on the Artifact menu icon on the left and select 'Upload artifact'.

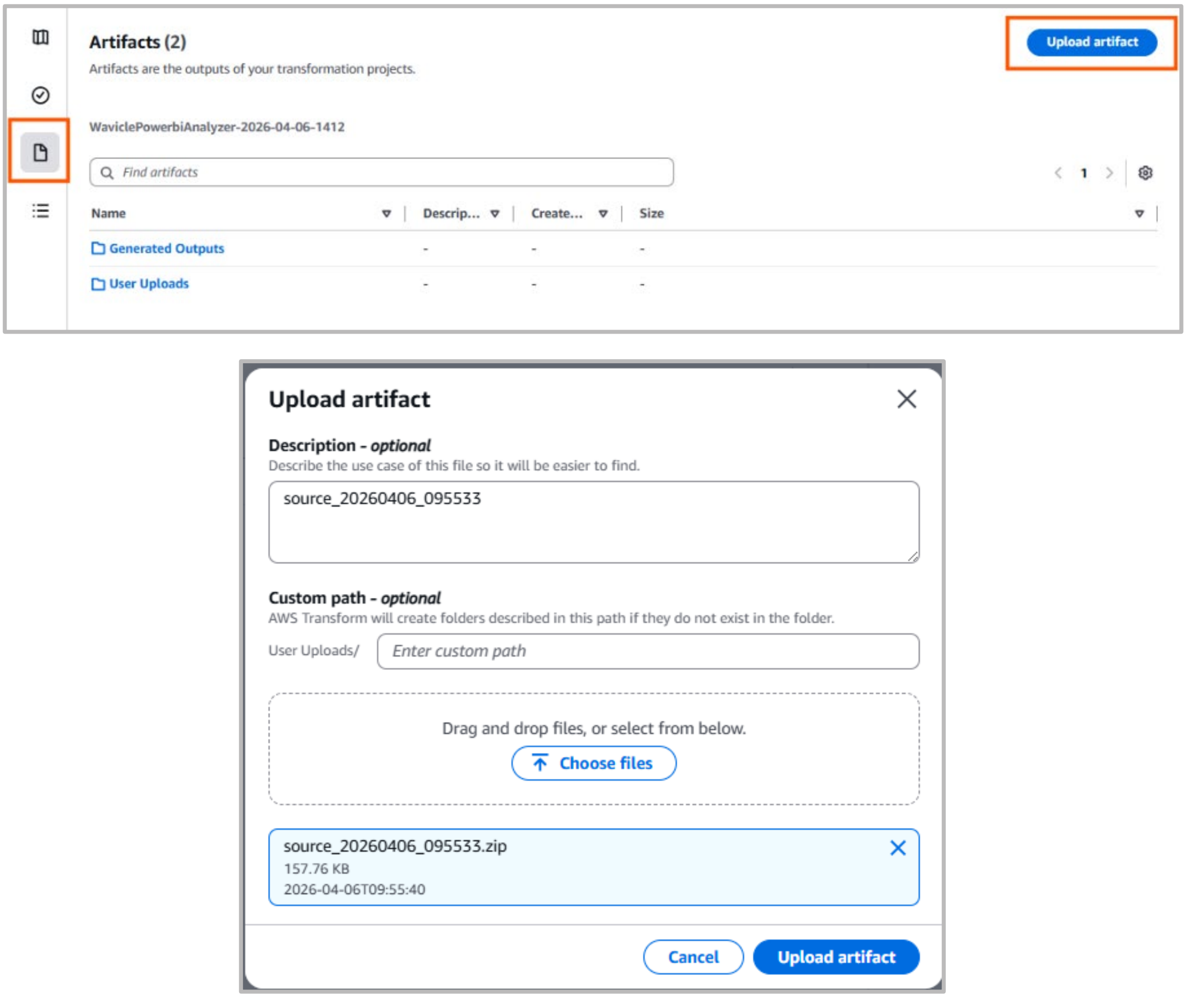

Figure 14: Upload artifact screen

Confidential

6f. Once the file is uploaded, navigate to **Job Plan**, click on **Package Generation** step in the Job Plan, select the confirmation checkbox, and click **Submit** to continue.

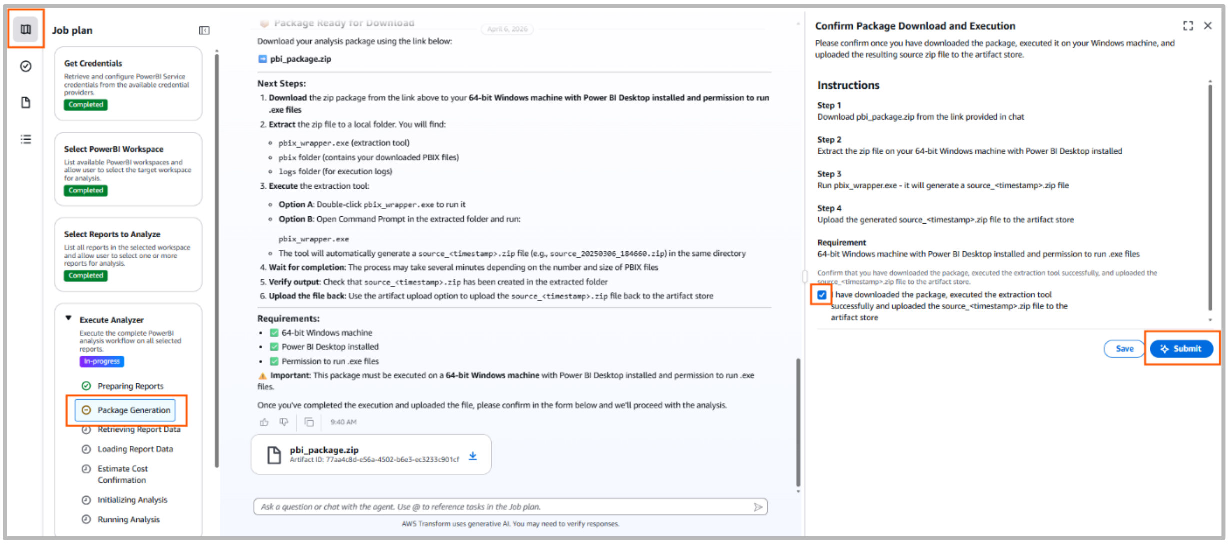

Figure 15: Upload artifact confirmation submit screen

This process may take several minutes depending on the complexity of the dashboard.

6g. Confirm Source File to Process: Confirm the source zip file found in the artifact store before proceeding with analysis.

Click on **Retrieving Report Data** step in the Job Plan, select **Yes, proceed with this file,** and click on **Submit.**

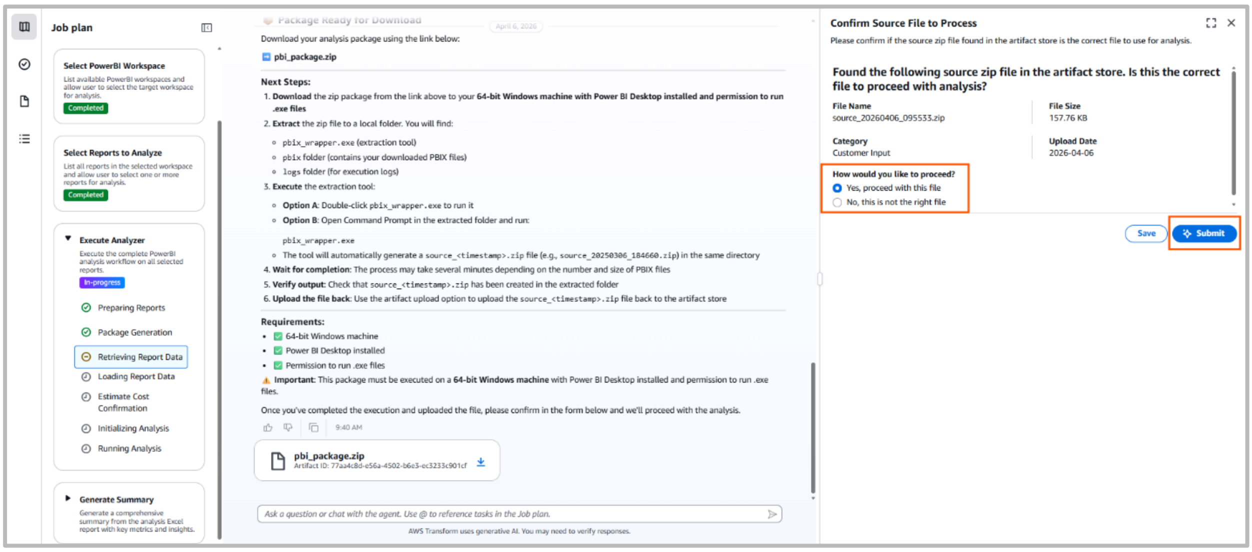

Figure 16: Source file confirmation screen

6h. Confirm Cost: Review the estimated cost for the analysis and confirm whether you would like to proceed.

Click on **Estimate Cost Confirmation** step in the Job Plan, select **Yes, proceed with this file,** and click on **Submit.**

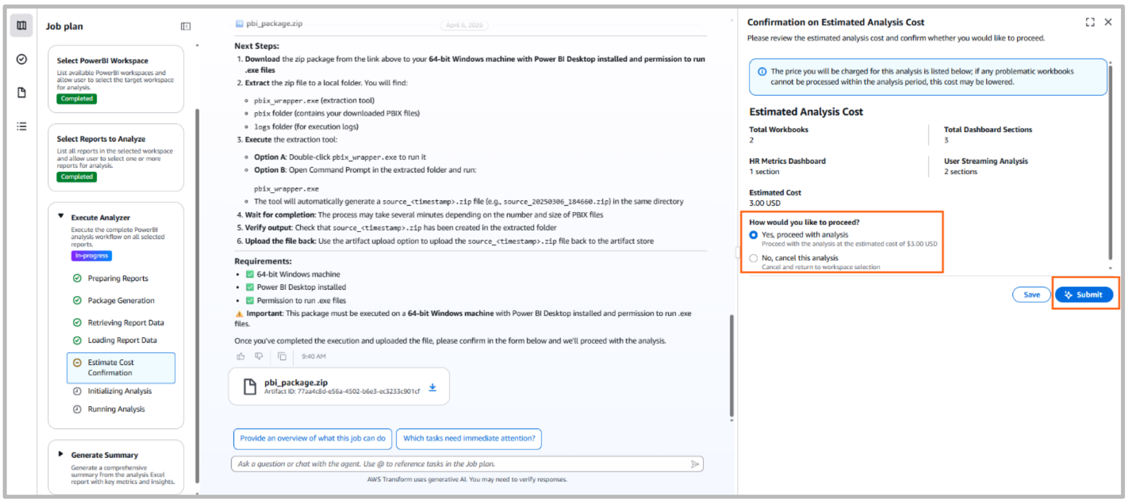

Figure 17: Estimated cost confirmation screen

Step 7: Review the Conversion Summary

When the analysis finishes, the agent displays a summary directly in the chat window. This summary includes the overall extraction status and a breakdown of all objects captured in Power BI, typically including:

- Number of data sources/semantic models
- Number of calculated fields extracted
- Number of reports and pages extracted
- Number of database connections extracted

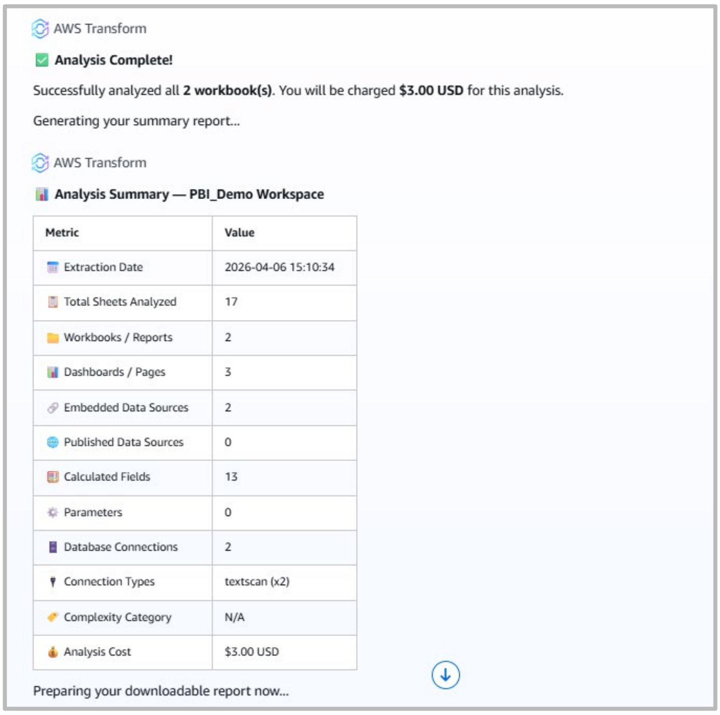

Figure 18: Review analysis summary

7. Verifying the Analysis Results

After the analysis completes, you are provided with a link to download the Analysis Results.

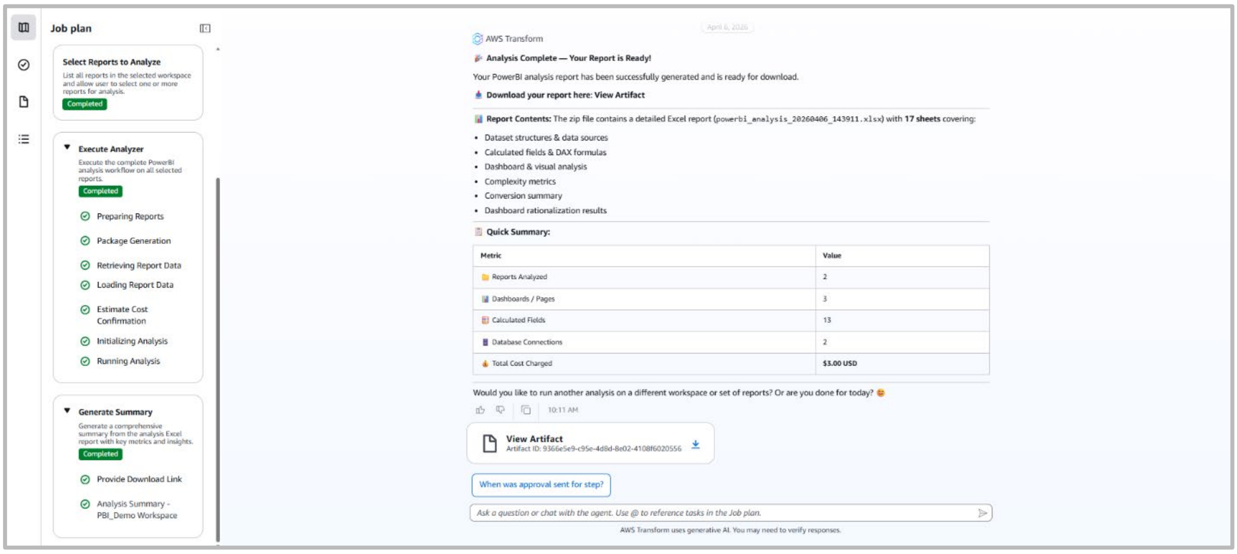

Figure 19: Analysis completion screen

Click on the link to download. And extract the analysis results zip file. Then, Open the analysis report Excel file and verify the results.

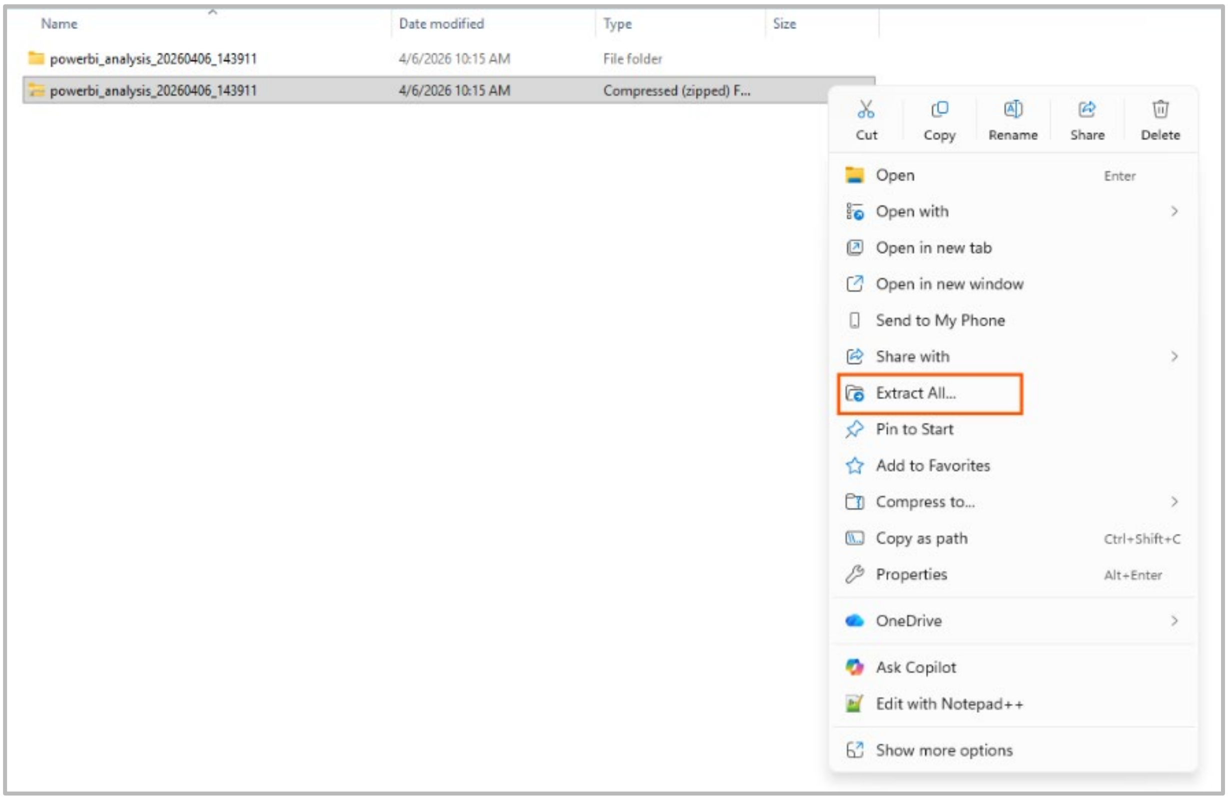

Figure 20: Extract results zip file.

8. Reading the Analysis report

8.1 What is in the report

During an Analyzer execution, the agent creates the following sheets in the analysis summary file:

- **Summary:** Provides a high-level overview of the analysis output, including total number of objects, Power BI server URL, and a complexity categorization summary.
- **Chart Types:** Details all **charts detected across dashboards**, including the raw chart type, inferred type, predicted type, and the associated workbook/dashboard. This sheet is used to understand visualization distribution and for conversionreadiness assessments.
- **Dashboards:** Lists each page with attributes such as **complexity score**, sheet count, calculated field count, creation/update information, and adjusted complexity metrics. Useful for understanding page size and transformation complexity.
- **Workbooks:** Captures metadata for each report, including name, project name, filename paths, page count, and visual count. Helps identify source PBIX file structures.
- **Data Sources:** Describes all data sources used in the report, including the list of fields, columns, queries, calc field count, and upstream database details.
- **Parameters:** Lists data parameters used in visualizations or queries within the reports.
- **DB Connections:** Documents database connection information such as file paths, connection type, and database ID. This includes details for underlying CSV/extract sources used by Power BI.
- **Calculated Fields:** Lists all DAX or calculation expressions used in the reports, including formula text, data type, whether parameters are involved, and what pages use them.
- **Rationalization Summary:** Compares dashboards against each other to identify overlap, duplicates, or content similarities. Shows matched sheet percentages, helping assess dashboard consolidation opportunities, **deduplication, and optimization** efforts.

8.2 Complexity and Conversion Time

Report complexity (as measured by the Analyzer Agent) directly impacts conversion time. A medium-complexity dashboard with 7 sheets and 19 calculated fields typically converts in a few minutes. More complex dashboards with many data sources, multiple relationships, or dozens of calculated fields will take longer.

Industry Insight:

Organizations migrating from Power BI to Quick Sight typically see the Converter Agent reduce per-dashboard migration time from hours or days of manual development down to minutes of automated conversion plus a short period of manual look-and-feel adjustments.

9. Tips and Best Practices

- Run the Analyzer first. Use the EZConvertBI Power BI Analyzer Agent to assess your Power BI environment before converting. The Analyzer's complexity scores and conversion readiness ratings will help you prioritize which dashboards to convert and anticipate potential issues.
- Use the Analyzer's rationalization results to eliminate duplicate dashboards before converting. This avoids unnecessary conversion work.
- Remember that Power BI service credentials only need to be configured once. For subsequent Analysis, simply select the existing Credential Providers.

10. Troubleshooting

Issue	Resolution
Credential validation fails	Verify that both your Power BI service Credential Provider and Amazon Quick Sight Connector are correctly configured in AWS Transform. Ensure access tokens have not expired.
No workspace appear after credentials are accepted	Confirm that the Power BI service user associated with the credentials has access to at least one workspace. Contact your Power BI service administrator if needed.
No reports appear	Check that the selected workspace contains published reports, and that the authenticated user has view permissions on the target content.
Analyzer takes a long time	Complex reports with many pages, calculated fields, and data sources take longer to analyze. This is expected. Monitor the Job Plan and chat window for progress updates.
Chat interface and Job Plan are out of sync	Occasionally there may be a brief lag between the chat interface, the Job Plan panel, and the right-hand form panel updating. Wait a few seconds and the panels will synchronize. This does not affect the conversion.

11. Glossary

Term	Definition
Workspace (AWS)	An AWS Transform container for organizing jobs, artifacts, and team collaboration.
Job Plan	The step-by-step workflow displayed in the left panel that guides you through the conversion process.
Credential Provider	A pre-configured set of connection details (URL, tokens) for accessing your Power BI Service. Each PBI connection only needs to be configured once.
Connector	The AWS Transform configuration object that defines how to reach an external system such as a Power BI service or Amazon Quick Sight. A Connector is associated with one or more Credential Providers.
Artifact	An output file generated by the agent (e.g., the manifest file or analysis summary).
Manifest File	A configuration file that describes the data source structure and location (typically in S3) used by Quick Sight to create a data source.
Data Source	In Quick Sight, a connection to an underlying data store such as S3, a relational database, or a data warehouse.
Data Set	In Quick Sight, a prepared and queryable representation of data built on top of a data source. Includes column definitions, joins, and calculated fields.
Analysis	A Quick Sight object that contains one or more sheets (visuals) and can be published as a dashboard. This is the primary output of the Converter Agent.
Calculated Field	A derived field created using a formula or expression. The Converter Agent translates Power BI DAX calculated field syntax into Quick Sight syntax.
Complexity Score	A numeric value assigned by the Analyzer Agent to each dashboard based on factors like sheet count, calculated fields, data source complexity, and chart types. Used to estimate conversion effort.

Agentic Workflow	An AI-driven, conversational workflow in which the agent autonomously creates and executes a step-by-step plan based on your instructions.

For additional support, contact ***Wavicle Data Solutions.***

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wavicle DATA SOLUTIONS

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1.2 What Does the Converter Do?

The Converter Agent uses an agentic, conversational workflow to connect to both your Power BI Service and your Amazon Quick Sight environment. It reads the selected Power BI dashboard and its underlying components, then programmatically recreates them in Quick Sight. Specifically, the agent creates data sources and data sets in Quick Sight, converts all calculated fields, builds analysis sheets corresponding to each Power BI page, and assembles the final dashboard.

After conversion, an engineer reviews the Quick Sight output for look-and-feel adjustments such as chart placement, colors, and formatting, then performs final validation testing. The bulk of the structural migration work is handled automatically by the agent.

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- Power BI Service credentials (URL, personal access token, or username/password) already configured as a Credential Provider in AWS Transform.
- An Amazon Quick Sight connector configured in AWS Transform. The Converter Agent connects to both Power BI (to read the source dashboard) and Quick Sight (to create the converted objects).
- Permission to access the Power BI Service and workspaces containing the reports you wish to convert.
- Appropriate permissions in Amazon Quick Sight to create data sources, data sets, and analyses.
- A modern web browser (Chrome, Edge, or Firefox recommended).

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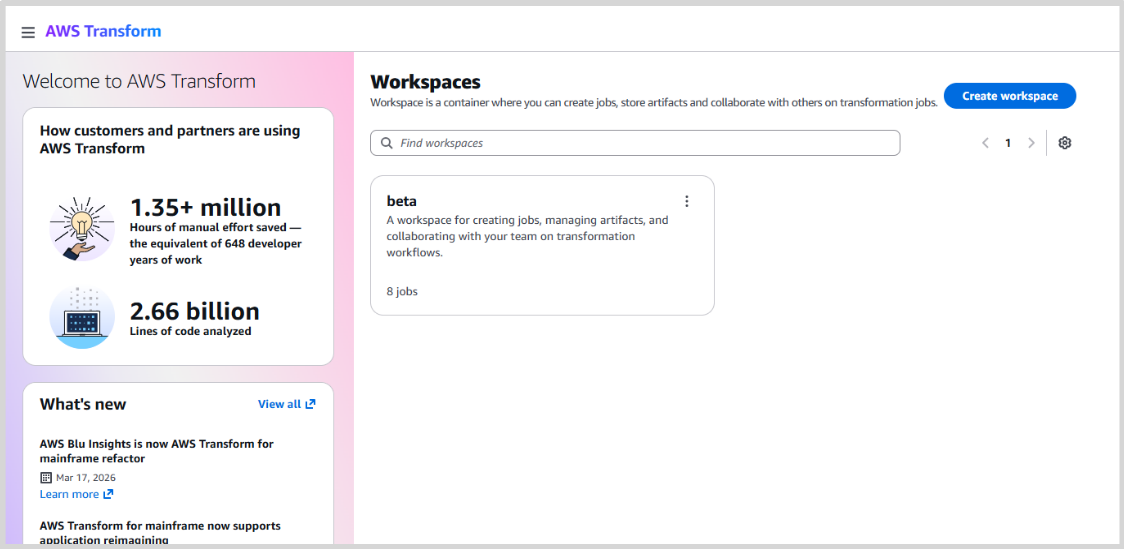

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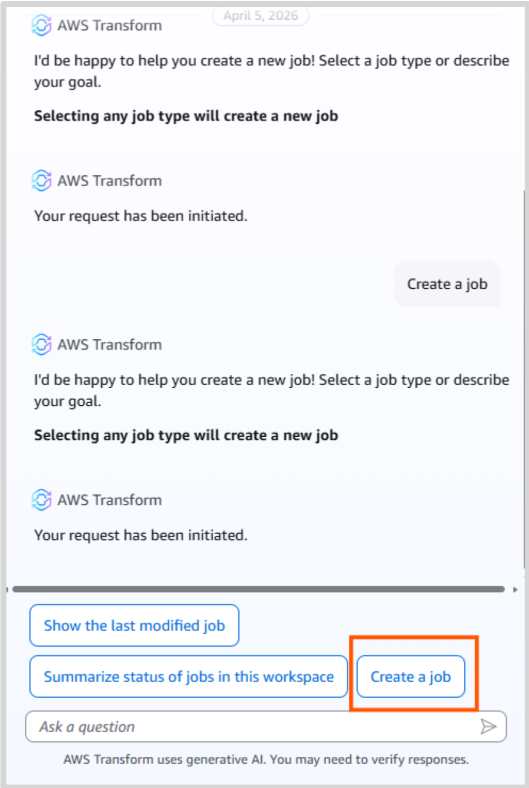

Figure 2: Select Create a job.

Step 3: Select the Power BI Analyzer Agent

After clicking “Create a job,” you will be presented with a list of available job types. Select “BI Migration” and then choose “MarketPlace Wavicle Power BIto Quick Sight Converter Agent”

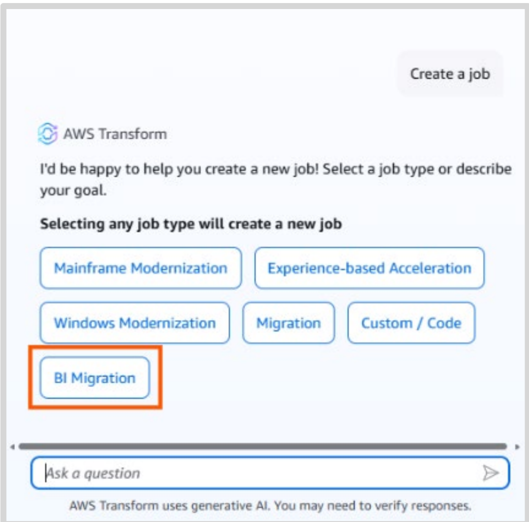

Figure 3: Selecting BI Migration job type.

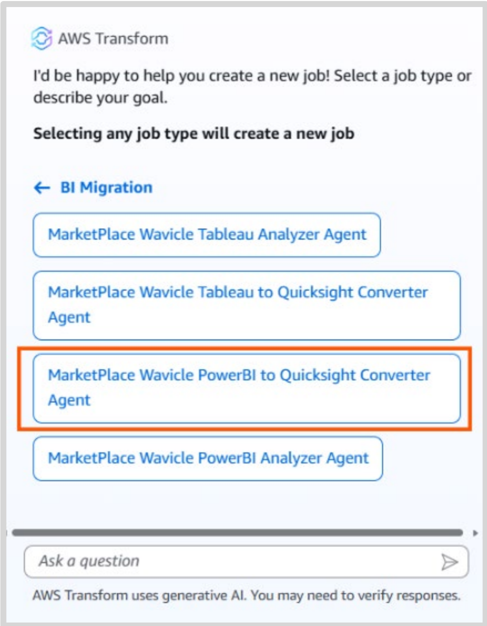

Figure 4: Selecting the Wavicle Power BI Converter Agent.

In the chat window that appears, type a prompt such as “Help me migrate a report from Power BI to Quick Sight” to instruct the agent to create a Job Plan. The agent will automatically determine all the steps required, from connecting to your Power BI service and Quick Sight environment through to generating the conversion summary. This Job Plan is created in a matter of seconds.

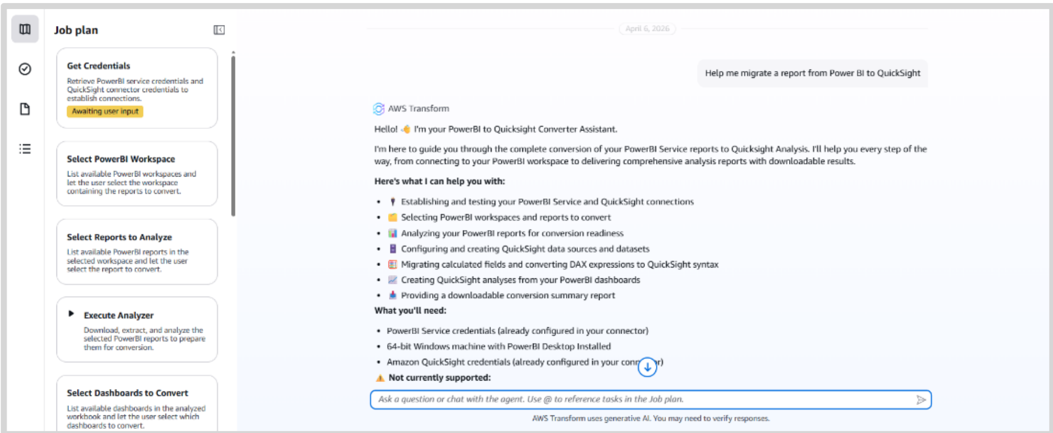

Figure 5: The Job Plan showing all conversion steps from credentials through to summary generation.

Tip:

Throughout the workflow, you have two ways to interact with the agent: type your answers directly in the chat window, or click the corresponding step in the Job Plan panel on the left and use the form that appears on the right-hand side. Both methods are equally valid.

6. Running the Conversion

Once the Job Plan is created, it will appear as a series of steps in the left-hand panel. The agent will guide you through each step in sequence. A step will display a status indicator such as “Awaiting user input,” “In-progress,” or “Completed” to show its current state.

Step 4: Provide Credentials

The first step in the Job Plan is “Get Credentials.” Because the Converter Agent connects to both Power BI and Quick Sight, you need to provide connection details for both systems.

You can either type the connector names in the chat window or click “Get Credentials” in the Job Plan. When you click the Job Plan step, a form will appear on the right-hand side with dropdown menus listing your available credential providers.

For example, you might type: *“Use the Power BI connector ending in 33v94 and use the default Amazon Quick Sight connector.”*

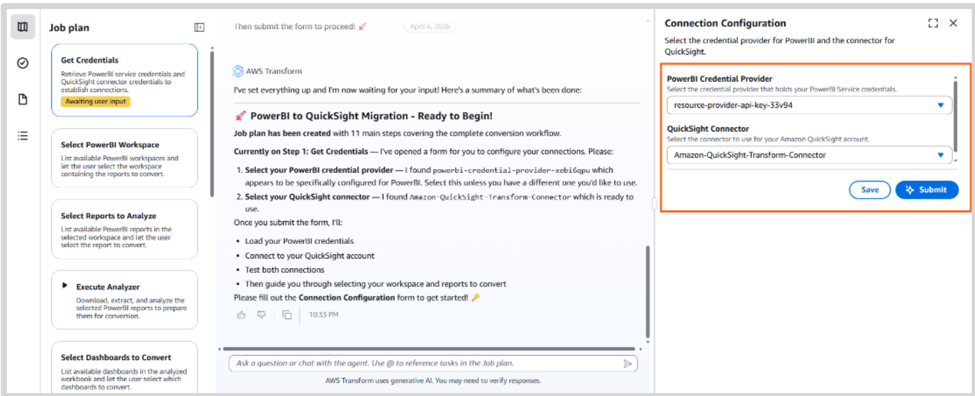

Figure 6: The Job Plan with the Get Credentials step active and the credential selection form on the right.

Once the credentials are validated and the agent confirms it can connect to both the Power BI Service and Quick Sight, the “Get Credentials” step will show a “Completed” status (green check mark) in the Job Plan.

Step 5: Select Power BI workspace, and Report

After credentials are validated, the agent walks you through selecting the Power BI content to convert. This is a multi-step process:

5a. Select Workspace: The agent retrieves all workspaces available on the connected Power BI service. Type the workspace name in the chat window or use the dropdown on the right-hand side.

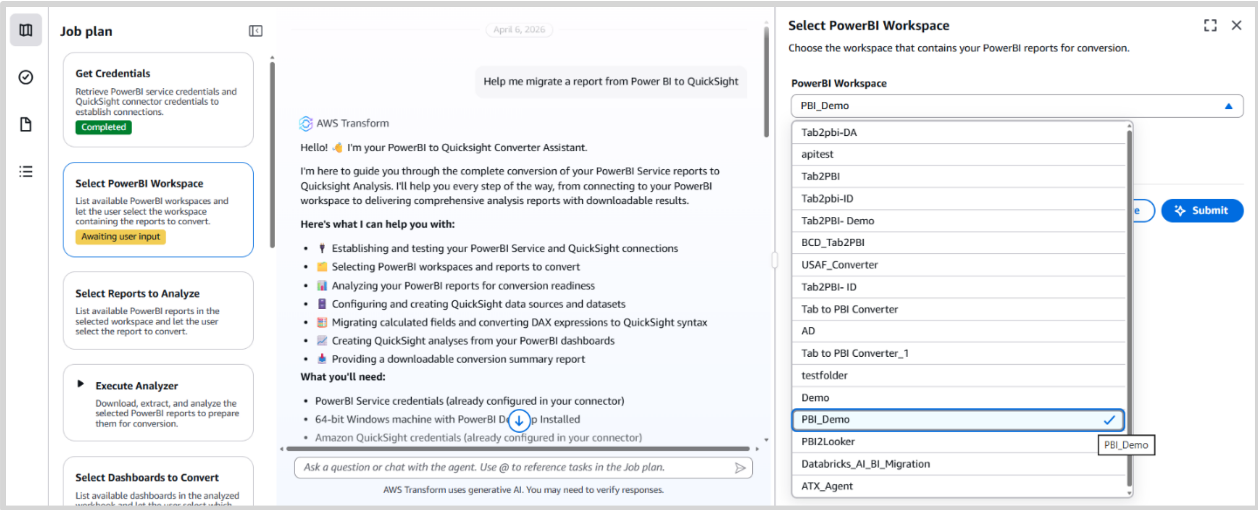

Figure 7: Select a workspace from the available list.

5b. Select Report: The agent retrieves all reports within the selected workspace and prompts you to choose which one to convert.

After you select the report, the agent runs an analysis step to inventory the dashboards and their components (sheets, calculated fields, data sources). This analysis may take a moment to complete.

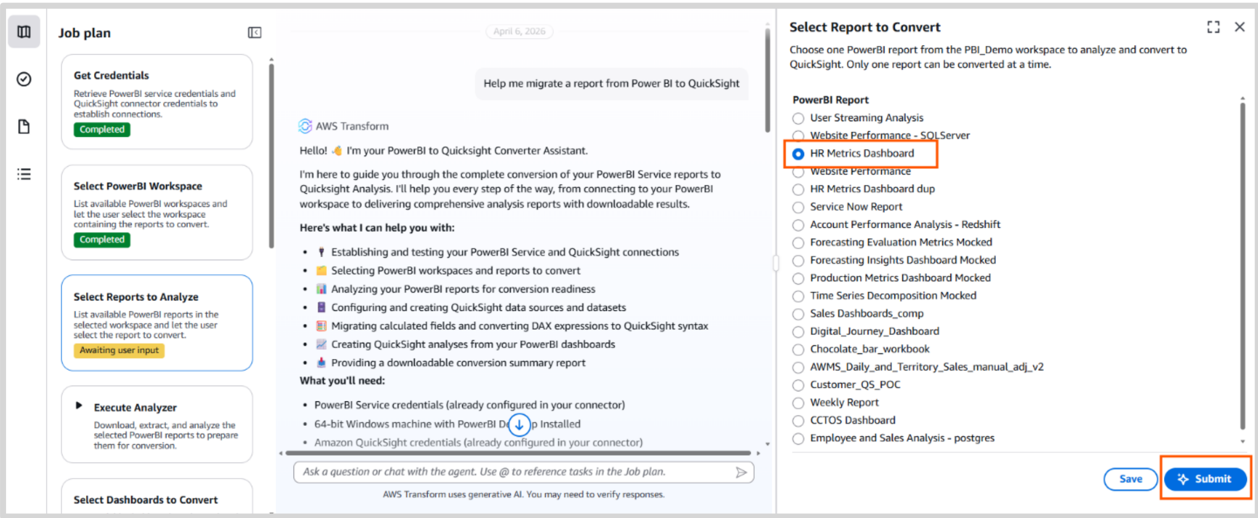

Figure 8: Select a report from the available list.

Step 6: Automatic Analysis

After report selection, the agent automatically proceeds through the remaining Analyzer steps. You will see status updates in the chat and the Job Plan as the agent:

6a. Preparing Reports: The Analyzer will download the chosen reports and prepare them for analysis.

6b. Package Generation: The Analyzer creates a package to download. Follow the instructions shown in the chat interface.

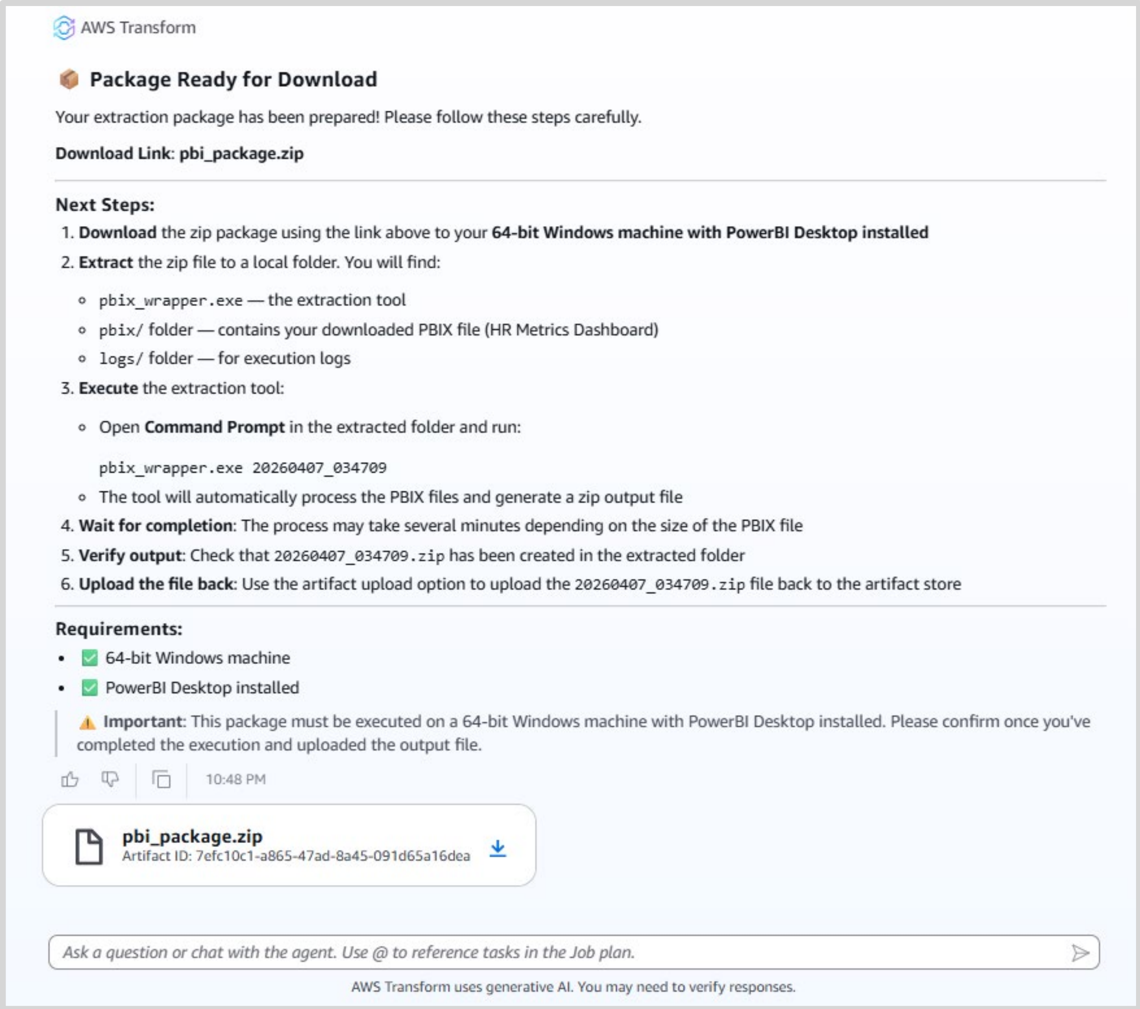

Figure 9: Package Generation.

6c. Download the zip file, extract, and execute the pbix_wrapper.exe as per instructions in the chat interface to initiate the extraction tool.

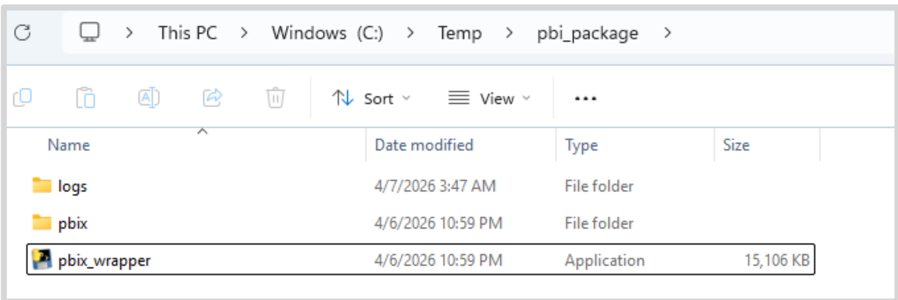

Figure 10: Extracted pbi_package zip file

Tip:

Download the ZIP file to a directory with a short path. Using a long directory path may cause errors when executing the .exe file.

(or)

If you still encounter **[WinError 206]** after using a short directory path, run the following command in **PowerShell** to enable long file paths in Windows (administrator privileges may be required):
New-ItemProperty -Path "HKLM:\SYSTEM\CurrentControlSet\Control\FileSystem" -Name "LongPathsEnabled" -Value 1 -PropertyType DWORD -Force

Steps to execute .exe file:

- Open Command Prompt
- Navigate to the extracted zip file directory (e.g. cd C:\Temp\pbi_package)
- Execute the pbix_wrapper.exe with the argument specified in the chat interface.

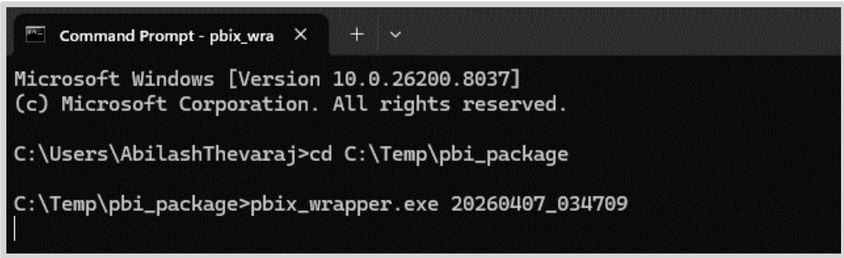

Figure 11: Execution of .exe file

- Execution should complete without any errors

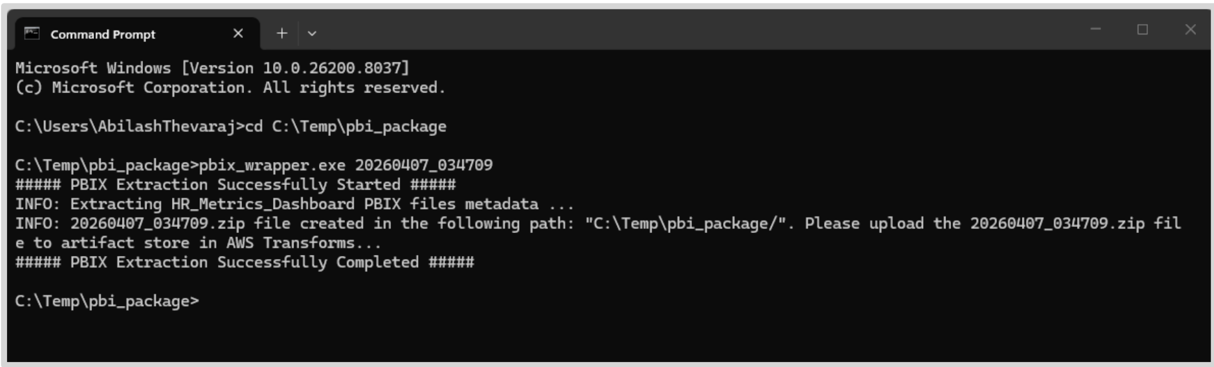

Figure 12: Successful execution

6d. After completion (which may take several minutes depending on the complexity of the report), verify the **<timestamp>.zip** file is generated in the extracted folder.

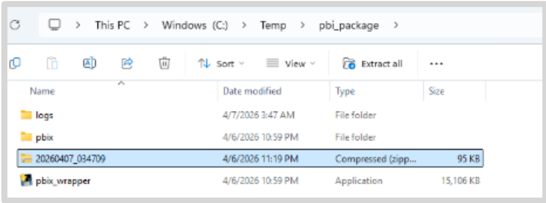

Figure 13: Generated source zip file

6e. Upload the <timestamp>.zip file back: Use the artifact upload option to upload the zip file back to the artifact store. Click on the Artifact menu icon on the left and select 'Upload artifact'.

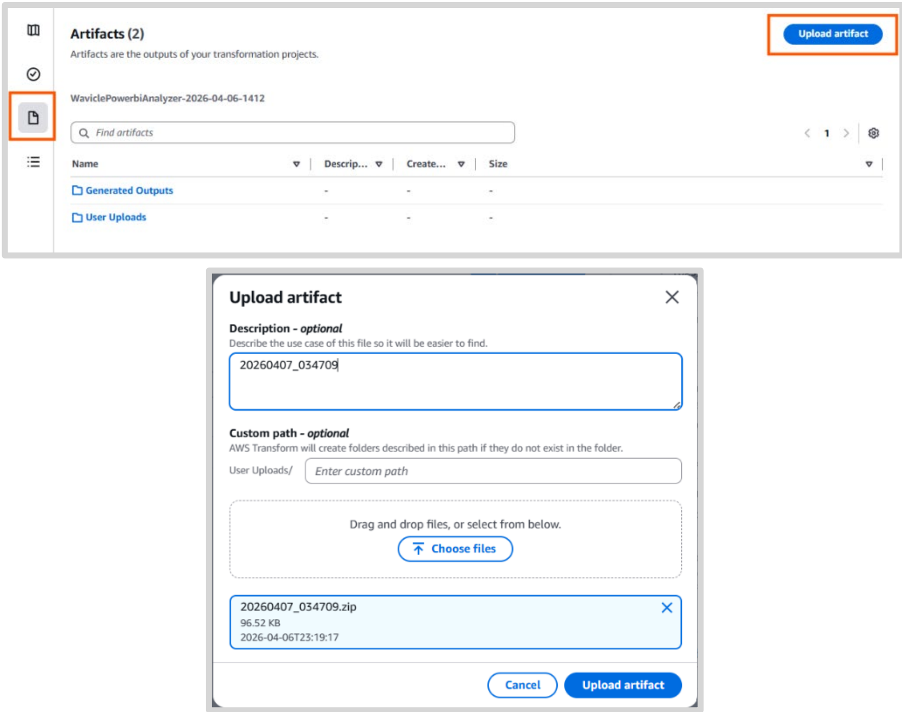

Figure 14: Upload artifact screen

6f. Once the file is uploaded, navigate to Job Plan, click on **Package Generation** step in the Job Plan, select the confirmation checkbox, and click **Submit** to continue.

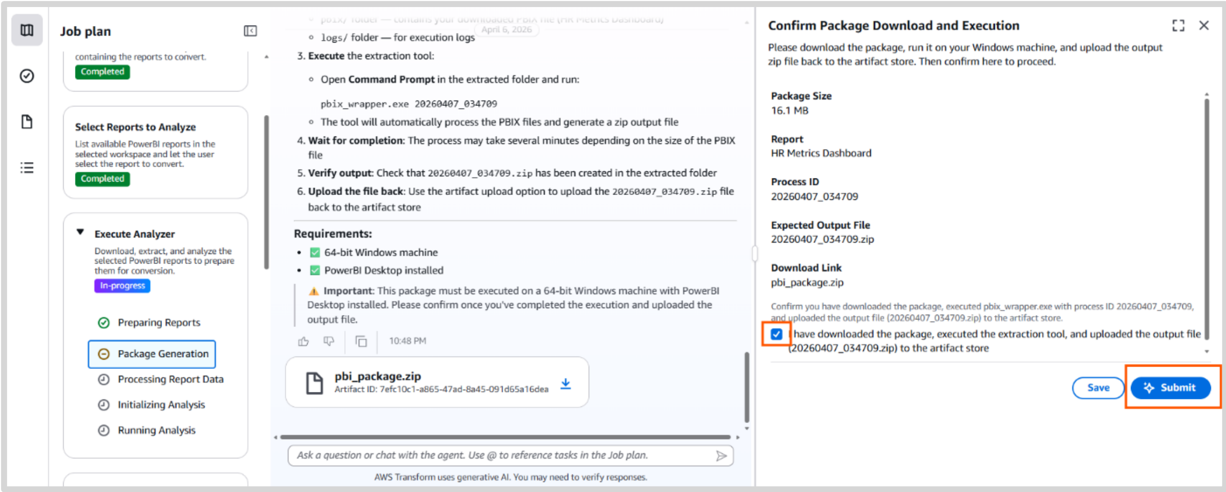

Figure 15: Upload artifact confirmation submit screen

This process may take several minutes depending on the complexity of the dashboard.

6g. Confirm uploaded file: Confirm the zip file found in the artifact store before proceeding with analysis.

Click on **Processing Report Data** step in the Job Plan, select the **file,** and click on **Submit.** This process may take several minutes depending on the complexity of the dashboard.

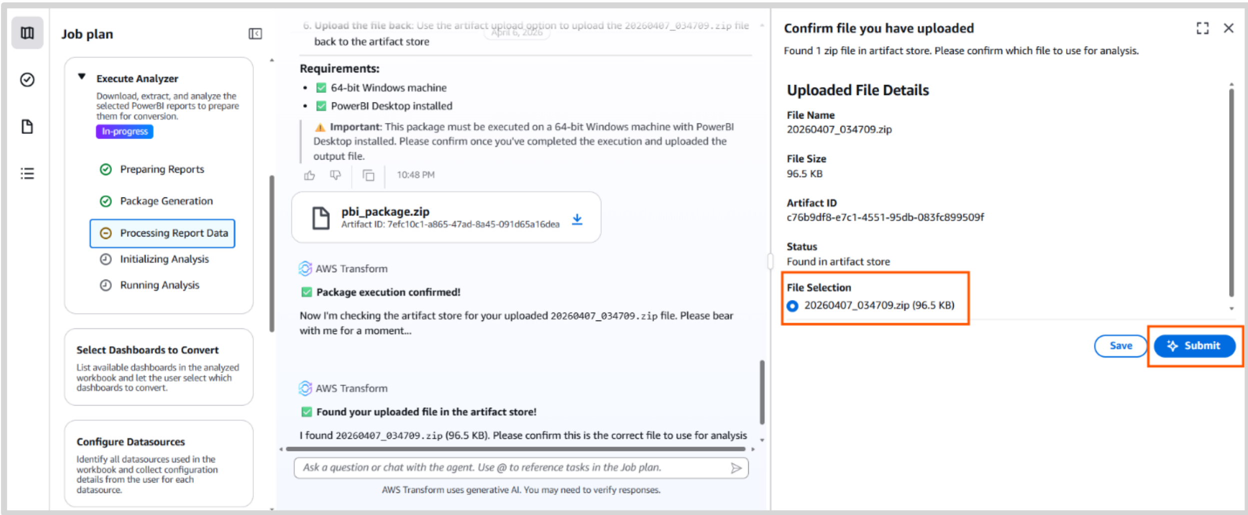

Figure 16: Source file confirmation screen

Once analysis is completed, the chat interface presents a quick summary of the report.

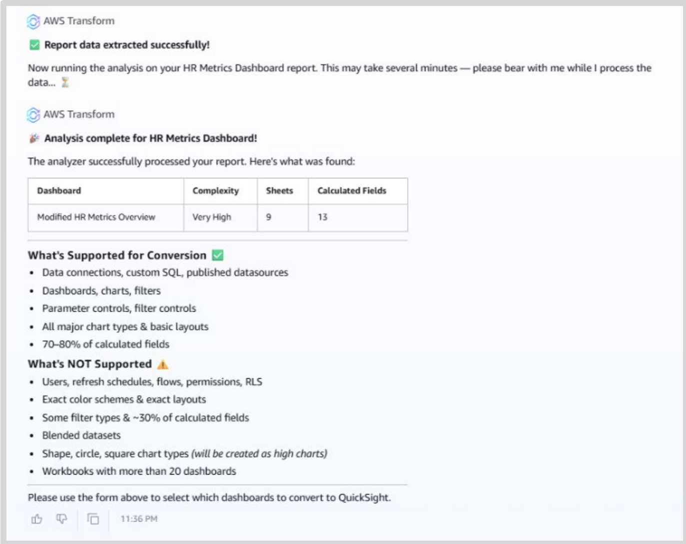

Figure 17: Analysis completion showing dashboard details including sheets and calculated fields.

Step 7: Select Dashboards to Convert

Once the analysis completes, the agent displays the available dashboards within the selected report along with key details such as the number of sheets, calculated fields, and complexity level. Select all dashboards you would like to convert.

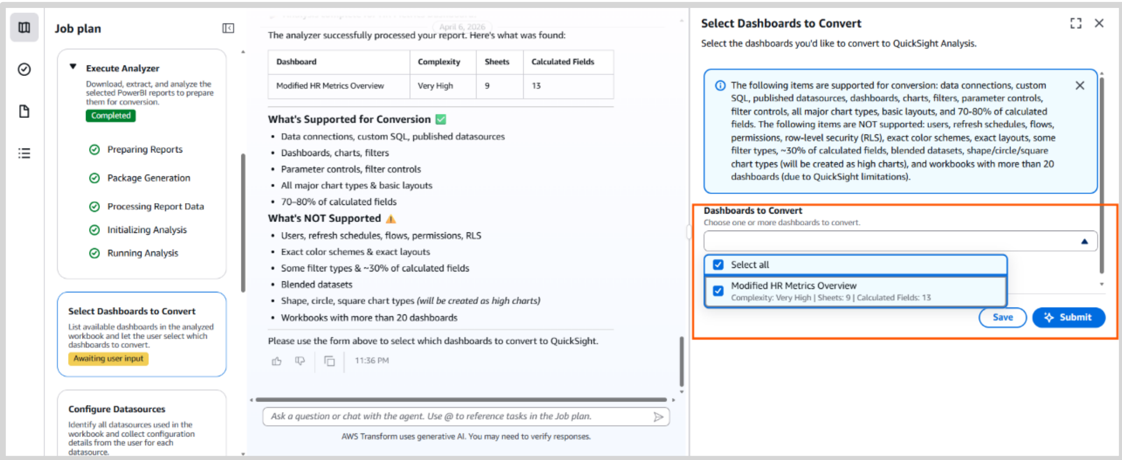

Figure 18: Choose a dashboard(page) to convert.

Click on the **Select Dashboards to Convert** on the Job Plan and choose the dashboards you wish to convert. Click **Submit**.

Step 8: Configure Data Sources

This is a critical step in the conversion process. The agent needs to set up data sources and data sets in Quick Sight that correspond to the Power BI data connections. Select **Configure Data Sources** on the Job Plan to see the available configuration methods.

8a. File based data source:

For file-based data source, the agent presents three options for configuring the data source.

Option 1: Provide S3 Data File URI (we'll generate the manifest)
Upload your data file (CSV/TSV) to an S3 bucket and provide the S3 URI.
We will generate a manifest file for you.

Option 2: Provide S3 Manifest File URI (you create the manifest)
Create your own manifest JSON file, upload it to S3, and provide the manifest S3 URI.

Option 3: Provide Quick Sight Datasource URL (you create it in Quick Sight console)
Create the datasource directly in the Quick Sight console (S3 only) and provide the URL.

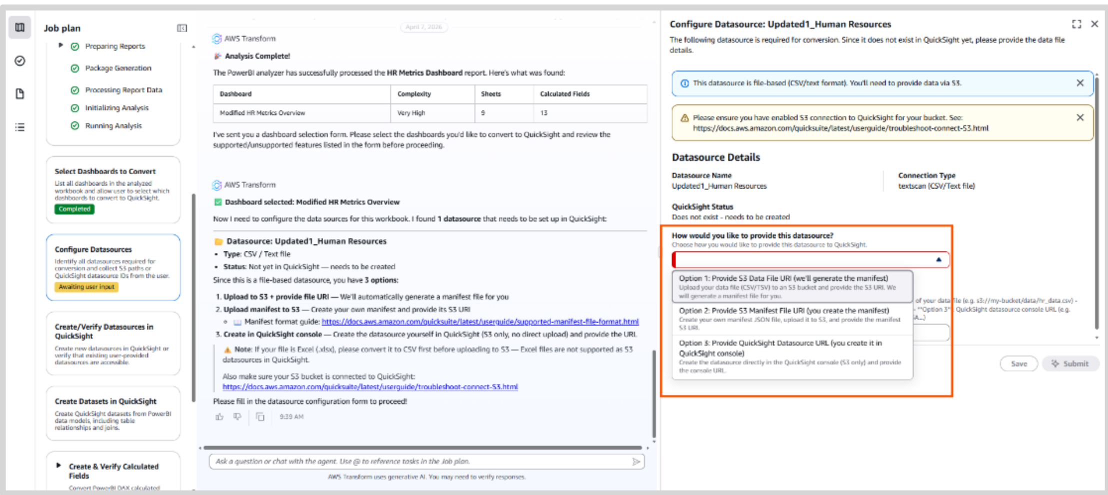

Figure 19: Data source configuration options showing available methods.

A common approach is option 1 where user provides the S3 URI path of the data file and the agent creates the necessary manifest file for the conversion. If you choose this method:

- **Step 1:** Upload the Data file to S3 and provide the URI path. The agent generates a manifest file describing the data source configuration.

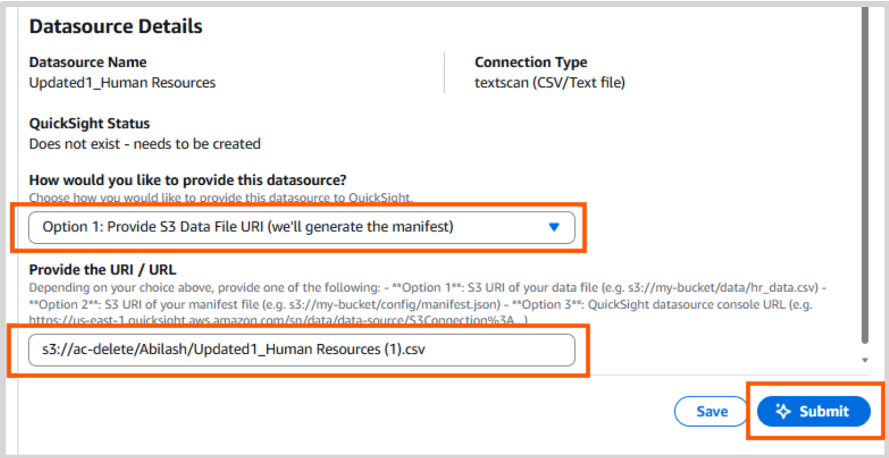

Figure 20: Provide the S3 URI path of Data file.

- **Step 2:** The agent generates a manifest file describing the data source configuration. Download the manifest file from the chat interface or from the Artifacts section.

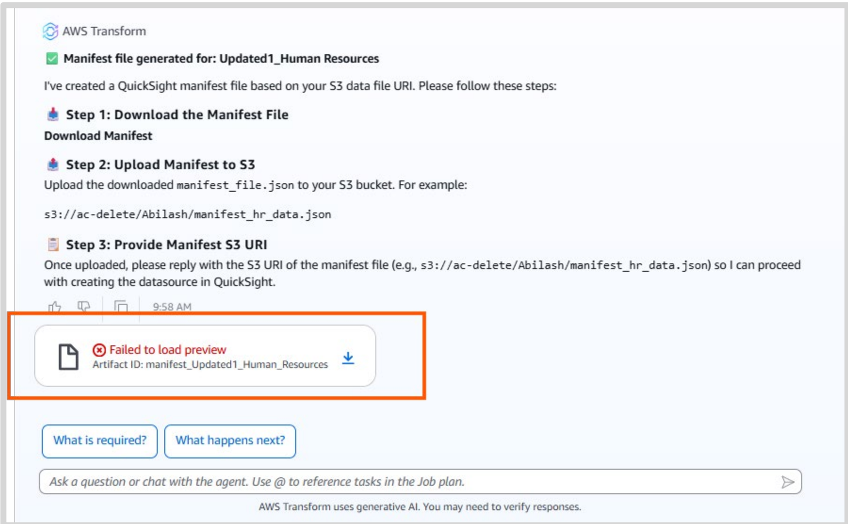

Figure 21: The manifest file available for download in the chat interface.

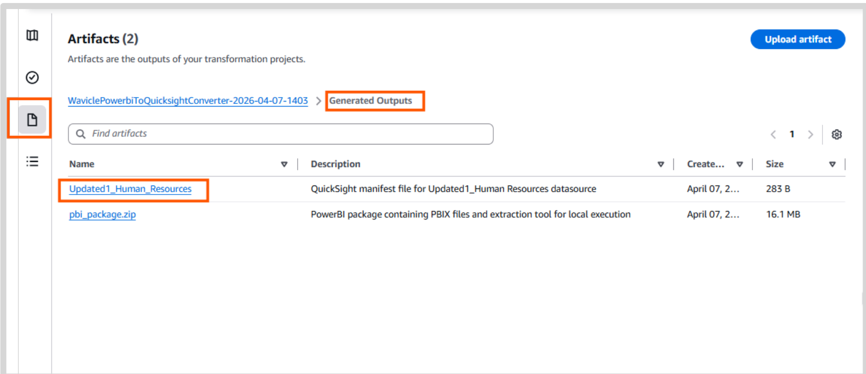

Figure 22: The manifest file available for download in the Artifacts section.

- **Step 3:** Upload the manifest file to your S3 bucket.
- **Step 4:** Provide the S3 location of the manifest file to the agent so it can create and verify the Quick Sight data source.

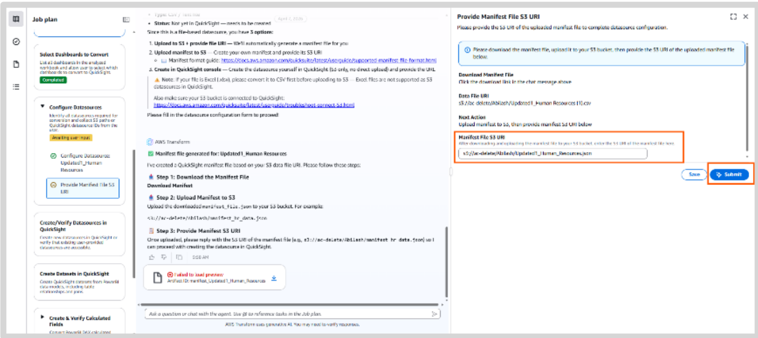

Figure 23: The manifest file S3 URI path provision.

- Once data source is configured, the agent will create and verify the data source in Quick Sight, then proceed to create the data sets.

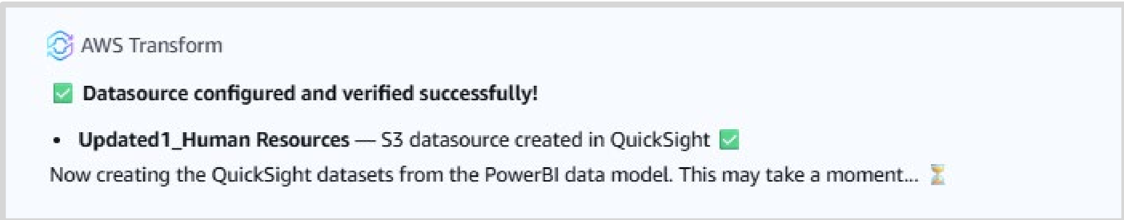

Figure 24: Data source creation confirmation.

Tip:

You can tell the agent to use a specific manifest file and skip dataset validation confirmations to speed up the process. For example: “Use the manifest file at s3://my-bucket/manifest.json and don’t ask me for confirmations to validate the data sets.”

8b. Database based data source:

For database-based data sources, the agent presents three options for configuring the data source.

Option 1: Quick Sight Datasource ID (e.g. abc123-def456-ghi789)

Option 2: Quick Sight Datasource URL (e.g. https://us-east-1.Quick Sight.aws.amazon.com/sn/data/data-source/...)

A common approach is option 2 where user provides the Quick Sight data source URL, and the agent creates the necessary dataset for the conversion. If you choose this method:

- **Step 1: Create Data source in Quick Sight**. Go to Quick Sight Console → Datasets → Data sources → Create data source.

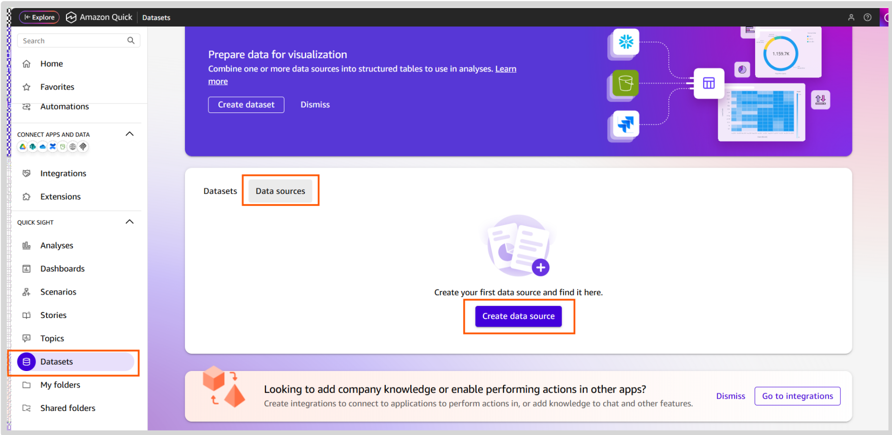

Figure 25: Create data source in Quick Sight

- **Step 2:** Configure your database (Redshift) connection.

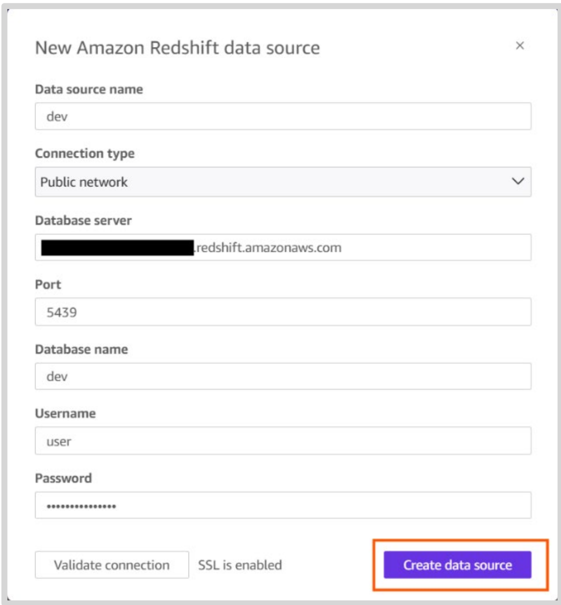

Figure 26: Database connection configuration

- **Step 3:** Navigate to the created data source and copy the url.

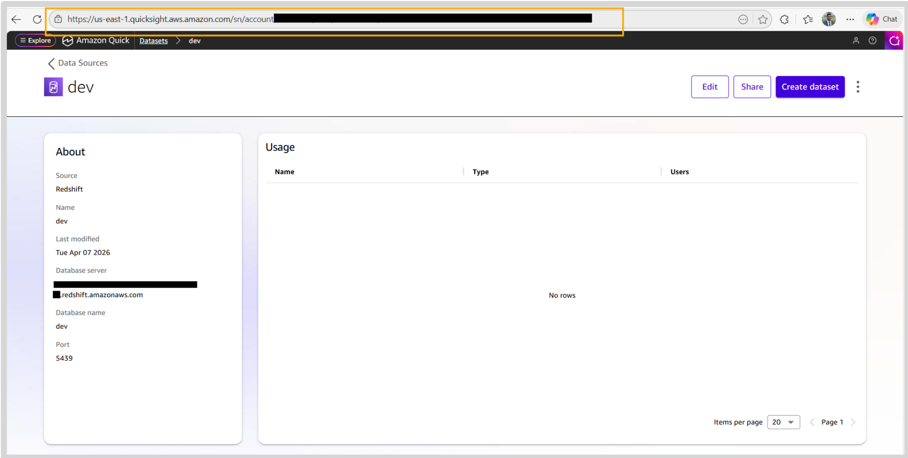

Figure 27: Data source details screen

- **Step 4:** Paste the Datasource URL and Submit.

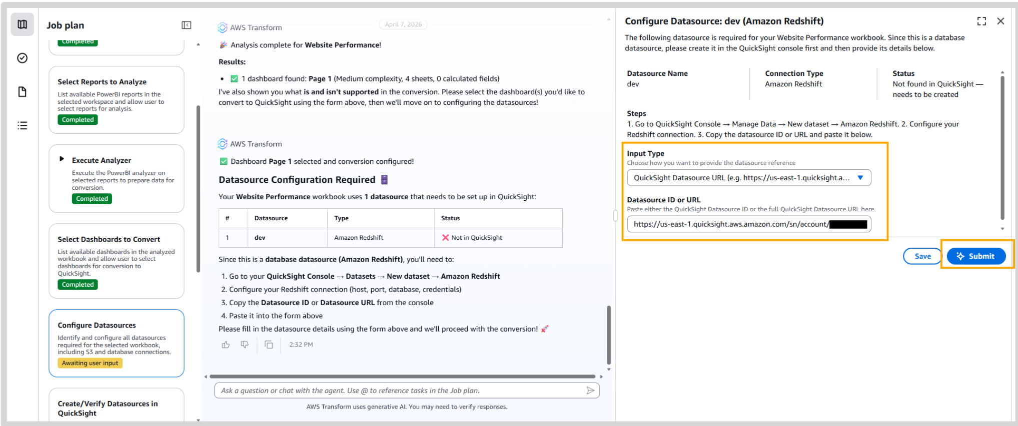

Figure 28: Data source configuration in agent

- Once data source is configured, the agent will create and verify the data source in Quick Sight, then proceed to create the data sets.

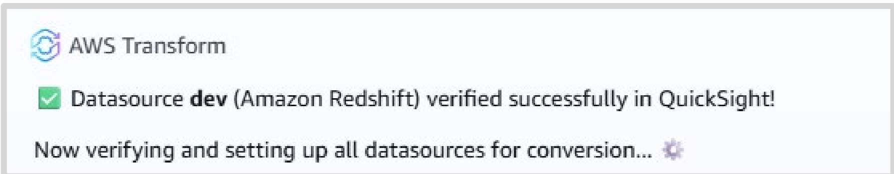

Figure 29: Data source creation confirmation.

Step 9: Verify Data Sets

Once the data sets are created, the agent will display a confirmation message such as “Dataset Created Successfully!” along with a “View Dataset in Quick Sight” link. Click this link to open Quick Sight and verify that the data set looks correct.

If everything looks good, respond with “Confirmed” or “Verified” in the chat to proceed to the next step.

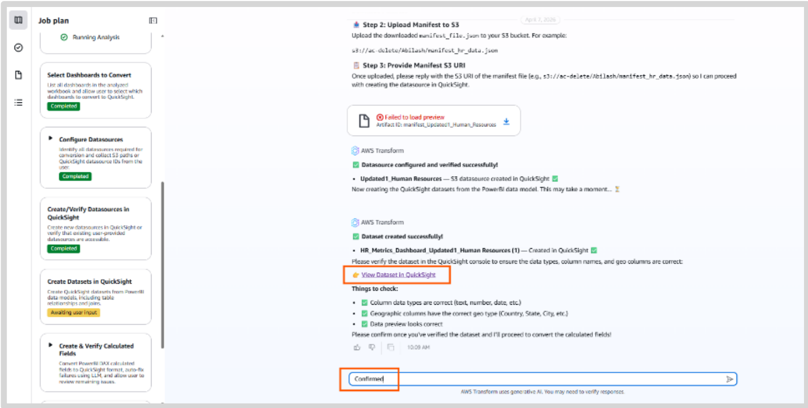

Figure 30: Verify dataset by selecting the verification link or navigating to quick sight.

Step 10: Automatic Conversion

After data set verification, the agent automatically proceeds through the remaining conversion steps. You will see status updates in the chat and the Job Plan as the agent:

- Creates and verifies all calculated fields in Quick Sight.
- Builds the analysis sheets (one for each Power BI worksheet in the dashboard).
- Assembles the final Quick Sight dashboard (analysis) with all charts, metrics, and filters.
- Generates a conversion summary report.

This process may take several minutes depending on the complexity of the dashboard.

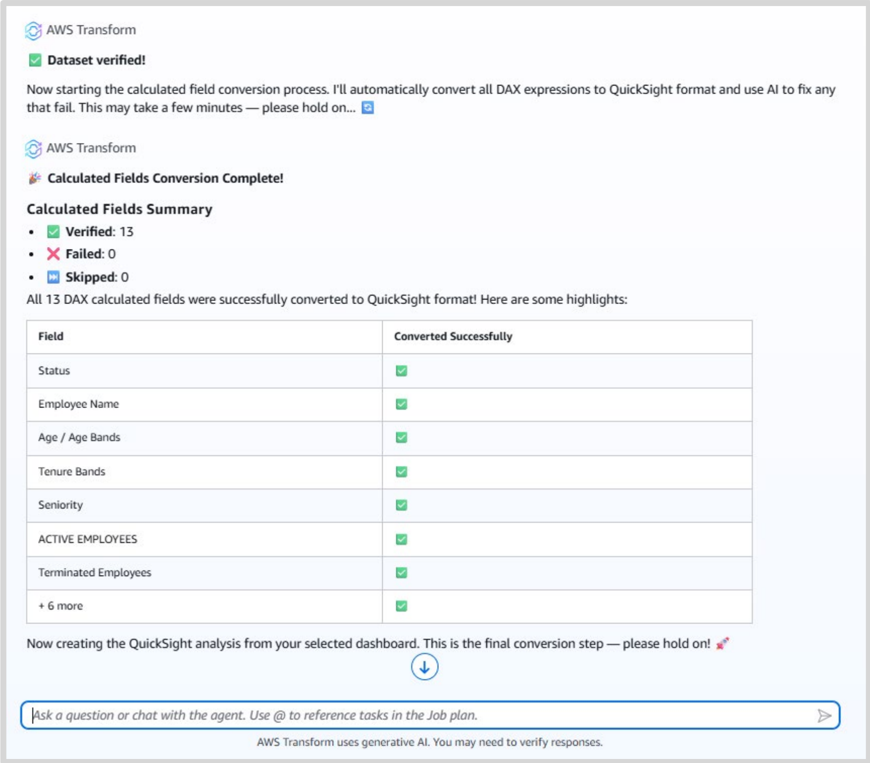

Figure 31: Review Calculated field conversion details

Step 11: Review the Conversion Summary

When the conversion finishes, the agent displays a summary directly in the chat window. This summary includes the overall conversion status (e.g., 100% successful) and a breakdown of all objects created in Quick Sight, typically including:

- Number of data sources created
- Number of data sets created
- Number of calculated fields converted
- Number of analysis sheets built
- Number of dashboards assembled

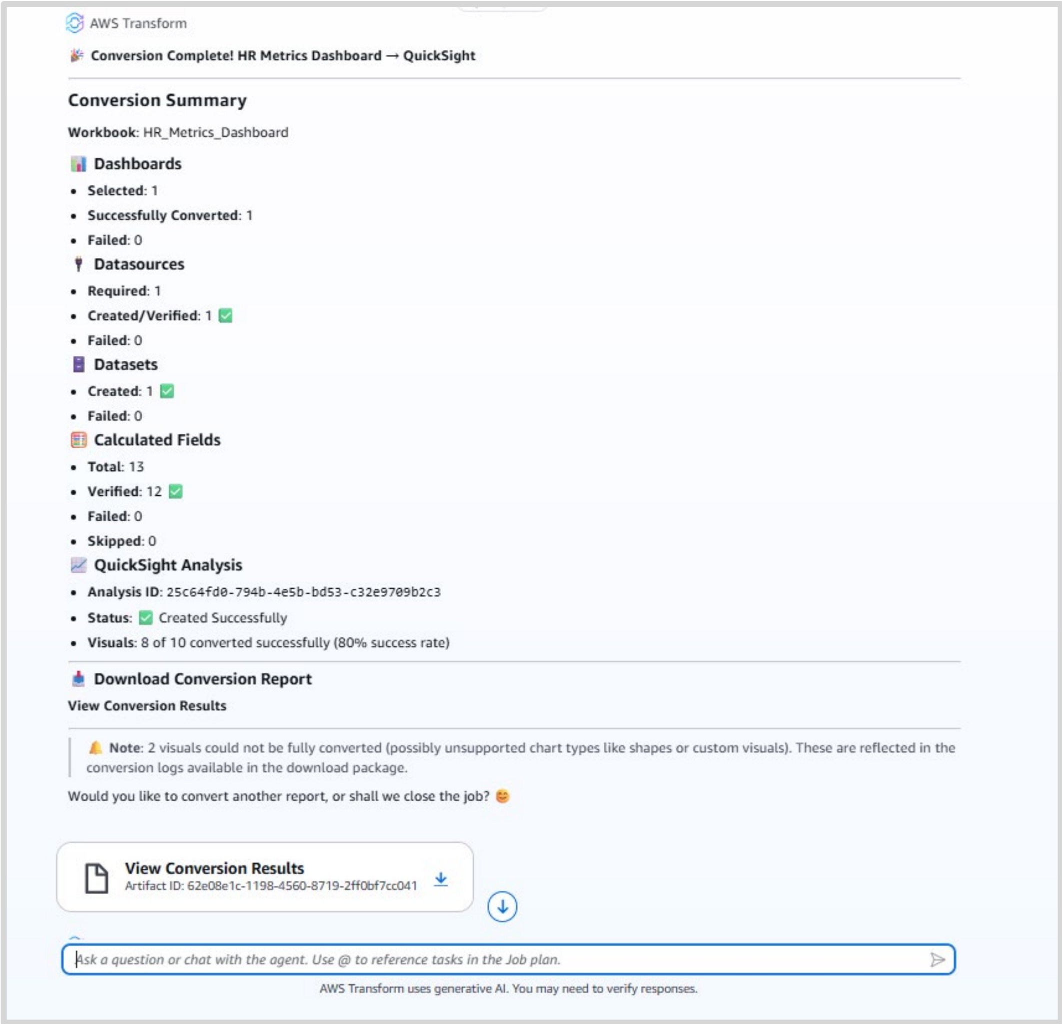

Figure 32: Review conversion summary

Note:

After verification in the Quick Sight, you can either convert another report or close the agent.

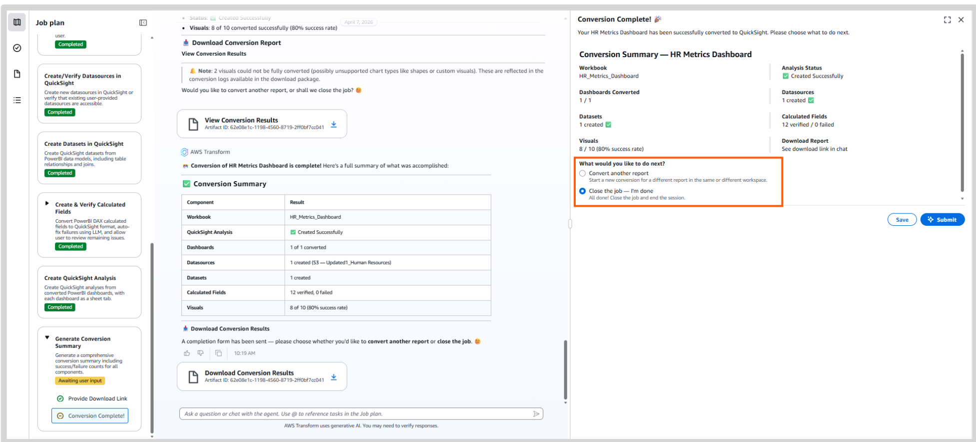

Figure 33: Review conversion summary

7. Verifying the Conversion Results

After the conversion completes, you should verify the results by comparing the Quick Sight analysis to the original Power BI dashboard.

7.1 Open the Quick Sight Analysis

Navigate to Amazon Quick Sight in your browser and open the Analyses section. You should see a new analysis with the same name as the converted Power BI dashboard. Click on it to open.

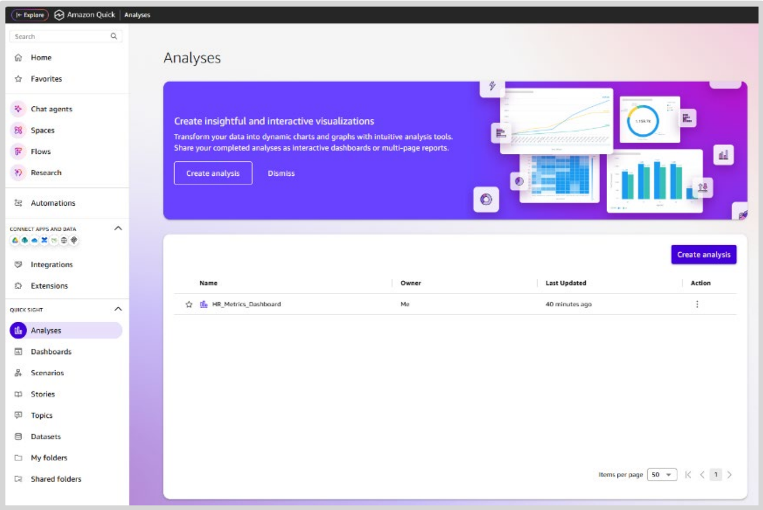

Figure 34: The newly created analysis visible in the Quick Sight Analyses list.

7.2 Compare to the Original Power BI Dashboard

Open the original Power BI dashboard side by side with the new Quick Sight analysis. Verify the following:

- **Data accuracy:** Compare key metrics and numbers between the two dashboards. The values should match exactly.
- **Chart presence:** Confirm that all charts from the Power BI dashboard are present in the Quick Sight analysis.
- **Filters:** Verify that filters have been recreated and are functional.
- **Calculated fields:** Spot-check calculated metrics to confirm they produce the same results.

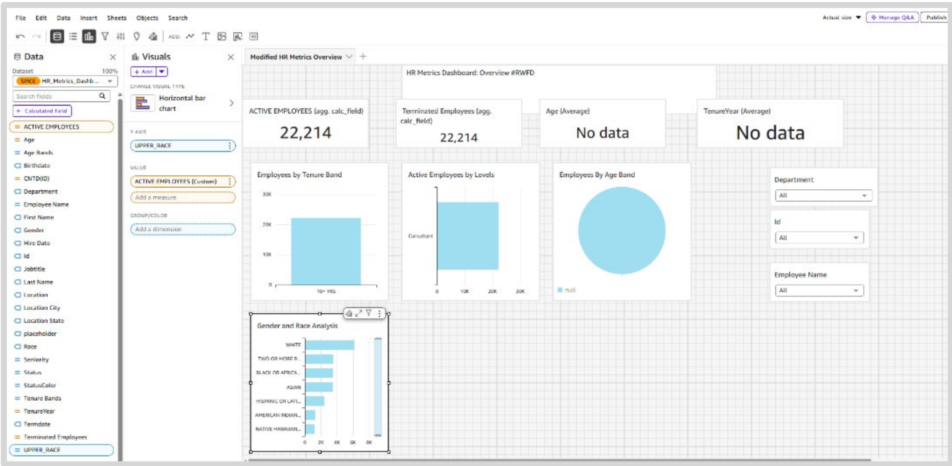

Figure 35: The converted Quick Sight analysis showing the same charts and data as the original Power BI dashboard.

7.3 Post-Conversion Manual Steps

After verifying data accuracy, an engineer should address the following items which typically require manual adjustment:

- **Look and feel:** Adjust chart placement, sizing, and layout to match your organization's design standards.
- **Colors and themes:** Apply your preferred color palette and Quick Sight theme.
- **Final testing:** Perform end-to-end testing including filter interactions, drill-downs, and data refresh to confirm everything works as expected.
- **Publishing:** Once satisfied, publish the Quick Sight analysis as a dashboard for end users.

Note:

The Converter Agent handles the structural migration work automatically. The manual steps listed above are cosmetic and validation tasks that typically take a fraction of the time compared to building the dashboard from scratch.

8. Key Concepts

8.1 What Gets Created in Quick Sight

During a conversion, the agent creates the following objects in your Quick Sight environment:

- **Data Source:** The connection to the underlying data (e.g., S3, database). Corresponds to Power BI's data connection.
- **Data Set:** A prepared, queryable data set built on top of the data source. Includes column definitions, joins, and calculated fields.
- **Calculated Fields:** Power BI calculated fields are translated into Quick Sight calculated field syntax.
- **Analysis Sheets:** Each Power BI worksheet becomes a sheet within the Quick Sight analysis, containing the corresponding chart or visual.
- **Dashboard (Analysis):** The final assembled Quick Sight analysis that combines all sheets, filters, and layout into a single view.

8.2 Conversion Success Rate

The conversion summary provides a success percentage indicating how much of the dashboard was converted automatically. A 100% success rate means all components (data source, data sets, calculated fields, sheets, and dashboard) were created without errors.

In cases where the success rate is less than 100%, the summary will indicate which components could not be converted automatically. These components will need to be created or adjusted manually in Quick Sight.

8.3 Complexity and Conversion Time

Dashboard complexity (as measured by the Analyzer Agent) directly impacts conversion time. A medium-complexity dashboard with 7 sheets and 19 calculated fields typically converts in a few minutes. More complex dashboards with many data sources, blended relationships, or dozens of calculated fields will take longer.

Industry Insight:

Organizations migrating from Power BI to Quick Sight typically see the Converter Agent reduce per-dashboard migration time from hours or days of manual development down to minutes of automated conversion plus a short period of manual look-and-feel adjustments.

9. Tips and Best Practices

- Run the Analyzer first. Use the EZConvertBI Power BI Analyzer Agent to assess your Power BI environment before converting. The Analyzer's complexity scores and conversion readiness ratings will help you prioritize which dashboards to convert and anticipate potential issues.
- Start with a low-complexity dashboard for your first conversion to familiarize yourself with the workflow and output format.
- Verify data accuracy immediately after conversion by comparing key metrics between the Power BI dashboard and the Quick Sight analysis.
- Use the "skip confirmations" option when configuring data sources if you are confident in your manifest file configuration. This speeds up the conversion process.
- Address look-and-feel adjustments after verifying data accuracy. Focus on getting the data right first, then refine the visual presentation.
- Use the Analyzer's rationalization results to eliminate duplicate dashboards before converting. This avoids unnecessary conversion work.
- Remember that Power BI Service and Quick Sight credentials only need to be configured once. For subsequent conversions, simply select the existing Credential Providers.
- The Converter Agent job creation takes slightly longer to initialize than the Analyzer Agent. This is normal and reflects the additional configuration required for the Quick Sight connection.

10. Troubleshooting

Issue	Resolution
Credential validation fails	Verify that both your Power BI Service Credential Provider and Amazon Quick Sight Connector are correctly configured in AWS Transform. Ensure access tokens have not expired.
No workspaces appear after credentials are accepted	Confirm that the Power BI Service user associated with the credentials has access to at least one workspace. Contact your Power BI Service administrator if needed.
No reoprts appear	Check that the selected workspace contains published reports, and that the authenticated user has view permissions on the target content.
Data source creation fails in Quick Sight	Verify that the Quick Sight connector has appropriate permissions to create data sources. Check that the manifest file (if used) is correctly formatted and uploaded to an accessible S3 location.
Data set verification fails	Open the data set in Quick Sight directly and check for missing columns, data type mismatches, or connection errors. You may need to adjust the data source configuration.
Calculated field conversion errors	Some Power BI calculated field DAX may not have direct Quick Sight equivalents. Check the conversion summary for specific errors and create these fields manually in Quick Sight.
Conversion takes a long time	Complex dashboards with many sheets, calculated fields, and data sources take longer to convert. This is expected. Monitor the Job Plan and chat window for progress updates.
Chat interface and Job Plan are out of sync	Occasionally there may be a brief lag between the chat interface, the Job Plan panel, and the right-hand form panel updating. Wait a few seconds and the panels will synchronize. This does not affect the conversion.
Quick Sight analysis looks different from Power BI	Visual differences in layout, colors, and chart sizing are expected and normal. These are cosmetic items that

	should be addressed during the post-conversion manual review.
Numbers don't match between Power BI and Quick Sight	Check calculated field definitions, filter configurations, and data set joins in Quick Sight. Ensure the data source is pointing to the same underlying data as the Power BI workbook.

11. Glossary

Term	Definition
Workspace	An AWS Transform container for organizing jobs, artifacts, and team collaboration.
Job Plan	The step-by-step workflow displayed in the left panel that guides you through the conversion process.
Credential Provider	A pre-configured set of connection details (URL, tokens) for accessing your Power BI Service. Each Power BI Service connection only needs to be configured once.
Connector	The AWS Transform configuration object that defines how to reach an external system such as a Power BI Service or Amazon Quick Sight. A Connector is associated with one or more Credential Providers.
Artifact	An output file generated by the agent (e.g., the manifest file or conversion summary).
Manifest File	A configuration file that describes the data source structure and location (typically in S3) used by Quick Sight to create a data source.
Data Source	In Quick Sight, a connection to an underlying data store such as S3, a relational database, or a data warehouse.
Data Set	In Quick Sight, a prepared and queryable representation of data built on top of a data source. Includes column definitions, joins, and calculated fields.
Analysis	A Quick Sight object that contains one or more sheets (visuals) and can be published as a dashboard. This is the primary output of the Converter Agent.
Calculated Field	A derived field created using a formula or expression. The Converter Agent translates Power BI calculated field syntax into Quick Sight syntax.
Complexity Score	A numeric value assigned by the Analyzer Agent to each dashboard based on factors like visual count, calculated fields, data source complexity, and chart types. Used to estimate conversion effort.

Agentic Workflow	An AI-driven, conversational workflow in which the agent autonomously creates and executes a step-by-step plan based on your instructions.

*For additional support, contact **Wavicle Data Solutions.***