EZConvertBI Tableau Analyzer Agent

User Guide

AWS Transform Partner Agent

Wavicle Data Solutions

Version 2.0 | March 2026

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Contents

1. Introduction

The EZConvertBI Tableau Analyzer Agent, developed by Wavicle Data Solutions, is a partner agent available on the AWS Transform platform. It automates the pre-migration analysis of Tableau dashboards, providing a detailed assessment of your existing Tableau environment to help plan and execute a successful BI migration to Amazon Quick Sight.

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 migrate Power BI and Tableau dashboards and then convert them to Amazon Quick Sight.

1.2 What Does the Analyzer Do?

The agent uses an agentic, conversational workflow to connect to your Tableau Server, inventory your workbooks and dashboards, and produce a comprehensive Excel spreadsheet documenting every aspect of your Tableau environment. This includes dashboard complexity scoring, chart type mapping with conversion recommendations, data source cataloging, calculated field inventories, and dashboard rationalization to identify duplicates.

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 assess Tableau environments prior to migration. No specialized coding or scripting knowledge is required.

2. Prerequisites

Before you begin, ensure you have the following:

- An active AWS account with access to AWS Transform.
- Tableau Server credentials (URL, personal access token, or username/password) already configured as a Credential Provider in AWS Transform. Note that each Tableau Server connection only needs to be configured once and can be reused across multiple analysis jobs.
- Permission to access the Tableau site and projects you wish to analyze.
- A modern web browser (Chrome, Edge, or Firefox recommended).

Note:

If your Tableau Server credentials have not yet been configured as a Credential Provider, you will need to set this up in AWS Transform before running the Analyzer. Refer to the AWS Transform documentation for instructions on creating a Connector and Credential Provider.

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, and view the analysis summary 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.

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

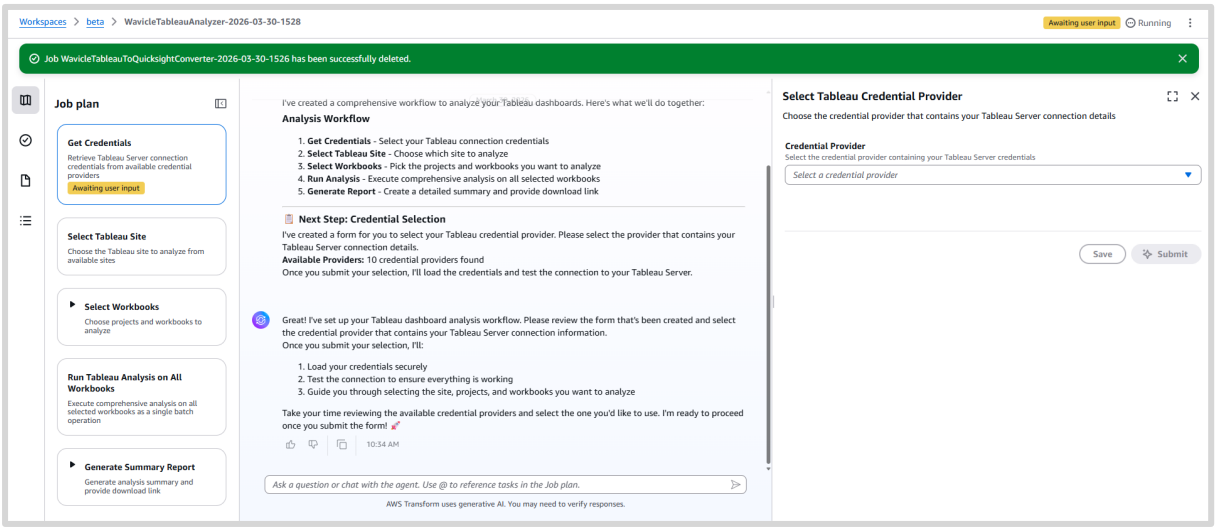

Figure 1: AWS Transform three-panel display.

4. Tableau Server Hierarchy

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

- **Tableau Server:** The top-level instance. Your organization may operate one or more Tableau Servers. The Analyzer supports connecting to multiple servers, each configured as a separate Credential Provider.
- **Site:** A Tableau Server contains one or more sites. Each site is an isolated environment with its own users, groups, and content. You will select a single site to analyze.
- **Project:** Within a site, content is organized into projects (similar to folders). You can select one or more projects to include in your analysis.
- **Workbook:** Each project contains workbooks. A workbook is a collection of related dashboards and worksheets. You can choose to analyze all workbooks in a project or a specific subset.
- **Dashboard / Sheet:** A workbook contains one or more dashboards and worksheets. The Analyzer examines each dashboard and its constituent sheets in detail.

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 a Connector for your Tableau Server credentials before proceeding.

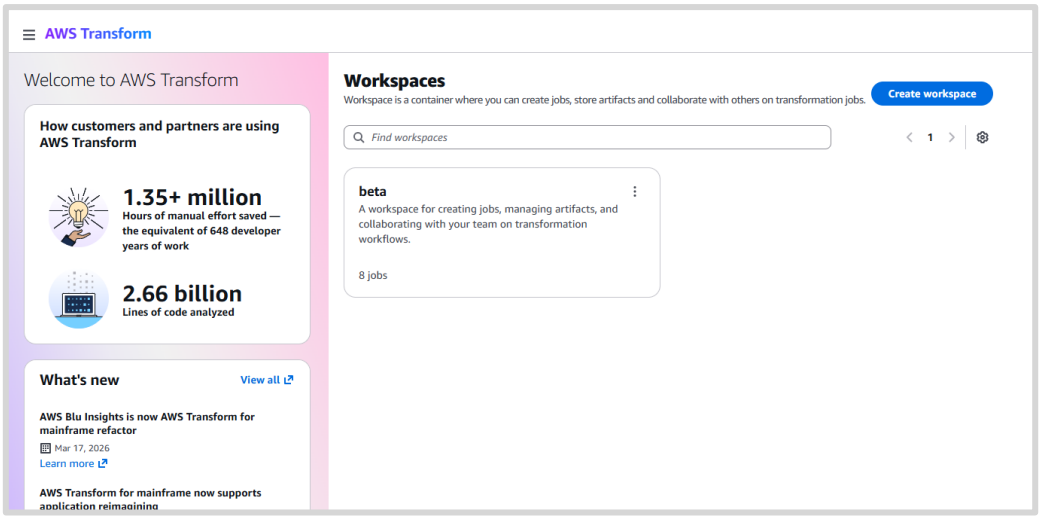

Figure 2: AWS Transform Workspaces tab showing available workspaces.

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 Analyzer agent.

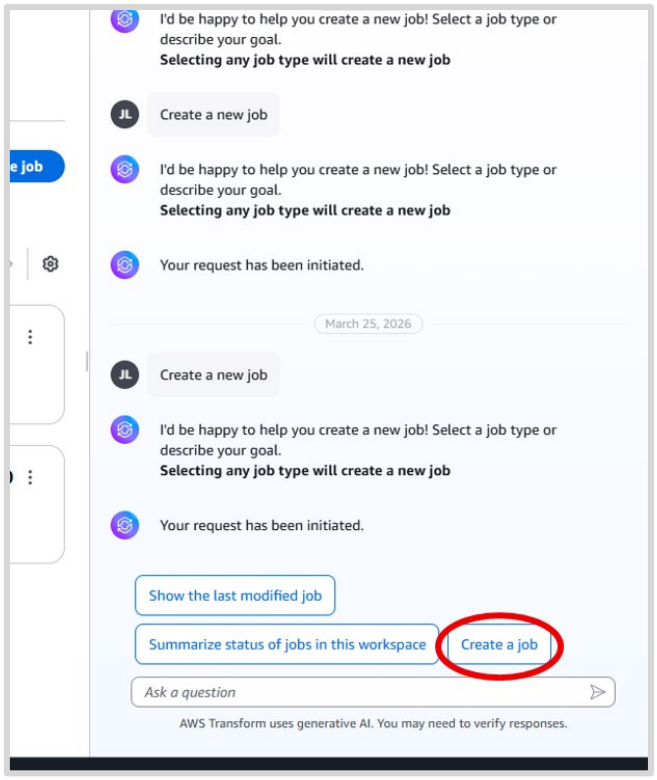

Figure 3: The chat pane with the "Create a job" button highlighted.

Step 3: Select the Tableau 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 Tableau Analyzer Agent."

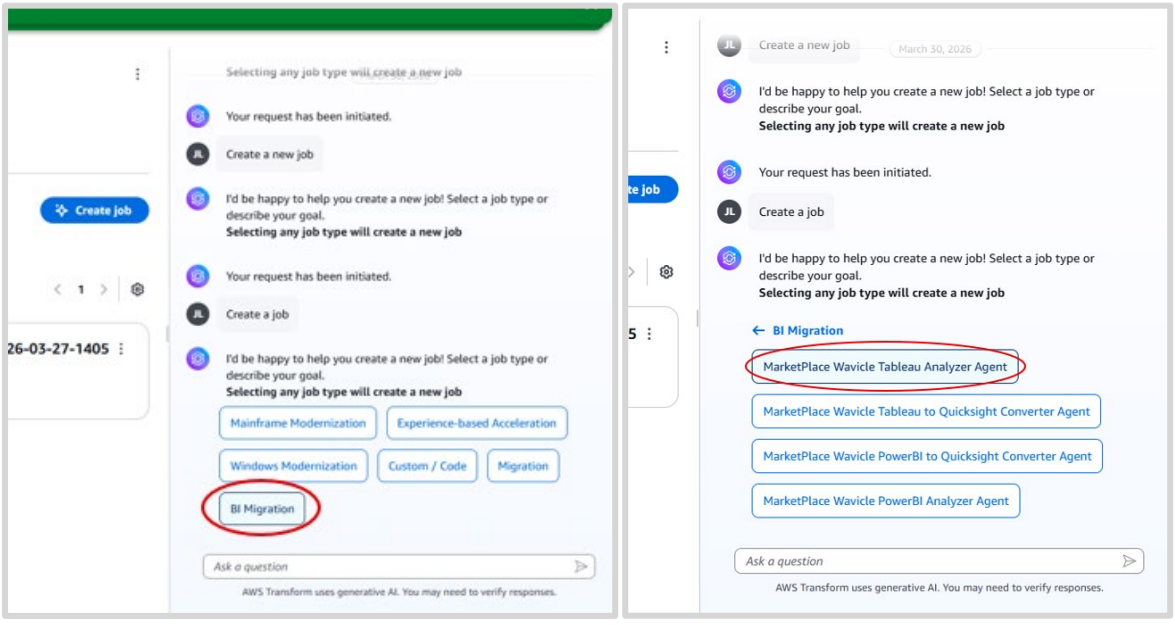

Figure 4 & 5: The chat pane with the selection of BI Migration and MarketPlace Wavicle Tableau Analyzer Agent

In the chat window that appears, type a prompt such as "Help me analyze dashboards from Tableau" to instruct the agent to create a Job Plan. The agent will automatically think through all the steps required, from connecting to your Tableau Server through to generating the summary Excel report. This Job Plan is created in a matter of seconds.

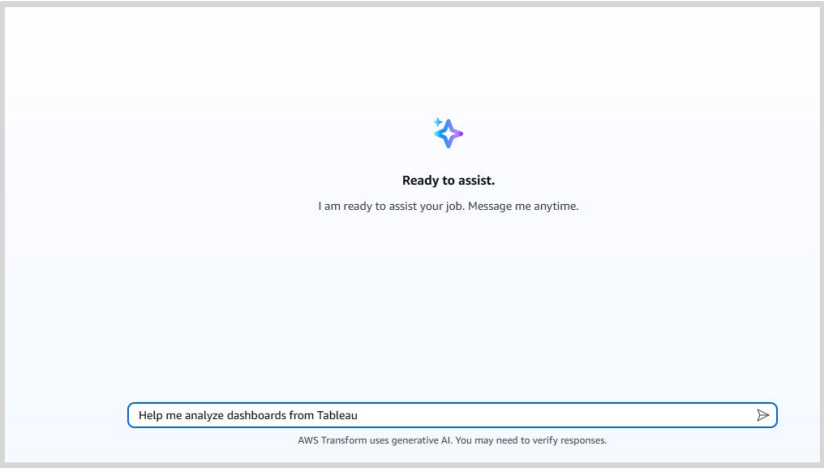

Figure 6: provide prompt "Help me analyze dashboards from tableau"

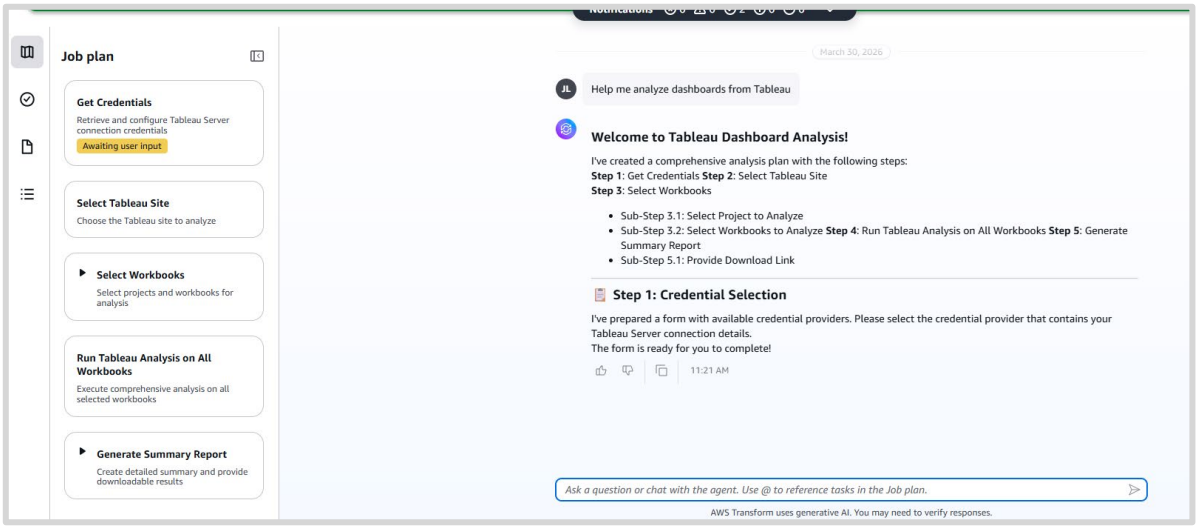

Figure 7: Job plan is created in left pane

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 Analysis

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 Tableau Server Credentials

The first step in the Job Plan is "Get Credentials." You need to select the Credential Provider that contains your Tableau Server connection details (server URL, personal access token, etc.).

You can either type the name of your credential provider 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 a dropdown menu listing your available credential providers. Select the appropriate provider and click "Submit."

The agent supports connecting to multiple Tableau Servers. If you have configured multiple Credential Providers, you will see all available servers listed. Select the one you wish to analyze.

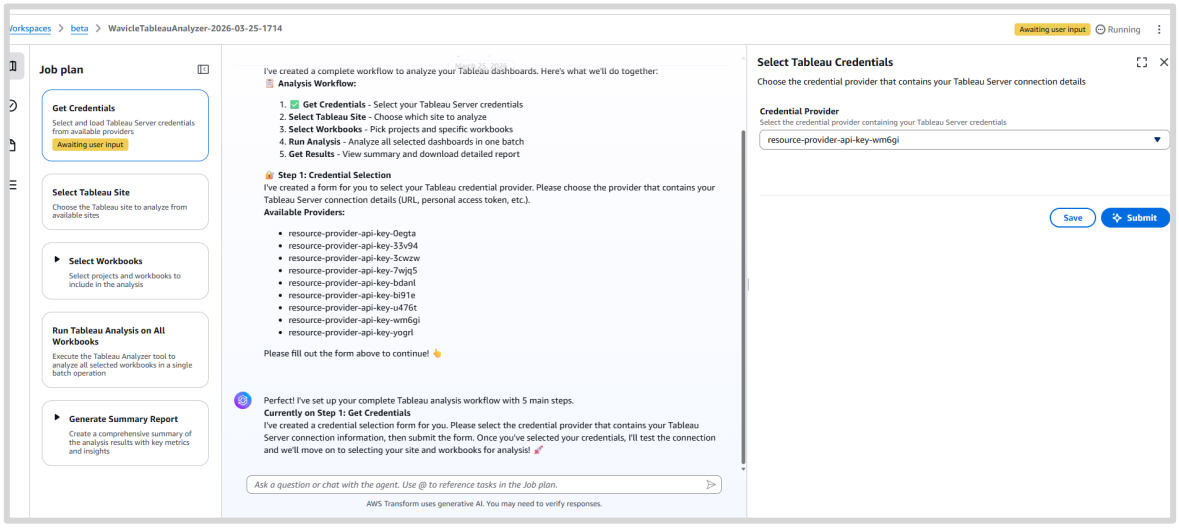

Figure 8: The Job Plan with the "Get Credentials" step active and the credential selection form on the right.

Once the credentials are validated and the agent has confirmed it can connect to the specified Tableau Server, the "Get Credentials" step will show a "Completed" status (green check mark) in the Job Plan.

Step 5: Select the Tableau Site

After credentials are validated, the next step is "Select Tableau Site." The agent will retrieve and display all sites available on the connected Tableau Server.

You can type the site name in the chat window, or click "Select Tableau Site" in the Job Plan to open a dropdown on the right-hand side. Select your target site from the list and click "Submit."

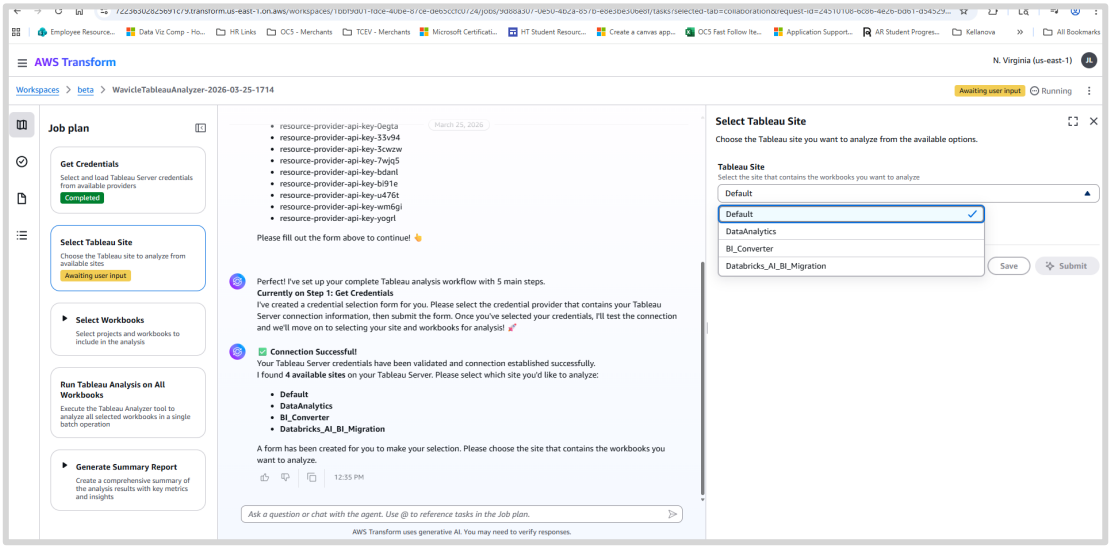

Figure 9: Selecting a Tableau site from the dropdown menu on the right-hand side.

Step 6: Select Projects and Workbooks

Selecting workbooks is a two-part process:

6a. Select Project: Click "Select Project to Analyze" in the Job Plan (under the "Select Workbooks" step) or type the project name in the chat. A dropdown will appear on the right listing all projects available on the selected site. Choose one or more projects and click "Save."

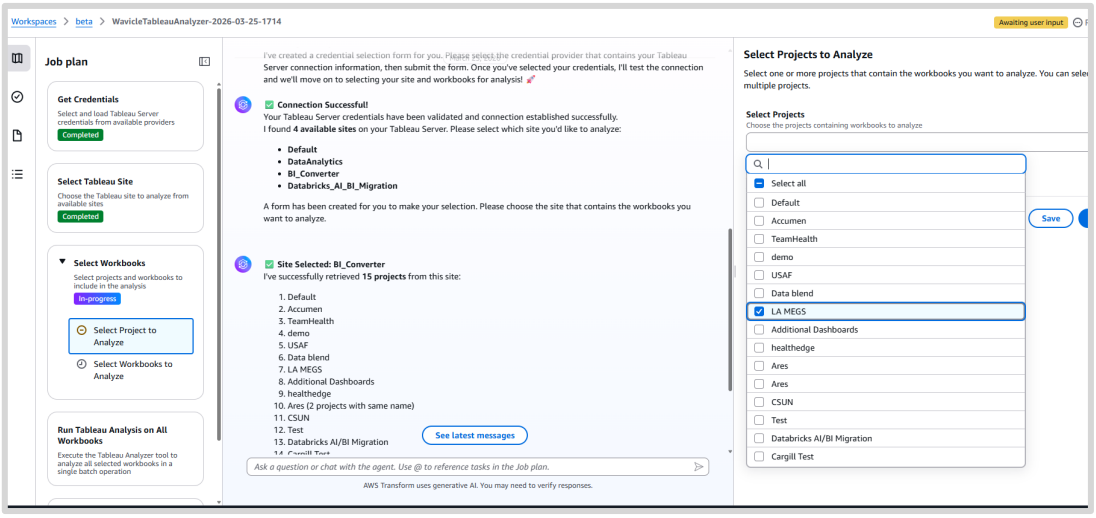

Figure 10: Selecting a project from the available list. Multiple projects can be selected.

6b. Select Workbooks: After choosing a project, the agent will retrieve all workbooks within that project and prompt you to select which ones to analyze. You can choose to analyze all workbooks or select a specific subset. Use the chat window to specify your choice, or use the selection form on the right-hand side.

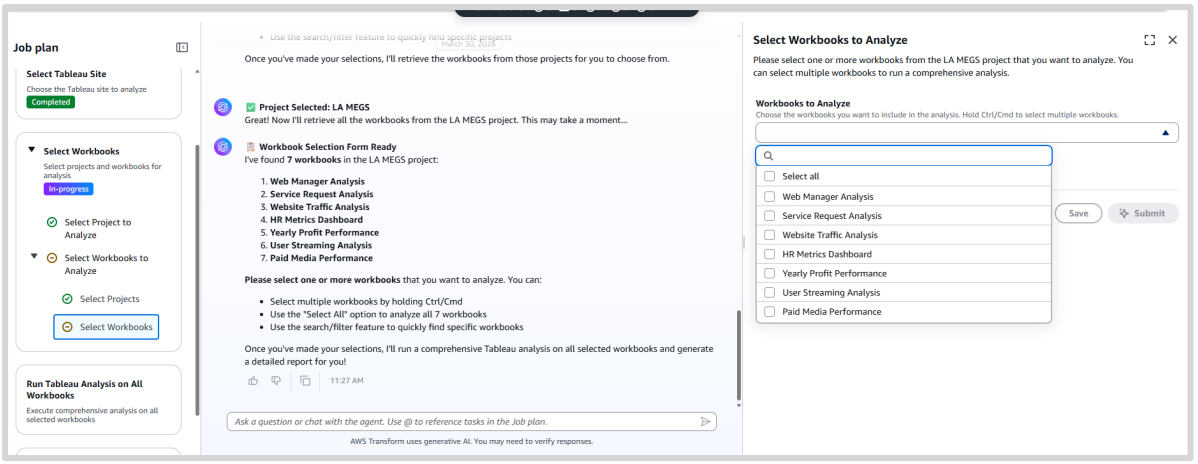

Figure 11: Select a workbook from the available list.Multiple Workbooks can be selected

Step 7: Run the Analysis and Download Results

Once you have selected your workbooks, the agent will automatically execute the Tableau Analyzer tool across all selected dashboards in a single batch operation. The analysis may take several minutes depending on the number and complexity of the workbooks.

While the analysis runs, the Job Plan steps will update to show "In-progress" status. When each step completes, it receives a green check mark.

In-Chat Analysis Summary

When the analysis finishes, the agent displays a summary directly in the chat window. This summary includes the total number of workbooks and dashboards analyzed, a breakdown of complexity scores, and the types of data connections found (for example, text files, Snowflake, or other database connections). Review this summary for a quick sanity check before downloading the full report.

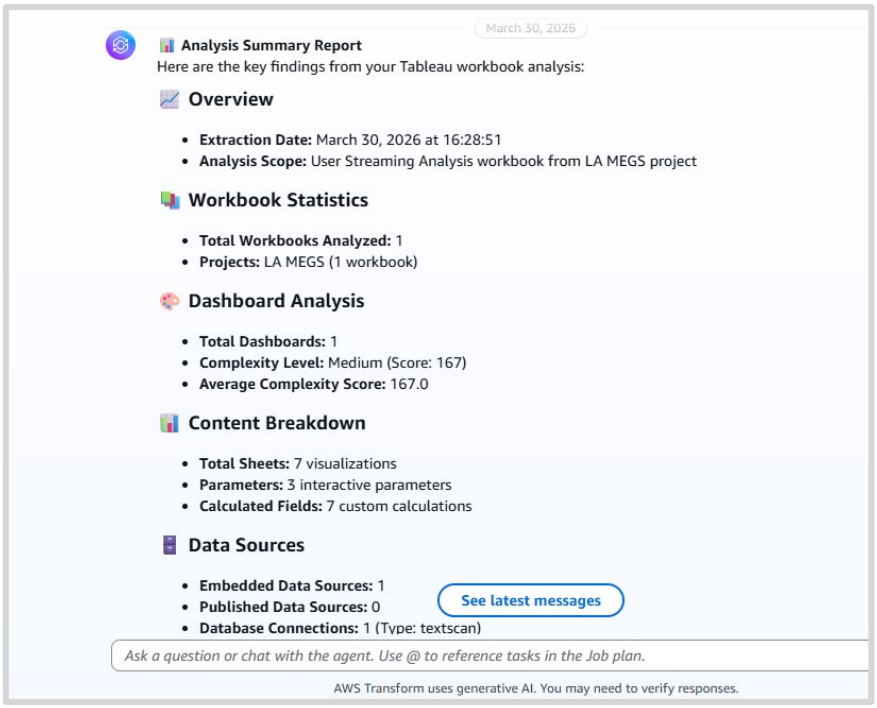

Figure 12: Review in-chat analysis summary

Downloading the Excel Report

After the summary, the agent generates a downloadable Excel artifact. To download the results:

- Click the "View Artifact" link in the chat window, or
- Click the Artifacts icon on the left-side navigation bar to access all generated files.

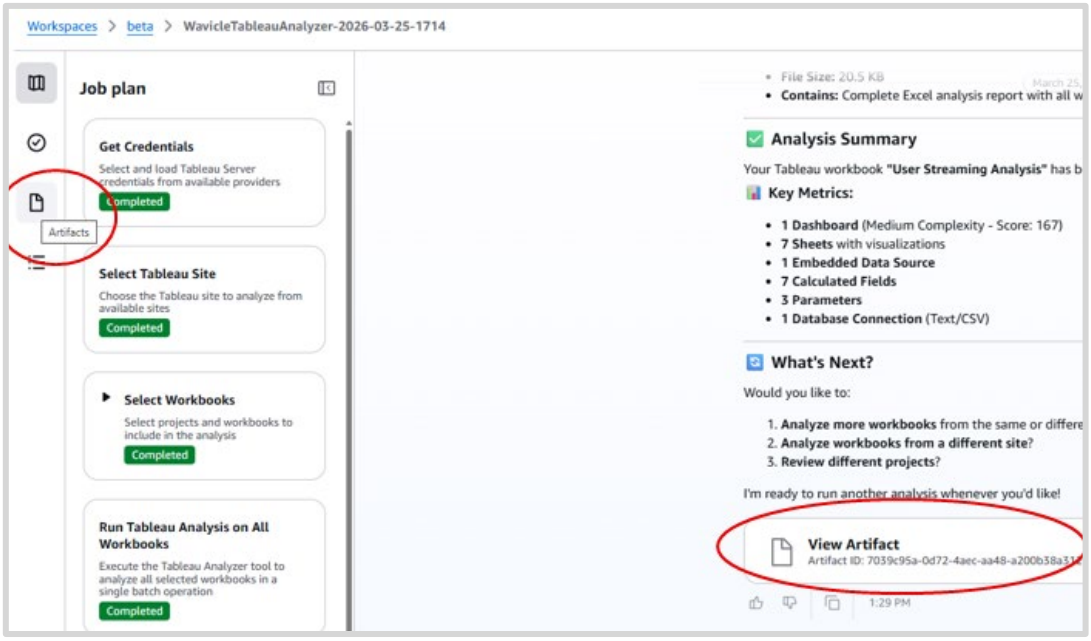

Figure 12: The completed Job Plan with the Artifacts icon and "View Artifact" link highlighted.

7. Understanding the Analysis Results

The Analyzer produces an Excel workbook containing 18 tabs. Each tab provides a different view of your Tableau environment. The following table describes every tab and how to interpret its contents.

Tab Name	Description
Summary	High-level overview: extraction date, Tableau Server URL, total counts of workbooks, dashboards, and views, and a complexity breakdown (Low / Medium / High / Very High) for all analyzed dashboards.
Chart Types	Lists every visual/chart from each dashboard. Includes the original chart type, inferred type, predicted type, and a replacement chart type recommendation when a one-to-one conversion is not available. Use this tab to identify charts that may require manual adjustment during migration.
workbooks	Inventory of all analyzed workbooks with metadata including project name, owner, creation/update dates, sheet count, dashboard count, and analysis status.
Dashboards	Details for each dashboard including a programmatically calculated complexity score and complexity category (Low / Medium / High / Very High), along with adjusted scores, sheet counts, and calculated field counts.
Sheets	Lists every sheet (worksheet) within each workbook, including which dashboards it belongs to and which data fields it references.
Views	Catalog of all views (sheets and dashboards) with view type, path, and timestamps.
Published Data Sources	Lists any published (shared) data sources used by the workbooks, including extract status, field counts, and parameters.
Embedded Data Sources	Details on data sources embedded directly within workbooks, including column definitions, calculated field counts, custom SQL queries, upstream databases, and table relationships.
Parameters	Inventory of all Tableau parameters including name, data type, default value, allowed values, and which calculated fields reference each parameter.

DB Connections	Lists all database connections including host, connection type (e.g., Snowflake, text/CSV), database name, and port. Useful for understanding the data infrastructure supporting each workbook.
dataset_ definitions	Detailed upstream table definitions including schema, full table name, connection type, column details, and any custom SQL queries used.
Blended Relationships	Documents any data blending relationships between data sources, showing primary/secondary sources, joining columns, and whether the blend can be converted during migration.
Conversion Summary	Provides both a per-dashboard and per-chart-type conversion readiness assessment. Shows how many charts are converter-supported vs. requiring manual migration, and the overall conversion rate. Includes footnotes on methodology.
Calculated Fields	Full inventory of every calculated field: name, formula, data type, data source, upstream table, whether it is used in a dashboard, and whether it includes parameters.
Charts Report	Detailed per-chart conversion analysis: workbook name, dashboard name, sheet name, chart type, conversion feasibility, comments, and calculated field counts per chart.
Table Relations	Documents table join relationships within data sources, showing primary and secondary tables along with the join conditions.
rationalization_ summary	Combines dashboard details with workbook metadata. Includes columns for identifying duplicate dashboards (dup_dashboard_id, dup_dashboard_name) and the matched sheet percentage to help determine if similar dashboards can be consolidated.
rationalized_ dashboards	Identifies pairs of dashboards that may be duplicates or near-duplicates. Shows primary and secondary dashboard names, matched sheet/filter counts and percentages, and whether they share the same layout. Review any pair with a high match percentage (80%+) to determine if both need to be migrated.

8. Key Concepts

8.1 Complexity Scoring

Each dashboard receives a complexity score and is categorized into one of four levels: Low, Medium, High, or Very High. The score is calculated programmatically based on factors such as the number of sheets, calculated fields, data sources, parameters, and chart types used. The Dashboards tab includes both the raw complexity score and an adjusted complexity score.

Complexity scoring helps migration teams estimate the level of effort required for each dashboard and prioritize their work accordingly. Dashboards with higher complexity scores will likely require more manual effort after conversion for items such as look-and-feel adjustments and testing.

Example: In the sample output, the "Executive Overview" dashboard scored 336 (Very High complexity) due to 12 sheets and blended data relationships, while the "Web & Marketing Manager" dashboard scored 99 (Low complexity) with only 4 sheets.

8.2 Chart Type Mapping and Conversion Recommendations

The Chart Types tab maps each visual to its original Tableau chart type, an inferred type, a predicted type, and (when applicable) a recommended replacement chart type for Amazon Quick Sight. If the original chart type has a direct one-to-one equivalent in Quick Sight, the replacement_chart_type column will be empty. When no direct equivalent exists, the agent provides a recommended alternative.

The Conversion Summary tab aggregates this information at both the dashboard and chart-type level, showing the percentage of charts that can be automatically converted versus those requiring manual effort.

8.3 Dashboard Rationalization

The rationalization_summary and rationalized_dashboards tabs help identify dashboards that may be duplicates or near-duplicates. The agent compares sheets and filters across all analyzed dashboards and calculates a matched_sheet_percent to quantify how similar two dashboards are.

If two dashboards have a matched sheet percentage of 80% or higher, review them carefully to determine whether both need to be migrated. Consolidating duplicate dashboards before migration can significantly reduce effort, cost, and ongoing maintenance.

Industry Insight:

In many client organizations, anywhere from 15% to 25% of all dashboards are found to be duplicates or near-duplicates. Identifying and consolidating these before migration can dramatically reduce both the time and cost of the overall project.

Example: In the sample output, the "main" and "Modified-Main Page" dashboards (both in the Service Request Analysis workbook) have a 100% matched sheet percentage with 28 of 28 sheets matching and 100% filter matching, indicating one is a copy of the other.

9. Tips and Best Practices

- Start with a single project or a small set of workbooks for your first analysis to familiarize yourself with the output format.
- Review the Conversion Summary tab first to get a quick overview of migration readiness before diving into individual dashboard details.
- Pay close attention to dashboards categorized as "Very High" complexity. These will likely require the most manual effort during migration for look-and-feel adjustments and testing.
- Use the rationalized_dashboards tab to identify consolidation opportunities before beginning migration work. Eliminating duplicates can reduce migration scope by 15–25% in typical environments.
- Check the DB Connections tab to understand the full data infrastructure supporting your workbooks. This is essential for planning the data layer of your Quick Sight migration.
- Export or save the analysis spreadsheet to a shared location so your entire migration team can reference it throughout the project.
- Re-run the Analyzer after making changes to your Tableau environment to keep your migration assessment current.
- Remember that each Tableau Server credential only needs to be configured once. For subsequent analyses of the same server, simply select the existing Credential Provider.

10. Troubleshooting

Issue	Resolution
Credential validation fails	Verify that your Credential Provider is correctly configured in AWS Transform with the right Tableau Server URL and access token. Ensure the token has not expired.
No sites appear after credentials are accepted	Confirm that the Tableau Server user associated with the credentials has access to at least one site. Contact your Tableau Server administrator if needed.
No projects or workbooks appear	Check that the selected site contains published projects and workbooks, and that the authenticated user has view permissions on the target content.
Analysis takes a long time	Large or complex workbooks with many dashboards, calculated fields, and data sources will take longer to analyze. Consider analyzing a smaller subset of workbooks to start.
Excel file appears incomplete	Some tabs (e.g., Published Data Sources, Table Relations) may be empty if the analyzed workbooks do not use those features. This is expected behavior.
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 analysis.

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 analysis process.
Credential Provider	A pre-configured set of connection details (URL, tokens) for accessing your Tableau Server. Each Tableau Server connection only needs to be configured once.
Connector	The AWS Transform configuration object that defines how to reach an external system such as a Tableau Server. A Connector is associated with one or more Credential Providers.
Artifact	An output file generated by the agent (e.g., the analysis Excel spreadsheet).
Complexity Score	A numeric value assigned to each dashboard based on factors like sheet count, calculated fields, data source complexity, and chart types.
Rationalization	The process of comparing dashboards to identify duplicates or near-duplicates that may be candidates for consolidation before migration.
Data Blending	A Tableau feature that combines data from multiple data sources at the visualization level rather than at the database level.
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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1. Introduction

The EZConvertBI Tableau Converter Agent, developed by Wavicle Data Solutions, is a partner agent available on the AWS Transform platform. It automates the conversion of Tableau dashboards to Amazon QuickSight, creating all required QuickSight objects including data sources, data sets, calculated fields, analysis sheets, and dashboards. The Converter Agent dramatically reduces migration 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 QuickSight, for AWS clients.

1.2 What Does the Converter Do?

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

After conversion, an engineer reviews the QuickSight 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.

1.3 Relationship to the Analyzer Agent

The EZConvertBI product includes two complementary agents. The Tableau Analyzer Agent performs a pre-migration analysis of your Tableau environment, producing a detailed assessment of dashboard complexity, chart types, data sources, and rationalization opportunities. The Tableau Converter Agent then takes individual dashboards and converts them to QuickSight.

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.

1.4 Who Should Use This Guide?

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

2. Prerequisites

Before you begin, ensure you have the following:

- An active AWS account with access to AWS Transform.
- Tableau Server credentials (URL, personal access token, or username/password) already configured as a Credential Provider in AWS Transform.
- An Amazon QuickSight connector configured in AWS Transform. The Converter Agent connects to both Tableau (to read the source dashboard) and QuickSight (to create the converted objects).
- Permission to access the Tableau site and projects containing the dashboards you wish to convert.
- Appropriate permissions in Amazon QuickSight to create data sources, data sets, and analyses.
- A modern web browser (Chrome, Edge, or Firefox recommended).

Note:

If your Tableau Server credentials or Amazon QuickSight connector have not yet been configured, you will need to set these up in AWS Transform before running the Converter. 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.

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- **Project:** Within a site, content is organized into projects (similar to folders). You will select a project containing the workbook you wish to convert.
- **Workbook:** Each project contains workbooks. A workbook is a collection of related dashboards and worksheets. You will select a specific workbook for conversion.
- **Dashboard / Sheet:** A workbook contains one or more dashboards and worksheets. You will select which dashboards within the workbook to convert.

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 Tableau Server and Amazon QuickSight before proceeding.

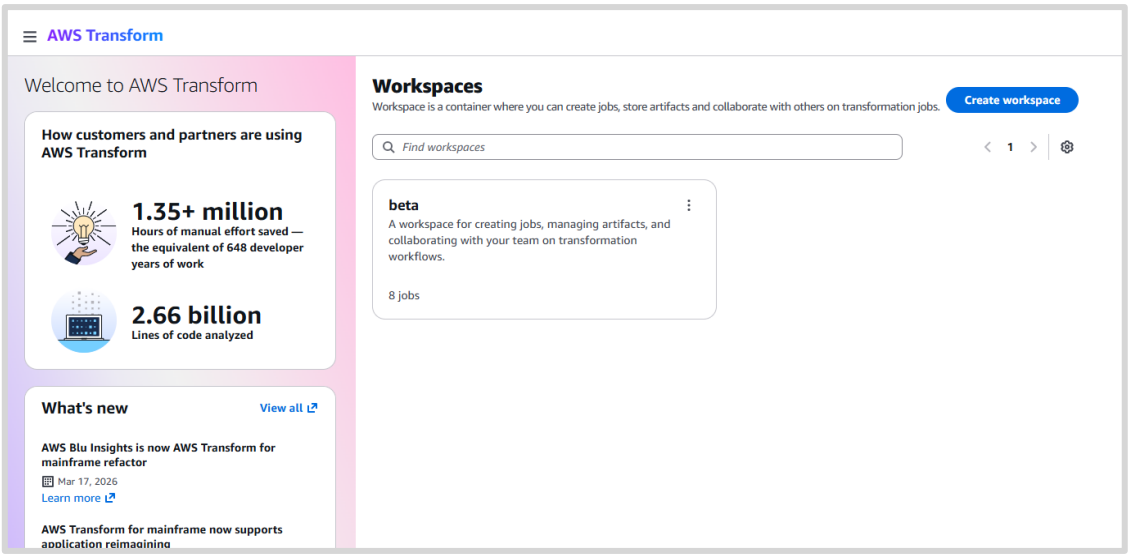

Figure 1: AWS Transform Workspaces tab showing available workspaces.

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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.

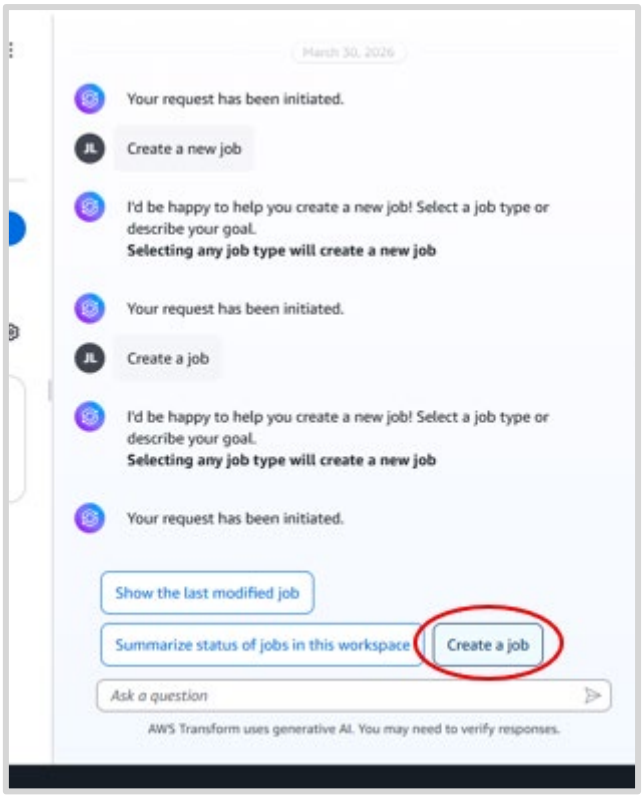

Figure 2: Select Create a job.

Step 3: Select the Tableau Converter 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 Tableau to QuickSight Converter Agent.”

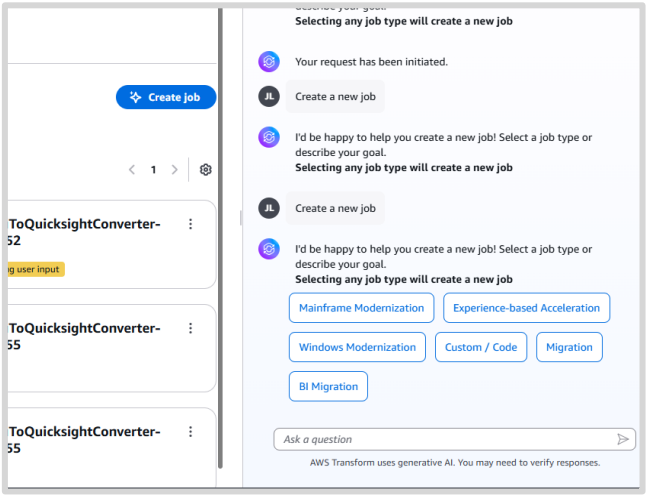

Figure 3: Selecting BI Migration job type.

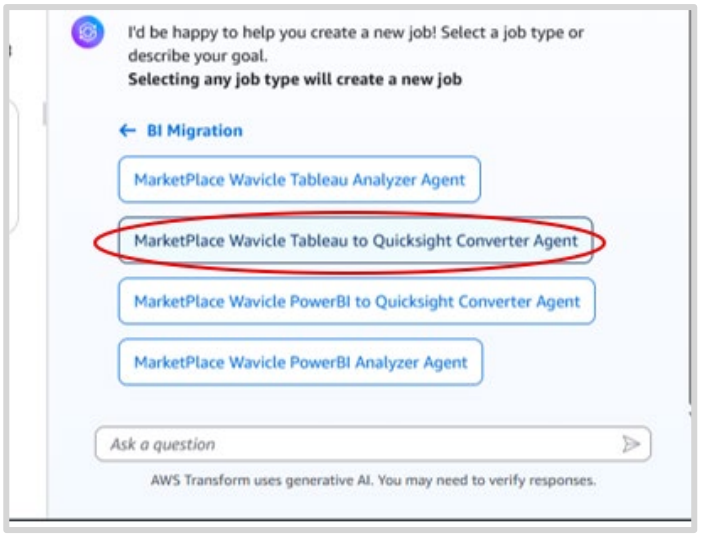

Figure 4: Selecting the Wavicle Tableau to QuickSight Converter Agent.

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

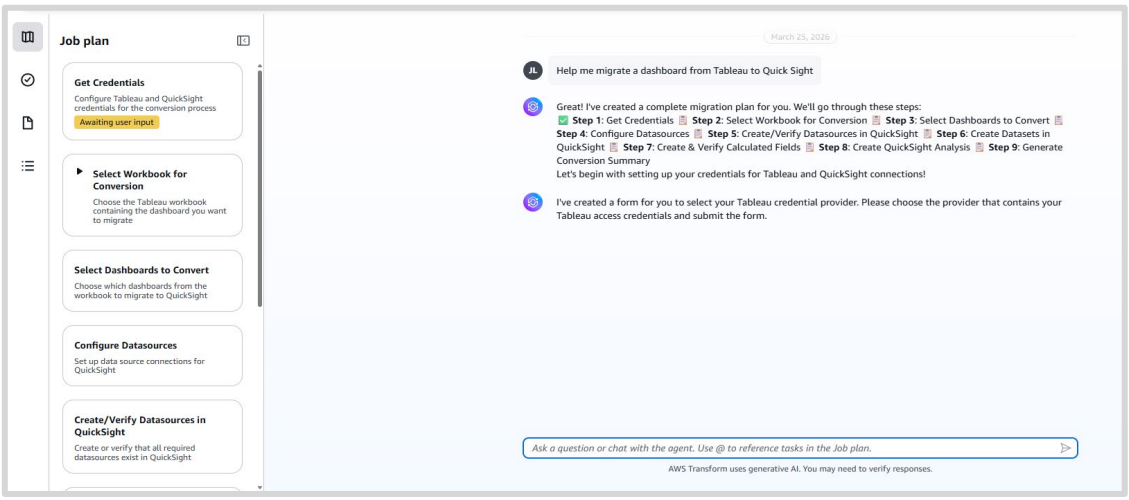

Figure 5: The Job Plan showing all conversion steps from credentials through to summary generation.

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 Tableau and QuickSight, 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 Tableau connector ending in BI91E and use the default Amazon QuickSight connector.”*

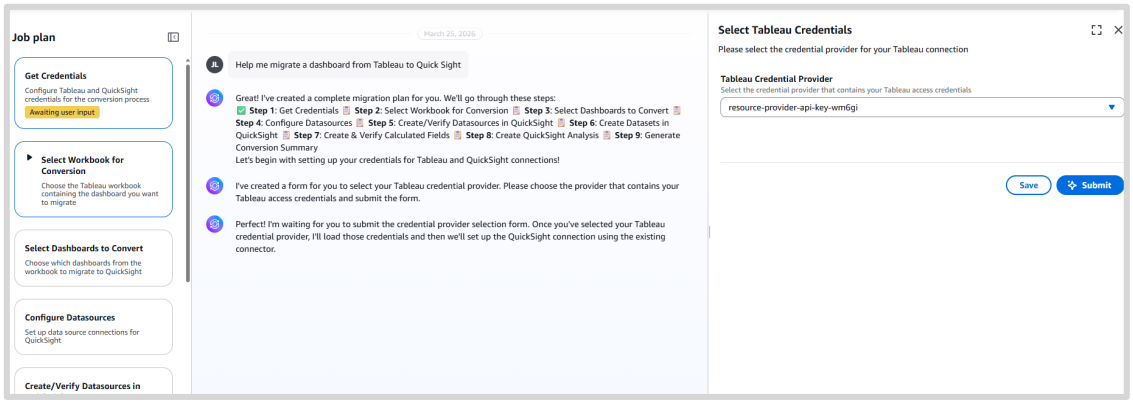

Figure 6: The Job Plan with the Get Credentials step active and the credential selection form on the right.

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

Step 5: Select Tableau Site, Project, and Workbook

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

5a. Select Site: The agent retrieves all sites available on the connected Tableau Server. Type the site name in the chat window or use the dropdown on the right-hand side.

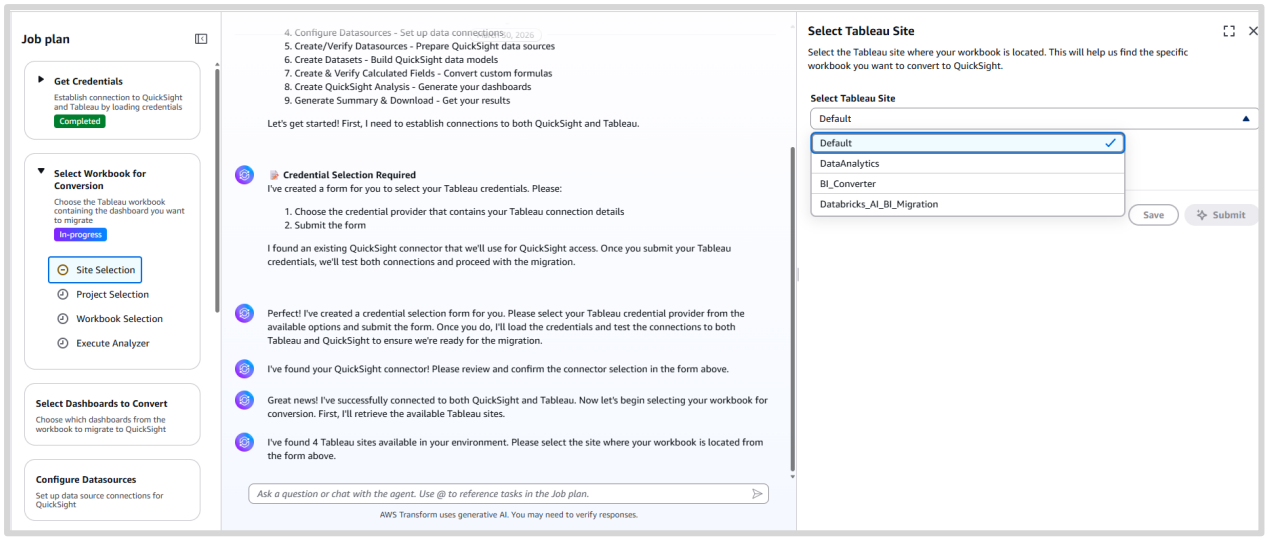

Figure 7: Select a site from the available list.

5b. Select Project: After choosing a site, the agent lists available projects. Select the project containing the workbook you wish to convert.

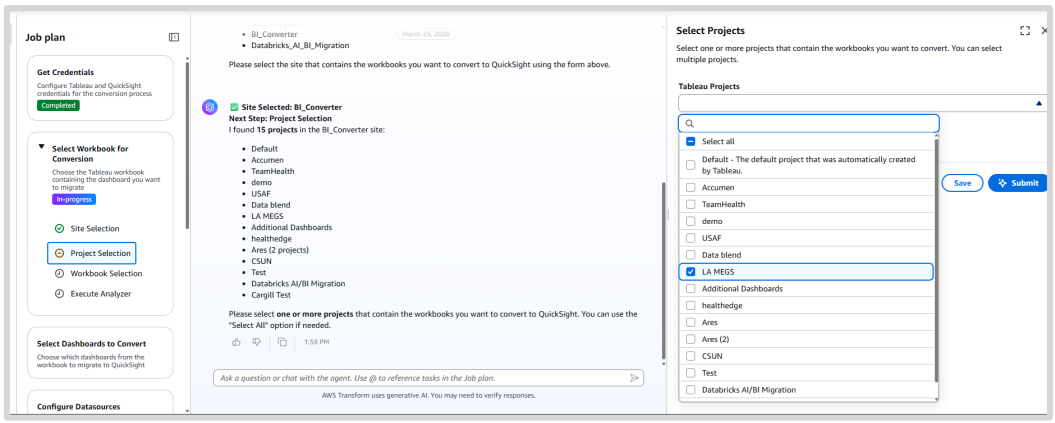

Figure 8: Selecting a project from the available list.

5c. Select Workbook: The agent retrieves all workbooks within the selected project and prompts you to choose which one to convert.

After you select the workbook, 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.

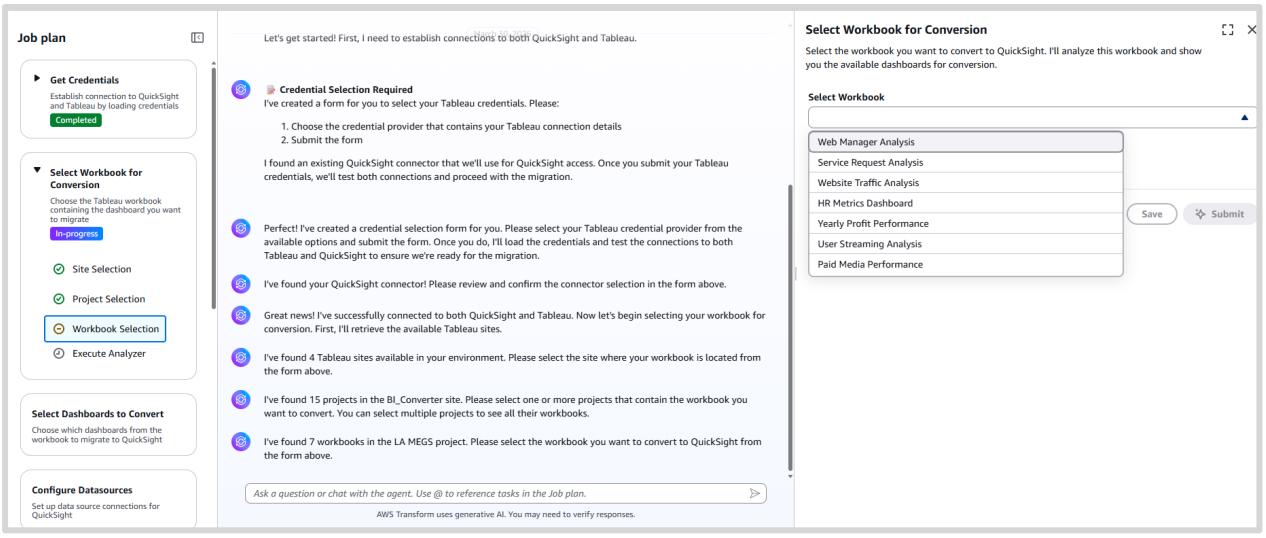

Figure 9: Select a workbook from the available list.

Step 6: Select Dashboards to Convert

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

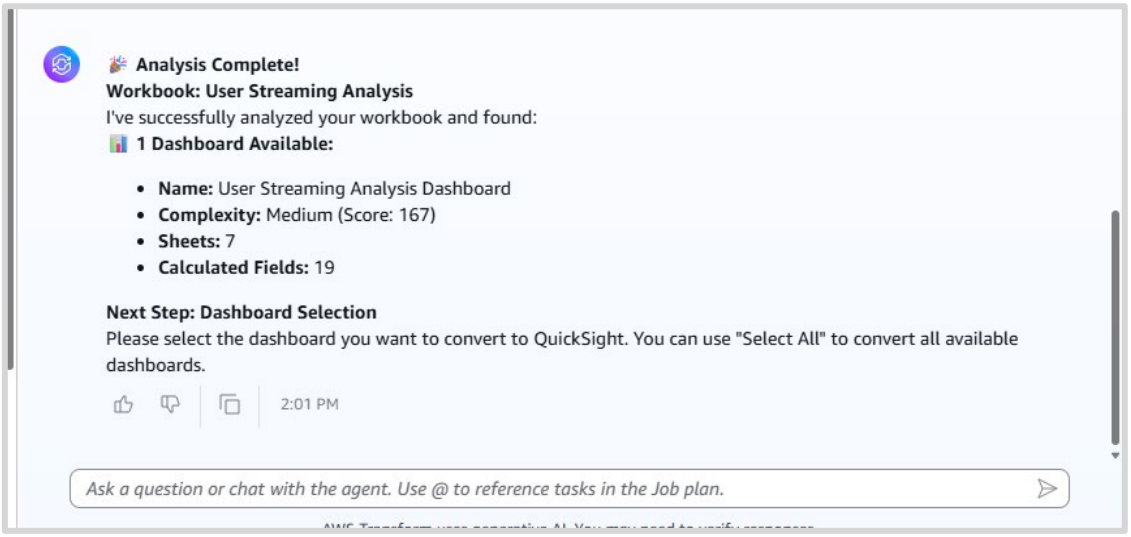

Figure 10: Analysis complete showing dashboard details including sheets and calculated fields.

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

Step 7: Configure Data Sources

This is a critical step in the conversion process. The agent needs to set up data sources and data sets in QuickSight that correspond to the Tableau data connections. Select “Configure Data Sources” on the Job Plan to see the available configuration methods.

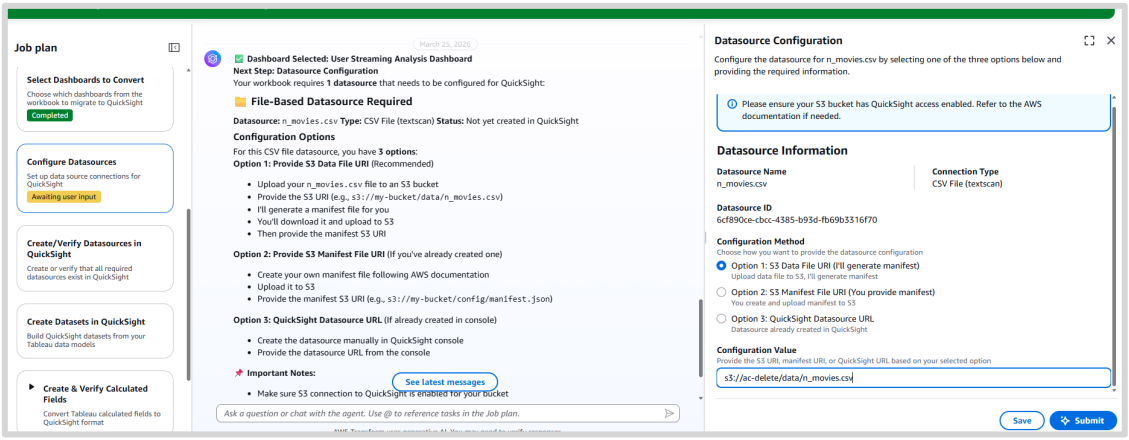

Figure 11: Data source configuration options showing available methods.

The agent presents several options for configuring the data source. A common approach is to use a manifest file. If you choose this method:

- The agent generates a manifest file describing the data source configuration.
- Download the manifest file from the chat window or from the Artifacts section.
- Upload the manifest file to your S3 bucket.
- Provide the S3 location back to the agent so it can create and verify the QuickSight data source.

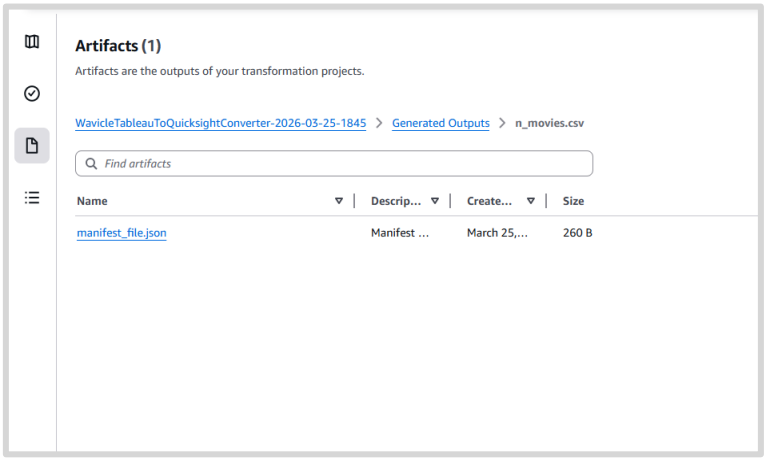

Figure 12: The manifest file available for download in the Artifacts section.

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.”

The agent will create and verify the data source in QuickSight, then proceed to create the data sets. You will see status updates in the chat window as each component is created.

Step 8: 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 QuickSight” link. Click this link to open QuickSight 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.

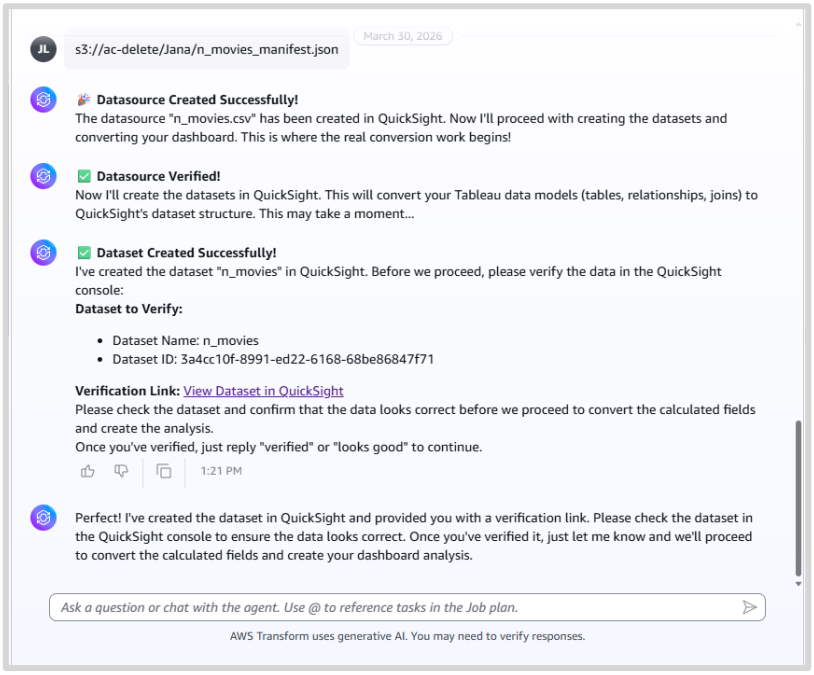

Figure 13: Verify dataset by selecting the verification link or navigating to quick sight.

Step 9: 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 QuickSight.

- Builds the analysis sheets (one for each Tableau worksheet in the dashboard).
- Assembles the final QuickSight 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.

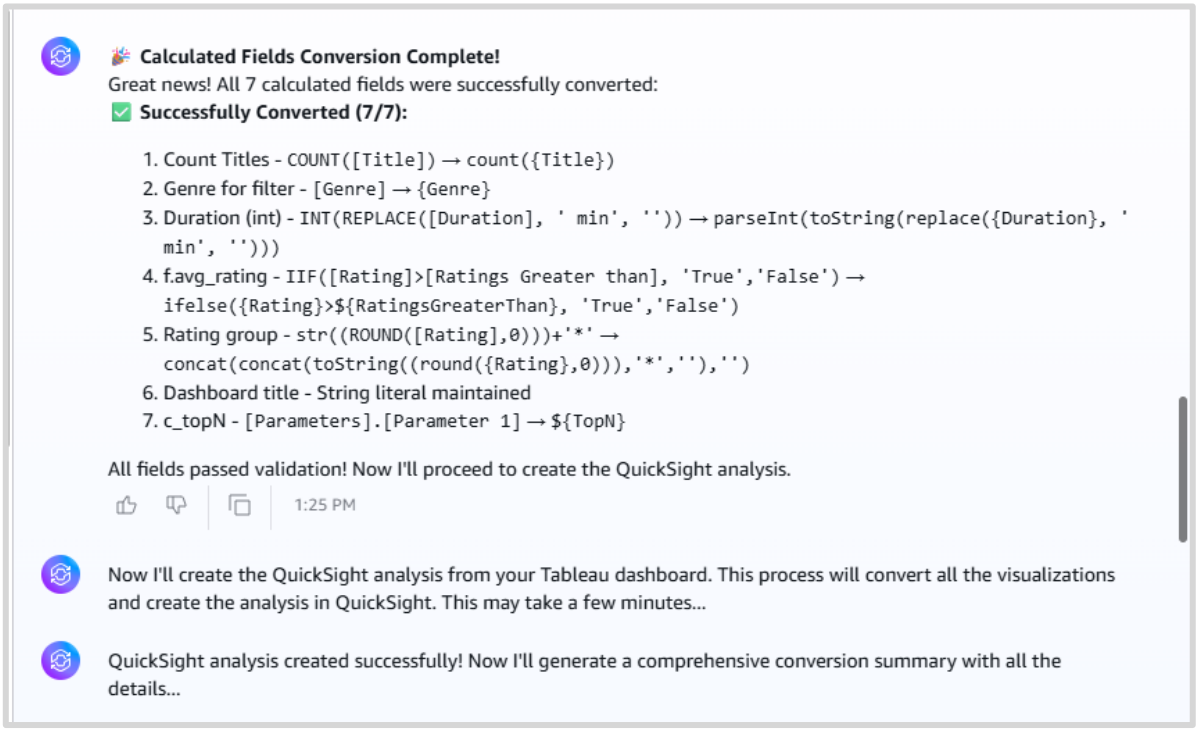

Figure 14: Review Calculated field conversion details

Step 10: 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 QuickSight, 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

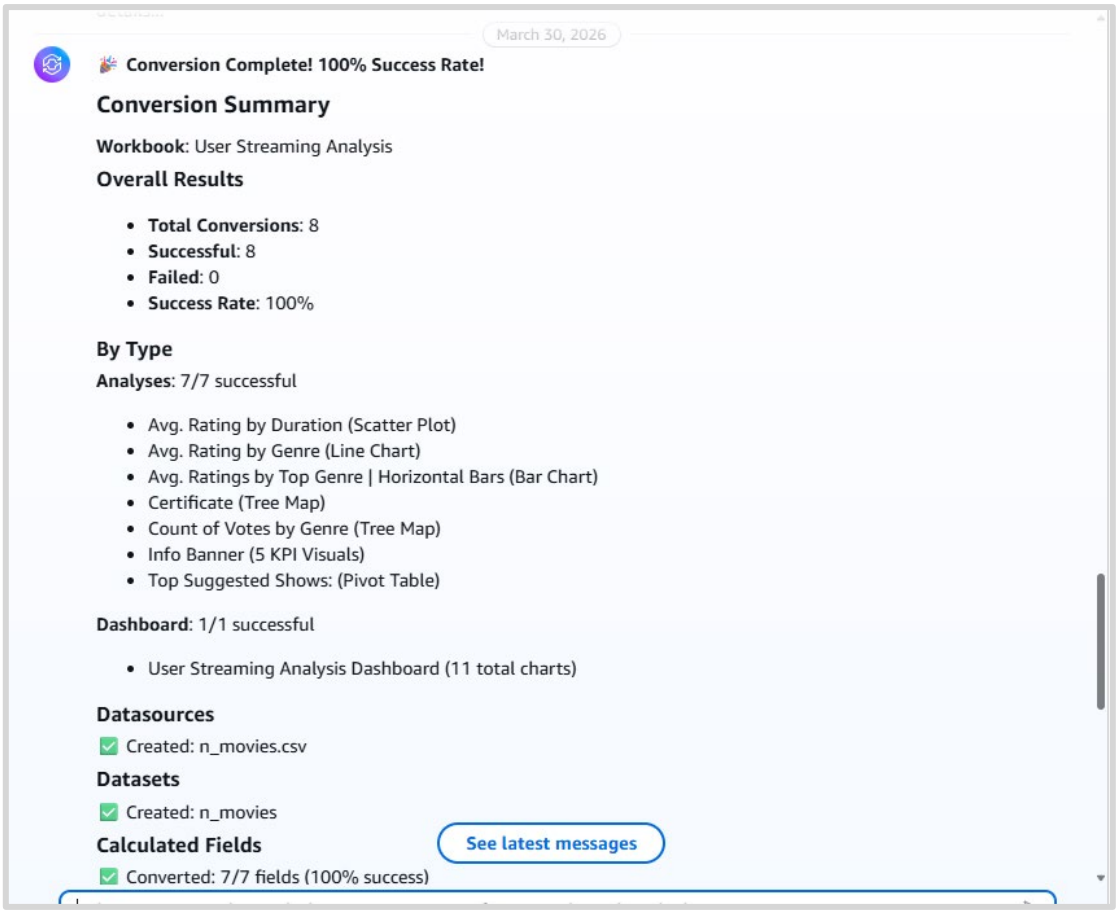

Figure 15: Review conversion summary

7. Verifying the Conversion Results

After the conversion completes, you should verify the results by comparing the QuickSight analysis to the original Tableau dashboard.

7.1 Open the QuickSight Analysis

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

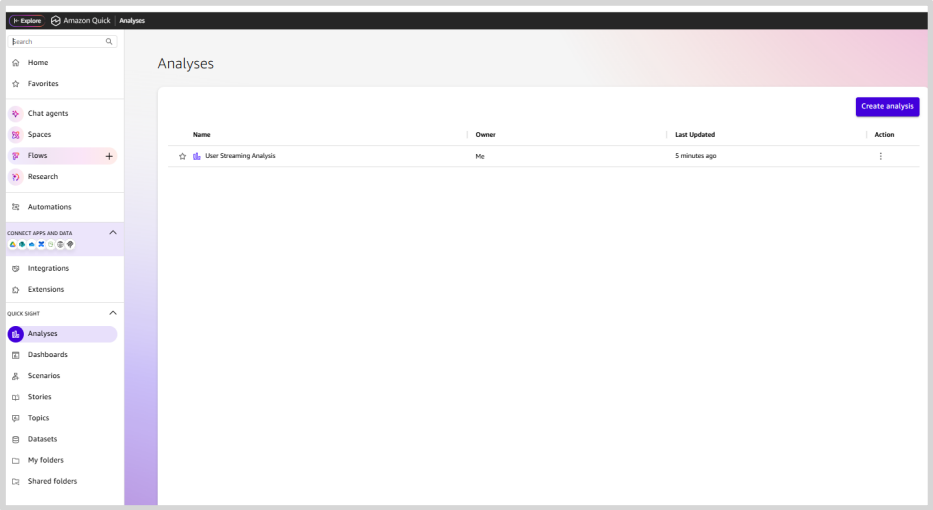

Figure 16: The newly created analysis visible in the QuickSight Analyses list.

7.2 Compare to the Original Tableau Dashboard

Open the original Tableau dashboard side by side with the new QuickSight 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 Tableau dashboard are present in the QuickSight analysis.
- **Filters:** Verify that filters have been recreated and are functional.
- **Calculated fields:** Spot-check calculated metrics to confirm they produce the same results.

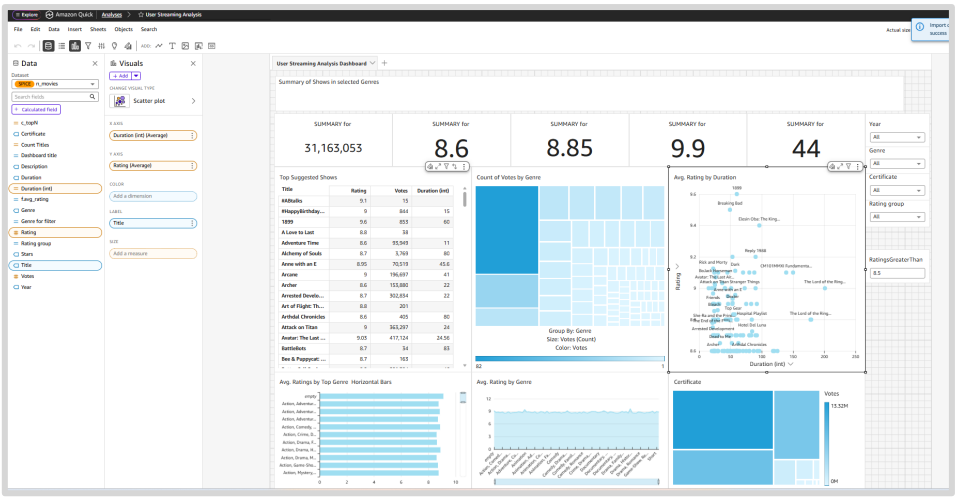

Figure 17: The converted QuickSight analysis showing the same charts and data as the original Tableau dashboard.

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 QuickSight 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 QuickSight 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.

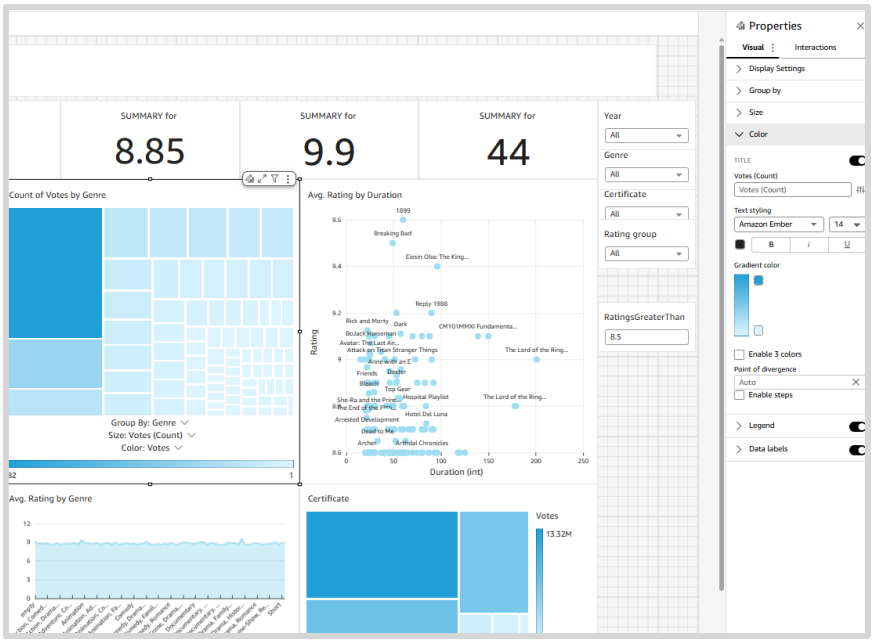

Figure 18: Using properties feature in quickSight, update items that need manualadjustments

8. Key Concepts

8.1 What Gets Created in QuickSight

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

- **Data Source:** The connection to the underlying data (e.g., S3, database). Corresponds to Tableau'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:** Tableau calculated fields are translated into QuickSight calculated field syntax.
- **Analysis Sheets:** Each Tableau worksheet becomes a sheet within the QuickSight analysis, containing the corresponding chart or visual.
- **Dashboard (Analysis):** The final assembled QuickSight 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 QuickSight.

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 Tableau to QuickSight 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 Tableau Analyzer Agent to assess your Tableau 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 Tableau dashboard and the QuickSight 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 Tableau Server and QuickSight 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 QuickSight connection.

10. Troubleshooting

Issue	Resolution
Credential validation fails	Verify that both your Tableau Server Credential Provider and Amazon QuickSight Connector are correctly configured in AWS Transform. Ensure access tokens have not expired.
No sites appear after credentials are accepted	Confirm that the Tableau Server user associated with the credentials has access to at least one site. Contact your Tableau Server administrator if needed.
No projects or workbooks appear	Check that the selected site contains published projects and workbooks, and that the authenticated user has view permissions on the target content.
Data source creation fails in QuickSight	Verify that the QuickSight 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 QuickSight 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 Tableau calculated field functions may not have direct QuickSight equivalents. Check the conversion summary for specific errors and create these fields manually in QuickSight.
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.
QuickSight analysis looks different from Tableau	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 Tableau and QuickSight	Check calculated field definitions, filter configurations, and data set joins in QuickSight. Ensure the data source is pointing to the same underlying data as the Tableau 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 Tableau Server. Each Tableau Server connection only needs to be configured once.
Connector	The AWS Transform configuration object that defines how to reach an external system such as a Tableau Server or Amazon QuickSight. 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 QuickSight to create a data source.
Data Source	In QuickSight, a connection to an underlying data store such as S3, a relational database, or a data warehouse.
Data Set	In QuickSight, a prepared and queryable representation of data built on top of a data source. Includes column definitions, joins, and calculated fields.
Analysis	A QuickSight 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 Tableau calculated field syntax into QuickSight 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.***