EZConvertBI Tableau Analyzer Agent

User Guide

AWS Transform Partner Agent

Wavicle Data Solutions

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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.

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 analysis. Wait a few seconds and all panels will update.

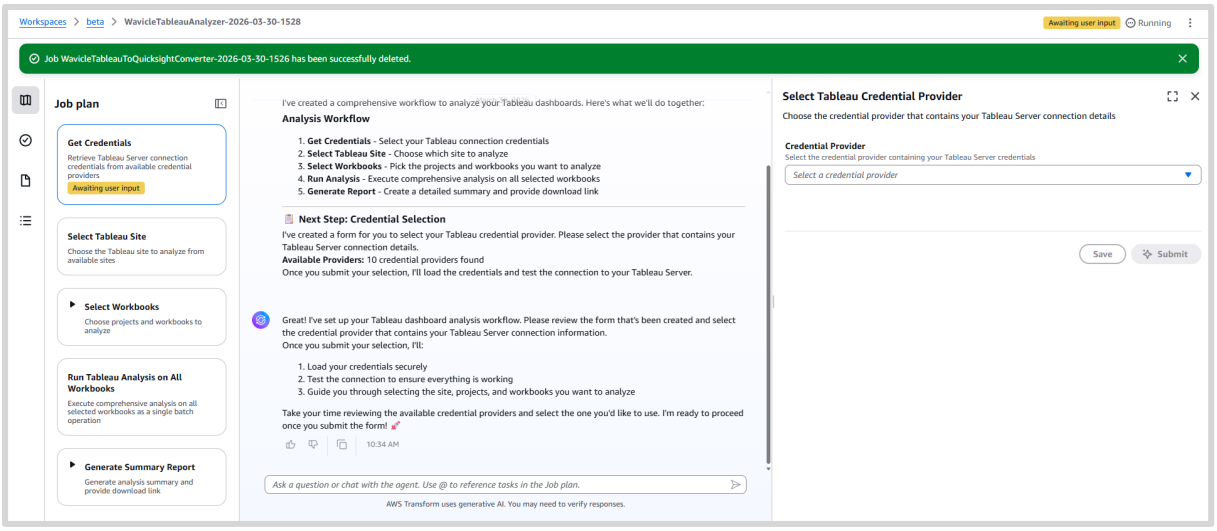

Figure 1: AWS Transform three-panel display.

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.

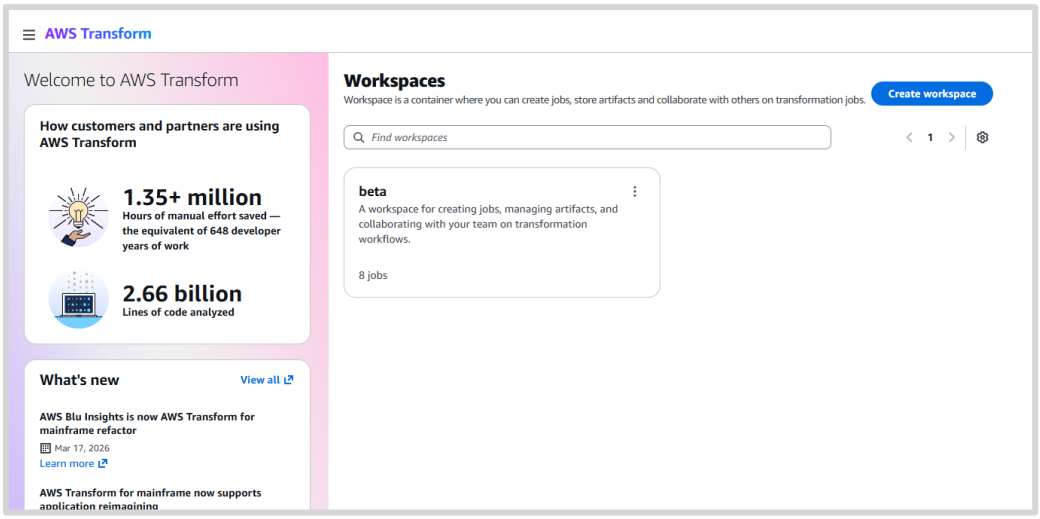

Figure 2: AWS Transform Workspaces tab showing available workspaces.

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.

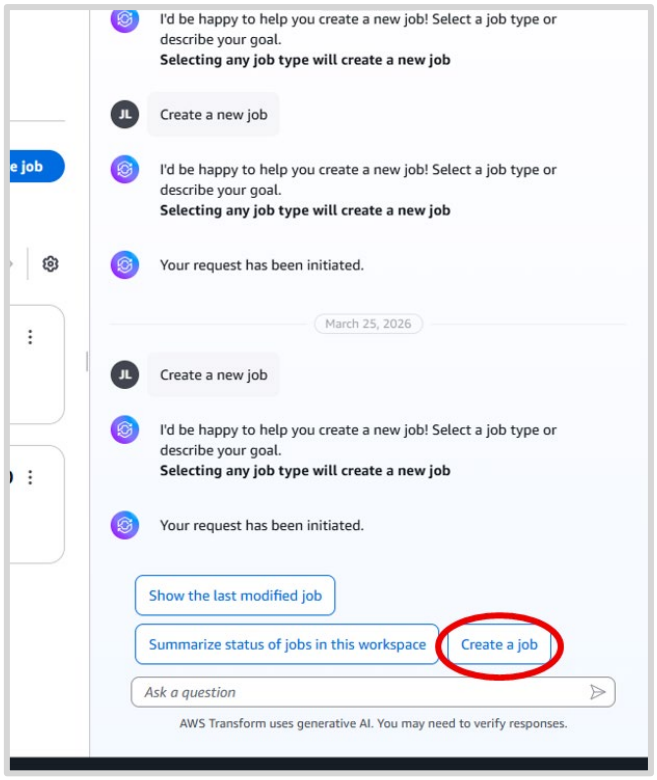

Figure 3: The chat pane with the "Create a job" button highlighted.

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."

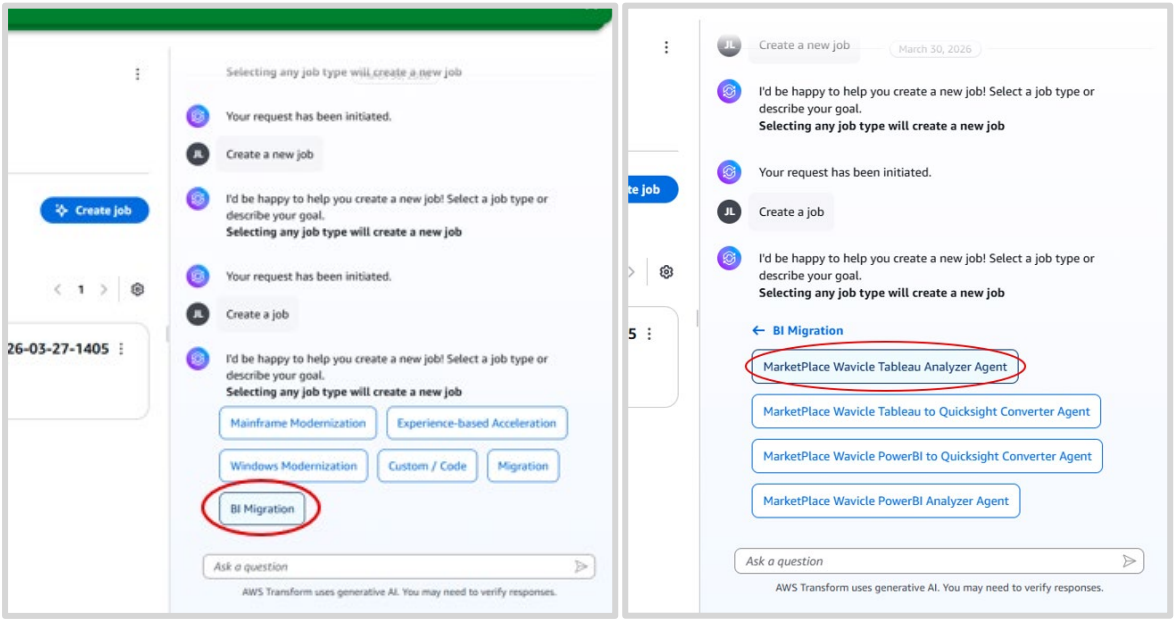

Figure 4 & 5: The chat pane with the selection of BI Migration and MarketPlace Wavicle Tableau Analyzer Agent

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.

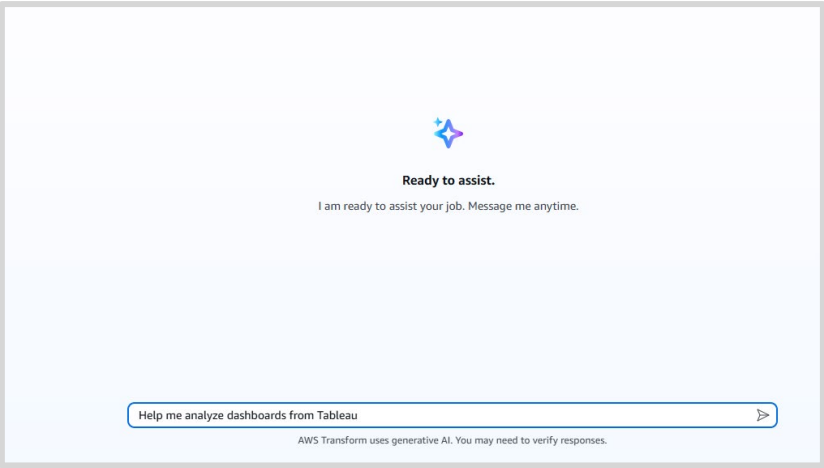

Figure 6: provide prompt "Help me analyze dashboards from tableau"

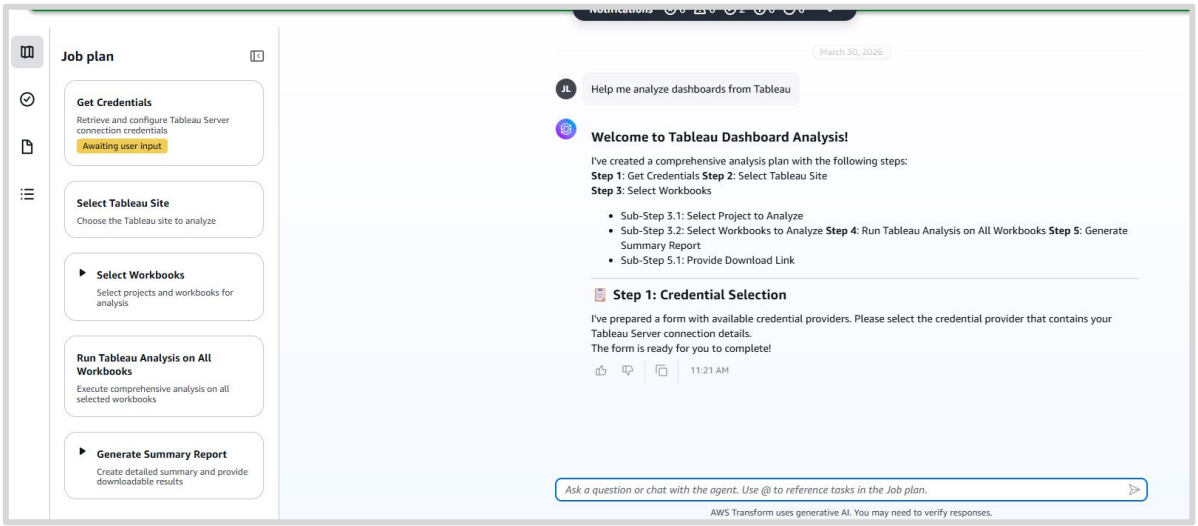

Figure 7: Job plan is created in left pane

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.

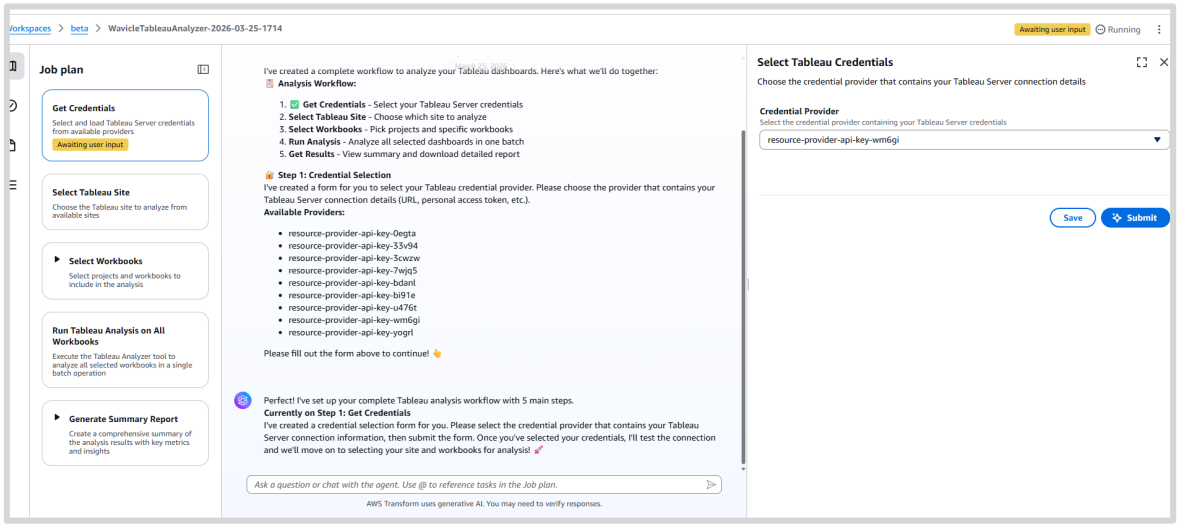

Figure 8: The Job Plan with the "Get Credentials" step active and the credential selection form on the right.

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."

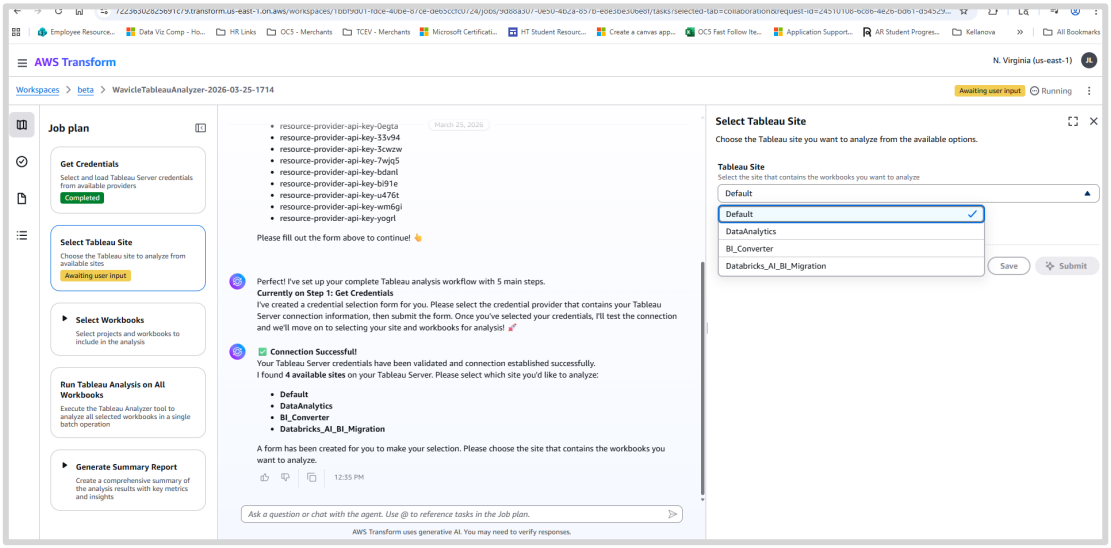

Figure 9: Selecting a Tableau site from the dropdown menu on the right-hand side.

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."

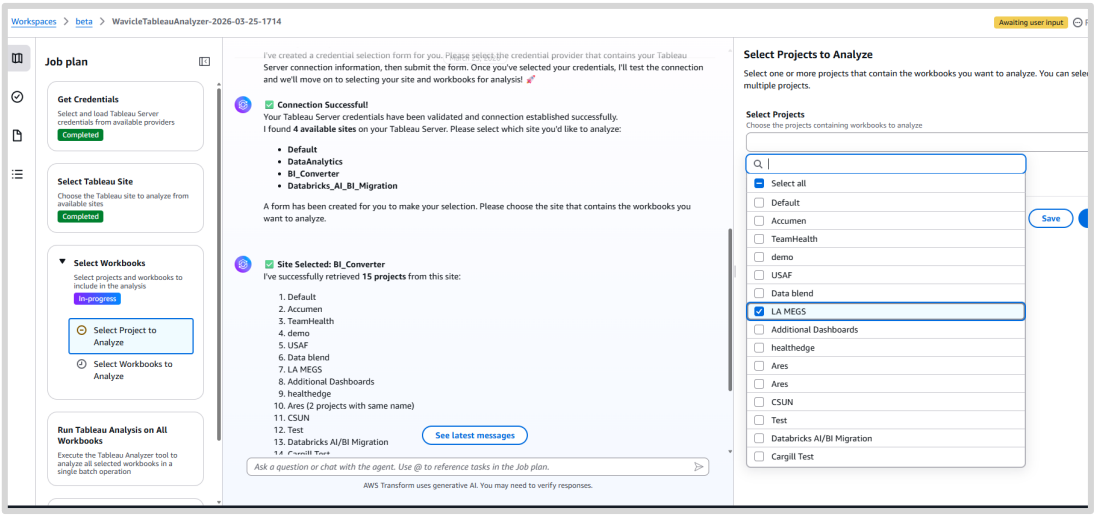

Figure 10: Selecting a project from the available list. Multiple projects can be selected.

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.

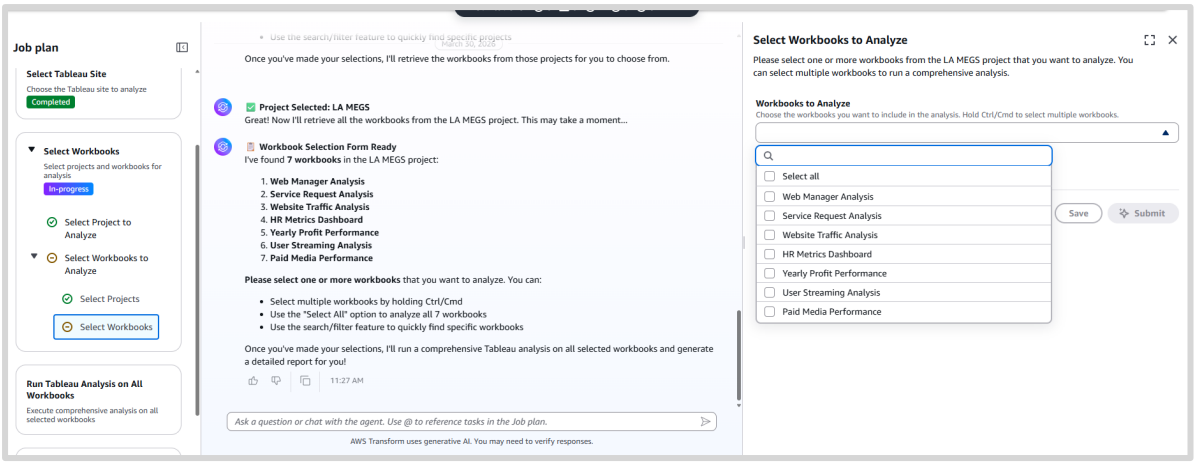

Figure 11: Select a workbook from the available list.Multiple Workbooks can be selected

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.

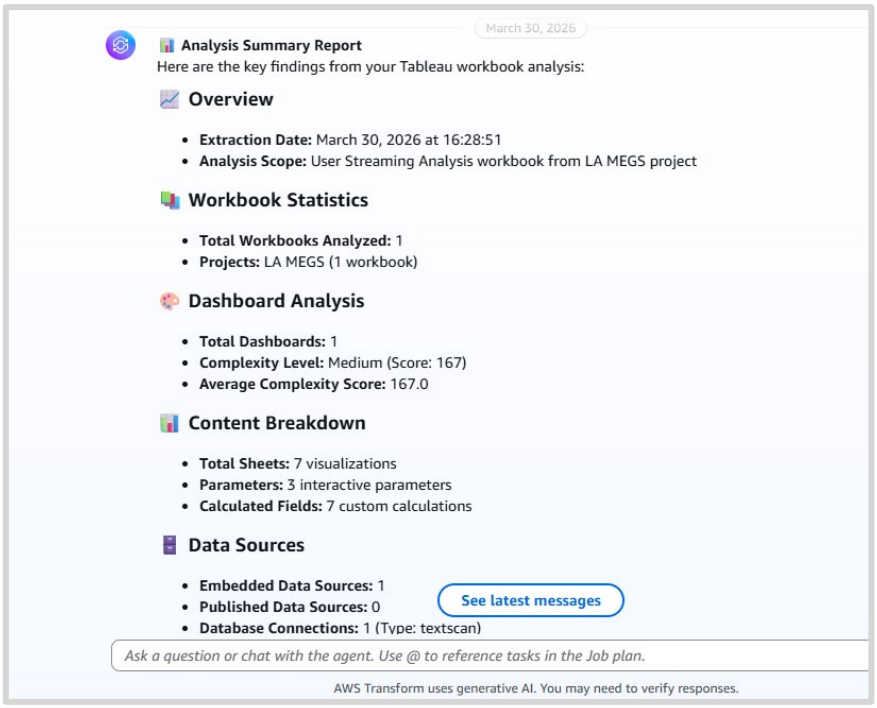

Figure 12: Review in-chat analysis summary

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.

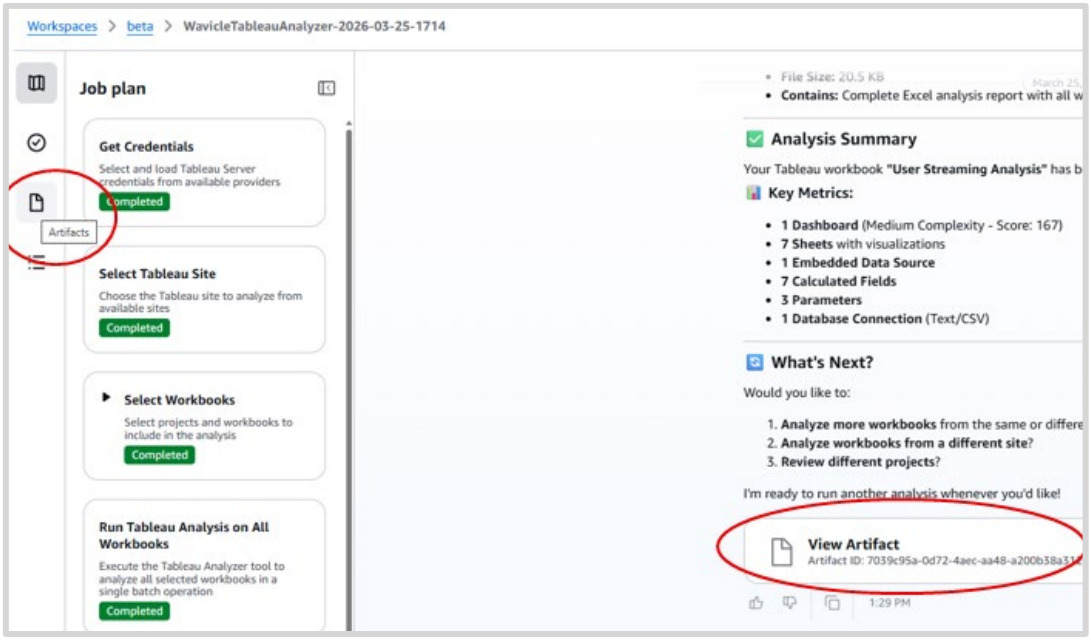

Figure 12: The completed Job Plan with the Artifacts icon and "View Artifact" link highlighted.

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***