Lab: Generative AI for Storytelling

Estimated time needed: 30 minutes

Learning objectives

After completing this lab, you will be able to:

- Sign up in Zoho Analytics and upload a dataset
- Generate a report by prompting Zia AI

Welcome to the lab on **Generative AI for Storytelling**!

Overview

In this lab, you will learn how to use Generative AI to prepare a report for your data using charts and insights.

To begin, you need to create your login on the Zoho Analytics website page.

Task 1: Sign up in Zoho Analytics

Step 1: Click www.zoho.com/analytics/

Step 2: Fill in the required information and click the SIGN UP FOR FREE button.

> Note: You can sign up for Zoho Analytics using various options such as Google, LinkedIn, or a Zoho email account. The platform offers a 15-day free trial without requiring any credit card details.

Step 3: On the Welcome screen, click **Get Started**.

Task 2: Upload a dataset

Step 1: To download the dataset, press the **Ctrl** key on your keyboard and then, click here.

Step 2: On your Zoho Analytics homepage, select **Local Drive**.

Step 3: Enter the **Workspace Name** and click **Choose file**.

Step 4: Select and upload the `electronics_dataset.csv` file. Now, click **Next**.

Step 5: The resulting screen displays a preview. Click **Create**.

Task 3: Using Zia AI to explore data and generate reports

Step 1: Go to the left corner, click **More** and select **Ask Zia** option.
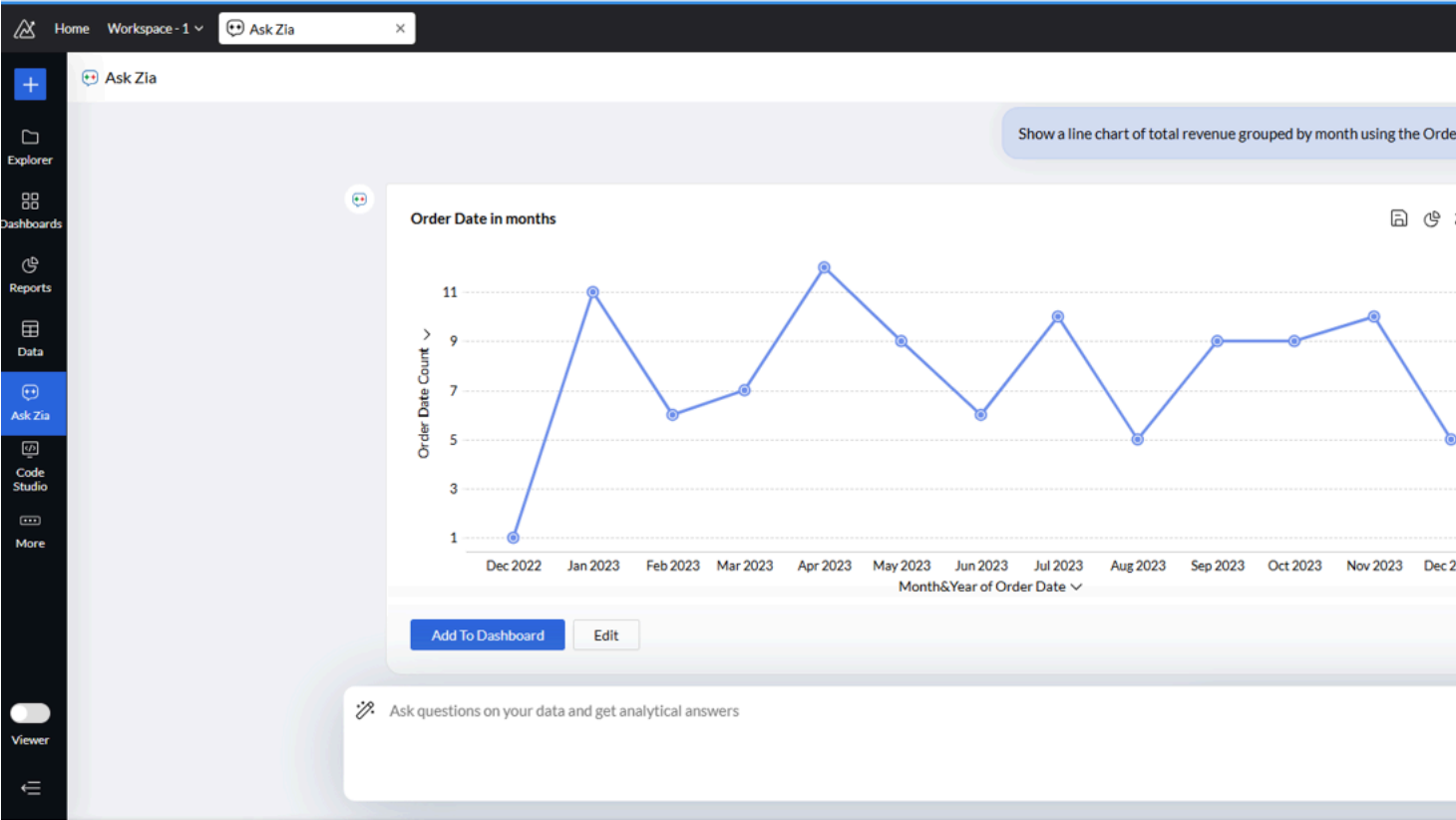

Step 2: Enter the following prompts one by one in the Zia AI prompt bar and generate all the charts through Zia.
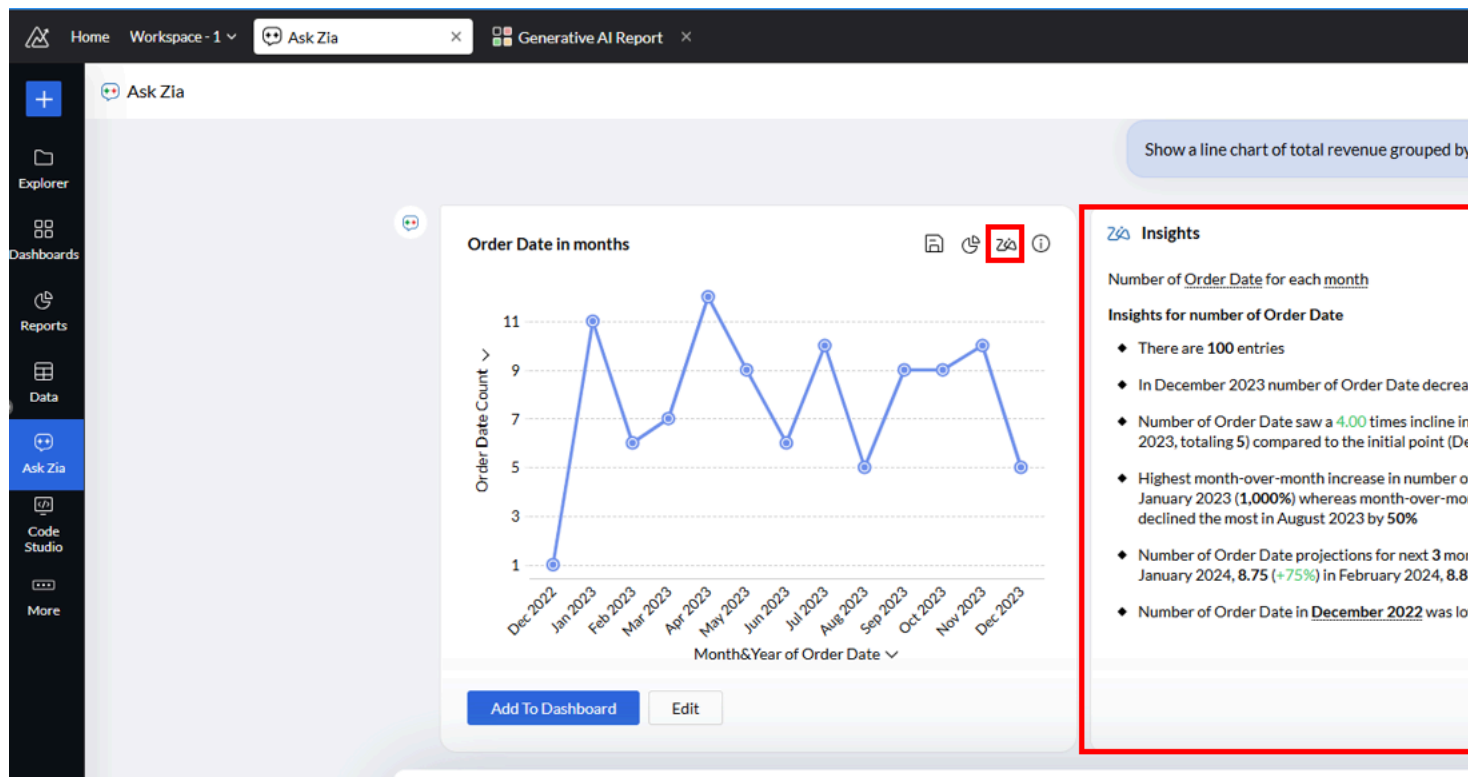
Prompt 1:

Show a line chart of total revenue grouped by month using the Order Date column.

Sample output

You can click **Zia insights** icon on the top-right corner to see the detailed insights of the generated chart as shown below.
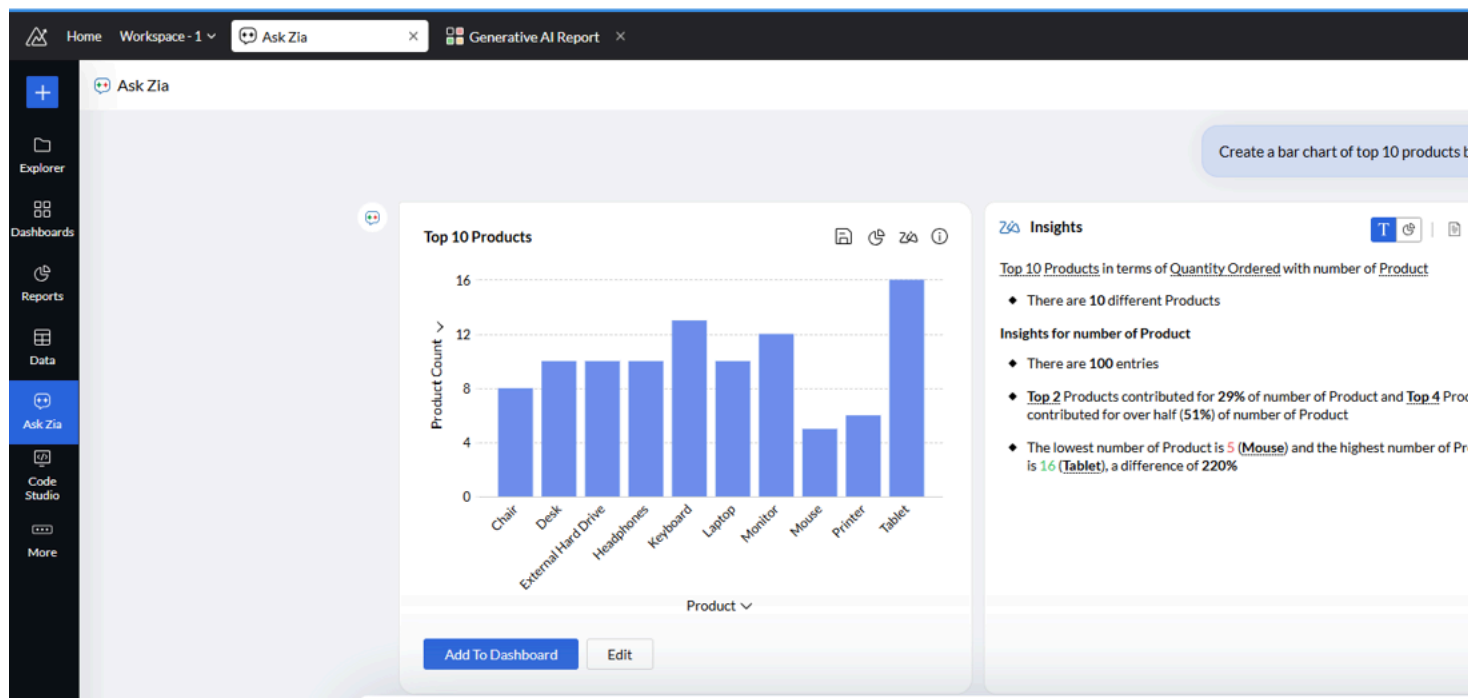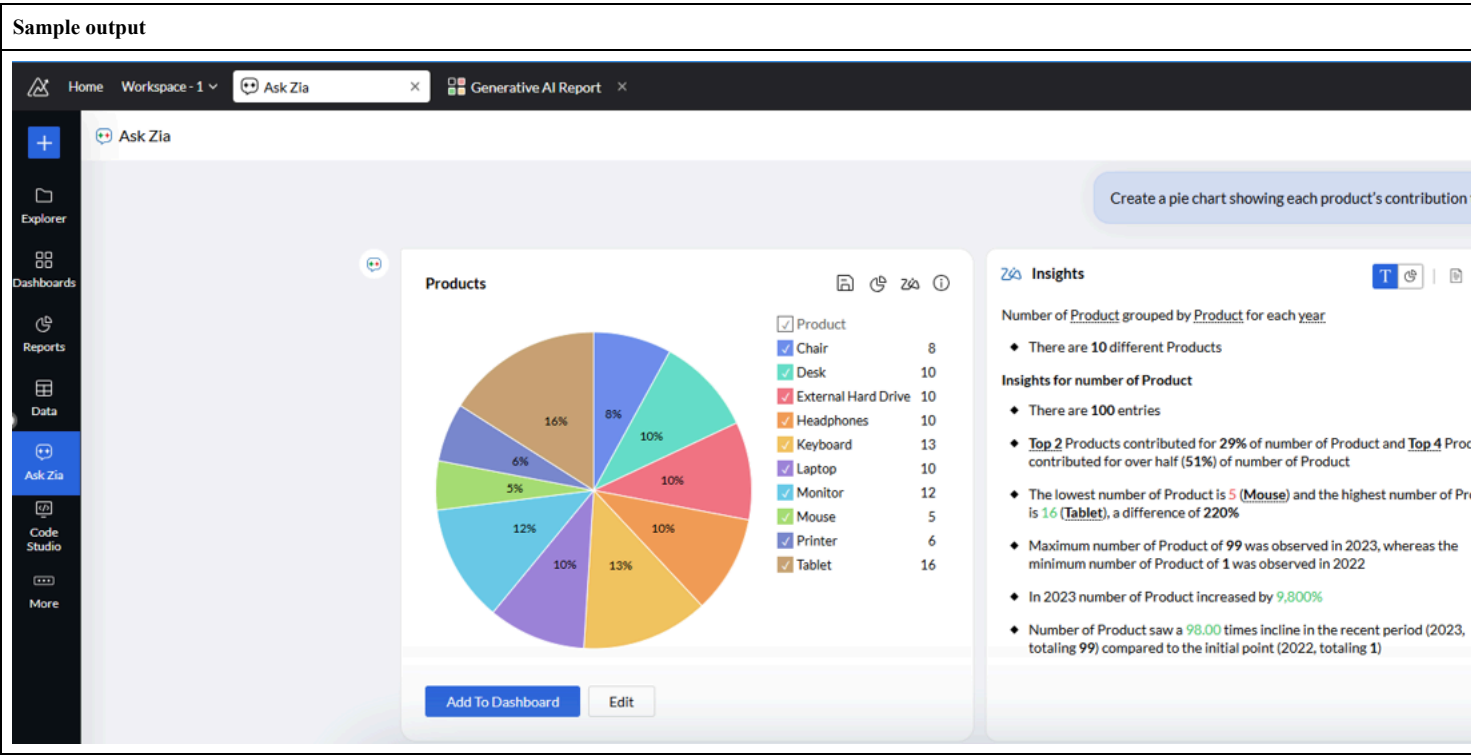
Sample output

Prompt 2:

```
Create a bar chart of the top 10 products by total revenue.
```
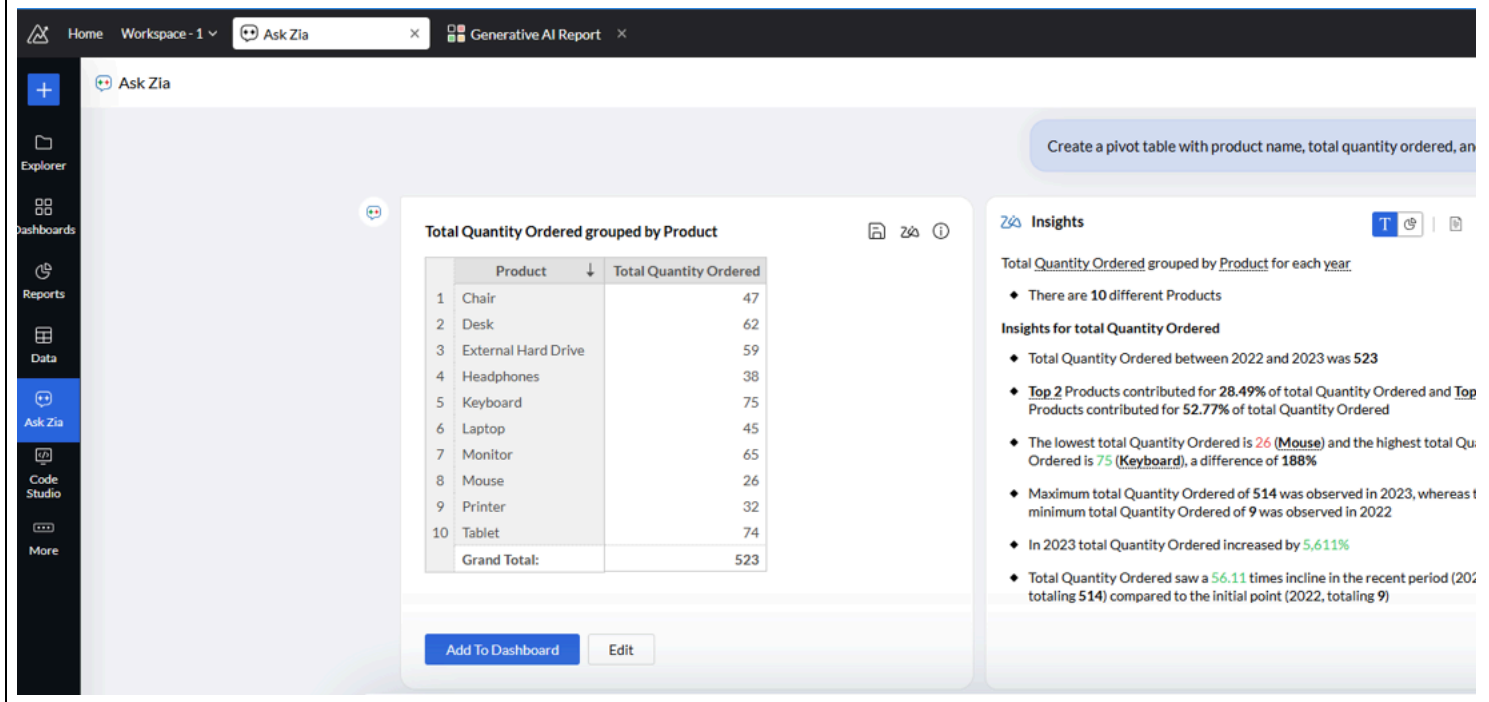
Sample output

Prompt 3:

    Create a pie chart showing each product's contribution to total revenue.

Sample output

Prompt 4:

    Create a pivot table with product name, total quantity ordered, and total revenue.
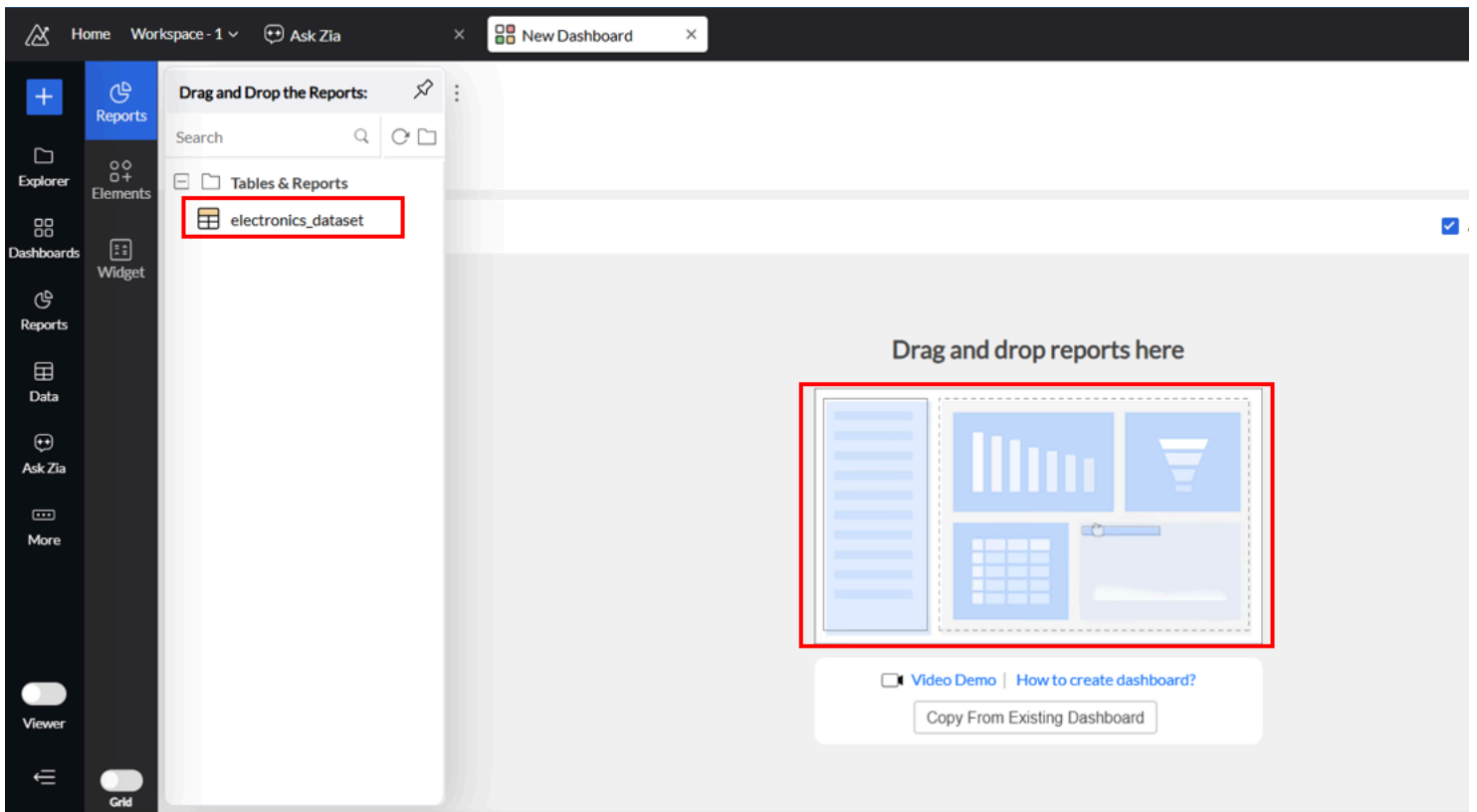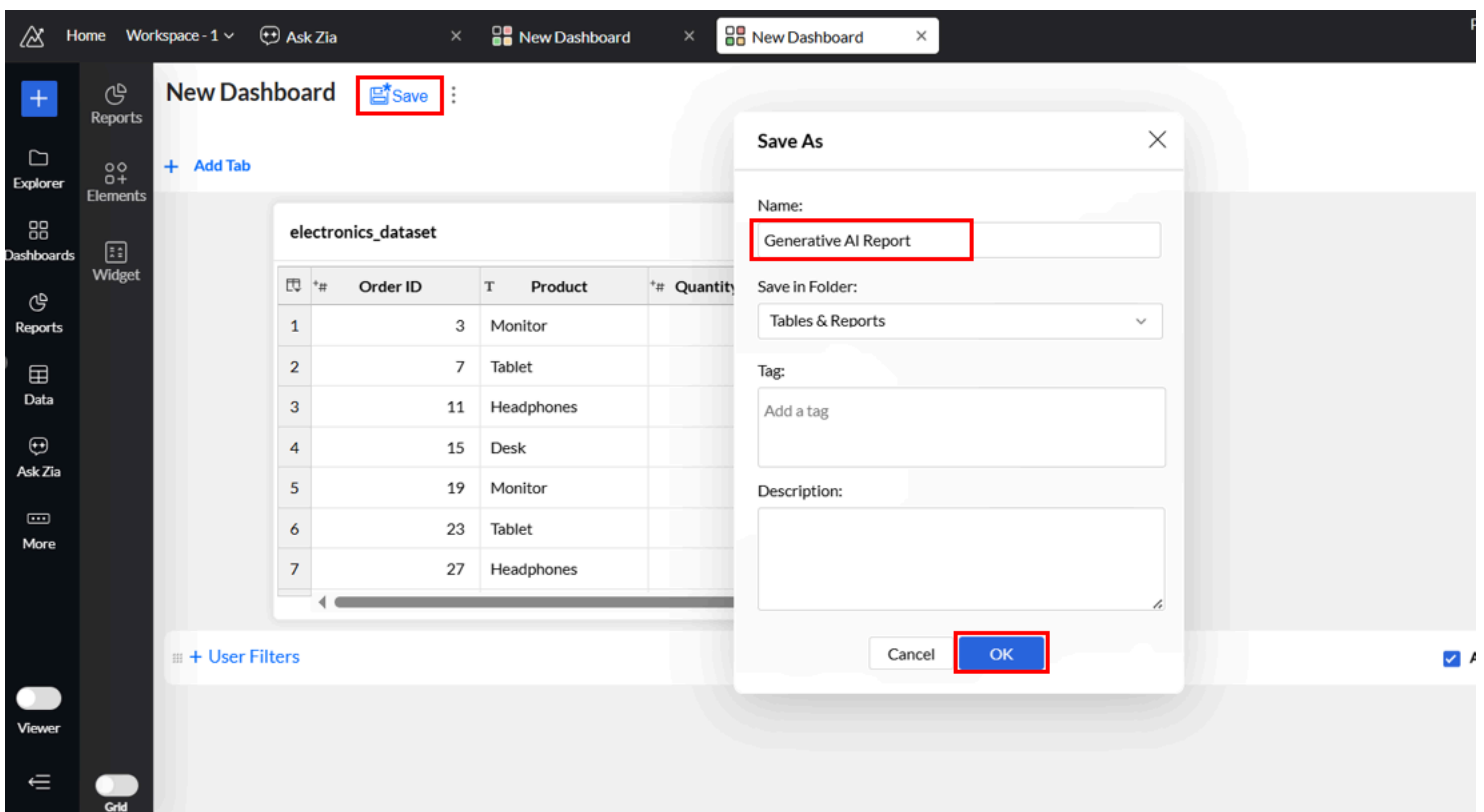
Sample output

Step 3: After generating all charts go to **Dashboard** and select **Create new Dashboard**

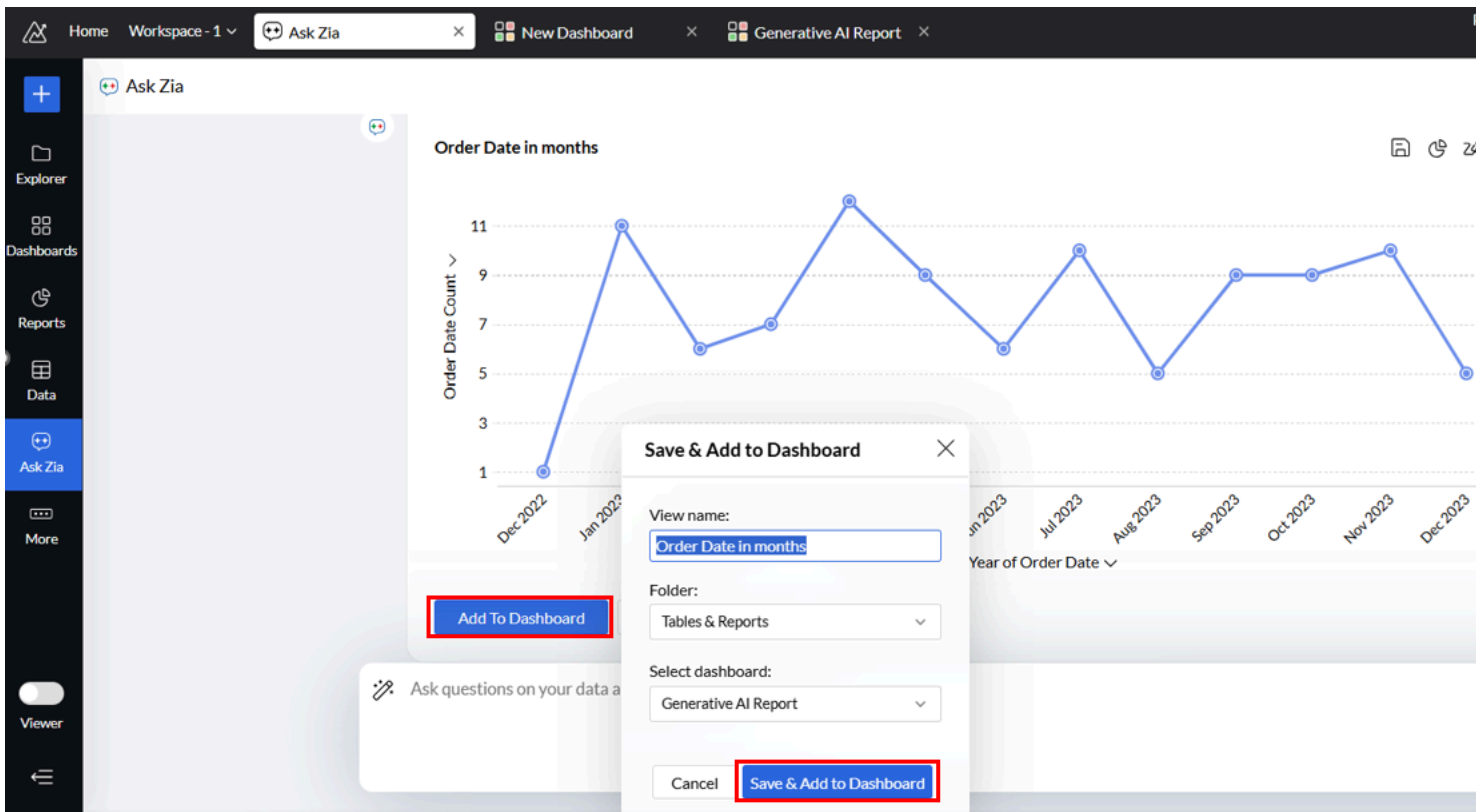**Step 4:** Drag and drop the dataset in the report section.

Step 5: Click **Save**, enter the dashboard name, and click **Ok** to save the dashboard.
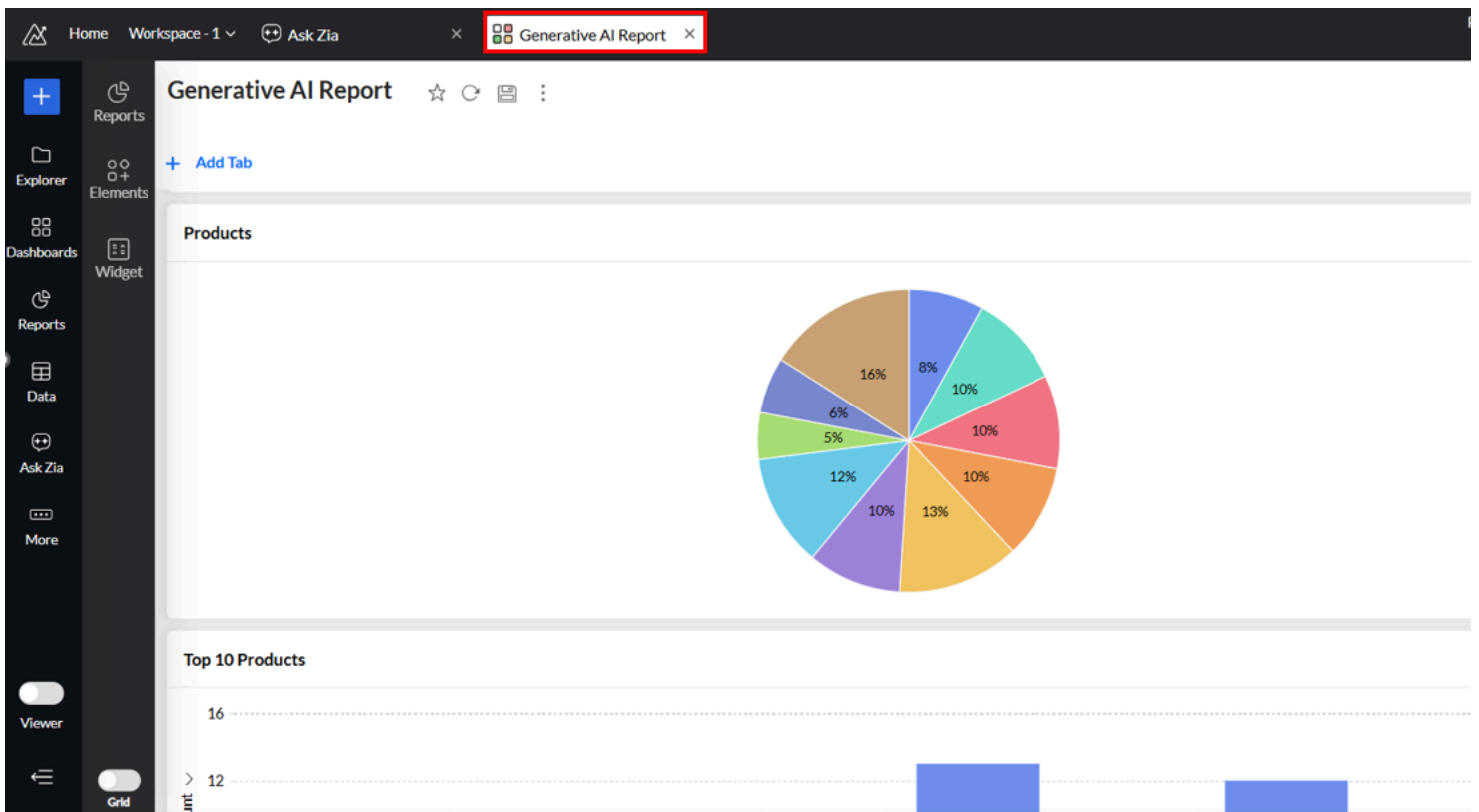

Task 4: Finalizing the charts to be used in the report

Step 1: Go back to Zia, save, and add the charts to the dashboard one by one that you created earlier.
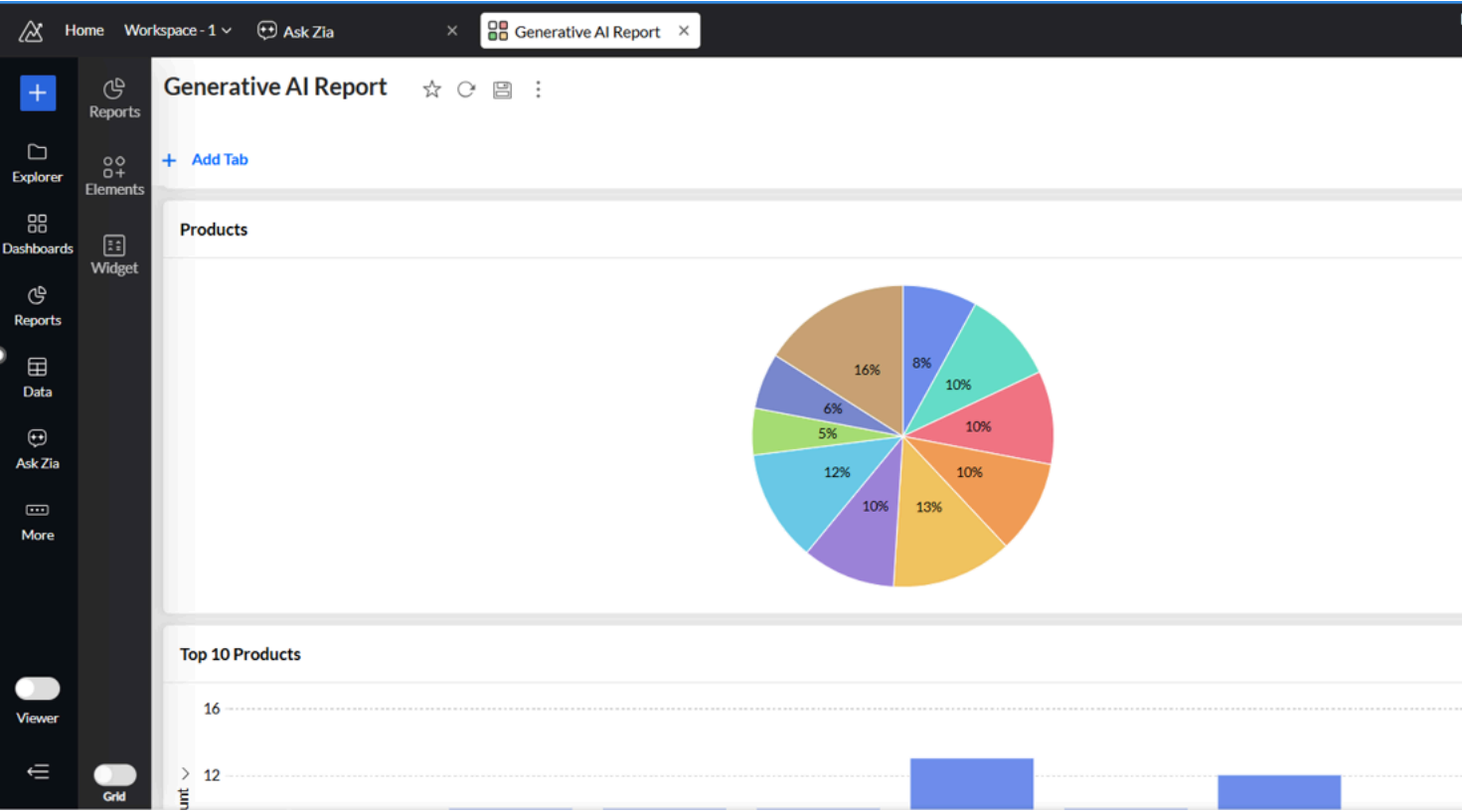
Repeat the same step to add the other charts to the dashboard.

Step 2: Once the charts are added, go to the dashboard to find the charts that you have added.

Task 5: Saving and sharing the report

Step 1: Go to the **View Mode**.
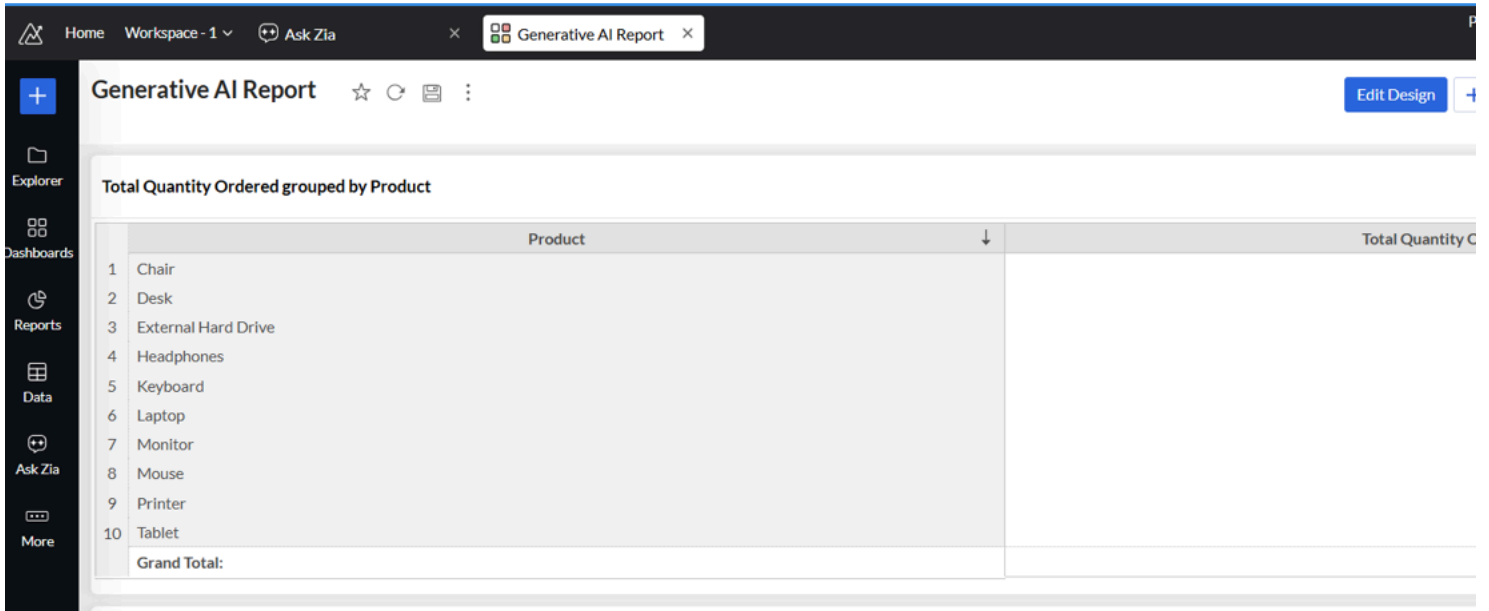
Step 2: To export the dashboard, click **Export** and select the appropriate option to download the dashboard.

Step 3: You can also share it with your colleagues and peers. To do so, click **Share** and then select the option as per your convenience.

Conclusion

In this lab, you have signed up in Zoho Analytics, added a dataset, and generated a report.

Author(s)

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