

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](https://www.zoho.com/analytics/) 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.

zoho.com/analytics/

GuidedProjects-Cou... dv_applied_sql_cou... IBM Data Analyst Pr... IBM Data Science Pr... IBM Data Engineeri... Dashboard | edX Supply Chain Shipm... Supply

DataPrep CRM Creator Books RPA Inventory All Products

Zoho Analytics has been recognized in the 2025 Gartner® Magic Quadrant™ for ABI Platforms. [READ MORE](#)

Zoho Analytics

Platform Features Solutions Pricing

AI-Powered Self-Service BI and Analytics Platform

Go from data to insights in minutes

✓ Connect Data ✓ Visually Analyze ✓ Get Actionable Insights

☒ Cloud ☐ On-premise

Work Email

Password

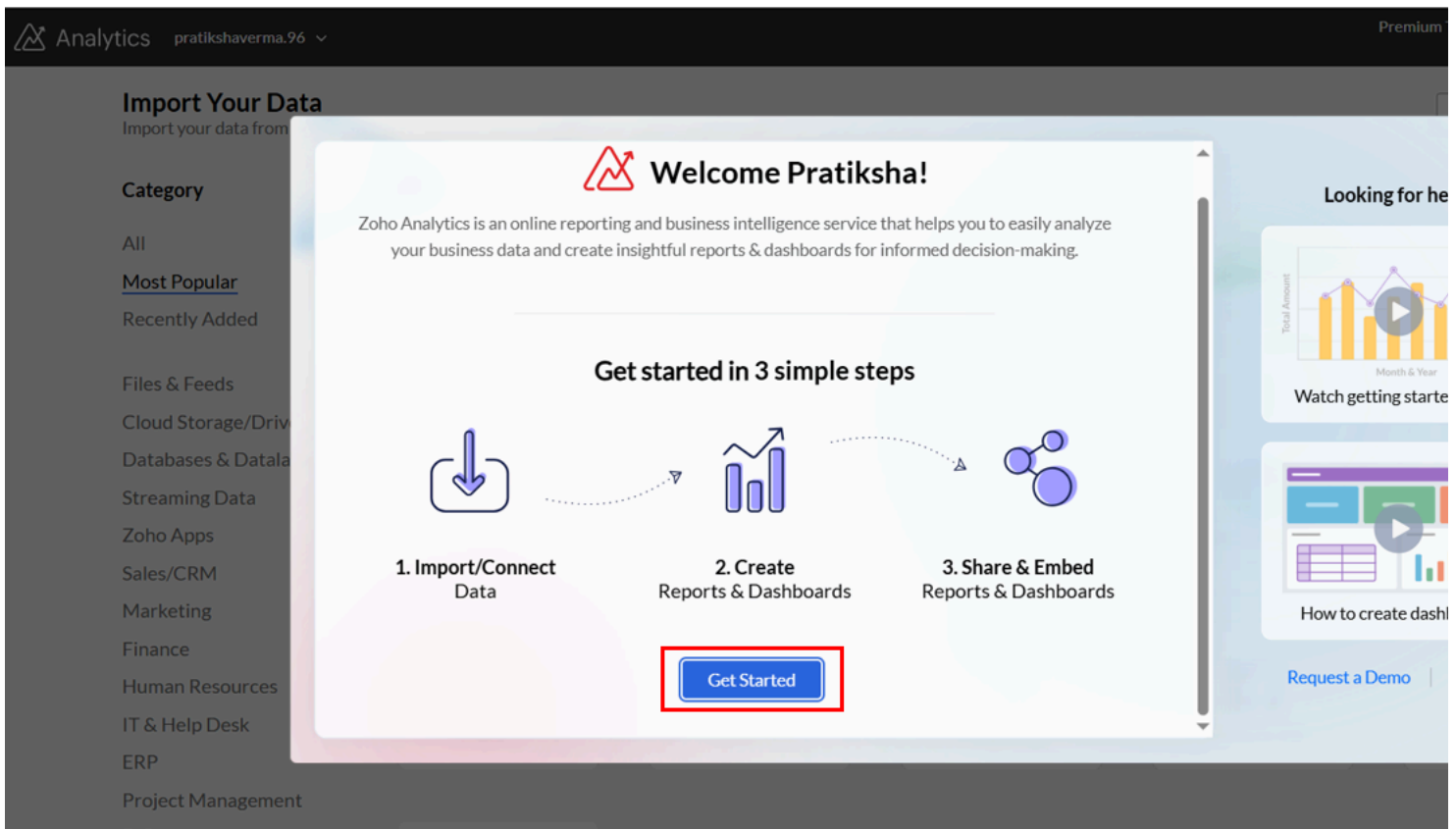
+91 Phone Number

☐ I agree to the [Terms of Service](#) and [Privacy Policy](#)

SIGN UP FOR FREE

or sign in using

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

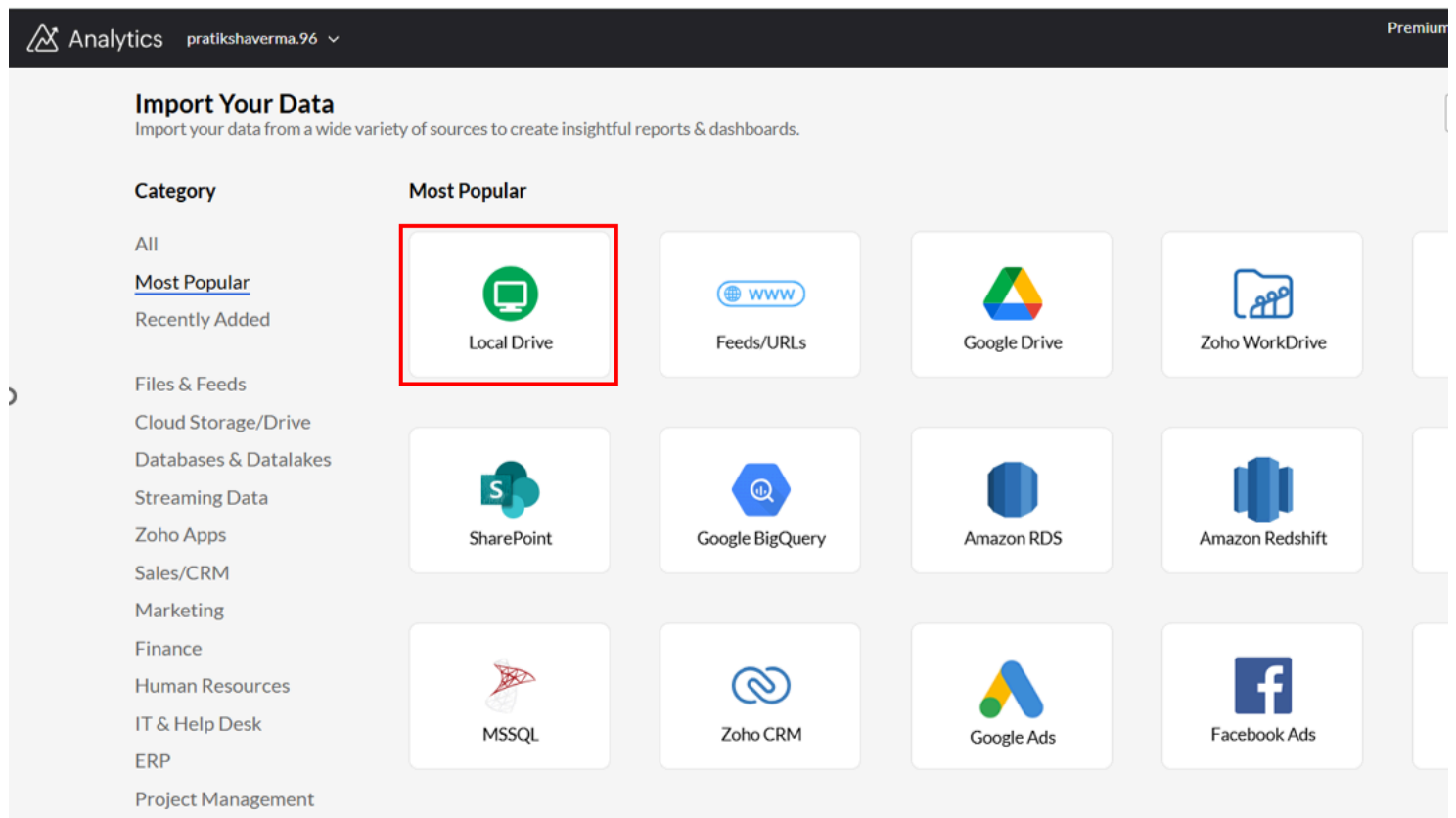


The image shows the Zoho Analytics 'Import Your Data' page. At the top, there's a header with the Zoho Analytics logo, the user name 'pratikshaverma.96', and a 'Premium' badge. The main heading is 'Import Your Data' with the subtext 'Import your data from'. Below this is a sidebar with a 'Category' section containing a list of data sources: All, Most Popular, Recently Added, Files & Feeds, Cloud Storage/Drive, Databases & Datalakes, Streaming Data, Zoho Apps, Sales/CRM, Marketing, Finance, Human Resources, IT & Help Desk, ERP, and Project Management. The main content area features a 'Welcome Pratiksha!' message, a brief description of Zoho Analytics, and a 'Get started in 3 simple steps' section. The steps are: 1. Import/Connect Data, 2. Create Reports & Dashboards, and 3. Share & Embed Reports & Dashboards. A 'Get Started' button is highlighted with a red box. On the right, there are video thumbnails for 'Watch getting started' and 'How to create dashboards', and a 'Request a Demo' link.

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**.



The image shows the 'Import Your Data' page in Zoho Analytics. The header is the same as the previous image. The main heading is 'Import Your Data' with the subtext 'Import your data from a wide variety of sources to create insightful reports & dashboards.' Below this is a sidebar with the same 'Category' list. The main content area is titled 'Most Popular' and displays a grid of data source icons. The 'Local Drive' icon, which shows a green monitor with a white 'L' on it, is highlighted with a red box. Other icons in the grid include Feeds/URLs, Google Drive, Zoho WorkDrive, SharePoint, Google BigQuery, Amazon RDS, Amazon Redshift, MSSQL, Zoho CRM, Google Ads, and Facebook Ads.

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

Step 1 of 2: Import Your Data
Import data from Excel, CSV, HTML, XML, JSON, Statistical & MS Access files

Workspace Name* (?)
Workspace - 1

Description

File Type
CSV,TSV & Other Text Format

Data Location
☒ Local Drive ☐ Pasted Data ☐ FTP

File* [Try Sample](#)
Choose File No file Selected
(Supported file formats: .CSV, .TSV and other text files)

Note:

- For other file formats, Choose the corresponding 'File Type' option above.
- For large size CSV or TSV or Text file, we recommend to zip it and upload.
- Zippped CSV, TSV or Text file should contain only one file in it.

[Cancel](#) [Next](#)

General Info:
Data size should be less than **100 MB** and number of rows should be less than **1 Milli**
To Upload more, use our [Databridge](#), prov data is in CSV or TSV text file formats
Contact support@zohoanalytics.com for assistance

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

Step 1 of 2: Import Your Data
Import data from Excel, CSV, HTML, XML, JSON, Statistical & MS Access files

Workspace Name* (?)
Workspace - 1

Description

File Type
CSV,TSV & Other Text Format

Data Location
☒ Local Drive ☐ Pasted Data ☐ FTP

File* [Try Sample](#)
Choose File electronics_dataset.csv
(Supported file formats: .CSV, .TSV and other text files)

Note:

- For other file formats, Choose the corresponding 'File Type' option above.
- For large size CSV or TSV or Text file, we recommend to zip it and upload.
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[Cancel](#) [Next](#)

General Info:
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To Upload more, use our [Databridge](#), prov data is in CSV or TSV text file formats
Contact support@zohoanalytics.com for assistance

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

Analytics pratikshaverma.96

Import Your Data

Import your data from a wide variety of sources

Category

- All
- Most Popular**
- Recently Added
- Files & Feeds
- Cloud Storage/Drive
- Databases & Datalakes
- Streaming Data
- Zoho Apps
- Sales/CRM
- Marketing
- Finance
- Human Resources
- IT & Help Desk
- ERP
- Project Management
- E-Commerce
- Social Media
- Survey/Forms

Step 2 of 2: Import Your Data

Import data from Excel, CSV, HTML, XML, JSON, Statistical & MS Access files

Table Name [?]

First Row Contains Column Names?

Format of Date Column(s)
 (yyyy-MM-dd)

> More CSV Settings

Data Preview (Top 5 rows shown) [View Data Quality](#) [Prepare Data](#)

<input checked="" type="checkbox"/>	Order ID	<input checked="" type="checkbox"/>	Product	<input checked="" type="checkbox"/>	Quantity Ordered	<input checked="" type="checkbox"/>	Price Each	<input checked="" type="checkbox"/>
	Positive Number		Plain Text		Positive Number		Decimal Number	
1			Monitor	1			150.89	2023-10-01
2			Keyboard	4			36.51	2023-01-01
3			Monitor	9			26.52	2023-08-01
4			Desk	1			15.66	2023-01-01
5			Keyboard	4			106.02	2023-05-01

* Click on the header cell to edit the column

On Import Errors

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.

Workspace - 1

Share Search

☐ Expand / Collapse All

Tables & Reports

electronics_data...
Last Modified 5 days ago

☒ Ask Zia

☐ Code Studio

☐ AutoML

☐ Data Sources

☐ Settings

☐ Trash

More

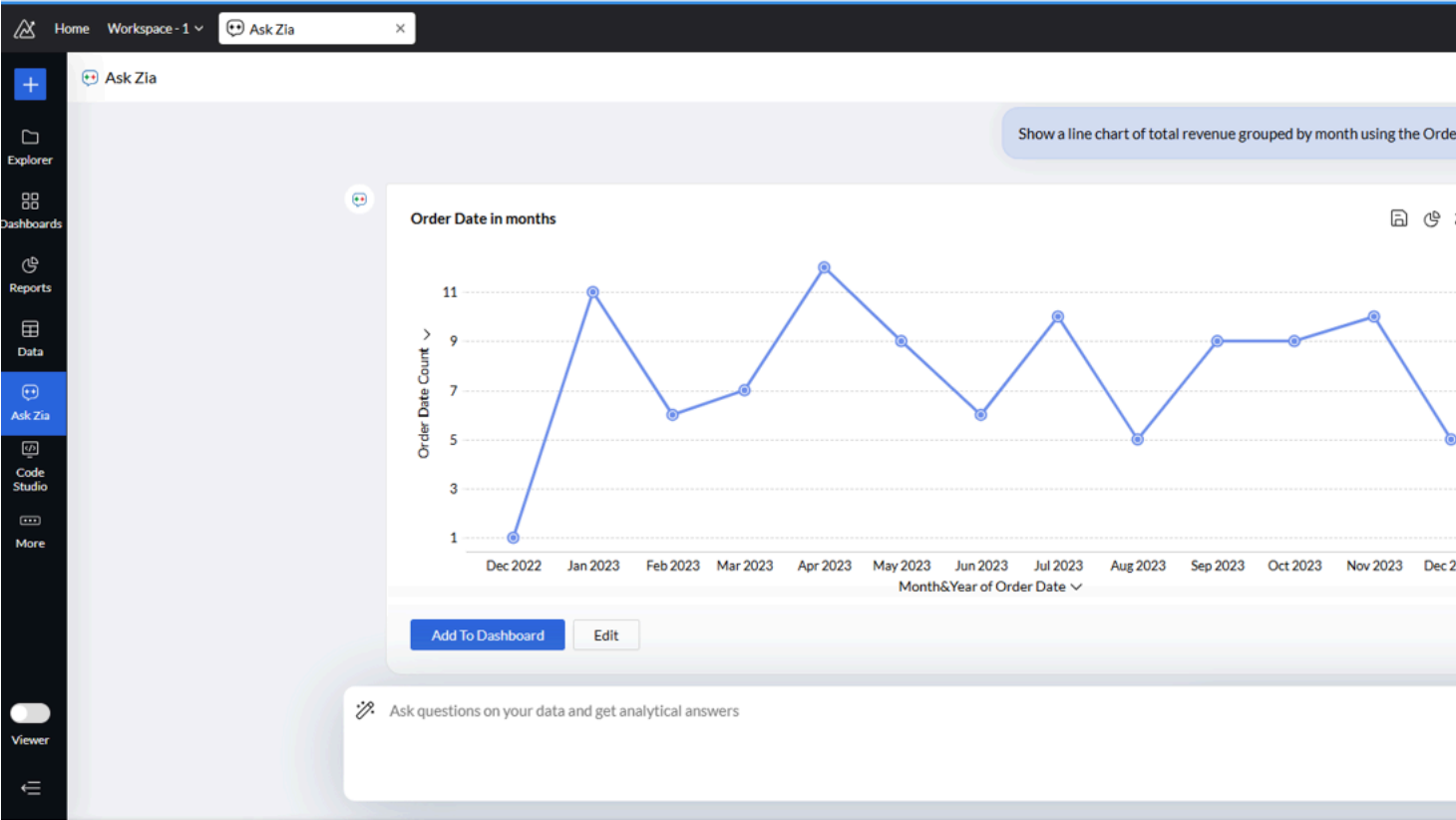
Viewer

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

Prompt 1:

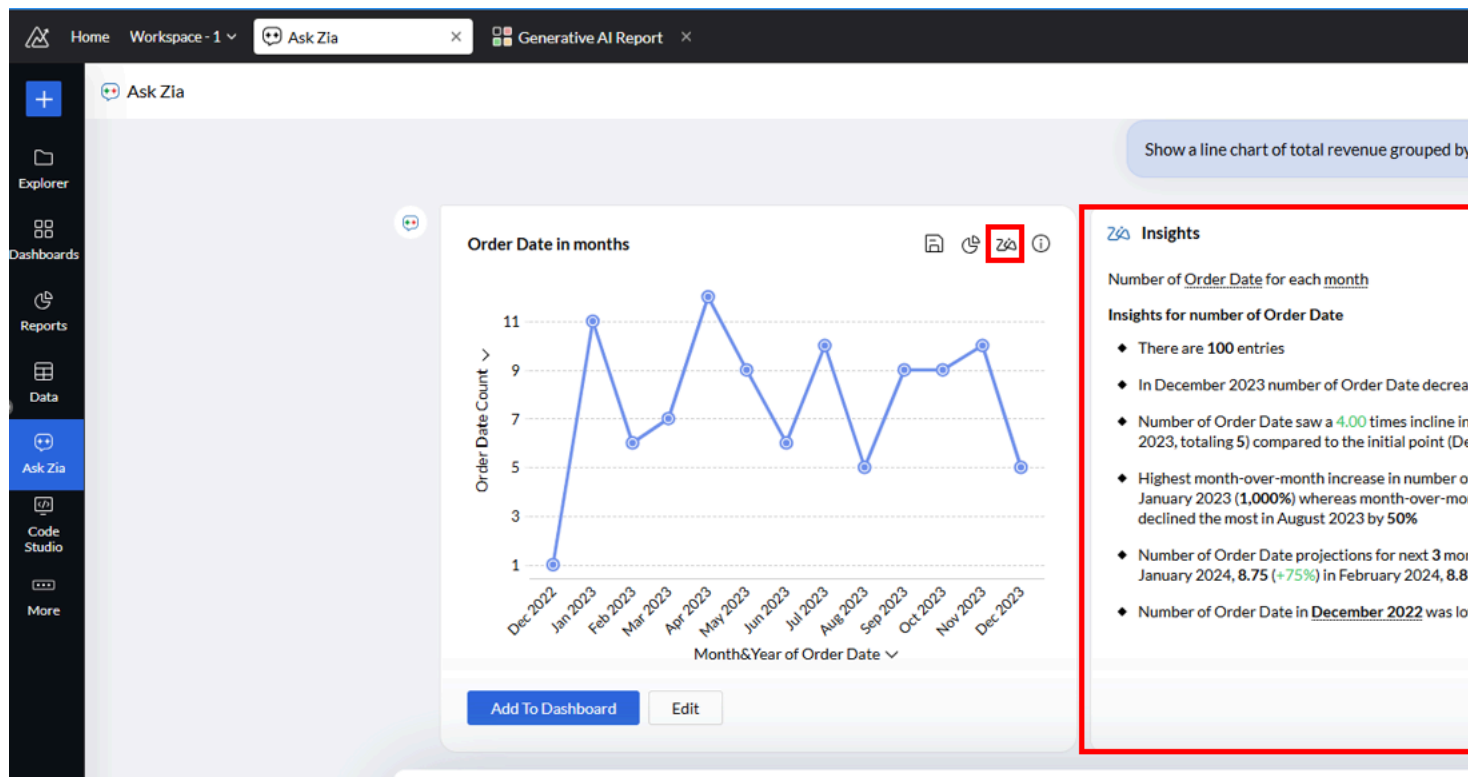
Show a line chart of total revenue grouped by month using the Order Date column.

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.

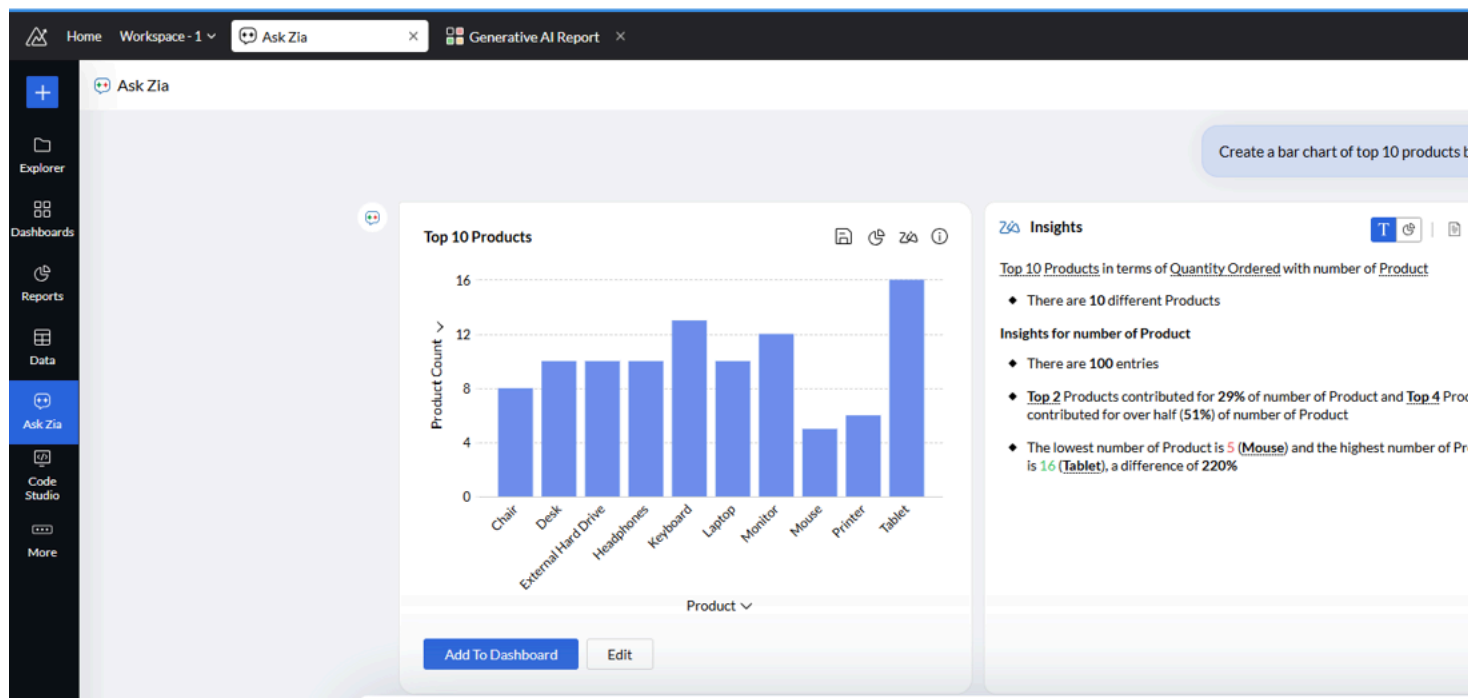
Sample output



Prompt 2:

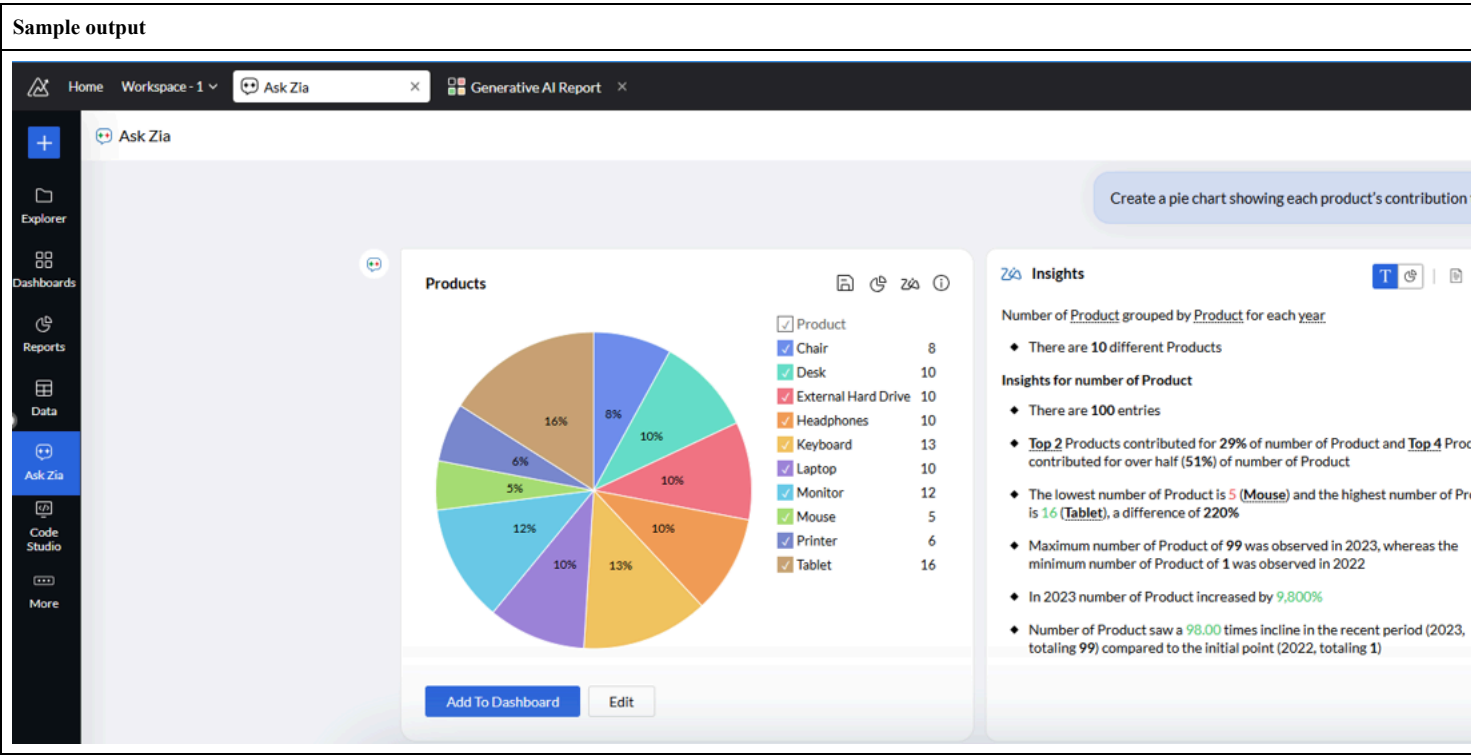
Create a bar chart of the top 10 products by total revenue.

Sample output



Prompt 3:

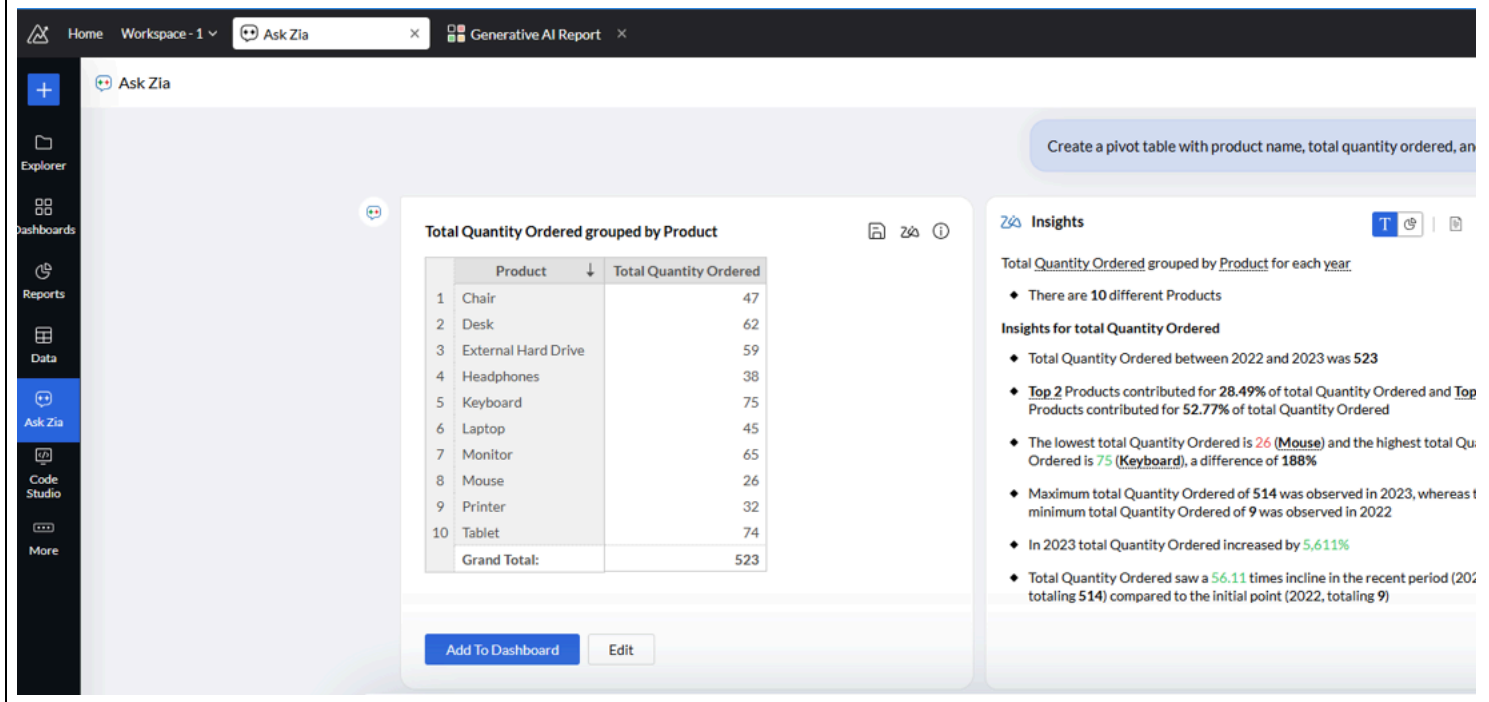
Create a pie chart showing each product's contribution to total revenue.



Prompt 4:

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

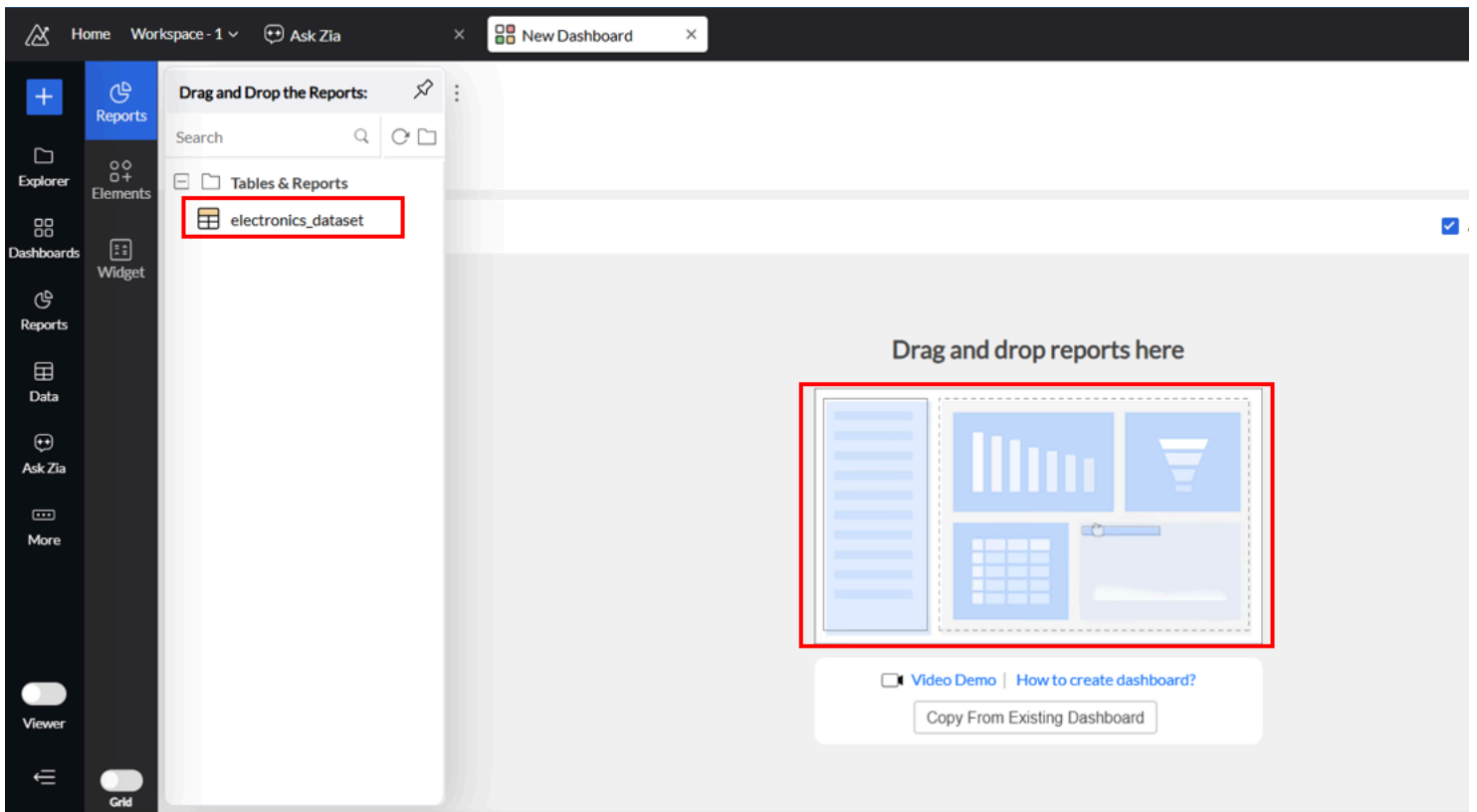
Sample output



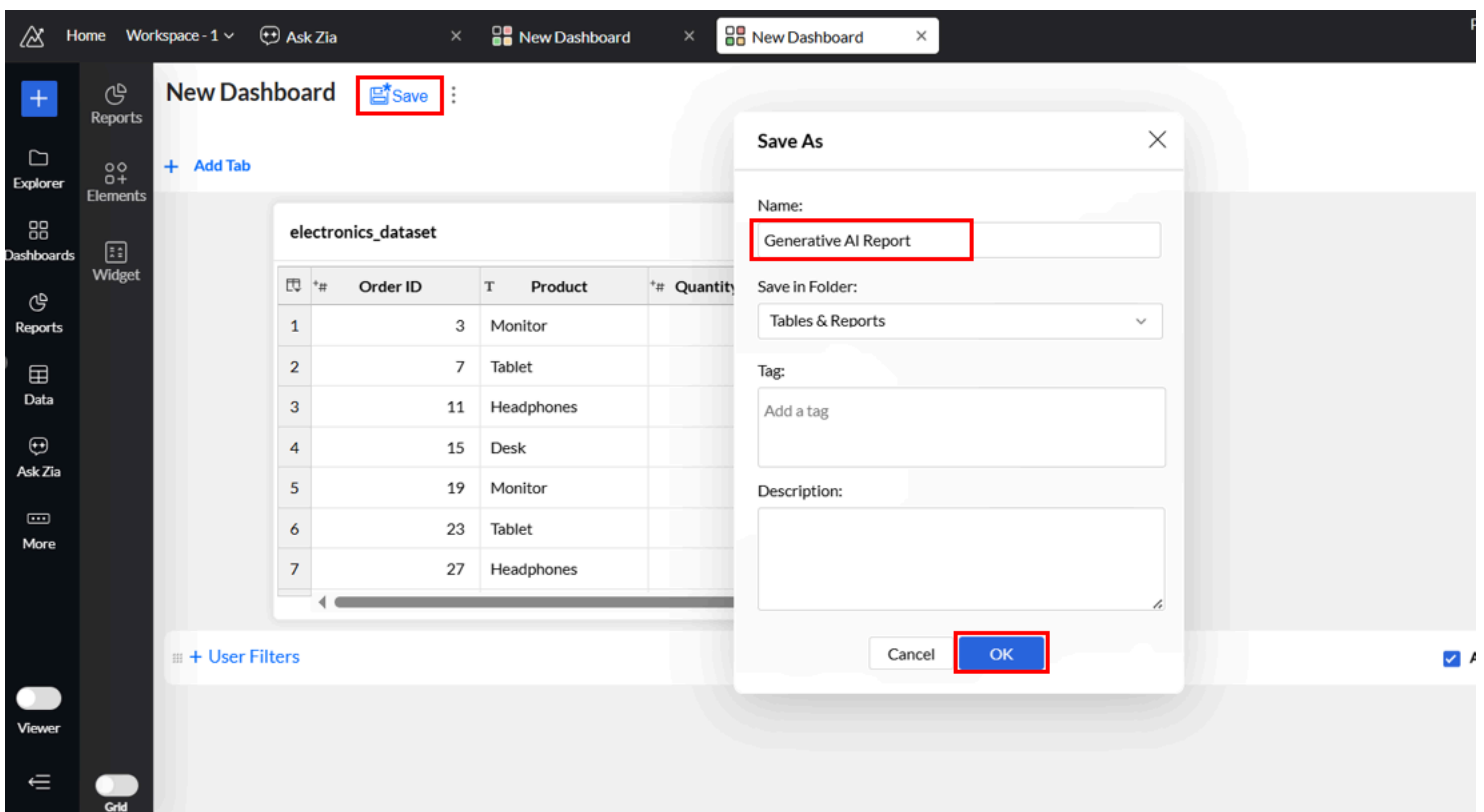
Step 3: After generating all charts go to **Dashboard** and select **Create new Dashboard**



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

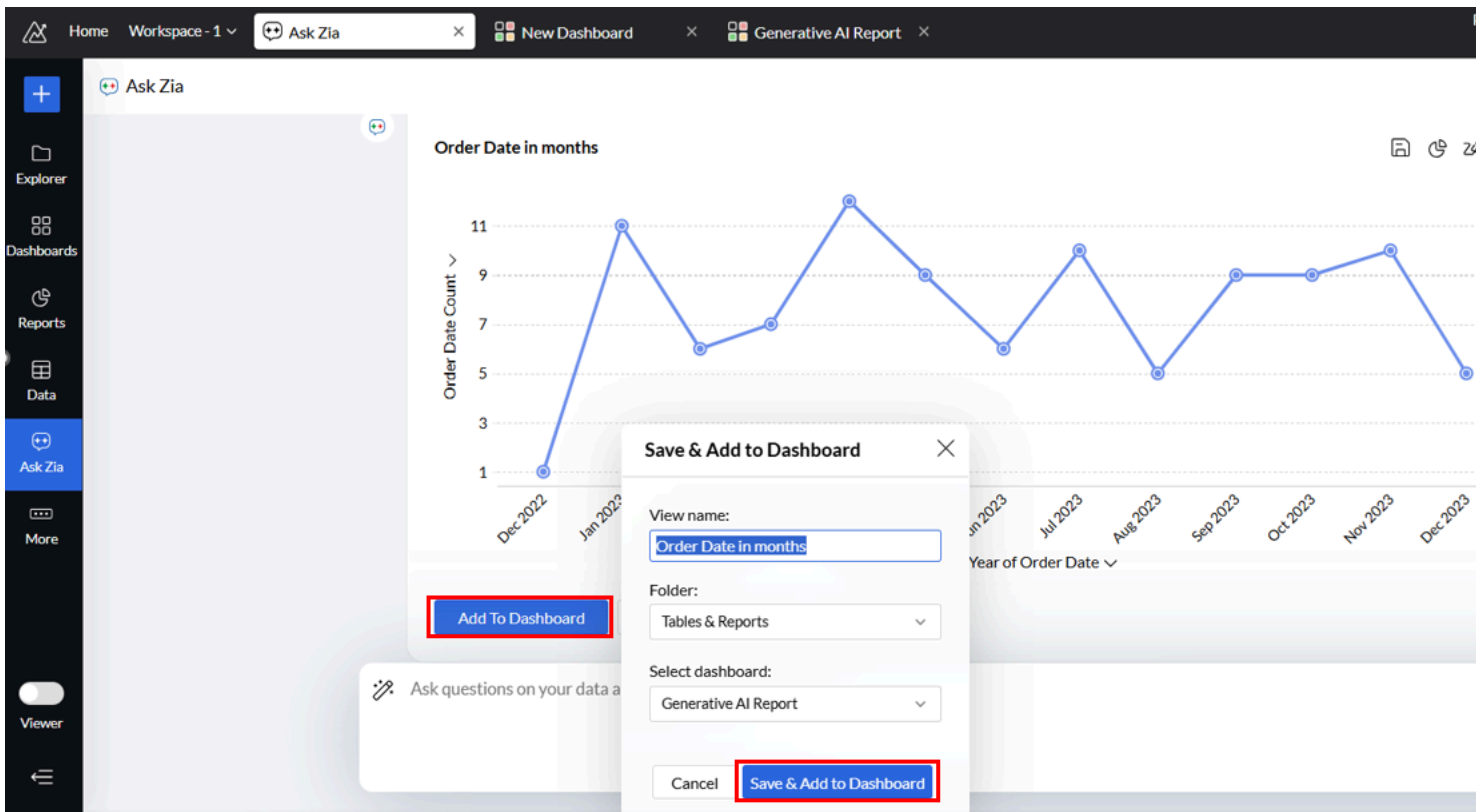


Step 5: Click **Save**, enter the dashboard name, and click **Ok** to save the dashboard.



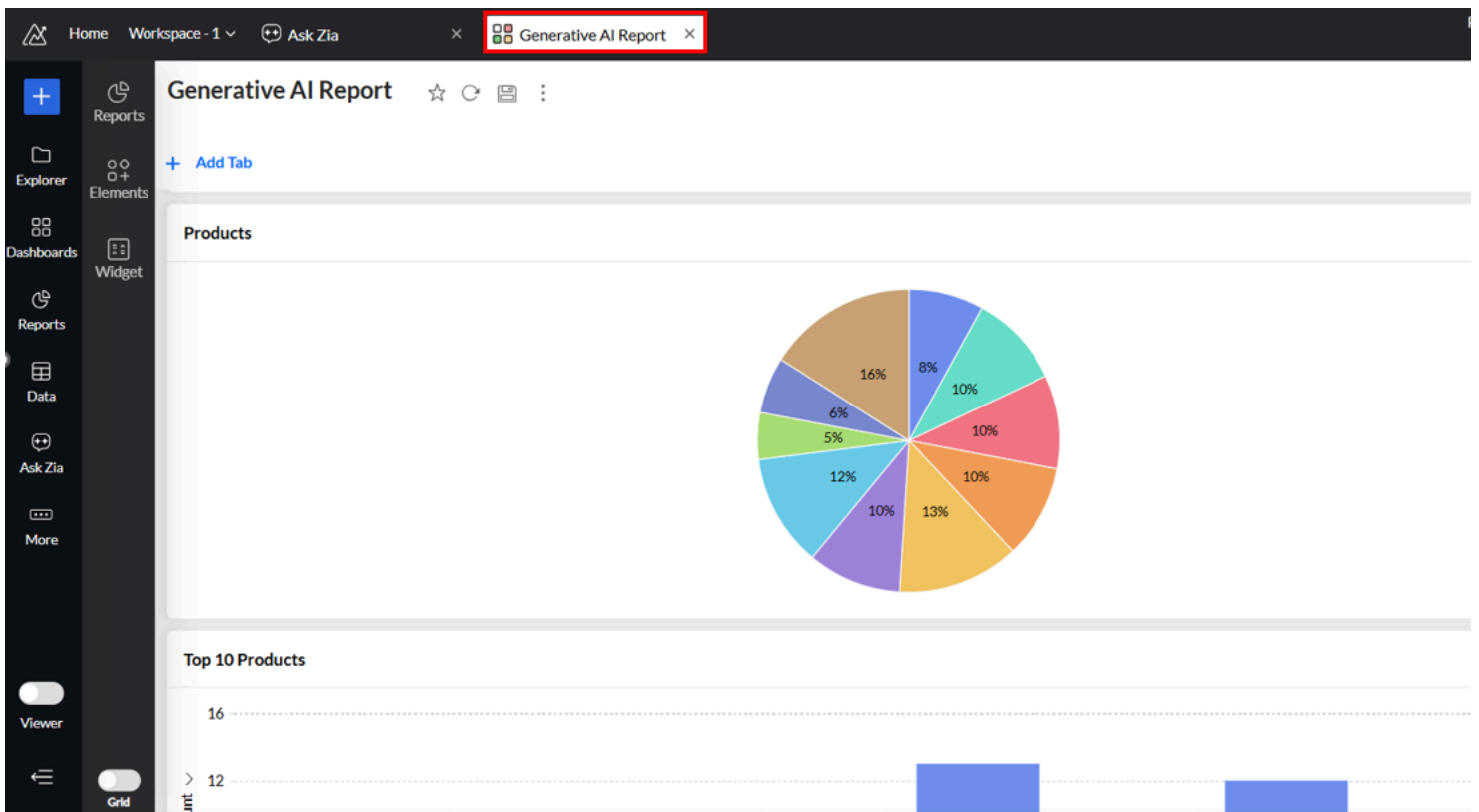
Task 4: Finalizing the charts to be used in the report

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



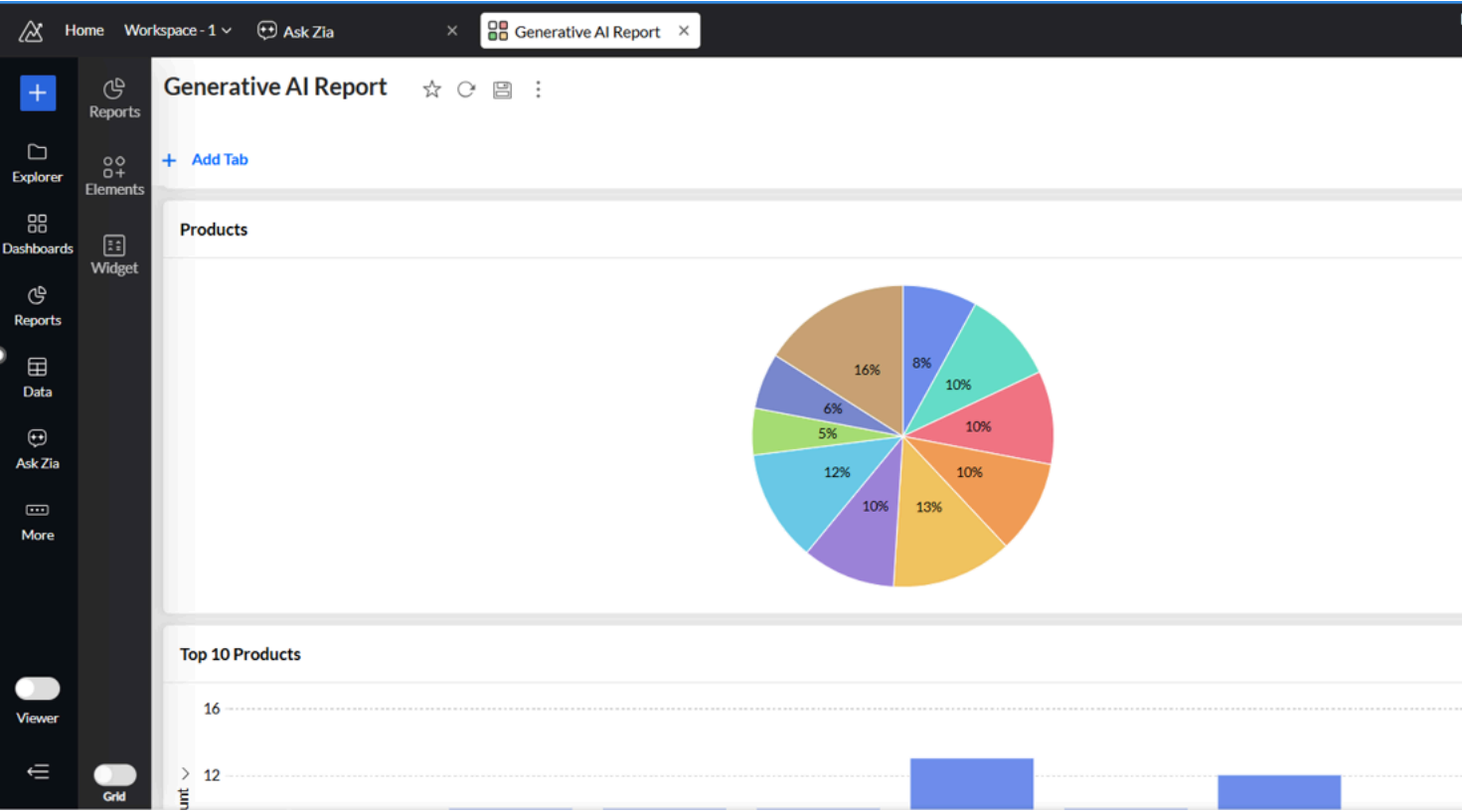
Repeat the same step to add the other charts to the dashboard.

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.

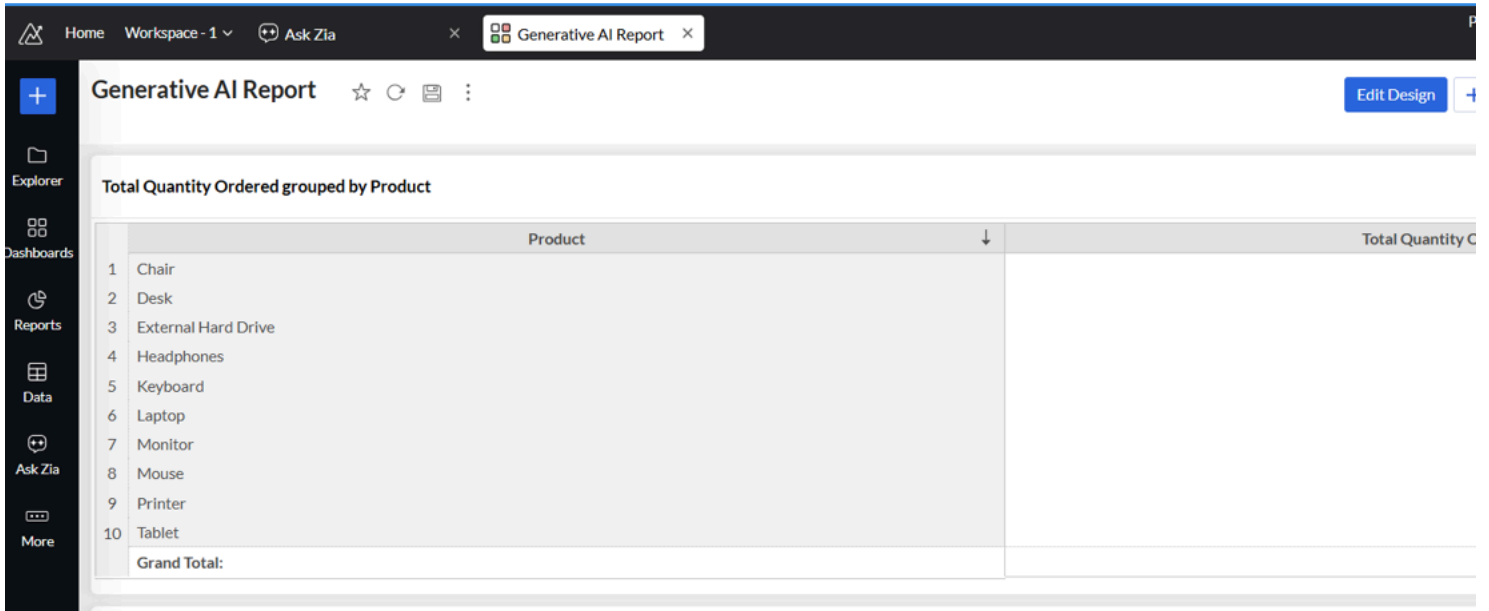


Step 2: To export the dashboard, click **Export** and select the appropriate option to download the dashboard.

The screenshot shows a dashboard titled "Generative AI Report" with a sidebar on the left containing navigation options: Home, Workspace - 1, Ask Zia, Reports, Explorer, Elements, Dashboards, Widget, Reports, Data, Ask Zia, More, Viewer, and Grid. The main content area displays a table titled "Total Quantity Ordered grouped by Product". The table has two columns: "Product" and "Total Quantity Ordered". The table lists 10 products and a "Grand Total" row.

	Product	Total Quantity Ordered
1	Chair	
2	Desk	
3	External Hard Drive	
4	Headphones	
5	Keyboard	
6	Laptop	
7	Monitor	
8	Mouse	
9	Printer	
10	Tablet	
	Grand Total:	

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.



The screenshot shows the Zoho Analytics interface. The top navigation bar includes 'Home', 'Workspace - 1', 'Ask Zia', and a tab for 'Generative AI Report'. The left sidebar contains icons for Explorer, Dashboards, Reports, Data, Ask Zia, and More. The main area displays a report titled 'Generative AI Report' with a subtitle 'Total Quantity Ordered grouped by Product'. The report is a table with two columns: 'Product' and 'Total Quantity C'. The table lists 10 products: Chair, Desk, External Hard Drive, Headphones, Keyboard, Laptop, Monitor, Mouse, Printer, and Tablet. A 'Grand Total' row is at the bottom.

	Product	Total Quantity C
1	Chair	
2	Desk	
3	External Hard Drive	
4	Headphones	
5	Keyboard	
6	Laptop	
7	Monitor	
8	Mouse	
9	Printer	
10	Tablet	
	Grand Total:	

Conclusion

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

Author(s)

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Skills Network