

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.

The screenshot shows the Zoho Analytics homepage. At the top, there's a navigation bar with links for GuidedProjects-Cou..., dv_applied_sql_cou..., IBM Data Analyst Pr..., IBM Data Science Pr..., IBM Data Engineeri..., Dashboard | edX, Supply Chain Shipm..., and Supply. Below the navigation is the Zoho logo and a menu bar with DataPrep, CRM, Creator, Books, RPA, Inventory, and All Products. A banner at the top right states "Zoho Analytics has been recognized in the 2025 Gartner® Magic Quadrant™ for ABI Platforms. [READ MORE](#)". The main content area features a large headline "AI-Powered Self-Service BI and Analytics Platform" and "Go from data to insights in minutes". Below this are three bullet points: "✓ Connect Data", "✓ Visually Analyze", and "✓ Get Actionable Insights". To the right, there's a sign-up form with fields for "Work Email", "Password", "Phone Number", and "I agree to the Terms of Service and Privacy Policy". There are also "Cloud" and "On-premise" radio buttons, and "SIGN UP FOR" and "or sign in using" buttons for Google and LinkedIn.

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

Welcome Pratiksha!

Zoho Analytics is an online reporting and business intelligence service that helps you to easily analyze your business data and create insightful reports & dashboards for informed decision-making.

Get started in 3 simple steps

1. Import/Connect Data
2. Create Reports & Dashboards
3. Share & Embed Reports & Dashboards

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**.

Import Your Data

Import your data from a wide variety of sources to create insightful reports & dashboards.

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

Most Popular

- Local Drive**
- Feeds/URLs
- Google Drive
- Zoho WorkDrive
- SharePoint
- Google BigQuery
- Amazon RDS
- Amazon Redshift
- MSSQL
- Zoho CRM
- Google Ads
- Facebook Ads

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

Analytics pratikshaverma.96

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- ERP
- Project Management
- E-commerce

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*
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.
- Zipped CSV,TSV or Text file should contain only one file in it.

Cancel **Next**

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

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Choose File `electronics_dataset.csv`

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Cancel **Next**

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

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)

More CSV Settings

Data Preview (Top 5 rows shown)

Order ID	Product	Quantity Ordered	Price Each	Date
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

View Data Quality | Prepare Data

On Import Errors

Cancel | Previous | **Create**

* Click on the header cell to edit the column

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.

Home Workspace - 1 Premium

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

Order ID	Product	Quantity Ordered	Price Each	Date
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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

Ask Zia | Code Studio | AutoML | Data Sources | Settings | Trash

Ask Zia

More

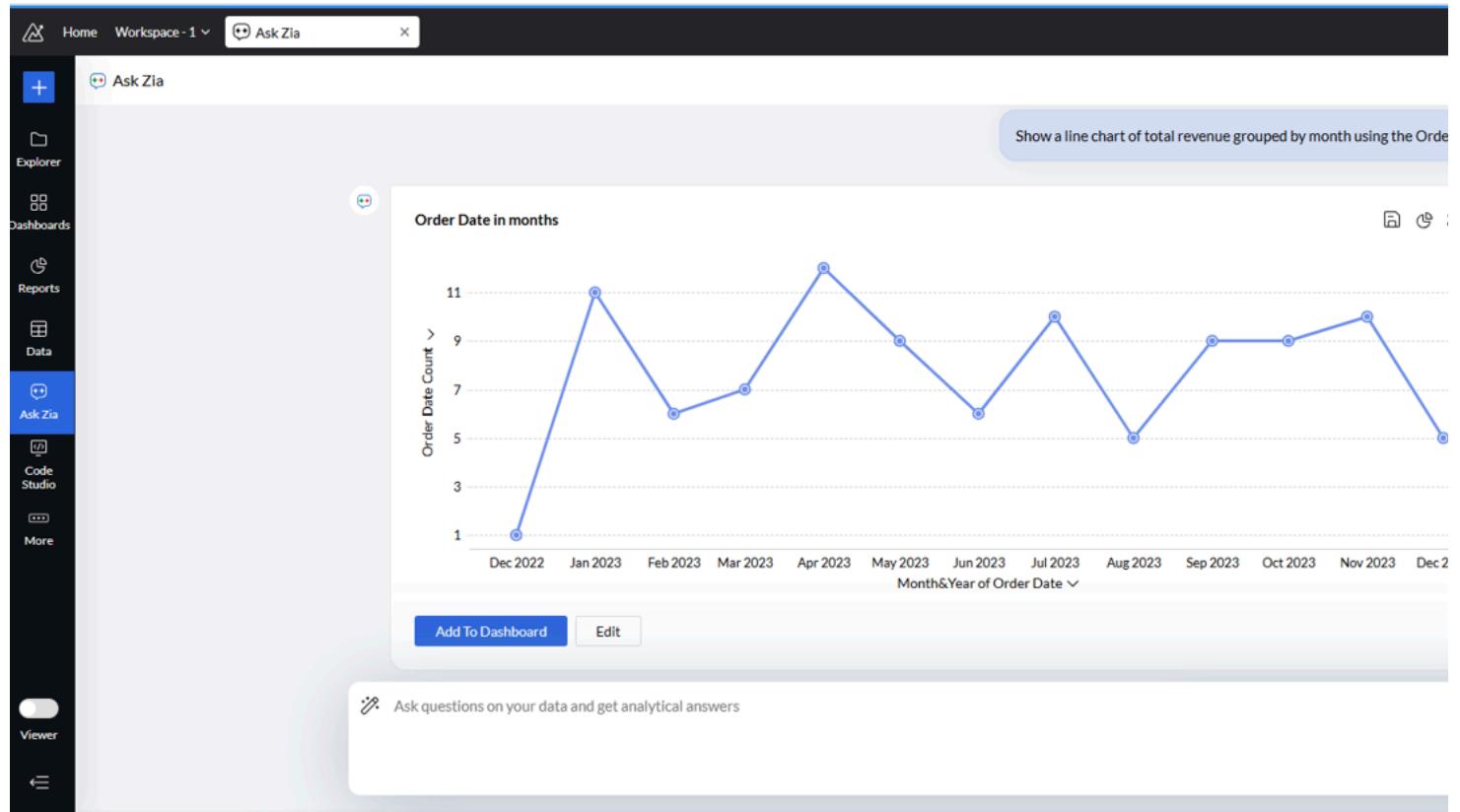
Viewer

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

Home Workspace - 1 Ask Zia Generative AI Report

Order Date in months

Month & Year	Order Date Count
Dec 2022	1
Jan 2023	11
Feb 2023	6
Mar 2023	7
Apr 2023	11
May 2023	9
Jun 2023	6
Jul 2023	9
Aug 2023	5
Sep 2023	9
Oct 2023	9
Nov 2023	10
Dec 2023	5

Insights

Number of Order Date for each month

Insights for number of Order Date

- There are 100 entries
- In December 2023 number of Order Date decreased by 10% compared to November 2023.
- Number of Order Date saw a 4.00 times incline in 2023, totaling 5) compared to the initial point (Dec 2022).
- Highest month-over-month increase in number of Order Date was seen in January 2023 (1,000%) whereas month-over-month decline was the most in August 2023 by 50%.
- Number of Order Date projections for next 3 months are 8.75 (+75%) in February 2024, 8.8 (+7%) in March 2024, and 8.8 (+7%) in April 2024.
- Number of Order Date in December 2022 was low at 1.

Prompt 2:

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

Sample output

Home Workspace - 1 Ask Zia Generative AI Report

Top 10 Products

Product	Product Count
Chair	8
Desk	9
External Hard Drive	9
Headphones	9
Keyboard	13
Laptop	9
Monitor	12
Mouse	5
Printer	6
Tablet	16

Insights

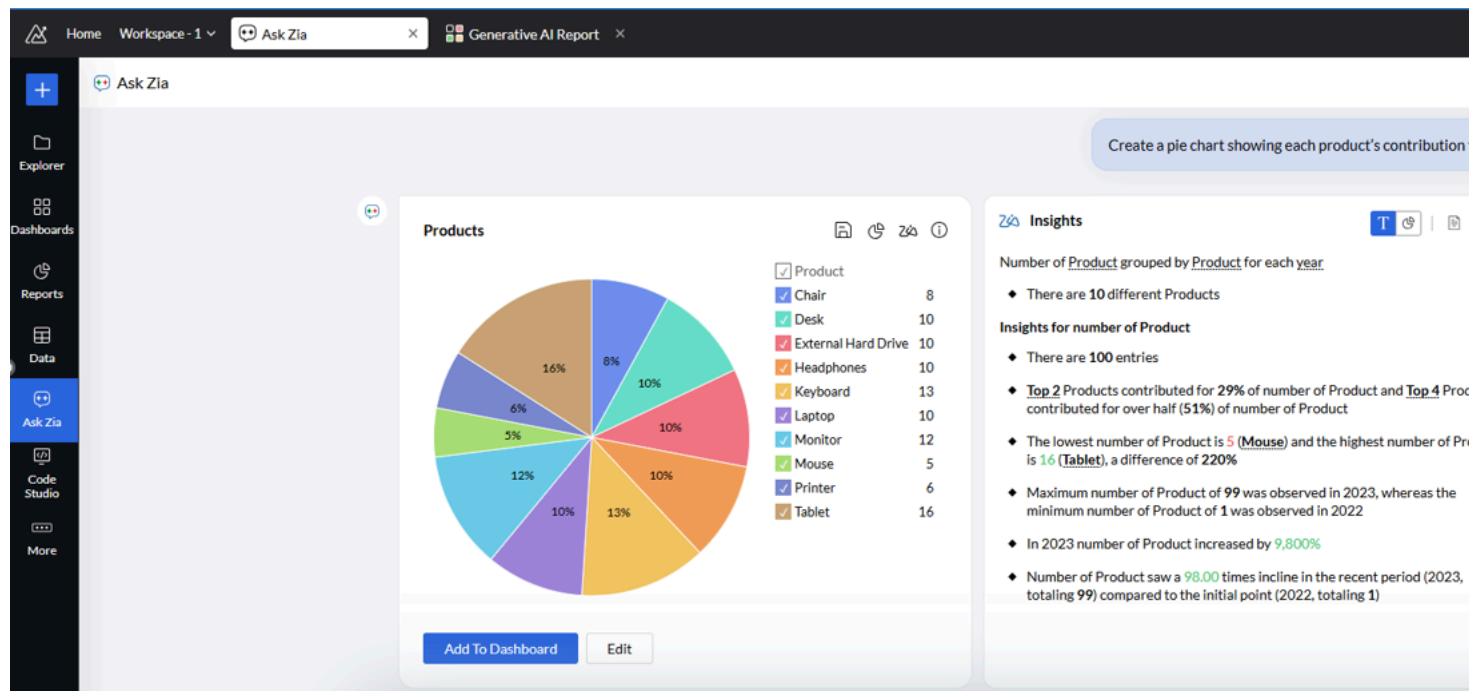
Top 10 Products in terms of Quantity Ordered with number of Product

Insights for number of Product

- There are 10 different Products
- Top 2 Products contributed for 29% of number of Product and Top 4 Products contributed for over half (51%) of number of Product.
- The lowest number of Product is 5 (Mouse) and the highest number of Product is 16 (Tablet), a difference of 220%.

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

The screenshot shows a dashboard interface with a sidebar on the left containing links for Home, Workspace - 1, Ask Zia, Generative AI Report, Explorer, Dashboards, Reports, Data, Ask Zia, Code Studio, and More. The main area displays a table titled "Total Quantity Ordered grouped by Product" and an "Insights" section.

Total Quantity Ordered grouped by Product

Product	Total Quantity Ordered
1 Chair	47
2 Desk	62
3 External Hard Drive	59
4 Headphones	38
5 Keyboard	75
6 Laptop	45
7 Monitor	65
8 Mouse	26
9 Printer	32
10 Tablet	74
Grand Total:	523

Insights

- Total Quantity Ordered grouped by Product for each year
- There are 10 different Products
- Insights for total Quantity Ordered
 - Total Quantity Ordered between 2022 and 2023 was 523
 - Top 2 Products contributed for 28.49% of total Quantity Ordered and Top Products contributed for 52.77% of total Quantity Ordered
 - The lowest total Quantity Ordered is 26 (Mouse) and the highest total Qu Ordered is 75 (Keyboard), a difference of 188%
 - Maximum total Quantity Ordered of 514 was observed in 2023, whereas minimum total Quantity Ordered of 9 was observed in 2022
 - In 2023 total Quantity Ordered increased by 5,611%
 - Total Quantity Ordered saw a 56.11 times incline in the recent period (2023 totaling 514) compared to the initial point (2022, totaling 9)

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

The screenshot shows the "Create New Dashboard" interface. The sidebar on the left is identical to the previous one. The main area features a chart titled "Order Date Count" showing the number of orders per month from December 2022 to December 2023. A red box highlights the "Create New Dashboards" button.

You don't have any Dashboards

+ Create New Dashboards

Order Date Count

The chart displays the following data points:

Month & Year	Order Date Count
Dec 2022	1
Jan 2023	11
Feb 2023	6
Mar 2023	7
Apr 2023	11
May 2023	9
Jun 2023	6
Jul 2023	10
Aug 2023	5
Sep 2023	9
Oct 2023	9
Nov 2023	10
Dec 2023	5

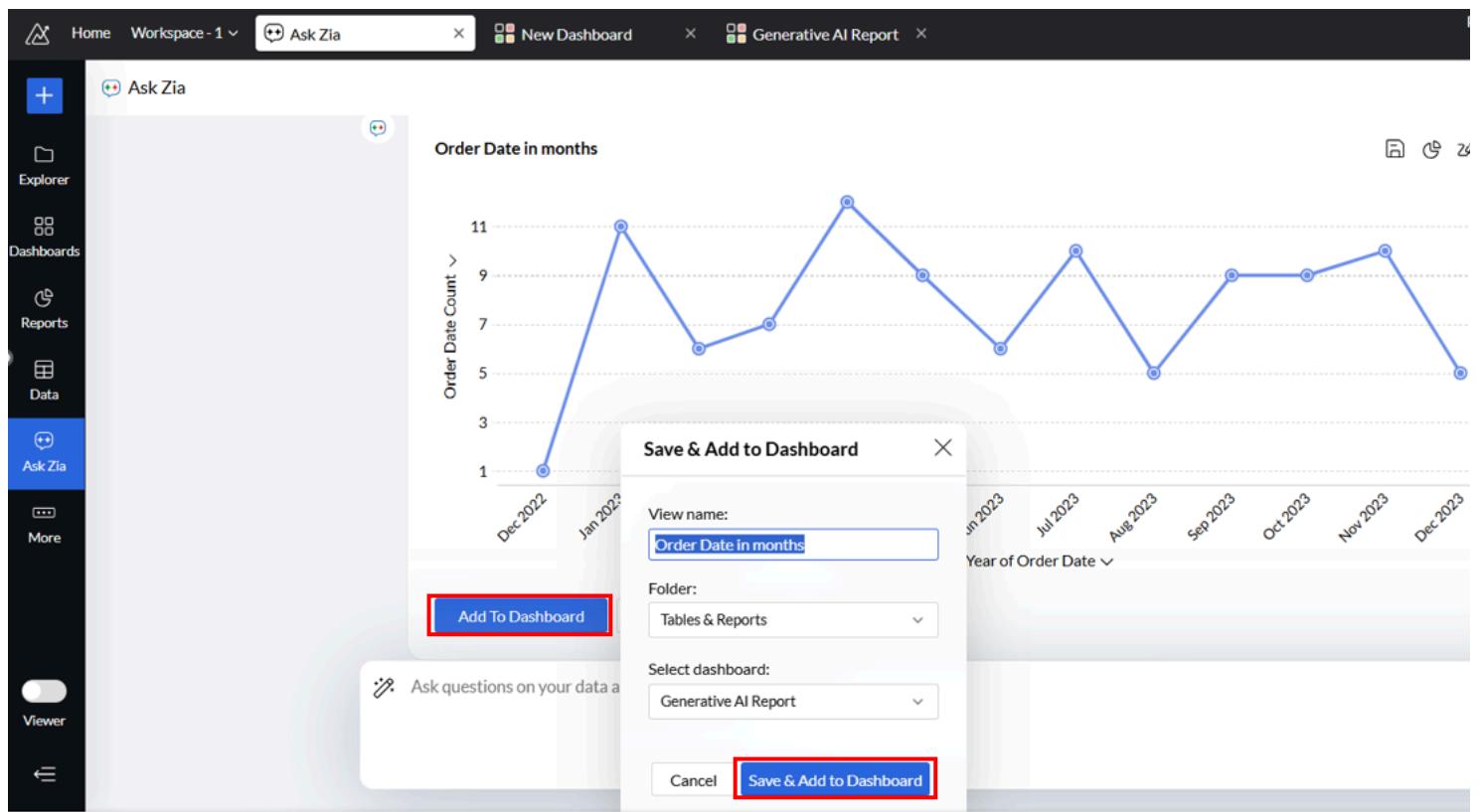
Step 4: Drag and drop the dataset in the report section.

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

#	Order ID	T	Product	#	Quantity
1	3		Monitor		
2	7		Tablet		
3	11		Headphones		
4	15		Desk		
5	19		Monitor		
6	23		Tablet		
7	27		Headphones		

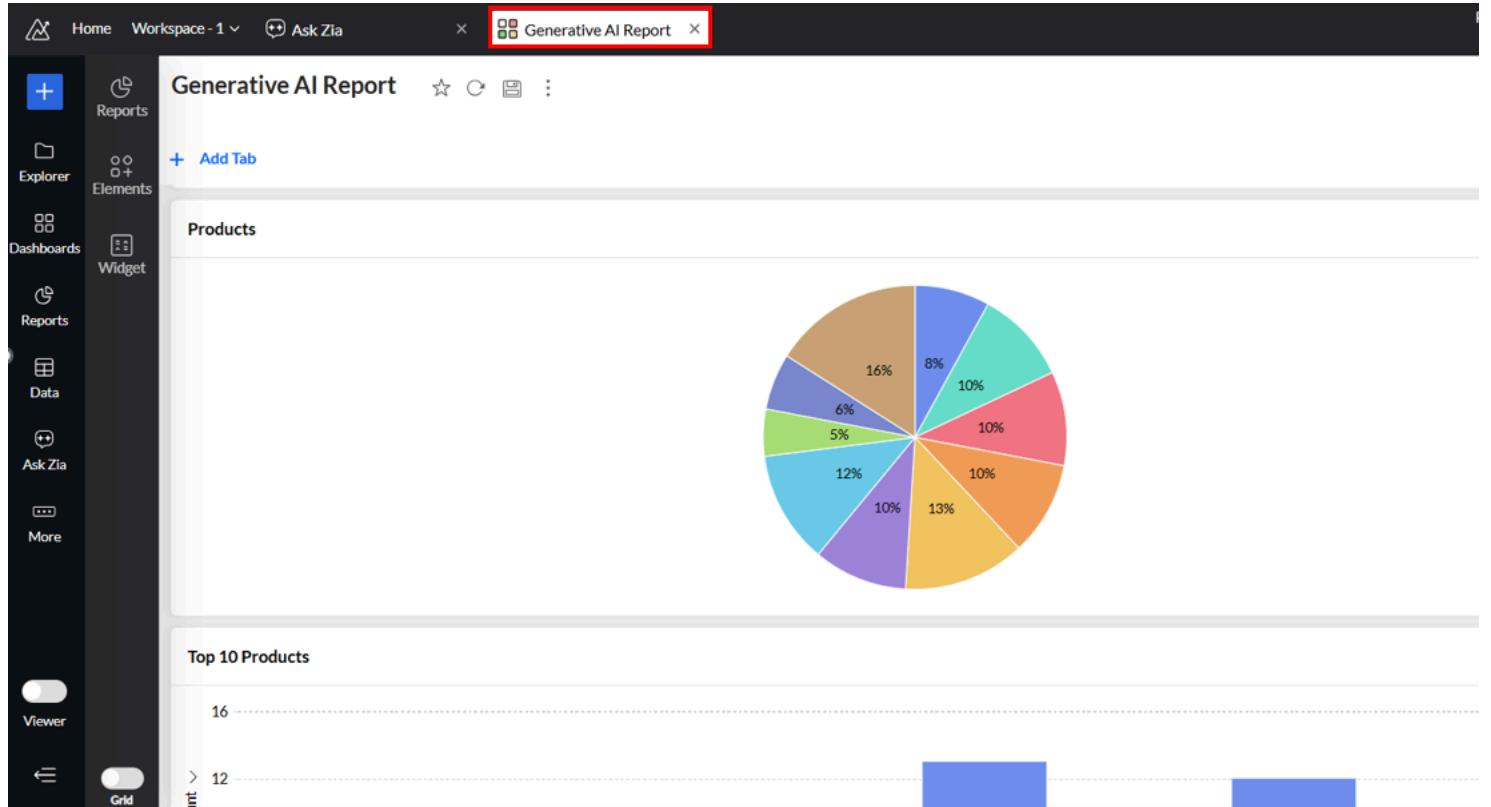
Task 4: Finalizing the charts to be used in the report

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.

The screenshot shows a dashboard titled "Generative AI Report". On the left is a sidebar with icons for Home, Workspace - 1, Ask Zia, Reports, Elements, Dashboards, Widget, Reports, Data, Ask Zia, and More. Below the sidebar are two toggle switches: "Viewer" and "Grid". The main content area has a title "Products" and a pie chart divided into 12 segments with percentages: 16%, 8%, 10%, 10%, 13%, 10%, 12%, 10%, 5%, 6%, 10%, and 12%. Below the pie chart is a section titled "Top 10 Products" with a table:

Rank	Product	Total Quantity Ordered
1	Chair	16
2	Desk	12
3	External Hard Drive	10
4	Headphones	10
5	Keyboard	13
6	Laptop	10
7	Monitor	10
8	Mouse	10
9	Printer	10
10	Tablet	10
	Grand Total:	160

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

The screenshot shows the same dashboard after export. The "Edit Design" button is visible in the top right corner. The "Products" section now contains a table:

Product	Total Quantity Ordered
Chair	16
Desk	12
External Hard Drive	10
Headphones	10
Keyboard	13
Laptop	10
Monitor	10
Mouse	10
Printer	10
Tablet	10
Grand Total:	160

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. On the left, there's a sidebar with icons for Home, Workspace - 1, Ask Zia, Explorer, Dashboards, Reports, Data, Ask Zia, and More. The main area is titled "Generative AI Report". It contains a table with the following data:

	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)

[Pratiksha Verma](#)



Skills Network