

# Getting started in TRUECHART4POWERBI

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This document describes the first steps on how to use TRUECHART for Power BI.

## Prerequisites

It is assumed that TRUECHART is already installed. If not, consult the [TRUECHART Installation Guide](#) to get a detailed explanation of the installation process.

Furthermore, users must be created in order for the TRUECHART visual to communicate with the TRUECHART service. If you need help, consider reading the [TRUECHART Service Guide](#).

The following browsers are supported:

- Google Chrome (85+)
- Microsoft Edge (85+)
- Firefox (80+)

 Notice: **Internet Explorer 11 is not supported!**

## First steps

### Add TRUECHART to your report page

To add TRUECHART to your report, choose TRUECHART from the visualization menu. This will create a new empty TRUECHART visual. Initially, you'll see this page:

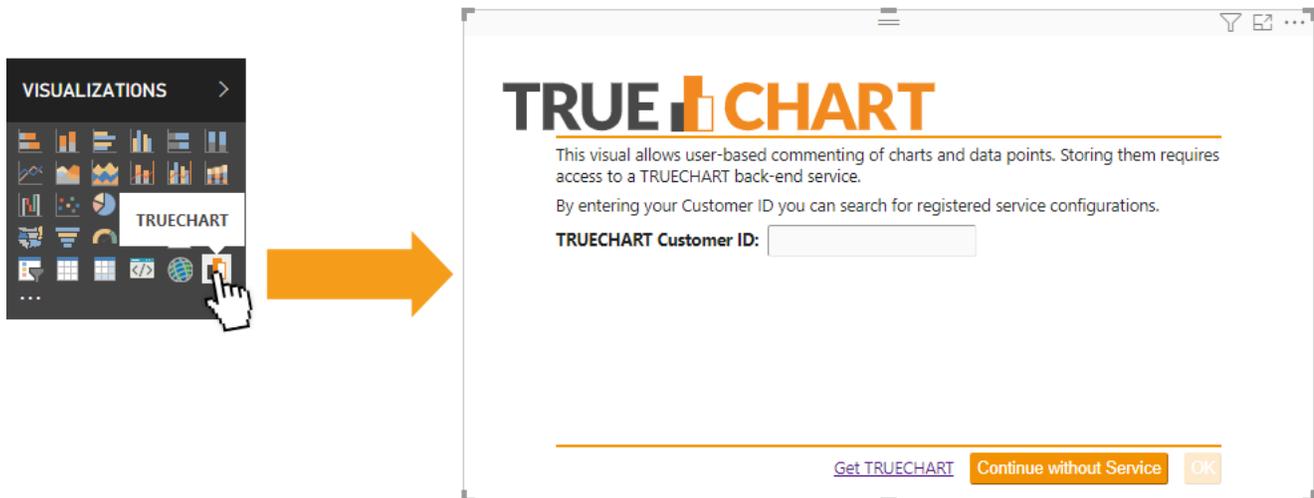
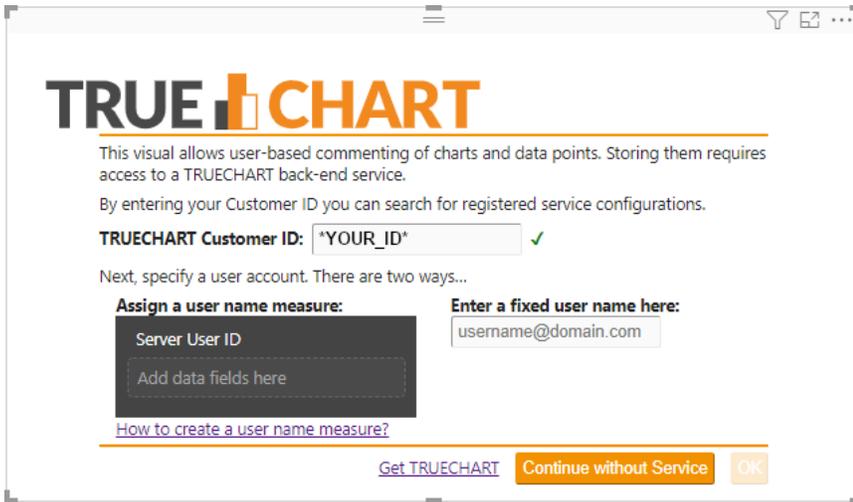


Figure 1. Clicking on the TRUECHART icon will create a new visual on your report.

Here you can decide, if you want to use TRUECHART without the back end for collaboration, by pressing the "Continue without Service" button. Otherwise, you have to enter your Customer ID (given to you by us after you submit your installation details and have a working license entered in the back end). If the Customer ID is valid, you are prompted to specify a user name:

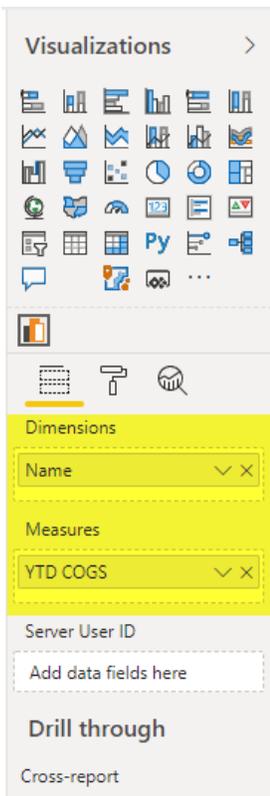


## Applying a user name

In order to support the collaboration functionality, it is needed to specify a static or dynamic user name. Find additional information here: [Setup user binding](#).

## Add data to TRUECHART

Although TRUECHART works without any data connection, you'll probably want to add some data from Power BI's **Fields** pane. For displaying charts, at least one dimension and one measure must be selected.



## Design hint

In order to get a clearer representation of the TRUECHART visualization, it is recommended to select the representation under *View > Actual size*.

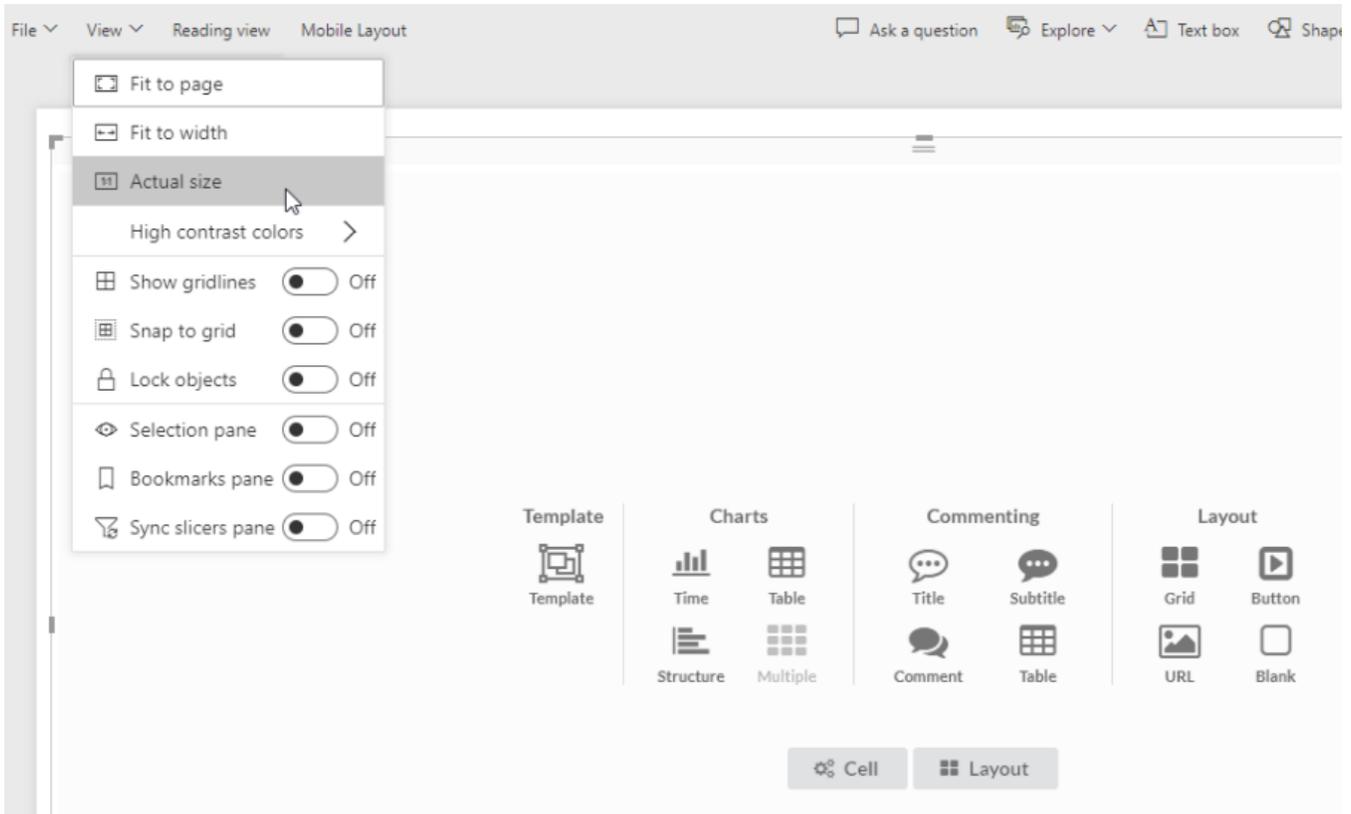


Figure 3. Use actual size view mode

**Known Issue:** At the moment there is a [known issue](#) with PowerBI itself when using the 1:1 Actual size view, where the custom visuals don't get their state updated when switching between reading and editing mode. The PowerBI team is aware of this and hopefully resolves this soon.

### Context Menu

Right clicking on the visualization opens the TRUECHART context menu, which offers multiple options to configure the visualization. Depending on what element is clicked when opening the context menu the entries might be different. The last entry of the context menu opens a separate PowerBI context menu with PowerBI specific options.



### Where to go from here?

Congratulations! You've just created your first TRUECHART visualization and successfully added data to the display. Information about the further configuration of TRUECHART can be found in [the general introduction](#).