Using Balsamiq to Create UI Mockups
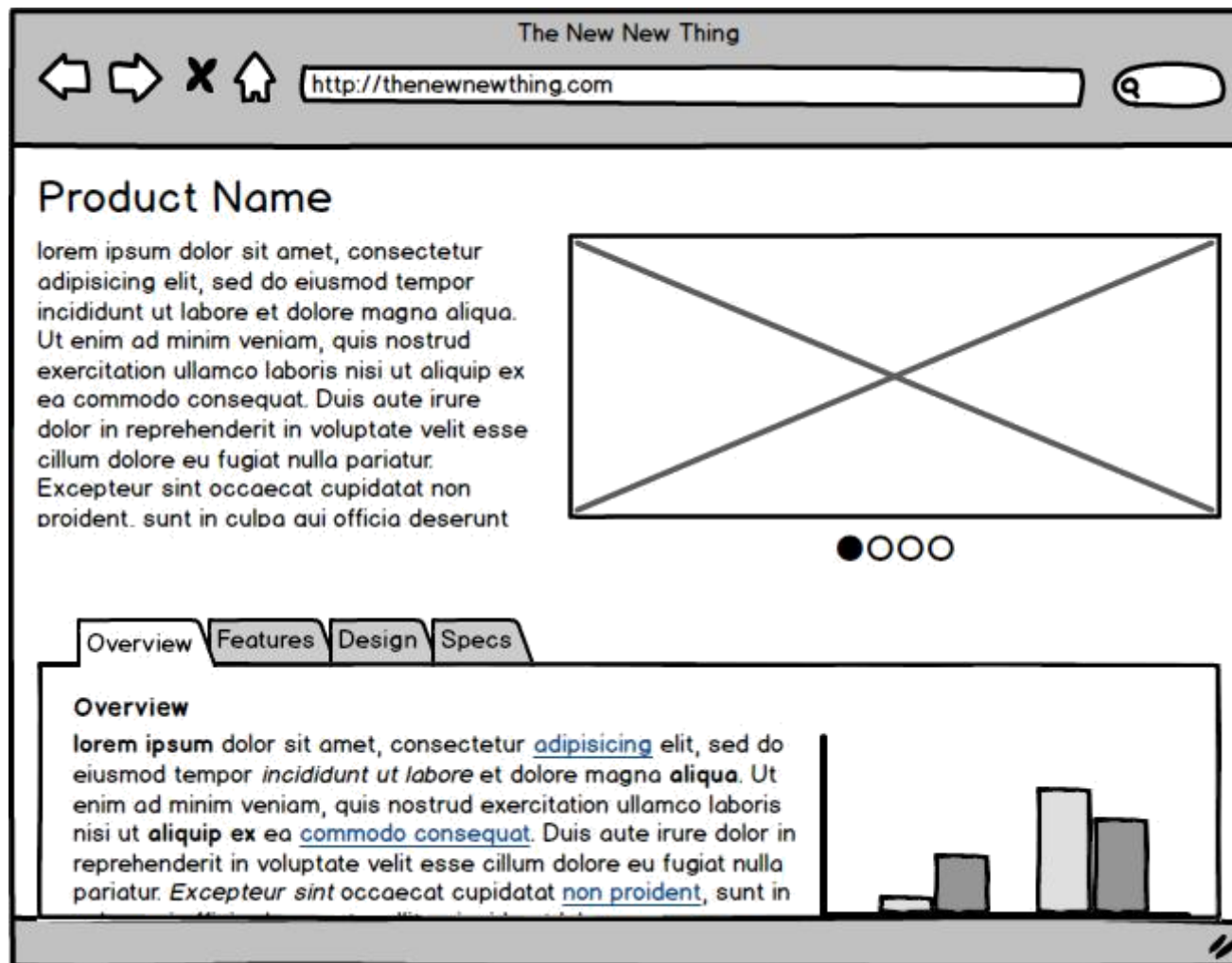
Executive Summary

In software engineering, mockups are commonly used to demonstrate the look, feel, and some of the function of an intended user interface without actually building the software (or the underlying functionality). Mockups play many important roles in the software engineering process. They provide an easy way to communicate what the software will "look" like to the customer. They provide a way for the developers to share a vision for the software and to communicate about what the intended functions are and how they will be accessed. They are also useful for driving the creation of *unit tests*. In this lab, you will use one of many available mockup tools to create a sample mockup.

For more information on other tools you can use for Mockups, click here.

This tutorial is based almost completely on the Creating Your First Mockup tutorial at the balsamiq website.

Introduction to mockups

Here is a snapshot of the mockup you'll make as part of this tutorial:

The New New Thing

http://thenewnewthing.com

Product Name

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Overview | Features | Design | Specs

Overview

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Mockups are also called *wireframes*. As mentioned above, they are very important components of the user interface side of software engineering. If you want more information about what mockups are and how they fit into this design process, balsamiq's UX Apprentice is a good place to start.

Basic Concepts and Terminology

Here are some of the basic components of balsamiq Mockups:

- UI Control - A standard user interface "widget" (e.g., Button, Image, Dialog Window). The building blocks of any Mockup.
- Canvas - The grid-lined area where UI Controls are placed.
- UI Library - A row of UI Controls that can be dragged onto the Canvas.
- Property Inspector - A floating toolbar that contains common actions (e.g., copy, group) and actions that are specific to each UI Control.
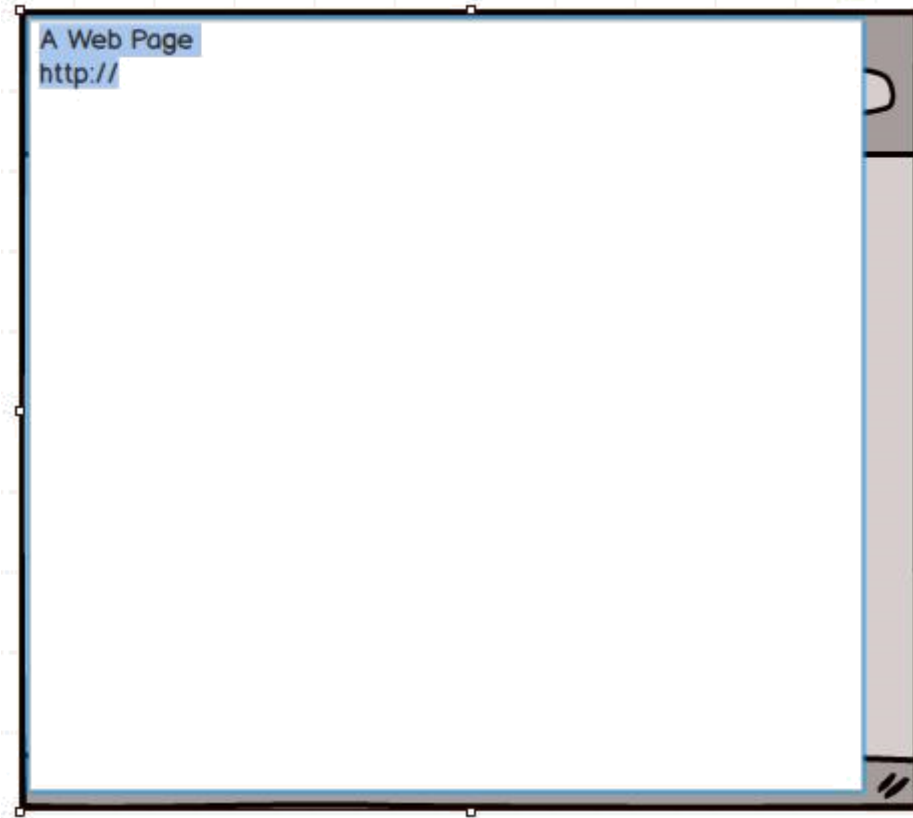
The Mockups Application Overview has more information about the elements and controls in balsamiq mockups.

Adding the First Few Controls

To create the Mockup shown above, begin by dragging the Browser Window UI Control onto the Canvas.

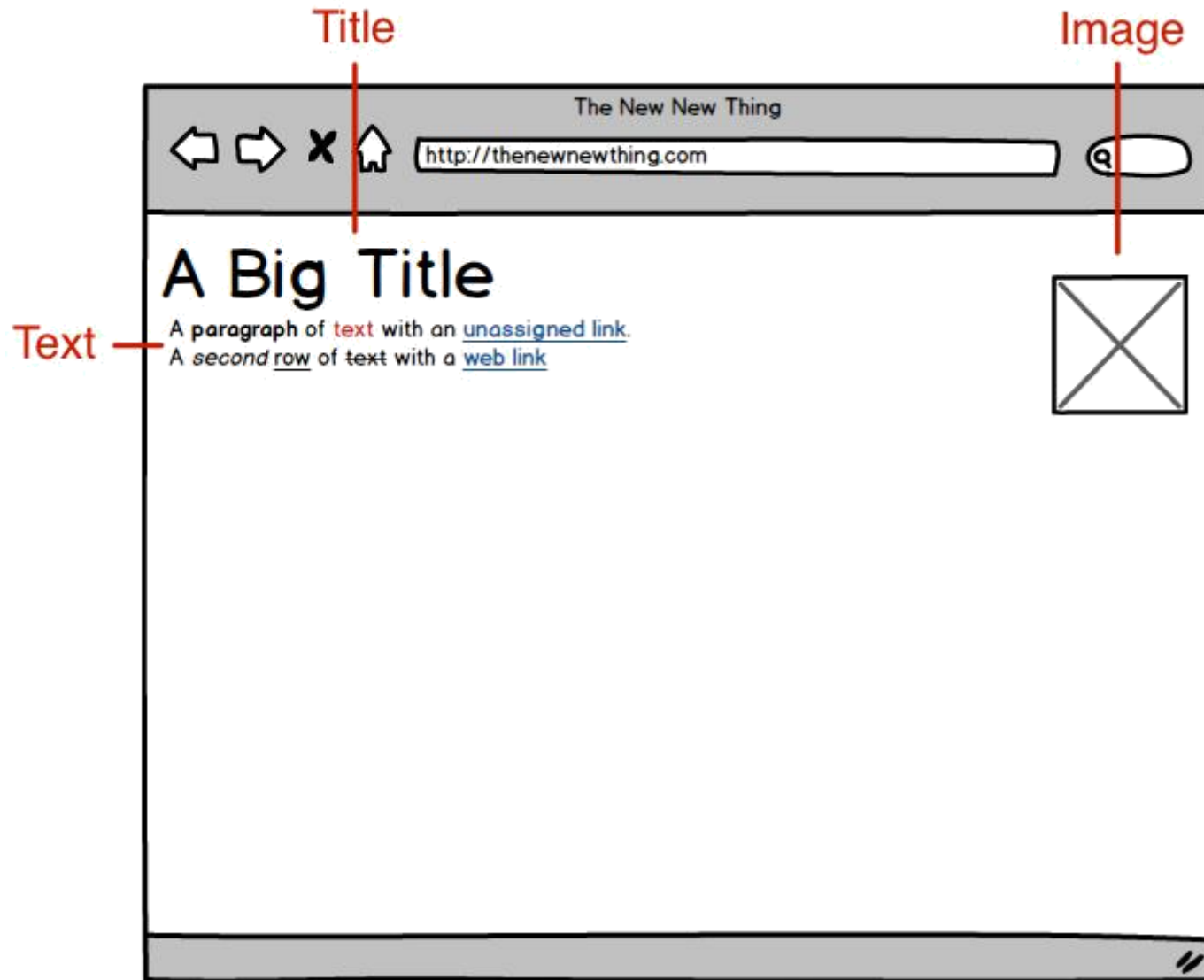Breadcrumbs   Browser   Button   Button Bar   Calendar   Callou

A Web Page

http://
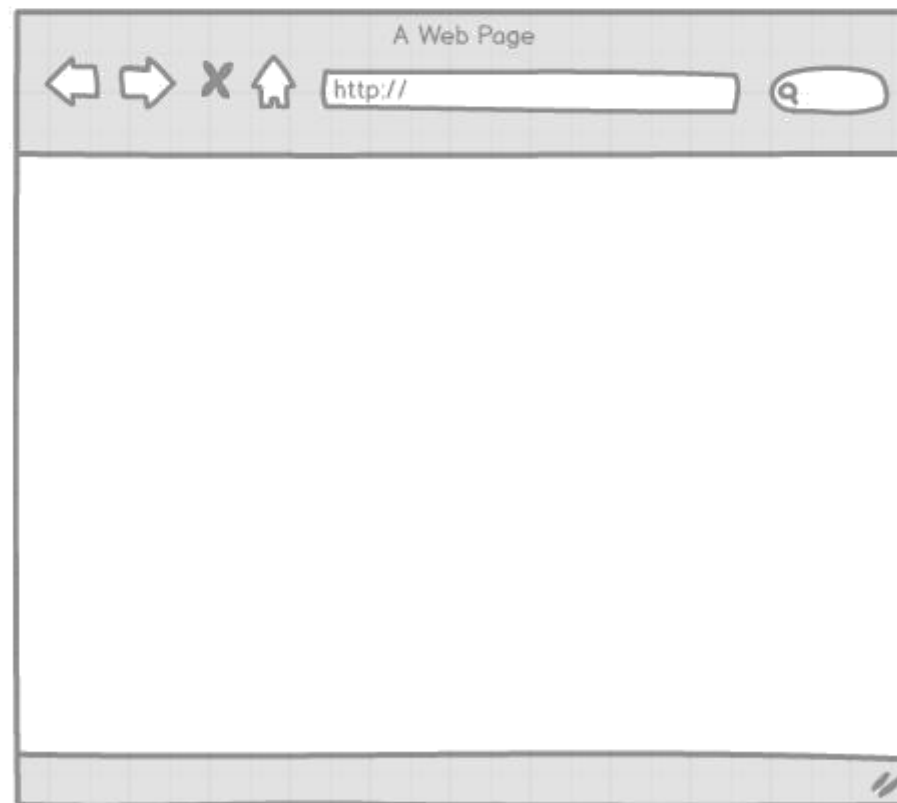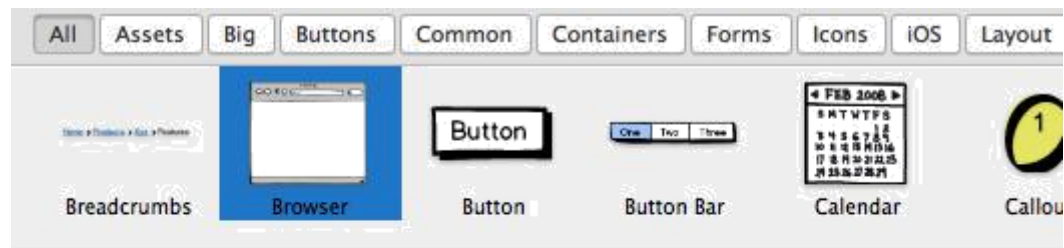
The content of nearly all controls in balsamiq mockups is defined by simple text. When a control is first added to the canvas, it will be shown in edit mode, often with hints about how to use it. For the Browser Window control, you can specify the title bar and URL text, or just use the default. For this tutorial, give your webpage a name and a URL.

Tip: To edit a control at any time, double-click on it, or press Enter when it is selected.
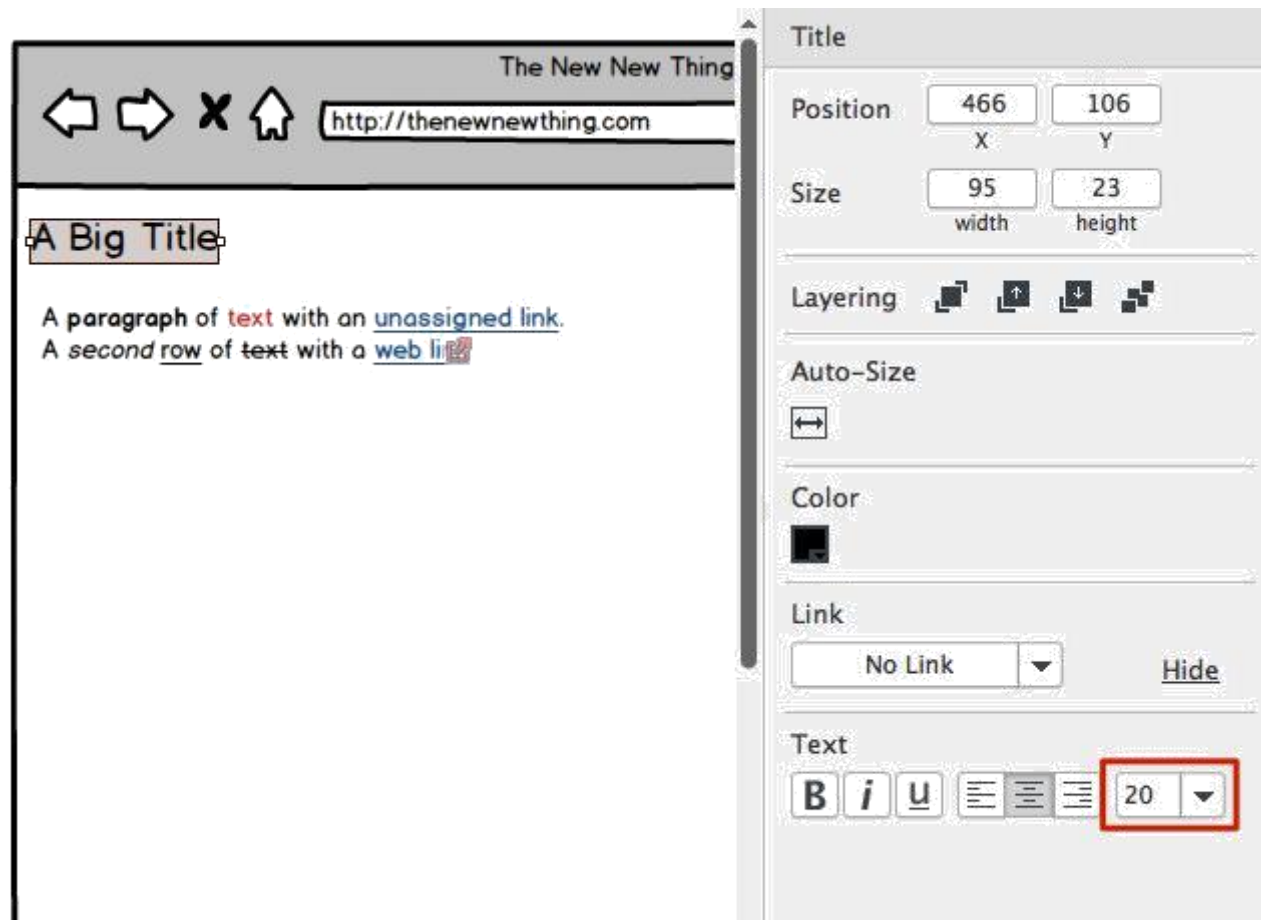
Next, resize the control to the desired size using the resize cursor controls at the edges and corners of the control.

Continue by adding the following controls to the canvas: Title/Headline, Paragraph of Text, and Image as shown below. Note that alignment guides appear just inside the edges of the Browser Window control when you move them toward the edges and that the controls "snap" to these guides.
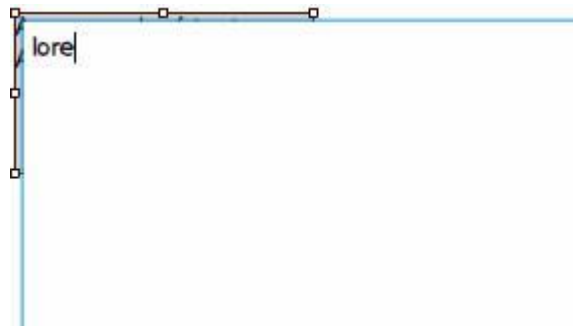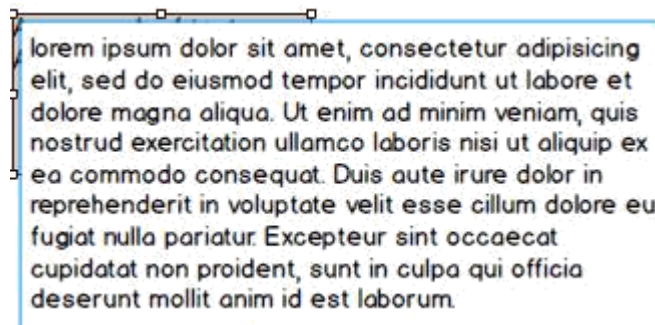
Title

Image

The New New Thing

http://thenewnewthing.com

A Big Title

Text

A paragraph of text with an unassigned link.
A second row of text with a web link

Tip: Controls can also be added using the "Quick Add" box by typing the first few letters of the name of the control and pressing Enter.

To change the size of the text for the product name label, select the Title/Headline control and change the font size using the Property Inspector.

The New New Thing

http://thenewnewthing.com

A Big Title

A paragraph of text with an unassigned link.
A second row of text with a web lin

Title

Position | 466 | 106
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Layering

Auto-Size

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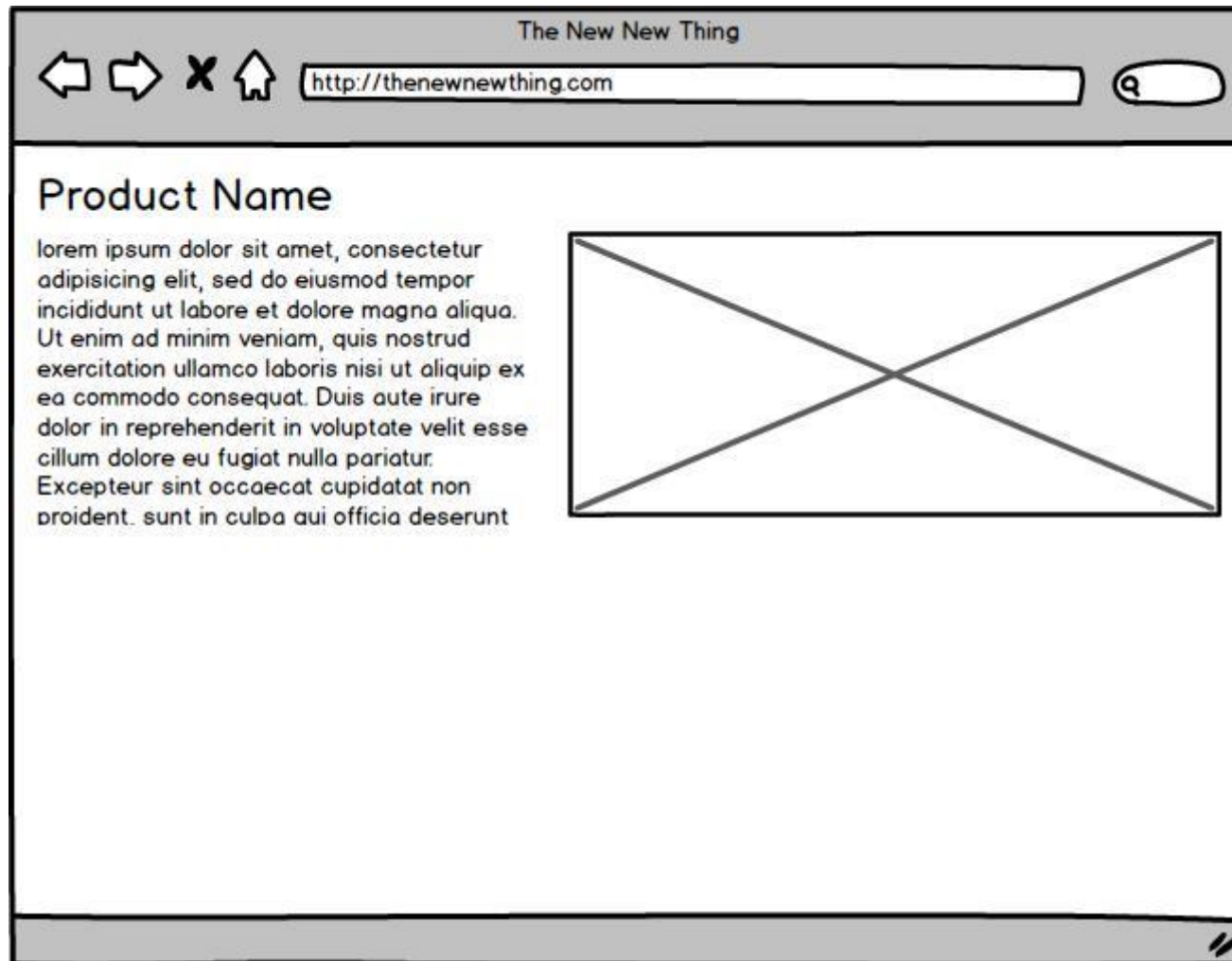
Link

No Link ▼ Hide

Text

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For the product description placeholder text in the Paragraph of Text control, enter your own placeholder text, or begin typing "lorem" and Lorem Ipsum text will automatically be generated.

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After resizing the Image control, your Mockup should look something like this:

The New New Thing

http://thenewnewthing.com

Product Name

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If it doesn't look something like that, make it so. It doesn't have to be exact, but you get the idea. Be sure to use the grid lines to even out the tops, bottoms, and sides of your UI components to keep your UI from looking sloppy.

Tip: If you have trouble selecting a control that is in front of another control, try "locking" the background control to prevent it from being selected.
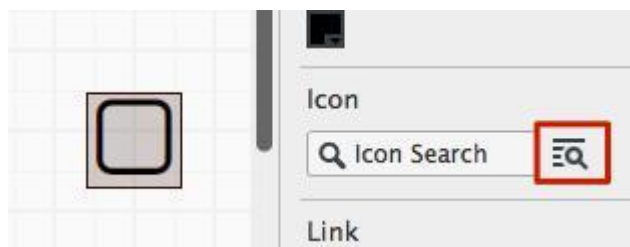

Creating and Aligning the Image Pager Controls
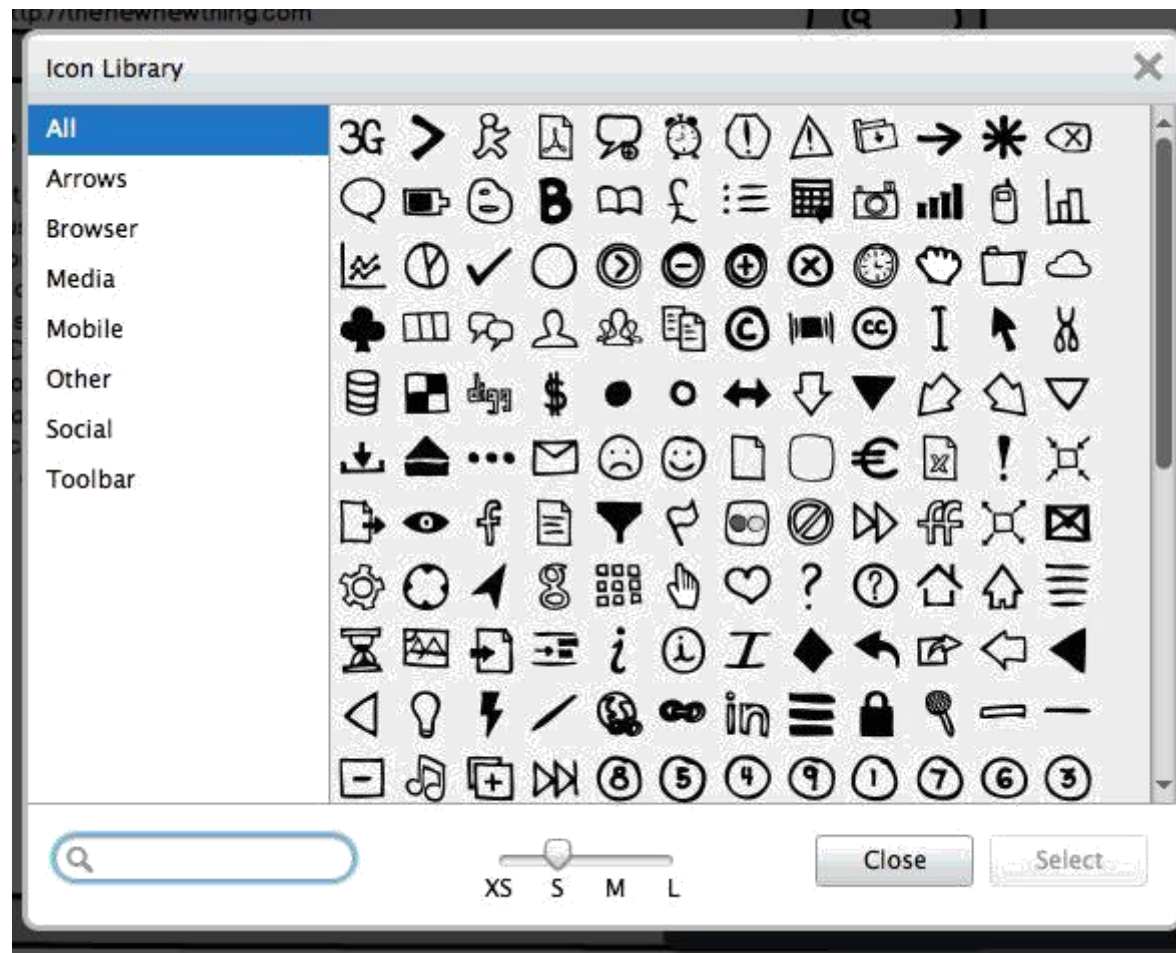
The next step is to add the pager controls beneath the Image control.
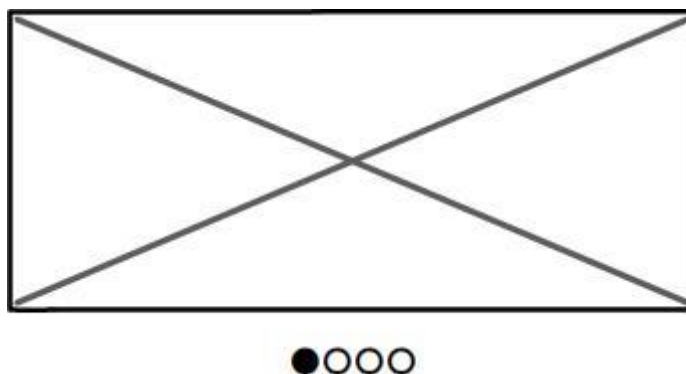
In this part of the tutorial you will learn about adding Icons and Grouping and Aligning controls.

Begin by adding the Icon control to the canvas.

Next, click the arrow inside the "Icon Search" box to open the Icon Library.

This window shows the list of all the icons included with balsamiq mockups. You can filter them by category or search by name. Once you have chosen an icon you can choose from one of four sizes (XS, S, M, L). For this tutorial, select the Little Black Circle icon and set the size to "XS" and click "Select".

Tip: The "Icon Search" box in the Icon Property Inspector behaves like the "Quick Add" box and displays icons matching the text you enter (try typing "arrow", for example). (More about using icons can be found on the Working with Icons page.)
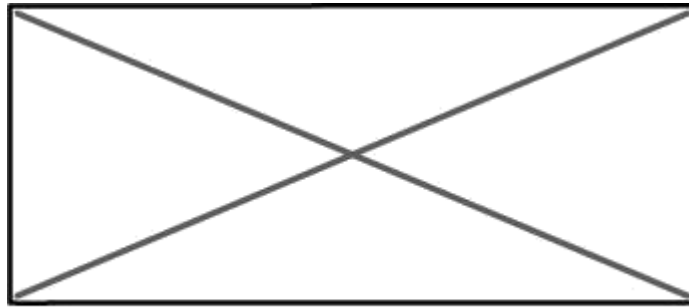
Add three more icons to the right of the Little Black Circle icon (use the Little Circle this time). You can also copy and paste once you've added the second icon. Using your mouse, position the icons next to each other. You can see that alignment guides appear both horizontally and vertically, helping you place them appropriately.
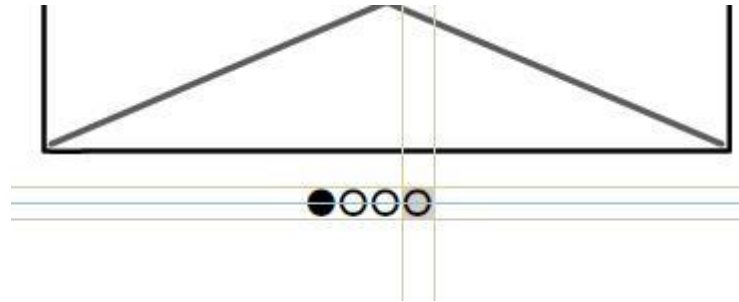
Tip: Use the Duplicate keyboard shortcut (CTRL + D on Windows; CMD + D on Mac) to quickly replicate items on the canvas.

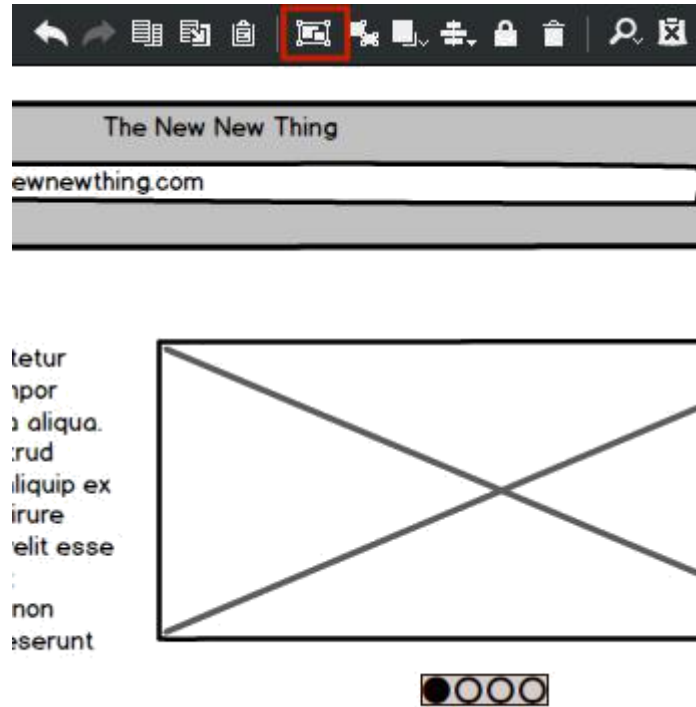Zooming out, your mockup should now look something like this.
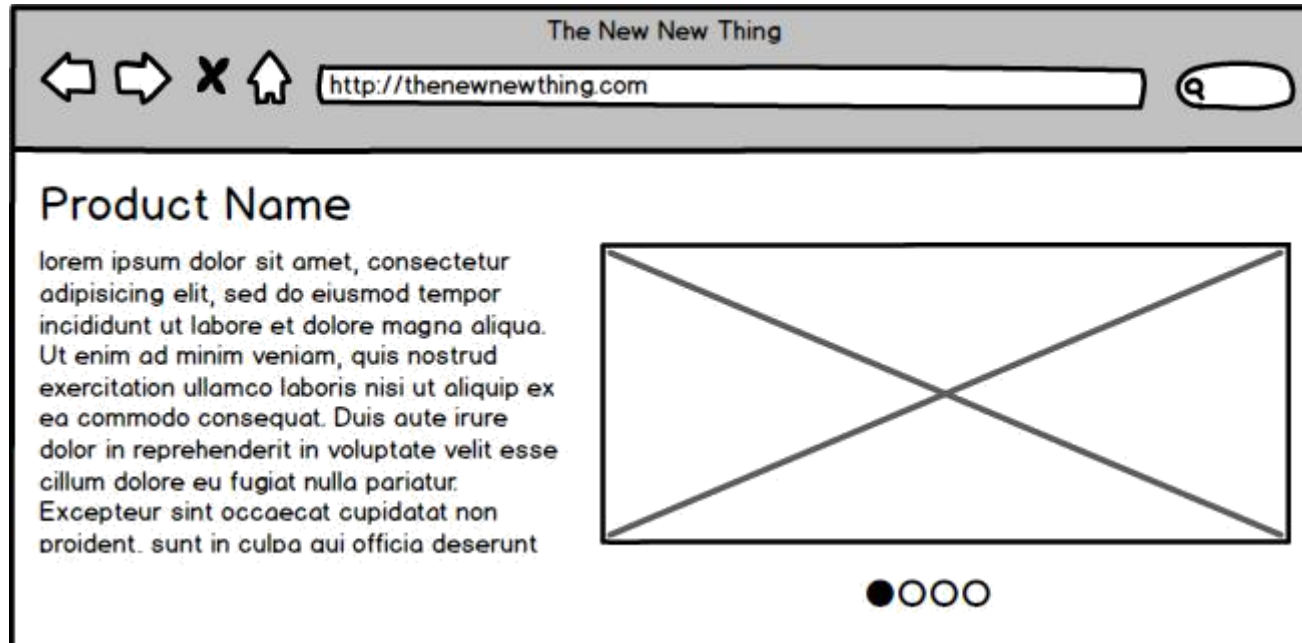
The next step is to center-align the four icons below the Image control. The procedure for doing this is to first group the icons and then align the icon group with the image control.

To group a set of controls, select them by drawing a boundary around them with your cursor or holding down SHIFT and selecting each one with your mouse.

Tip: *When you become annoyed by your inability to do the above because the main web page widget gets in the way, lock the main web page widget as described above.*

Tip: Another way to select only controls that are in the foreground (besides "locking" background controls) is to hold down the ALT/OPTION key while dragging the mouse. This will prevent background controls from being selected.

Next click the Group command in the Property Inspector or press CTRL+G (on Windows; CMD + G on Mac).

The New New Thing

ewnewthing.com

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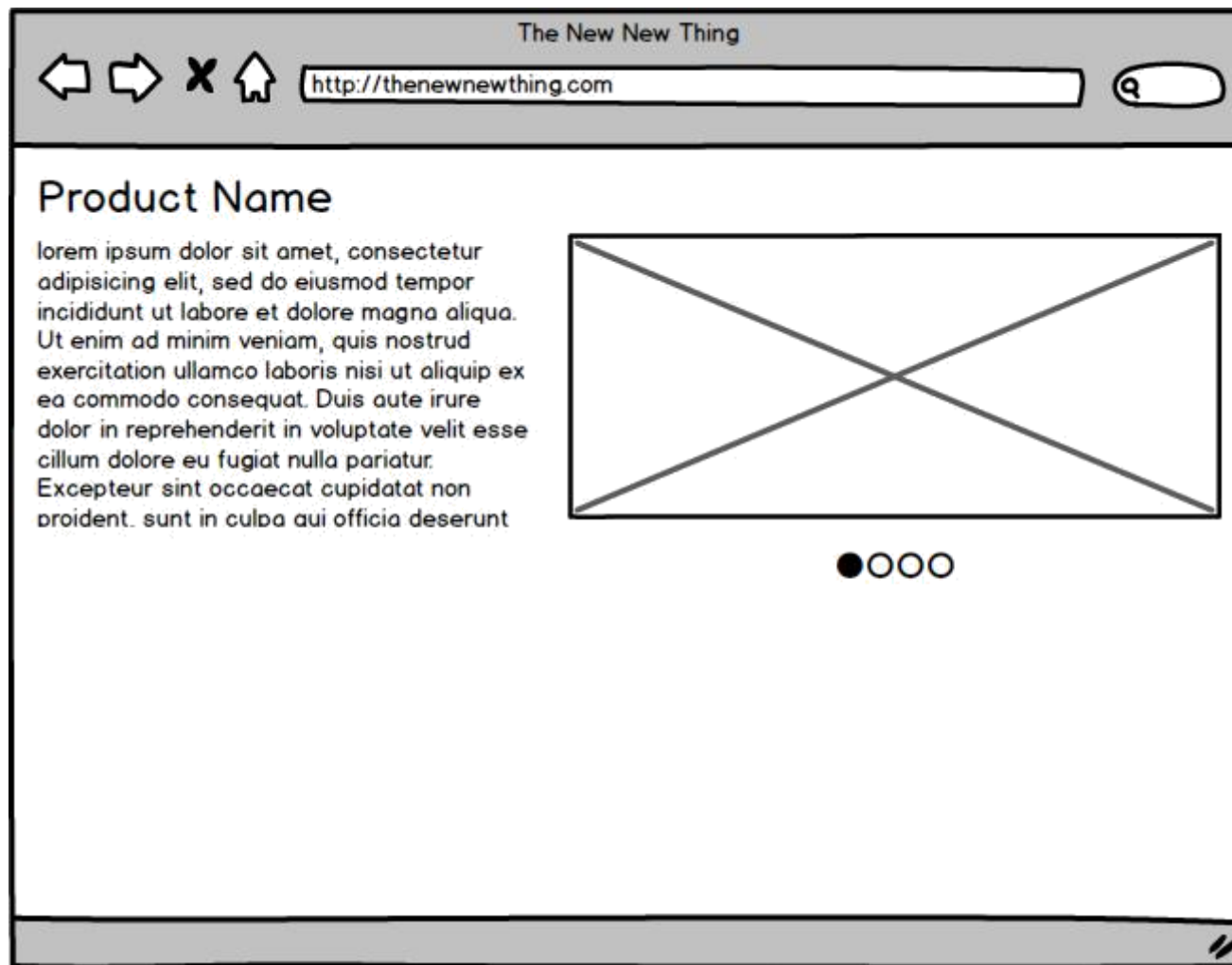:rud
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Grouped controls can be identified by a light purple color and will remain grouped until Ungrouped (shortcut: CTRL/CMD + SHIFT + G). To align the grouped icons with the Image control, select them both and use the Align Center command in the Property Inspector.
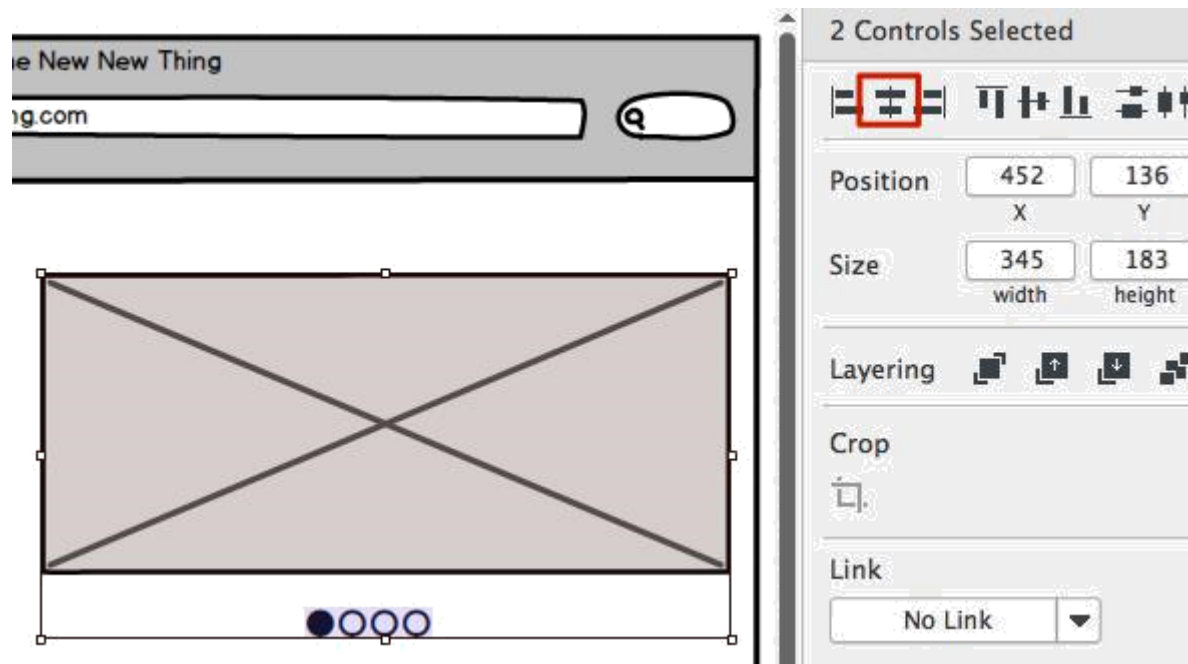
You can move the pager controls closer to the Image control either by using the keyboard arrow keys or by using the mouse and the alignment guides. Get those pager controls close to the bottom of the image and centered on the image.

Tip: Holding down SHIFT while moving controls with the arrow keys will move them 20 pixels at a time (instead of the usual 2 pixels).

The Mockup so far, with the pager controls added.

The New New Thing

http://thenewnewthing.com

Product Name

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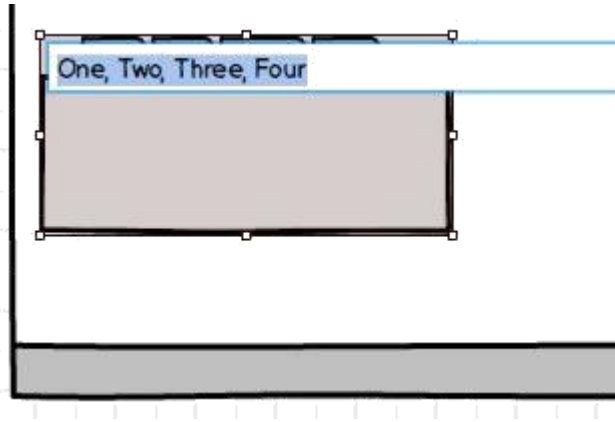
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Completing the Mockup

The remainder of the Mockup consists of a set of tabs, more text, and a chart.

Add a Tabs Bar/Ribbon control and place it in the bottom half of the Mockup.

Tip: If you run out of room in the application window, drag the control to the bottom of the window to enlarge the canvas. A scrollbar will appear so that you can access the entire mockup.

Commas are used to create tabs in this control, so you can create as many tabs as you like simply by entering additional text separated by a comma. Entering the text "Overview, Features, Design, Specs", for example, will create the tabs shown below.
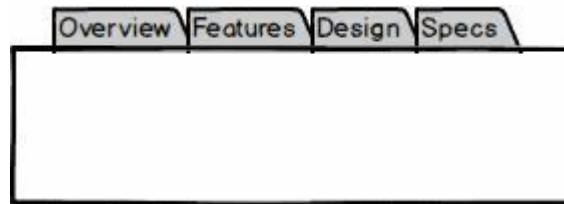
To show the "Overview" tab as selected or highlighted, use the Selection inspector as shown below.
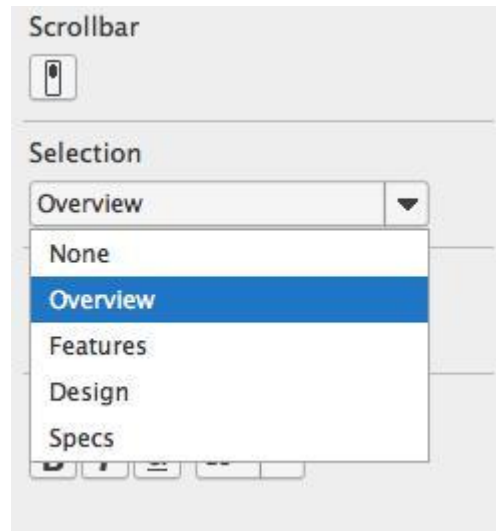
After resizing the Tabs Bar/Ribbon control to match the width of the page, add Label/String of Text and Paragraph of Text controls to create something like this:

The New New Thing

http://thenewnewthing.com

Product Name

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Overview | Features | Design | Specs

Overview

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You can format text as bold, *italic*, or hyperlinked in many controls by enclosing the text with special characters. Use *text* for bold, _text_ for italics, or [text] for hyperlinks.

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Tip: Learn more formatting tips on the Working with Text page.

Finally, drag a Column Chart control into the empty area inside the Tabs Bar as a finishing touch to complete the Mockup.
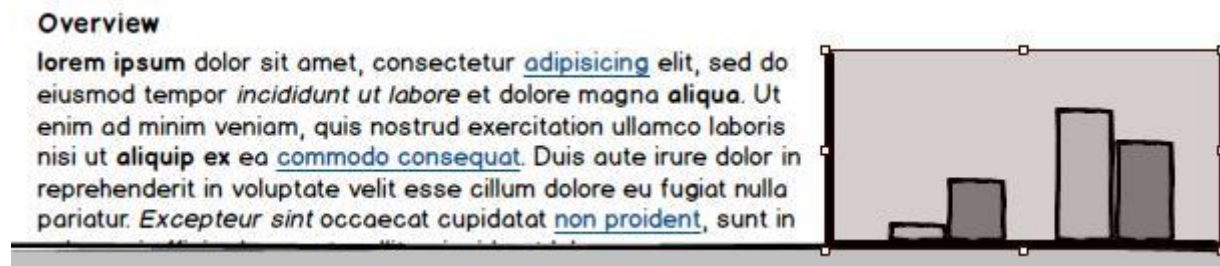
Exporting and Next Steps

Put something personalized in your mockup so they don't all look the same. Your name. Some kind of fancy web page name. We don't care exactly what.

Now that the Mockup is finished, you should remember to save it. This will make sure it persists in our project folder. Close your mockup. (Seriously, save first.) This will take you back to the Tutorial 4 main screen (with all of everyone's mockups). You can always go back in and edit your mockup by selecting it, then selecting "Edit".

Warning: Yes, you can also edit everyone else's mockups, since we're creating these in a public project. Don't. That's not cool.

We're basically done. However, you want to submit something for this tutorial. (This will also be useful in incorporating your mockups into other documents such as reports and presentations.) From the main Tutorial 4 project page, click on your mockup. You'll see a picture of your mockup. Click on "Download Image" (underneath the picture of your mockup). This will get you a .png file. Save that file to your computer.

What to Submit

None