

GOV.UK Service Builder Setup Guide - R5.1

Salesforce GOV.UK Frontend Components Framework



Release 5.1.0

OVERVIEW

The configuration steps described in this document must be completed prior to building your service for it to accurately reflect the GOV.UK Design System.

This guide covers:

- How to install the GOV.UK Service Builder package from the AppExchange
- Org configuration required prior to service build
- Important considerations for users upgrading from a prior package release

At this release, the Salesforce GOV.UK Frontend has been rebranded to the Salesforce GOV.UK Service Builder. During this transition, you may see references to Salesforce GOV.UK Frontend in our application and documentation. While the name is new, the functionality and content remains unchanged.

UPGRADING FROM A PRIOR RELEASE

⚠ If you are upgrading from a release prior to 2, complete the configuration described in the 'Upgrading to R2.x (Theme Layouts)' section of this document. Manual steps relating to the introduction of page Theme Layouts.

⚠ If you are upgrading to release 5, complete the configuration described in the 'Upgrading to R5.x (GOV.UK Brand Refresh)' section of this document. Manual steps relating to the GDS brand refresh header and revised service navigation.

REQUIRED SETUP

Complete all these steps in your target Salesforce Org, prior to building your service.

1. Enable Digital Experiences

Before you install the managed package, Digital Experiences must have been enabled within your Salesforce environment.

To create pages for your external stakeholders to access services Experience Builder must be available within your org, which requires Digital Experiences.

To enable Digital Experiences, within Setup> Feature Settings> Digital Experiences> Settings> select “Enable Digital Experiences” and save.

More details are provided in Salesforce help under [Set Up and Configure Your Org for Experience Cloud Sites](#).

2. Install Managed Package

Install the latest release of the package from the AppExchange (see link in the references section of this document).

If you have installed a prior version of the package, your package will be upgraded while preserving your existing data.

⚠ Also if you are upgrading from a prior release, it is important to review sections ‘Upgrading to R2.x (Theme Layouts)’ and ‘Upgrading to R5.x (GOV.UK Brand Refresh)’ in this document, because manual configuration may be required to utilise new features.

We recommend you assess the package in a sandbox environment prior to installing into production, or try out the package in a free stand-alone developer environment, whichever is appropriate for your organisation.

Several guides, with different levels of detail, are available to guide you through the installation process: [Salesforce Help](#), [Developer Guide](#) and a [Trailhead Unit](#).

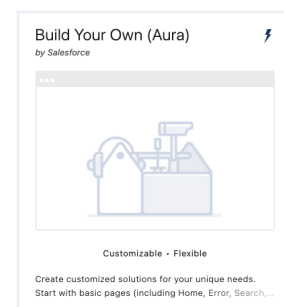
3. Create a new Digital Experience Site

Create a new Experience Site in which to publish your service.

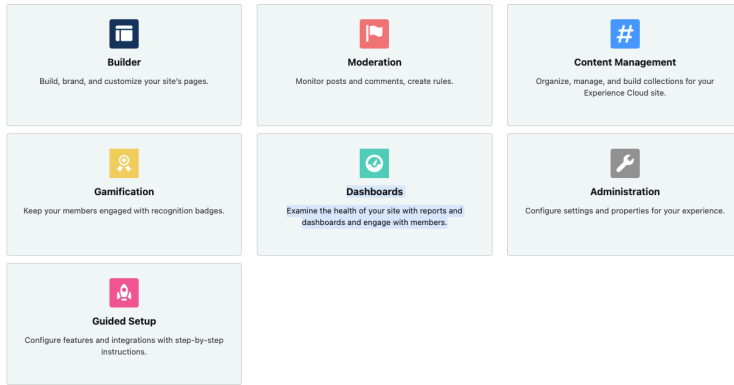
Go to Setup> Feature Settings> Digital Experiences> All Sites and click on the “New” button.

Choose the “Build Your Own (Aura)” template. The package will not function correctly in any other template.

Select “Get started”, enter a name and create your site.



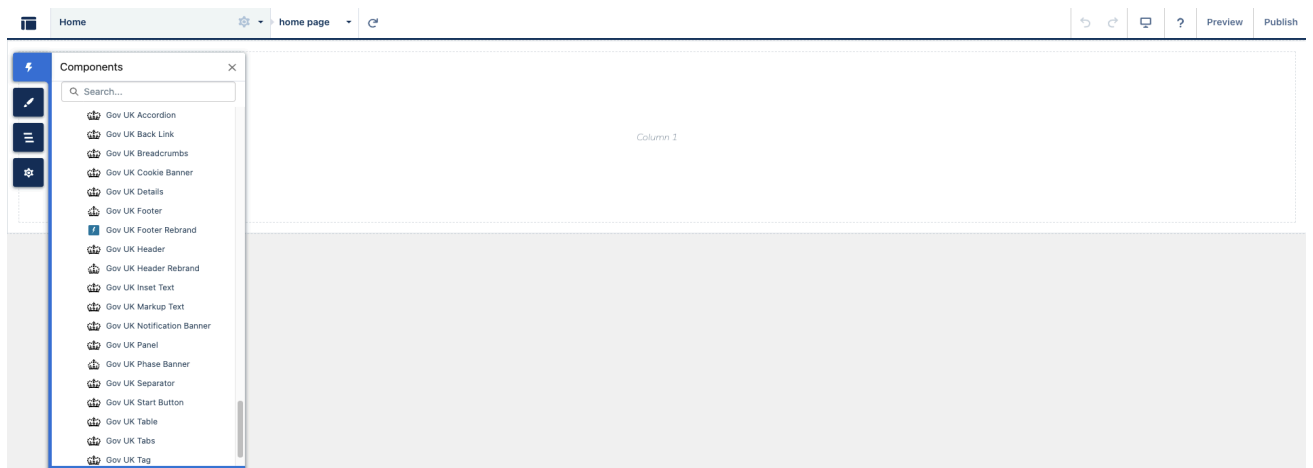
My Workspaces



When processing is complete, the Workspaces area will load.

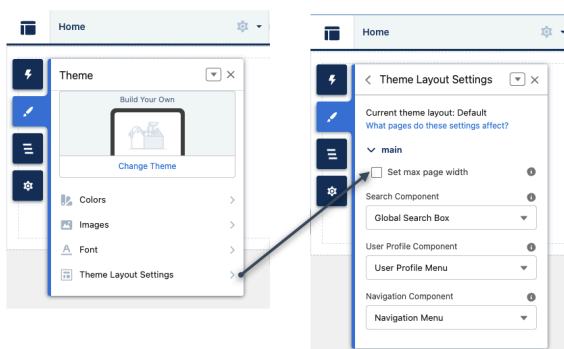
Select the Builder tile.

Experience Builder will be displayed for your newly created site, where you can create pages using the configurable custom GOV UK components.

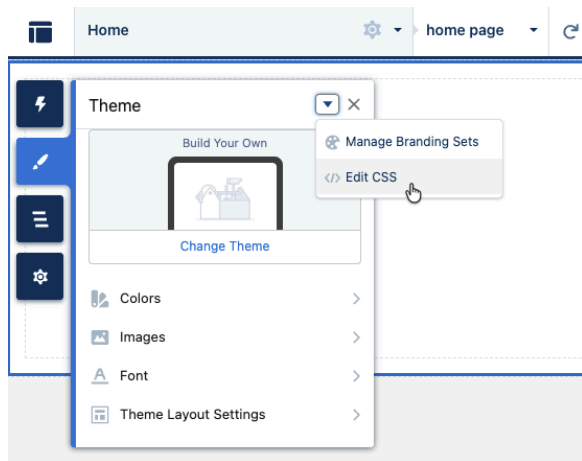


4. Update Site Settings

In the main Experience Builder screen for your new site, update the following settings to establish the underlying page and CSS settings for the GOV.UK Design System in all your site pages.

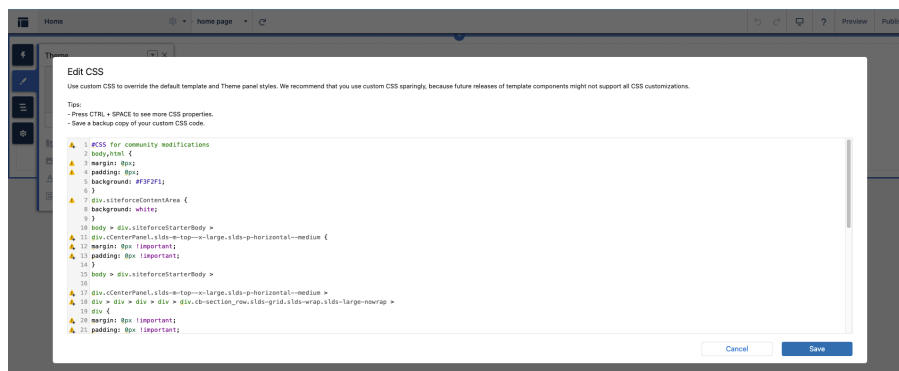


Select Theme > Theme Layout Settings and update the 'Set max page width' to unchecked



Select Theme, then from the drop-down select the “</> Edit CSS” option.

Select ‘Use Overrides’, then copy the CSS code reproduced below and paste it into the Editable Custom CSS field.



Click Save to confirm.

This will override the default styles for all pages in your site.

Custom CSS override code:

```
CSS

#CSS for community modifications
body,html {
margin: 0px;
padding: 0px;
background: #F3F2F1;
}
div.siteforceContentArea {
background: white;
}
body > div.siteforceStarterBody >
div.cCenterPanel.slds-m-top--x-large.slds-p-horizontal--medium {
margin: 0px !important;
padding: 0px !important;
}
body > div.siteforceStarterBody >

div.cCenterPanel.slds-m-top--x-large.slds-p-horizontal--medium >
div > div > div > div >
div.cb-section_row.slds-grid.slds-wrap.slds-large-nowrap >
div {
margin: 0px !important;
padding: 0px !important;
}
```

```

}
body > div.siteforceStarterBody >
div.cCenterPanel.slds-m-top--x-large.slds-p-horizontal--medium >
div > div.slds-col--padded.comm-content-header.comm-layout-column {
margin: 0px !important;
padding: 0px !important;
}
body > div.siteforceStarterBody >
div.cCenterPanel.slds-m-top--x-large.slds-p-horizontal--medium >
div > div.slds-col--padded.comm-content-footer.comm-layout-column {
margin: 0px !important;
padding: 0px !important;
}
.forceCommunityFlowCommunity, .slds-card {
border: none !important;
}
.govuk-link {
font-family: GDS Transport, arial, sans-serif;
-webkit-font-smoothing: antialiased;
-moz-osx-font-smoothing: grayscale;
text-decoration: underline;
text-decoration-thickness: max(1px, 0.0625rem);
text-underline-offset: 0.1578em;
}

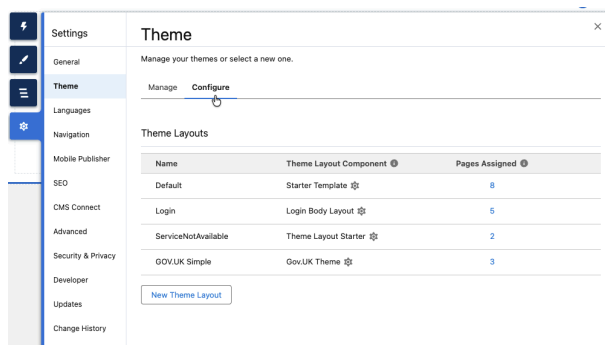
```

5. Apply GOV.UK Theme Layouts

Theme Layouts save administrative effort and to enable skip link functionality by defining ARIA regions on the page. You should typically apply a GOV.UK based Theme Layout to all pages.

In order to apply the GOV.UK Theme Layout to your pages, first create a new custom Theme Layout from the template provided in the package, then assign the custom Theme Layout to your pages.

5.1. Create a new custom Theme Layout



Select Settings > Theme.

Open the Configure tab and click the button to add a New Theme Layout.

Enter a name for your custom Theme Layout and select the GOV.UK Theme from the Theme Layout component drop down options.

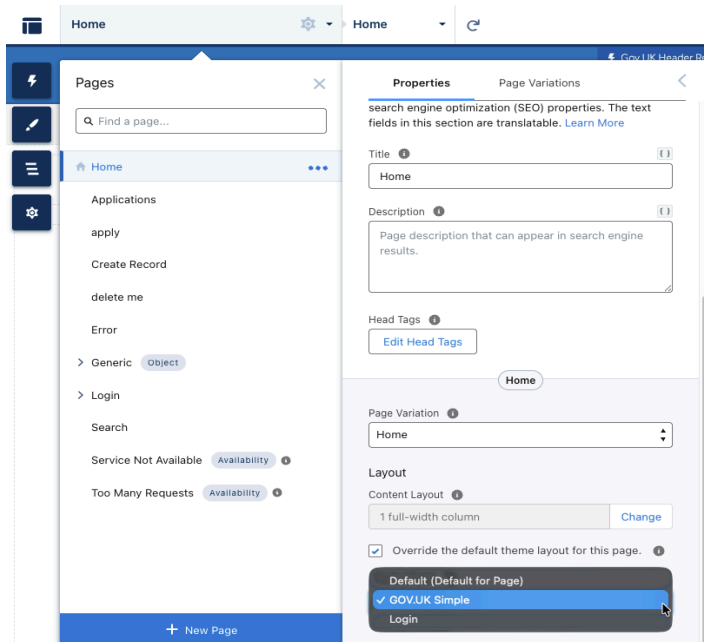
Save your changes.

Components placed within the header and footer regions will become shared. These components, as configured, will appear across all pages using the same Theme Layout, saving significant configuration effort.

By default the GOV.UK Theme Layout has three regions: header, main and footer. You can select the cog wheel icon on your new Theme Layout to edit additional properties. If you select 'Show the Intro Region', your pages will have four regions: header, intro, main and footer. This allows you to place additional banner type content separately below the header.

For example, on your service home page you might place the Gov UK Header and Service Navigation components in the header region to be shared with consistent configuration across all pages with the same theme layout, but place the Gov UK Phase Banner in the intro region to appear on only the home page.

5.2. Assign the custom Theme Layout to a page



From your currently selected page in Experience Builder:

Open the Page Settings (select the cog icon to the right of the page name).

Scroll down to 'Override the default theme layout for this page' and select the checkbox.

Specify your new custom Theme Layout as the override.

The regions defined in the custom theme will now be visible on your page, into which you can drag and drop components.

6. Set Required Permissions

The following sections detail the permissions settings necessary for Experience pages, Flows and considerations for data security.

6.1. Give permissions to run Apex Classes

To support some component features you must give users permission to run the Apex classes listed below. Without access to these, menu items will not render in the service navigation component and users will be unable to upload files using either of the file upload components. Miscellaneous other functions are also supported through the govComponentHelper class, for example support for option API names within radios and select components.

Permissions are required to run the following Apex classes:

- govComponentHelper
- FileUploadHelper
- FileUploadAdvancedHelper

For authenticated users, include these permissions in the user's allocated community profile.

- Go to Setup> Users> Profiles and select the relevant community profile (for example, Customer Community User)
- Click into Apex Class Access and add the required Apex classes into the Enabled Apex Classes column
- Save

For unauthenticated users, include these permissions in the community guest user profile.

- Access the community Guest User Profile from the link made available at the foot of the General tab under Settings in Experience Builder
- Click into Apex Class Access and add the required Apex classes into the Enabled Apex Classes column
- Save

6.2. Set required permissions for Flows

To allow external users to run flows, granular Flow permissions are required, i.e. to allow external user access you need to grant individual access to each flow that you want them to be able to run.

Access permissions must first be restricted on the flow itself, then access permission granted. The steps to grant access differ for authenticated or guest (unauthenticated) users.

To allow guest or external users to run any flow, you must override the flow permission to grant access only to specific external user profiles, permission sets, or site guest user profiles. To do this:

- Go to Setup> Process Automation> Flows
- Locate the flow to update and, from the actions dropdown next to the flow, select Edit Access.
- Select the check box “Override default behavior and restrict access to enabled profiles or permission sets”.
 - Note that you will see a list of available profiles at this stage, allowing you to enable access to this flow for authenticated user profiles*. This is not possible for guest users, as the guest user profile is not available here.
- Save.

* You can also grant access for authenticated users via the Flow Access link in either Profile or Permission Set definitions within setup. For example, go to Setup> Profiles, choose the profile associated with your target users and click into Flow Access, then use the Edit button and specify the Enabled Flows you want to grant access to.

To grant access to a flow for guest users (i.e. unauthenticated external access):

- Navigate to Experience Builder and go to Settings.
- On the General tab, select the Guest User profile.
- Under Enabled Flow Access, click Edit.
- Choose flows from the Available Flows column and add them to the Enabled Flows column.
- Save.

More information on how to enable Flows for guest users in your site is available in this [help page](#).

6.3. Set required permissions for Data security

You will need to implement additional permissions to ensure your target service users can securely access the appropriate Salesforce assets, for example by providing update permissions to an object or specific fields defined in your Salesforce environment, to which you intend to save data captured from an online form.

We recommend you review this help article [Secure your Experience Cloud Site](#) to maintain the security of your site while providing the access you require. This article

also covers the various settings and permissions required to protect your data when you publicly share the site with guest users.

7. Configure Languages (optional)

Some components utilise Custom Labels to support multiple languages. Details are provided in the user guide for each component.

If you wish to support additional languages, the Translation Workbench must be enabled in Setup> User Interface> Translation Workbench> Translation Workbench Settings.

Once enabled, users with the Manage Translations permission assigned can add translations for the provided Custom Labels in Setup> User Interface>Custom Labels.

You can view all Custom Labels provided in the package by filtering on category UXGOV within the Custom Labels page in setup.

8. Upgrading to R2.x (Theme Layouts)

 For users upgrading from R1.x to R2.x all pages on which the header and/or footer components are used must be reviewed and updated by applying a GOV.UK based Theme Layout.

Theme Layouts were introduced at Release 2, improving efficiency by allowing header and footer settings to be shared across multiple pages utilising the same Theme Layout, saving administrative configuration effort.

Theme Layouts also allowed us to introduce Skip Link functionality, by standardising the ARIA tags applied to define page regions.

Prior to release 2, the header and footer components continued integral HTML tags to mark them as 'banner' and 'contentinfo' ARIA regions respectively, as required by WCAG accessibility standards. To support SkipLink functionality at R2 inbuilt region tags have been removed from these components and are now specified on the page itself by applying a Theme Layout.

It is therefore important for upgrading users to review all pages on which the header and/or footer components are used and update them by applying a GOV.UK based Theme Layout. Failure to do this will result in pages missing ARIA header and footer region markers required for accessibility.

For setup details refer to the section 'Apply GOV.UK Theme Layouts' in this document.

9. Upgrading to R5.x (GOV.UK Brand Refresh)

To support the GDS GOV.UK brand refresh, which changed the look and feel, the following components were updated:

- GOV UK Footer
- GOV UK Cookier Banner
- GOV UK Phase banner

Upgrading to the latest managed package release will update these components automatically and no configuration changes should be necessary.

Because the GDS brand refresh removed navigation from the header into a separate navigation element, it was necessary to supersede the existing header component with a new rebranded component and introduce a new separate service navigation component. Therefore to adopt the refreshed brand look and feel you will need to install the updated package and also:

1. Remove the GOV UK Header component from relevant pages in your services and replace it with the new GOV UK Header Rebrand component.
2. Add the new GOV UK Service Navigation component, configured with navigation elements and/ or your service name, depending on your requirements.

Refer to the User Guide for details on configuration of the new components.

REFERENCES

AppExchange Listing

The latest release of the GOV.UK Service Builder package is available free of charge from the AppExchange. The AppExchange listing also provides links to relevant documentation in the Resources & Documentation section under the Details tab.

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000HikNdUAL&tab=d>

Setup Guide (this document)

In order for your service to accurately reflect the GOV.UK Design System, it is important that you follow all the required steps listed in the Setup Guide to configure your Salesforce environment before commencing your service build. Additional steps may be required if you are updating from a prior release.

User Guide

The online User Guide explains how to configure the framework components to build services rapidly, without code. It is important to follow the guide to accurately reflect both GDS and WCAG standards in your service.

<https://designsystemcatalogue.my.site.com/components/s/>