



Microsoft Vista and Office 2007 Compatibility for PureEdge

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Vista Compatibility Issue

Background

- Vista is a new operating system from Microsoft; it was released on Jan. 30, 2007.
- Vista includes significant changes from the last consumer operating system Windows XP.
- Application compatibility with Vista is a major problem across all Windows applications. Just because an application runs correctly on Windows XP is no guarantee that it will work well on Windows Vista.
- Grants.gov uses Adobe Reader and PureEdge Viewer, both free products to allow applicant community to complete Grants.gov forms.
- The currently supported version of PureEdge Viewer with Grants.gov forms is 6.0.2.
- There are certain versions of Adobe Reader software that are compatible with Grants.gov. To view the compatible versions of Adobe Reader visit: http://www.grants.gov/help/download_software.jsp#adobe811
- Grants.gov is migrating to the use of Adobe Reader for completing forms. PureEdge Viewer will continue to be supported in the short-term.

Why does Grants.gov have limited compatibility with Vista?

- PureEdge Viewer products predate release of Windows Vista.
- PureEdge Viewer v.6.0.2 is only compatible with Vista when using a Citrix server connection.

Citrix Client Start-up Guide for Vista:

<http://www.grants.gov/assets/peclientcitrixvistafinal.pdf>

Click below for more information on Citrix v.1.1:

<http://support.citrix.com/kb/entry.jspa?externalID=CTX113672>

To download Citrix v.1.1:

<http://www.citrix.com/English/SS/downloads/downloads.asp?dID=2755>

For a complete list of system requirements for these products, please visit our website: http://www.grants.gov/help/download_software.jsp

- Grants.gov requires the compatible version of Adobe Reader software which is officially supported by Adobe for use with Vista.

For more information on Grants.gov's compatible version of Adobe Reader, visit:

http://www.grants.gov/help/download_software.jsp#adobe811

When will Grants.gov be fully compatible with Vista?

- IBM has not indicated any plans to update PureEdge Viewer 6.0.2 in a way that will be compatible with Grants.gov PureEdge-based forms.
- Grants.gov is now fully compatible with Vista when using the compatible version of Adobe Reader: http://www.grants.gov/help/download_software.jsp#adobe811

What can Vista users do if they wish to submit a PureEdge application package?

Vista users who wish to submit a PureEdge application package have two options:

1. Use an operating system other than Vista. They have a choice of Windows XP, Windows 2000, Windows Me, Windows 98, Apple Mac OS X or Linux.
2. Grants.gov has setup an alternate solution called Citrix. With this solution, users may download and install a small application from our website called Citrix client for Vista, and follow the instructions. It will allow them to complete and submit a grant application of their choice even if they run Windows Vista on their own desktop computer. Please see http://www.grants.gov/help/download_software.jsp#citrixnonwindow for more details. Please note, the Citrix solution works equally well for Mac and other non-Windows users as well as those using Windows Vista.

Office 2007 Compatibility Issue

Background

- Microsoft recently released a new version of their Office suite of products called Office 2007. It uses a new format for saving documents which end in file extensions DOCX (Word 2007), XLSX (Excel 2007), and PPTX (PowerPoint 2007).

Is Grants.gov compatible with Office 2007 documents?

- If you are submitting an application with PureEdge you must save the files as .doc, .ppt, .xls as they are saved in versions prior to Office 2007 (such as Office 97, Office 2000, Office 2003 etc.)
- The default file formats used by Office 2007 are incompatible with PureEdge packages. The standard form schemas in PureEdge, used by Grants.gov do not accept the file type introduced by Office 2007. This causes processing exception errors if the grant opportunity is based on PureEdge forms. The PureEdge application form schemas were designed in consultation with all grant-making agencies over the past 4 years and predate release of Microsoft Office 2007. We are working with the agencies to understand and minimize the impact of making a system-wide change in the schema in order to resolve this issue.
- Yes, Grants.gov is compatible with Office 2007 documents **only** while submitting packages using the compatible version of Adobe Reader software: http://www.grants.gov/help/download_software.jsp#adobe811

What happens if an application gets ‘stuck’ in a queue?

- Any PureEdge grant application package with attachments in the new Office 2007 format will become “stuck” in processing, and users will not receive the usual notification that Grants.gov has successfully validated their application.
- Grants.gov follows the following process for working with stuck submissions:
 1. The Systems Integrator continuously monitors the processing queues for stuck submissions.
 2. A report is prepared twice a day that lists any submissions stuck in the processing queues.
 3. The Grants.gov Contact Center staff sends an email to all affected applicants with instructions on how to resubmit their applications.
 4. If a resubmission fails, the Grants.gov Contact Center proactively calls the applicant to walk them through the resubmission process.
- This is not an issue with the compatible versions of Adobe Reader application packages, which are compatible with Office 2007.

For more information on Grants.gov compatible versions of Adobe Reader, visit:
http://www.grants.gov/help/download_software.jsp#adobe811

What can the users do if they need to attach Office 2007 attachments?

- The workaround to this issue is documented on the Grants.gov website. The users can use the *File-Save As* option from Word 2007, Excel 2007 or PowerPoint 2007 *File* menu and save their file in Office 2003 compatible format before attaching it to their grant application.
- As highlighted in Figure 1, users should select the Word 97-2003 option to save a Word document in Word 2007 to ensure Grants.gov compatibility. Excel 2007 and PowerPoint 2007 workarounds are similar.
- As shown in Figure 2, users can optionally change the default format for saving files in their program preferences so all future saves of their documents are done in Office 2003 or previous formats which are fully compatible with Grants.gov PureEdge applications.
- This is not an issue with compatible versions of Adobe Reader application packages, which are compatible with Office 2007.

For more information on Grants.gov compatible versions of Adobe Reader, visit:
http://www.grants.gov/help/download_software.jsp#adobe811

Figure 1 - How to save files in Word 2007 for Grants.gov compatibility

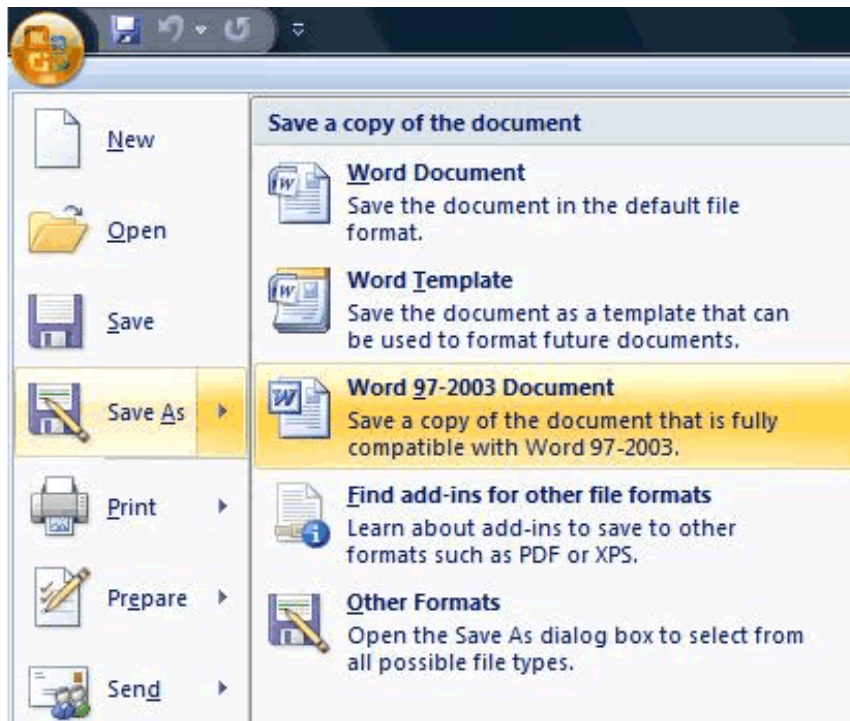
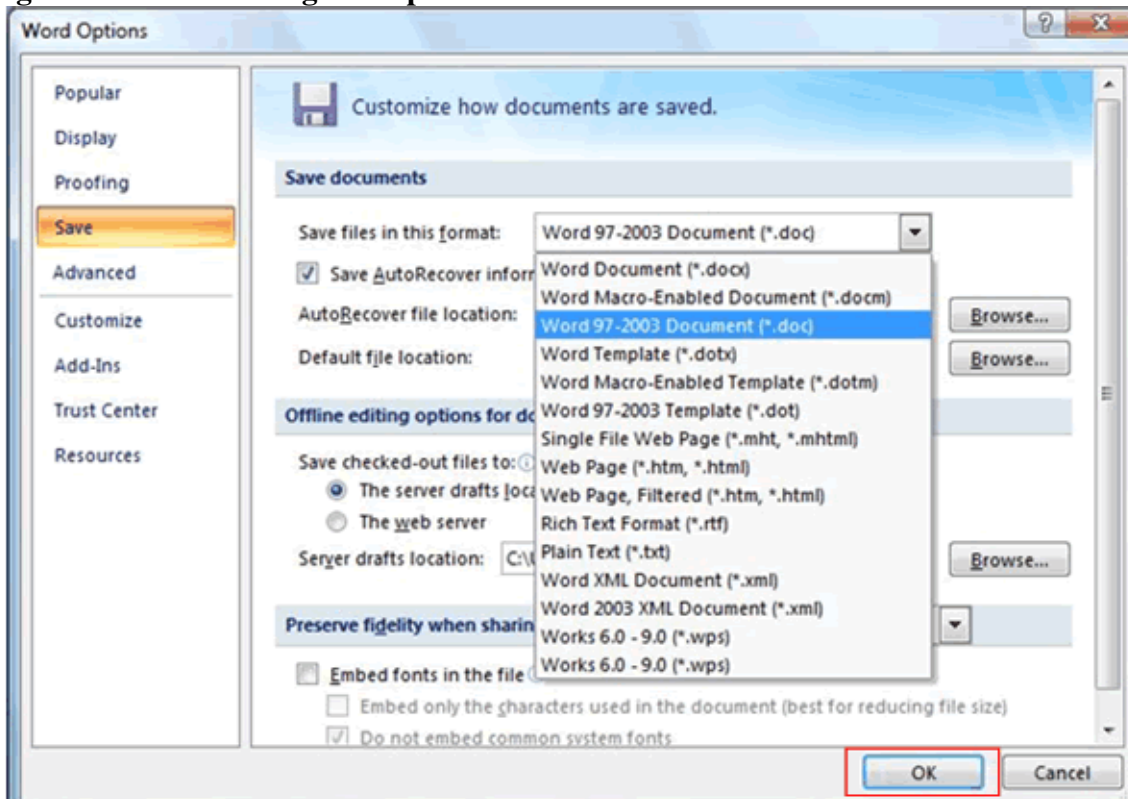


Figure 2 - How to change save preferences in Word 2007



Grants.gov Microsoft Vista and Office 2007 Compatibility

- Grants.gov Contact Center (800-518-4726 or support@grants.gov) can provide detailed instructions to assist applicants.
- Please note that agencies may have their own requirements for list of acceptable file formats in a submission. Applicants are advised to read agency instructions carefully to ensure their applications can be successfully processed by agency systems.
- Please visit http://www07.grants.gov/help/general_faqs.jsp#software for a detailed Frequently Asked Questions (FAQ) on this and related topics. These questions and answers were prepared by Grants.gov in consultation with agencies to ensure applicants receive accurate information about the submission process.

Table 1 - Summary

System	Compatibility with Microsoft Vista	Compatibility with Microsoft Office 2007	Full compatibility planned in the future?	Comments
PureEdge forms (.XFD, .PDF)	Requires use of Citrix server connection	Requires applicant to save files in a compatible format	No, Please use workarounds described in this document	Grants.gov is phasing out PureEdge forms. Until completed, please use the workarounds described in this document.
Adobe Reader forms (.PDF only)	Yes, completely compatible	Yes, completely compatible	Yes, established	Grants.gov has full compatibility with all the operating systems described in this document while using a compatible version of Adobe Reader.