

Downloads in Microsoft Edge – WINNIE Online Training Module

MARCH 2023

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. This is an overview of the documents found in the Participant Menu that download when using the Microsoft Edge browser and how to manage downloaded files.

Date 1

All dates in the first sections of this module are based on today's date being March 31, 2023.

Microsoft Edge 1

For the following information, please note that browser features and pages may change between when this module was developed and when it is viewed.

Click the Continue button.

Settings 1

Before we begin looking at documents, let's take a moment to ensure our browser Download settings are correct.

Click the horizontal ellipses icon.

Settings 2

Select Settings.

Settings 3

Select Downloads.

Settings 4

We need to verify these two things:

First, the Location is the Downloads folder.

If it isn't, we will need to click the Change button...

...and select Downloads.

Click the button to continue.

Settings 5

Second, "Ask me what to do with each download" should be toggled off.

If it is toggled on, toggle it off.

This ensures any files with private data won't be inadvertently saved to another folder on our computer.

Note 1

The settings are specific to each person that logs into the computer.

If we use more than one computer, we should verify these settings are correct on any computer we log into on which we may download a file with private data.

Close the browser tab.

<no audio> Click the x to close the tab.

Open Menu 1

OK. Back to documents. We are still working in Ella Ment's folder.

Open the Participant Menu.

<hint – audio> Click the participant information in the top right corner of the page.

Word Documents

There are three documents that open in Microsoft Word and download to our computer: the Account Balance and the two Shopping Lists.

Select Generate Account Balance.

Waiting

<screen description – no audio> Current page displays for 1-2 seconds.

Waiting Tab

<screen description – no audio> Empty tab displays for 1 second.

Downloads

Documents that are downloaded by the browser currently display in a Downloads message in Microsoft Edge.

If we hover over the “button”, we also have the option to open the document in the folder it was downloaded to or deleting it.

That said, we’re going to click the Open File link, or button on the message, to open the document. Go ahead.

<no audio> Click the button on the downloads bar.

Acct Balance 1

The Account Balance automatically opens in Microsoft Word.

This doc just has the Primary Cardholder’s name, which is still considered private.

It is a household-level document that provides a real-time snapshot of their current and future food benefit balance.

Acct Balance 2

Real-time snapshot means that the quantities in the current benefits reflect whether any purchases have been made.

Click below the scroll bar.

Acct Balance 3

We’ll learn more about these documents in the Benefit Issuance training modules.

<no audio> Click the x to close the document.

Open Menu 2

Back in WINNIE, let’s open the menu again.

<hint – audio> Click the participant information in the top right corner of the page.

Ppt Shop List 1

Since we can generate the Shopping List for either Ella or her household, the arrow to the right indicates another menu.

Go ahead and hover over Generate Shopping List to expand the menu, then select Participant.

Waiting

<screen description – no audio> Current page displays for 1-2 seconds.

Open Menu 3

Before opening this shopping list, let's go back to the menu and open the Household Shopping List too. Go ahead.

<hint – audio> Click the participant information in the top right corner of the page.

HH Shop List 1

<hint – audio> Hover over Generate Shopping List to expand the menu, then select Household.

One Message 1

A button and Open File link display for each document in the Downloads message.

We'll open the participant document first.

Click the middle button or Open File link.

<no audio> Click the button on the downloads bar.

Waiting Tab

<screen description – no audio> Empty tab displays for 1 second.

Ppt Shop List 2

The participant shopping list has both Ella's and her authorized rep's names.

This is a static document that shows the quantity and food items issued to the participant in their most recently issued benefit sets.

Close the doc when ready to continue.

One Message 2

Let's open the household doc.

Click the top button or Open file link.

Waiting Tab

<screen description – no audio> Empty tab displays for 1 second.

HH Shop List 2

Again, this document has names, which are private data.

The household Shopping List is also a static document that shows the quantity and food items issued to each member of the household in the most recently issued benefit sets.

Click below the scroll bar.

HH Shop List 3

It also has the combined total quantities and food items for the household's most recently issued benefit sets.

Go ahead and close this document.

Downloads 1

As soon as a file is generated, regardless of whether it is opened, it is automatically saved to our browser and computer.

All WIC files with private data, including WINNIE documents, reports, proofs, referral info, etc. should never be stored on our computers and must be deleted from our Downloads folder at the end of each workday (MOM Ref: Section 1.7. Data Privacy).

If this isn't an automated process, we must do it manually ourselves.

Managing Downloads

Edge Downloads

Managing Downloads in Microsoft Edge.

The following information is an overview of managing our Downloads folder if we must manually delete its contents each day.

Click the button to continue.

Browser Menu 1

Once our downloads message no longer displays, we can still access our downloaded documents using our browser menu.

Click the horizontal ellipses icon.

Browser Menu 2

Select Downloads.

Message

The Downloads message re-opens.

Let's click the message's open folder icon.

Downloads 1

As long as we have verified this browser setting, our documents, which are displaying in Details view, will automatically download to our Downloads folder.

Notice they do not have an ID associated with them; they just have a randomly assigned string of characters.

Note 2

Although we are currently working with Word documents, we need to note that this includes any file with private data, such as PDFs, spreadsheets or Excel files, print screens, etc.

Since the downloads are in our user folder, if more than one staff person uses a computer and downloads any files with private data, each staff person will need to ensure the downloaded files have been deleted from their own Downloads folder.

Best Practice

Before we begin, best practice is to first ensure the files are no longer needed and are closed.

Option 1

In Edge, we have two ways of permanently deleting downloaded files.

Option 1, which is optimal for deleting more than one file at a time, is manually deleting them from our Downloads folder.

In general, this is best practice.

Downloads All

We can use CTRL + A to select all files...

Downloads Some

... or if we have files we don't want to delete, we can multi-select individual files using our Control (or Shift) keys.

Option 1A

For now though, we're just going to delete the first two documents listed.

Option 1B

Once selected, we want to permanently delete the files.

To do this, we must select the dropdown arrow under delete.

We don't want to select the big red x because that sends our files to the recycle bin, which means they are still stored on our computer.

Option 1B1

Click the dropdown below Delete.

Option 1C

Select Permanently Delete.

Option 1D

Click the Yes button.

Option 1E

Click the button to continue.

Option 2

Deleting files from our downloads folder effectively deletes them from the browser.

Our second option when using Edge is to delete the file **individually** using the browser.

Hover over the third file and select the garbage can icon.

Option 2A

The document has been removed from the browser and if we click the Open downloads folder icon...

Option 2B

...we can see it has been removed from our downloads folder.

Click the button to continue.

<Transition Slide>

<Screen description – no audio> Slide transitions back to the Downloads message with the last document not yet removed.

Caveat 1

One caveat and one tip.

Click the horizontal ellipses icon in the Downloads message.

Caveat 2

It may be tempting to use the Clear all download history function.

Notice, this message tells us that we can still find our file in the Downloads folder.

Caveat 3

Clear all download history does **not** delete the files from our downloads folder.

<Transition Slide>

<Screen description – no audio> Slide transitions back to the Downloads message with the last document still available.

Lesson

Lesson: Do NOT use Clear all download history to delete files.

<Transition Slide>

<Screen description – no audio> Slide transitions back to the Downloads message with the last document removed.

Tip

Here's a tip: we can choose to always show the Downloads icon on our toolbar if we want, which is a handy shortcut available in Edge.

Let's do that. Select Show downloads button on toolbar.

Close Downloads

Close Downloads by clicking the dropdown icon.

<no audio> Click the Dropdown icon.

Download Icon

The Edge Download icon remains on our toolbar.

Click the button to continue.

Policy

The policy referenced in this training module can be found on the MDH WIC website in the MN Operations Manual (or MOM) in 1. Administration, Section 1.7 Data Privacy.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

If one WIC staff person verifies the Downloads settings on a computer, the settings for that specific browser should be appropriately set for any other WIC users.

Answer #1

The answer is False.

Browser settings are specific to each user that logs into a computer. If we log into a different computer, we should verify the settings are correct on our preferred browser.

Multiple Choice Q#2 (multi-select)

Multiple Choice – select all answers that apply...

We should verify in our Downloads settings that...

- A. The browser will always ask whether to open or save the files.
- B. The browser downloads to our user/Downloads folder.
- C. The browser downloads to a folder we specify.
- D. The “Ask me what to do with each download” is toggled on.
- E. The “Ask me what to do with each download” is toggled off.

Answer #2

The answers are B and E.

We should ensure the Downloads settings in our preferred browser are set to automatically download to our users/Downloads folder and that the “Ask me what to do with each download” is toggled off, which ensures the documents won’t be inadvertently saved to another folder.

T/F Q#3

True or False?

The policy expectation is that each WIC user, either by automated means or manually, will delete any files with private data from their computer and browser by the end of each workday.

Answer #3

The answer is True.

Any files with private data (Word documents, PDFs, Excel spreadsheets, print screens, etc.) should never be stored on our computer or in the browser.

Since we are responsible for ensuring and maintaining our participants' privacy, we are expected, either by automated or manual means, to delete any files with private data from our computer and browser prior to the end of the workday.

End

End Slide

Thank you for reviewing this WINNIE online training module presented by the Minnesota Department of Health WIC Program.

If you have any feedback, comments, or questions about the information provided, please submit the [WINNIE Questions for the State WIC Office](#) form.

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