Your skills. Your advantage.

Tosa Skills Framework

Outlook 2016

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Overview

Introduction to Tosa Skills Framework 1
Tosa® (Test on Software Applications) 2
Tosa Skills Framework Objective 2
Unique Tosa Scoring 2
Outlook domains and subdomains 3
About the Outlook certification 3
Level 1 – Beginner User 5
Overview 6
Level 2 – Basic User 7
Environment / Configuration / Saving 8
E-mailing 8
Calendar and tasks 8
Contacts and notes 9
Overview 9
Level 3 – Productive User 11
Environment / Configuration / Saving 12
E-mailing 12
Calendar and Tasks 13
Contacts and Notes 13
Overview 14
Level 4 - Advanced User 16
Environment / Configuration / Saving 17
E-mailing 17
Calendar and Tasks 18
Contacts and Notes 18
Overview 19
Level 5 – Expert User 22
Environment / Configuration / Saving 23
E-mailing 23
Calendar and Tasks 24
Contacts and Notes 24
Overview 25

Introduction to Tosa Skills Framework

For Tosa Assessment and Certification

Tosa® (Test on Software Applications)

The Tosa assessments and certifications will determine and validate a candidate's proficiency and skill level in software applications used in a professional environment. The Tosa assessments are designed to validate the professional Outlook software skills of individuals (students, trainees, employees, or jobseekers) in supporting their employment, professional or academic objectives.

Tosa assessments employ the Adaptive Testing methodology, which creates a personalized testing experience adapted to a candidate's skill level for a selected software application. The score is based on the Item Response Theory using a 3-parameter logistic model, similar to the GMAT scoring method. Adaptive-based testing selects questions that challenge candidates to the limit of their knowledge and abilities.

Tosa Skills Framework Objective

This Tosa framework provides an overview of the subject areas being assessed during the Tosa Assessment and Certification exams. Tosa assessments and certification exams validate candidate proficiency in the most popular professional Outlook software programs using a score on a scale from 1-1000 for the Certification Assessment, and a score divided into five levels, from "Beginner" to "Expert," for the Diagnostic Assessment.

The objective of this document is to present an overview of the technical skills associated with each of the four main Outlook domains within each proficiency level. This information will also support educators and trainers in tailoring their training programs to achieve desired proficiency levels.

Unique Tosa Scoring

The Tosa assessments and certifications are based on a unique score, divided into five levels.

- ranging from 1 to 1000 for the certification.
- divided into five levels, from Beginner to Expert, for assessment.

Tosa® levels	**Corresponding Tosa® score**	**Certification status & documents issued**
Expert	876 - 1000	Certification earned - diploma & Credly digital badge issued
Advanced	726 – 875	Certification earned - diploma & Credly digital badge issued
Productive	551 – 725	Certification earned - diploma & Credly digital badge issued
Basic	351 – 550	Certification failed - certificate of completion issued
Beginner	1 – 350	Certification failed - certificate of completion issued

Outlook domains and subdomains

Environment / Configuration / Saving	Knowing Outlook interface Knowing and customizing the software environment Using the basic functions of the software
E-mailing	Creating and sending e-mails Attaching Outlook files and items Adding a signature Using acknowledgment of receipt and reading Formatting of documents Creating and managing rules and alerts Managing messages and search
Calendar and Tasks	Customizing display Creating and managing tasks
Contacts and Notes	Creating and managing contacts Creating and managing notes Using the software’s basic functions

About the Outlook certification

The Tosa Outlook certification relies on a database of around 90 questions. It is composed of 20 questions and lasts one hour. The algorithm adapts to each answer of the candidates to adjust the difficulty level of the questions until they reach the exact definition of the candidates’ level by calculating the limit of their skills.

Since the test is adaptive, the series of questions that each candidate gets is unique for each test. This uniqueness allows for a more accurate evaluation of the candidate's level. It also limits cheating and the memorization of questions on different passages.

Our platform allows individuals to take the certification in class, in an approved testing center, or remotely via our integrated asynchronous online proctoring solutions.

Our remote proctoring solutions provide added flexibility for both the administrator and the candidate, allowing the certification exam to be taken anywhere, at any time. The candidate only needs an internet connection and a computer equipped with a working webcam and microphone.

Candidates receive a numeric score out of 1000 points associated to a proficiency level on a five-level scale. Candidates who score between 1 and 550 points don't earn the certification. They will not receive a diploma but a certificate of completion. Candidates who score 551 points or above earn the certification. They will receive a diploma by email within five (5) business days and are eligible to a Credly digital badge.

There is no requirement to be eligible to take the exam, but our recommendations to be well prepared on exam day are:

- Take at least one Tosa Outlook adaptive assessment to estimate your level and get familiar with the test format
- Use free practice tests on our website for training
- Follow e-learning or training courses (average duration per level is between 10 and 15 hours per certification so around 150 hours total)

Tosa certification diplomas are valid for three years from the date of issue as skill levels evolve or decline over time, depending on the use of the software. New software and software versions are released every year, and skills must be updated. We cannot legitimately certify a digital skills level for more than three years. Limiting the certification validity reinforces the need for life-long learning and professional development.

Tosa certifications can be retaken when expired. Earners willing to improve their score and level can also retake the exam at any time.

Level 1 - Beginner User

Between 1 and 350 points

The Beginner Proficiency is set for a score from 1 to 350, which is the lowest Tosa score category. Achievement of Beginner score defines little or limited knowledge of the Outlook application, including the application's basic functions and features, highlighting the inability to use the application in a professional environment.

Overview

Domains	Skills Assessed
Environment / Configuration / Saving	Identifying the ribbon, the navigation pane, and its main folders (E-mail, Calendar, Contacts)
E-mailing	Displaying e-mails
Calendar and Tasks	Displaying the calendar
Contacts and Notes	Displaying contacts

Level 2 - Basic User

Between 351 and 550 points

Prior to the acquisition of the skills of the Basic level, the candidate will have mastered the skills of the Beginner level.

At the Basic level, the candidate has partial knowledge of the software, but is not able to use it in a professional environment. They may, however, know some features.

Environment / Configuration / Saving

Users can open Outlook, identify the ribbon, the Quick Access Toolbar and the navigation pane. They can move throughout the navigation pane, display their inbox folders and individual emails. They understand and can use the main inbox folder types: Drafts, Sent Items, Deleted Items, Outbox, Junk E-mail. They are familiar with the main files (Mail, Calendar, Contacts).

Business application: For example, as an administrative assistant, these skills are useful for finding one's way around and navigating the Outlook software: reading and replying to emails, consulting one's agenda and those of one's colleagues, identifying contact information.

E-mailing

Users can open and display received e-mails, either directly via the reading pane or by displaying each e-mail individually.

They can reply to e-mails, compose new e-mails, and send e-mails to one or multiple recipients.

Users are familiar with the buttons in the Text group on the E-mail tab and can use them to apply basic formatting to an e-mail, such as: selecting font type and font size, applying text attributes (bold, italic, underline), changing text case and/or text color, highlighting text, changing text alignment and indentation, and performing a spell check.

Business application: For example, in an administrative assistant position, these skills are useful for writing emails and using useful tools to format them.

Calendar and tasks

Users can view their calendars by day, week or month. They can create a simple appointment in their calendar, by defining the subject, the location and the start and end time.

Users can accept or decline invitations.

Business application: For example, in an administrative assistant position, these skills allow them to consult and perform simple tasks on an Outlook calendar (setting appointments, answering invitations for meetings, etc.).

Contacts and notes

Users can view their contacts as electronic business cards or in a list. They can delete contacts and create new ones (adding name, e-mail addresses, telephone numbers, etc.). They can open an existing contact to view contact details and edit them.

Business application: For example, on an administrative assistant position, these skills allow them to consult the list of contacts and to manage it in a simple way (adding and deleting contacts) which allows them to keep an updated list of contacts without duplicates or useless contacts.

Overview

Domains	Skills Assessed
Environment / Configuration / Saving	**Outlook interface** - Identifying the Quick Access Toolbar and the ribbon - Knowing the navigation pane - Knowing the main folders (E-Mail, Calendar, Contacts)
E-mailing	**E-mail** - Writing and sending an e-mail **Formatting an e-mail** - Formatting an e-mail - Checking the spelling of the text
Calendar and Tasks	**Calendar** - Viewing calendars by day, week or month - Creating a simple appointment in the calendar **Meeting invitation** - Receiving and replying to a meeting invitation

Contacts and Notes	**Contacts** - Viewing contacts as electronic business cards or in a list - Creating or deleting contacts - Opening an existing contact to view contact details - Editing existing contacts

Level 3 - Productive User

Between 551 and 725 points

Prior to the acquisition of the skills of the Productive level, the candidate will have mastered the skills of the Basic level.

Environment / Configuration / Saving

Users know how to use all ribbon tabs (Home, Send/Receive, Folder, View) for e-mailing, calendar, contacts, tasks or notes.

Users can use the Automatic Replies (Out of Office) tool to set up an automatic response to be sent out during a defined time period.

Users can select how e-mails are to be viewed and their layout on the screen. They can filter e-mails according to criteria (date, subject, etc.). They can add columns to create additional filtering and archiving options and criteria.

Users can create new folders in their inboxes to archive arriving e-mails. They can sort folders in alphabetical order and add them to Favorites. They manage printing options.

Users can use Quick Print options to print different items (e-mails, calendar entries, contact cards, notes). They can set contact card and e-mail print options and print to a PDF file.

Business application: For example, on a secretary's workstation, their knowledge of the Outlook environment enables them to make the necessary settings for efficient management of their e-mail box (creation, organization and sorting of files, absence manager, etc.).

E-mailing

Users are familiar with the tabs associated with e-mail creation. They possess thorough knowledge of e-mails formats (HTML, plain text, and rich text) and can select the optimal format for each e-mail created. They can attach documents and other Outlook items (calendar entries, contact cards) to e-mails.

They can apply a priority level to e-mails via the Message tab Options group. They can request delivery and read receipts and understand the meaning of these 2 options, and also understand how to use the cc: and bcc: options. They can reply to e-mails, forward them, classify messages and move them to folders.

Users can create simple rules from received e-mails, including for example creating a rule to archive all e-mails from a specific sender in a specific folder.

Users can delete e-mails, empty the trash, and check the size of their inbox (especially Exchange users).

Users can identify most junk mail (spam/phishing) and immediately block a suspicious sender via the context menu, understanding the consequences of such an action.

Users can search the folders of their inbox and outbox based on criteria such as content or sender.

Business application: For example, on a secretary's job, these skills are necessary to set up the messaging system and write messages and send them to the various recipients while managing the confidentiality fields.

Calendar and Tasks

Users can easily modify calendar view, viewing it by day, work week or 7 consecutive days. They can also define the start and end of their work week and work hours during which they are available.

Users know the difference between Appointments and Meetings, and are thoroughly familiar with the tabs of these functions. They can create meetings, invite participants, and attach documents and other Outlook items to the meetings they set up. They can tag a meeting as “optional” or “required”, and set their current status (Busy, Tentative, Absent). They can also add a meeting reminder.

Users can create invitations and manage them. They know which participants have accepted and declined invitations and which have not yet responded.

Users can accept and decline invitations and forward them to others.

Business application: For example, in a secretary position, these skills are useful for navigating the Outlook calendar and managing its options and display. For example, they can prepare meetings and invite participants.

Contacts and Notes

Users understand the difference between personal contacts and LDAP contacts. They can find contacts to use in e-mailing or with the calendar.

Users can add columns to the Outlook view to sort their contacts according to criteria and group their contacts by criteria. Via the contact view window, users can use contacts to create items (a new e-mail or new meeting).

Users can create, format, and forward notes.

Business application: For example, on a secretary's job, these skills are useful to customize the display of contacts by criterion and to create notes in order to optimally organize one's messaging.

Overview

Domains	Skills Assessed
Environment / Configuration / Saving	**Outlook interface** • Using all ribbon tabs **Automatic replies** • Using Automatic replies • Setting up automatic response **E-mail view customization** • Selecting how e-mails are to be viewed and their layout on the screen • Filtering e-mails according to criteria (date, subject, etc.) • Adding columns **New folders** • Creating new inbox folders to file and store received e-mails • Sorting folders in alphabetical order • Adding folders to Favorites **Using printing options** • Printing different items with Quick Print options • Setting contact card and e-mail print options • Printing to PDF file
E-mailing	**E-mails** • Using the tabs in a new e-mail • Selecting an appropriate e-mail format • Attaching a document or other item to an e-mail • Assigning e-mail priority • Requesting a delivery or reading receipt • Using the cc: and bcc: fields • Replying to an e-mail • Forwarding an e-mail • Archiving an e-mail **Rules** • Creating simple rules from received e-mails

	E-mails and trash - Deleting e-mails - Emptying the trash - Checking the size of the inbox **Junk mails** - Identifying junk mail (spam/phishing) - Blocking suspicious senders via the context menu **Searches** - Searching the folders of inbox and outbox based on criteria
Calendar and Tasks	**Display customization** - Viewing calendar by day or by week - Defining default work hours **Appointments and meetings** - Using the Appointment and Meeting tabs - Attaching a document or other item - Inviting participants and defining whether their attendance is required or optional - Setting calendar status (Busy, Free, Tentative, Out of Office) **Invitations** - Accepting or declining an invitation
Contacts and Notes	**Contacts management** - Configuring the address book for LDAP - Searching for a contact **View customization** - Adding columns - Sorting contacts according to criteria - Grouping contacts by criteria - Using contacts to create items **Notes** - Creating and formatting a new note

Level 4 - Advanced User

Between 726 and 875 points

Prior to the acquisition of the skills of the Advanced level, the candidate will have mastered the skills of the Productive level.

Environment / Configuration / Saving

Users can create a new account from an e-mail address. They can distinguish between POP, IMAP and Exchange accounts. They manage data files (PST) and archive them.

Users can manage data files: create new files, save them and forward them. They can set default settings for data files, do automatic archiving or periodic automatic backups of data.

Users can manage all types of Outlook items (e-mails, calendar items, contacts) via categories and colors. They can add new categories and change existing ones. Items can be filtered and sorted via categories.

Users have a thorough understanding of follow-up flags and can tag items for personal follow-up or follow up by others. They can add a contact and set-up an action item regarding this contact. They can manage items for follow up via the task list. Users can create Quick Steps.

Users can configure the advanced options of automatic replies. They can set up multiple automatic replies - for example, one automatic reply to e-mails from colleagues and another to external e-mails. They can also manage specific rules during their absence, such as forwarding e-mails from specific senders to specific recipients.

Users can share Outlook items with people from the same organization, view their colleagues' calendars, and delegate someone to manage their e-mails and meeting invitations. They are thoroughly familiar with the delegation tool and how it works, acting as a delegator or delegate.

Proficient users can customize the Outlook interface. They can add tabs to the ribbon they need and hide the ones that are less useful to them, display the Developer tab, and customize the Quick Access Toolbar.

Business application: For example, in a purchasing manager position, these skills allow them to manage their files, and folders and configure their calendar as well as share it.

E-mailing

Users are thoroughly familiar with advanced e-mailing options, such as delay and scheduling of e-mail delivery, and adding voting buttons. They can change the appearance of e-mails by applying themes or stationery.

Users are thoroughly familiar with the Search tab and can carry out all types of search operations based on criteria such as specific dates, time periods, priority, e-mail size, and attachments.

Users can create one or multiple signatures, with or without logos or graphic objects. They can create a default signature to appear in all newly composed e-mail, replies or forwarded e-mails. They can create business cards to be sent to recipients.

Proficient users master the use of rules and alerts. They design custom rules starting with a blank rule. They can use the majority of the conditions proposed via the Rules Wizard, understand the concepts related to e-mail, such as e-mail headers and their properties. They also possess thorough understanding of exceptions.

Users can easily manage junk mail, identify suspicious e-mails, configure junk mail options, create customs filters, change the level of security, and designate senders as blocked or authorized.

Users can manage their inboxes (especially Exchange users) and can use Outlook cleaning tools. E-mails can be deleted based on their date and size and can also be saved without their large attachments.

Business application: For example, in a purchasing manager position, these skills are useful for setting up and configuring Outlook in order to be efficient in its use. They also know how to manage their calendar and share it.

Calendar and Tasks

Users can easily create a series of recurring meetings, define and modify the series end date, and the number of occurrences, and for example, change or delete one meeting within the series.

Users can manage many tasks, including follow-up of To-do list items. They can assign tasks to other colleagues, divide tasks into subtasks and assign them to multiple people, and can create repetitive tasks.

Advanced users are familiar with all printing options associated with their calendar and the calendar that they have been delegated to manage. They can edit calendars by day, week or month, and are familiar with the different styles (memos, flyers, etc.).

Business application: For example, in a purchasing manager position, these skills allow them to manage their calendar but also to access their collaborators' calendars. They can set up meetings with their clients and use the series of meetings to organize the follow-up of their files.

Contacts and Notes

Users can create distribution lists from their contacts. They know how to store them and add contacts to the list. They can also share lists with their colleagues and use them to send e-mails or meeting invitations.

Business application: For example, as a purchasing manager, these skills allow them to manage distribution lists to target their emailings.

Overview

Domains	Skills Assessed
Environment / Configuration / Saving	**Accounts** - Creating a new account from an e-mail address - Distinguishing between POP, IMAP and Exchange accounts **Data files and archiving** - Managing data files - Creating data files - Saving data files - Forwarding data files **Categories** - Creating and assigning color categories to identify group-associated Outlook items **Follow-up flags & Quick Steps** - Adding follow-up flags to e-mails, contacts, and calendar entries - Creating Quick Steps **Automatic replies** - Creating different automatic replies for different groups (i.e. internal and external) **Delegate and share** - Sharing items (esp. the calendar) and delegating **Interface customization** - Customizing the ribbon and the Quick Access Toolbar

E-mailing	**Email options** - Delaying an e-mail delivery - Scheduling an e-mail delivery - Adding a voting button - Applying themes or stationery **Search operations** - Using the Search tab - Carrying out all types of search operations based on different criteria **Signatures** - Creating one or multiple signatures, with or without a logo - Defining a default signature **Rules and alerts** - Creating a custom rule from a blank rule - Managing follow-up flags for all Outlook items **Junk mails** - Using the junk mail options (block and approve senders) **Clean up tools** - Deleting e-mails based on date and size
Calendar and Tasks	**Recurring meetings** - Creating a series of meetings - Modifying a series of meetings - Deleting a series of meetings **Tasks** - Following up on to-do items - Assigning tasks to others **Calendar** - Using advanced calendar printing options - Printing in different formats

Contacts and Notes	**Distribution lists** - Sending e-mails or meetings invitation to a group of contacts in a distribution list

Level 5 - Expert User

Between 876 and 1000 points

Prior to the acquisition of the skills of the Expert level, the candidate will have mastered the skills of the Advanced level.

Environment / Configuration / Saving

Users can create and configure various types of e-mail accounts, including Exchange accounts. They have thorough knowledge of SPA and SSL. They can manage multiple profiles.

Users completely master the Outlook environment and can customize it via the backstage File tab. They are familiar with all e-mail, calendar, contacts, search and language options and can also manage add-ins.

Users have expert knowledge of flags and date functions. They can add flags via a rule or flag alarms. They can assign default flags by create Quick Click flags.

Users fully understand the delegation option. They can grant all types of authorizations including those that authorize another person to create e-mails in their name and on their behalf. They are familiar with authorization levels and can modify the authorizations granted to a person to whom tasks were delegated.

Users can configure Outlook to receive the RSS feed they wish to subscribe to. They read, manage, and delete such feeds and are familiar with synchronization options.

Business application: For example, in an executive assistant position, these skills are useful for making optimal use of mail and calendar in Outlook.

At this level, the candidate can train on the software.

E-mailing

Users are familiar with e-mails forms and templates. They can create OFT templates, use and distribute them. They can use forms.

Users perform precise Find operations by defining many types of criteria. They are thoroughly familiar with the Search tab, and the Advanced Search dialog box which enables full search in Outlook. Additionally, they are familiar with Search Folders.

Users are thoroughly familiar with the various methods for creating a signature, including elaborate signatures with images and hypertext links. They can also create business cards that can be attached to e-mails.

Users can manage large attachments and send large images by reducing their size.

Business application: For example, for an executive assistant position, these skills allow the candidate to configure Outlook for optimal use and to personalize their messaging thanks to the various tools available (electronic signature, use of multimedia, writing, receiving, sending, and sorting mail, etc.).

At this level, the candidate can train on the software.

Calendar and Tasks

Users fully master the use of calendars and the creation of tasks. They can create appointments and meetings, resource scheduling, reminder set-up, and Lync meetings.

The calendar can be fully customized, for example, to display week numbers and international holidays, and the first day of the work week can be defined. Users use time zones and create appointments in the ICS format.

Business application: For example, as an executive assistant, these skills allow them to effectively manage the management calendar. They can organize appointments and meetings, set up task monitoring indicators, and thus optimize their time.

At this level, the candidate can train on the software.

Contacts and Notes

Users can export their contacts to a CSV file that is readable in Excel for example. They can also import addresses from a CSV file into their contacts.

Users possess knowledge of field mapping and can perform manual mapping if necessary.

Business application: For example, in an executive assistant position, these skills allow the candidate to import data into the Business Contact Manager from other files.

At this level, the candidate can train on the software.

Overview

Domains	Skills Assessed
Environment / Configuration / Saving	**Accounts customization** - Creating and configuring various types of e-mail accounts - Managing multiple profiles **Outlook environment customization** - Mastering the Outlook environment via the File tab - Knowing all e-mail, calendar, contacts, search, and language options - Managing add-ins **Add Follow-up and Quick Steps** - Mastering the Follow-Up tool - Adding a flag automatically with a rule - Using Quick Click flags **Delegation** - Using delegation options - Granting all types of authorizations - Modifying the authorizations **RSS feed** - Managing RSS feeds - Using synchronization options
E-mailing	**Creating an e-mail template** - Creating e-mail forms and templates - Creating OFT templates and use and distribute them - Using forms **Search operations** - Performing advanced searches - Using the Advanced Find command - Searching folders

	Signature & business cards - Creating elaborate signatures with images and hypertext links **Attachments** - Reducing attachments size
Calendar and Tasks	**Calendar and tasks** - Creating appointments/meetings with existing options - Displaying week numbers, world holidays - Using ICS format
Contacts and Notes	**Import and export contacts** - Contacting import and export to and from CSV files - Knowing field mapping - Performing manual mapping if necessary

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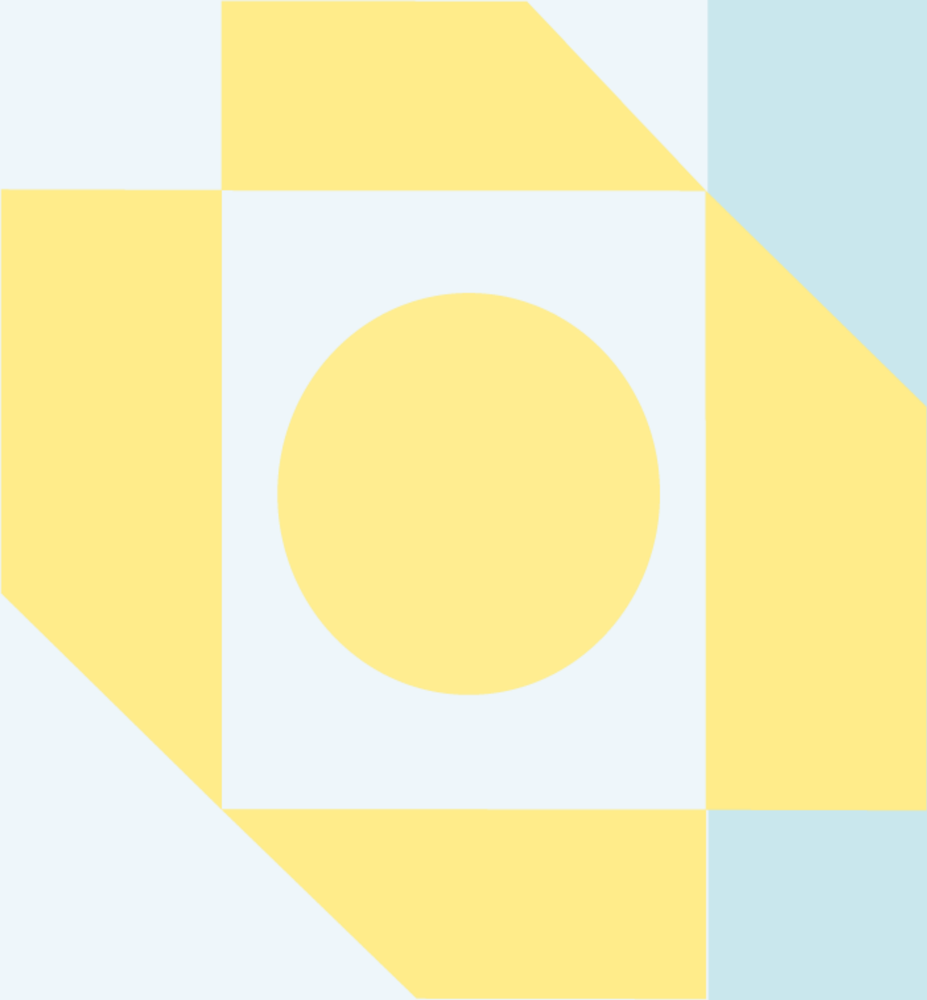

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