LEARNING, UPGRADED FIELD TOOL

# LMS Report Definition Card

A one-page card for turning a vague LMS report request into a definition that names the decision, audience, metric, source field, cadence, and caveat.

### Try this one thing today

Take one report request and write the decision, metric definition, source field, and caveat before building anything.

## Use this when

- A leader asks for a report before naming the decision it should support.
- Completion, attendance, assignment, enrollment, status, or overdue metrics are being interpreted differently.
- The team needs one shared report definition before building a dashboard.

## Systems thinking move

Treat a report request as a decision-design problem. The first job is to define what decision the report supports and what the data can honestly say.

## Quick use

Before building the report, fill one card with the decision, metric definition, source field, owner, cadence, and caveat.

## Working rows

### Decision

What to do: Name the decision this report should support.

What it tells you about the system: The report has a purpose beyond visibility.

### Audience

What to do: Name who will use the report and what action they can take.

What it tells you about the system: Different audiences need different cuts, not one dashboard for everyone.

### Metric definition

What to do: Define exactly what the metric includes and excludes.

What it tells you about the system: The team stops arguing over the same label.

### Source field

What to do: Name the LMS field, report export, or system table behind the metric.

What it tells you about the system: The definition can be checked and maintained.

### Cadence and owner

What to do: Name how often it updates and who owns the definition.

What it tells you about the system: Reporting becomes a maintained system instead of a one-time request.

### Caveat

What to do: Write what the report does not prove.

What it tells you about the system: Leaders can use the data without overclaiming impact.

## Three ways to act

### Manual way

Use one report-definition card in the request conversation. Do not build the report until the decision, metric definition, source field, and caveat are clear.

### Microsoft 365 or Google Workspace way

Use Microsoft Lists, SharePoint, Excel, Sheets, Power BI notes, Looker Studio documentation, or a data dictionary to store report definitions next to the reports people use.

### AI-assisted way

Use AI to draft report definitions from approved request notes, identify ambiguous metric language, suggest caveats, and create questions for the LMS owner. A person validates every source field and data claim.

> **AI output validation**
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> These prompt starters were created for the May 2026 model landscape. Verify all AI outputs before using them with learners, reviewers, leaders, customers, partner teams, or compliance-sensitive work. Do not paste sensitive or proprietary material into an AI tool unless your organization has approved that tool for that data.

## Unconventional moves

- A report request is not ready until the decision is named.
- Put the caveat on the report, not in a separate explanation nobody reads.
- Define completion, attendance, assignment, enrollment, overdue, and active learner before building another dashboard.
- Make report definitions versioned decisions so old logic does not quietly survive a migration.
- Do not use one report for all audiences when each audience can take a different action.

# Copy-ready structure

Use the HTML page for the copy button. This PDF includes the working fields so you can recreate the structure in Word, Docs, Excel, Sheets, Lists, or a shared planning note.

- Decision: Name the decision this report should support.
- Audience: Name who will use the report and what action they can take.
- Metric definition: Define exactly what the metric includes and excludes.
- Source field: Name the LMS field, report export, or system table behind the metric.
- Cadence and owner: Name how often it updates and who owns the definition.
- Caveat: Write what the report does not prove.