

## LEARNING UPGRADED SETUP GUIDE

# Build an LMS Report Definition Library

Set up a report definition library so LMS reports have visible decisions, metric definitions, source fields, cadence, owners, and caveats.

## Try this one thing today

Choose five recurring LMS reports and write the decision supported plus caveat for each one.

## Use this when

- Leaders ask for reports without naming the decision they support.
- Completion, assignment, enrollment, overdue, active, or pass rate means different things to different people.
- A migration, cleanup, or dashboard build needs reusable reporting definitions.

## What you should leave with

- A shared library for report names, definitions, source fields, cadence, owners, and caveats.
- A way to keep reports connected to the decision they support.
- A review rhythm so reporting definitions do not quietly rot after a migration or process change.

## Manual setup

1. Choose five reports people request most often.
2. For each report, name the decision it supports, the audience, and the action threshold.
3. Write the metric definition in plain language before opening the LMS export.
4. Name the source field, export, cadence, owner, caveat, and review date.
5. Use the first five definitions as the starter library.

## Microsoft 365 setup

1. Create a Microsoft List, SharePoint list, or Excel workbook called LMS Report Definitions.
2. Use choice columns for audience, cadence, source system, owner, and review status.
3. Add filtered views for definitions needing review, by report owner, by audience, by cadence, and by source system.

4. Link each Power BI, Excel, SharePoint, or exported report back to its definition.
5. Review definitions during LMS governance or reporting intake.

## Google Workspace setup

1. Create a Google Sheet called LMS Report Definitions.
2. Add a Definitions tab, a Review Log tab, and a Source Fields tab.
3. Use data validation for audience, cadence, owner, and review status.
4. Link Looker Studio, Sheets reports, or Drive report files back to the definition row.
5. Review definitions monthly or when LMS configuration changes.

## AI-assisted setup

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

### AI output validation

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.

## Recommended fields or columns

### Report name

The stable name people use for the report.

### Decision supported

The decision this report helps someone make.

### Audience

Who uses the report and what action they can take.

### Action threshold

What number, pattern, or exception triggers action.

### Metric definition

Plain-language definition of the metric.

### Includes

The learners, assignments, statuses, dates, or populations included.

### Excludes

The learners, assignments, statuses, dates, or populations excluded.

### **Source field**

The LMS field, report export, table, or source file behind the metric.

### **Source export**

Where the source data comes from.

### **Cadence**

How often the report updates.

### **Owner**

Person or team that owns the definition.

### **Caveat**

What this report does not prove.

### **Review date**

When the definition should be checked.

## **Views or tabs to create**

- By owner.
- By audience.
- By report cadence.
- By source system.
- Definitions needing review.
- Metrics with caveats.

## **Ownership model**

The LMS owner validates source fields. Learning operations owns definition quality. Program owners define decision use. Leaders decide action thresholds. Data or analytics partners help when the definition leaves the LMS.

## **Maintenance rhythm**

Review definitions monthly for active launch reports, quarterly for standing reports, and immediately after LMS migrations, catalog restructuring, data-source changes, or audience-rule changes.

## **Common mistakes**

- Building the report before naming the decision.
- Using completion without defining what completion includes and excludes.
- Separating the caveat from the report.

- Letting old migration logic survive inside a new report.
- Creating one report for audiences that can take different actions.

## Copy-ready setup checklist

# LMS Report Definition Library Setup Starter reports: 1. 2. 3. 4. 5. Required definition fields: - Report name - Decision supported - Audience - Action threshold - Metric definition - Includes - Excludes - Source field - Source export - Cadence - Owner - Caveat - Review date Rule: Every report should link back to its definition.

## Prompt starters

### ChatGPT GPT-5 family

Use an outcome-first prompt with the job, approved source material, constraints, and the exact artifact you want back.

I am working on Set up an LMS report definition library for an L&D system problem. Goal: Help me turn the notes below into a practical next move. Context: Use this when an L&D team needs a governed library for LMS report definitions, source fields, owners, and caveats. Use these working fields: report name, decision supported, audience, action threshold, metric definition, source field, source export, cadence, owner, caveat. Rules: - Use only the source notes I provide. - Do not invent policy details, metrics, learner needs, compliance requirements, or business context. - Separate known facts, assumptions, missing information, and next actions. - Flag anything that needs requester, reviewer, leader, legal, compliance, LMS owner, or manager confirmation. - Keep the output practical enough to review in a working meeting. Source notes: [paste approved notes here] Return: 1. Definition library setup 2. Known facts 3. Assumptions 4. Missing information 5. Ambiguous metric terms 6. LMS owner questions 7. Next setup actions

### Claude 4 family

Use XML-style sections so context, source material, task, constraints, and output format stay separate.

```
<context> I am working on Set up an LMS report definition library for an L&D system problem. Use this when an L&D team needs a governed library for LMS report definitions, source fields, owners, and caveats. </context> <source_notes> [paste approved notes here] </source_notes> <task> Turn the source notes into a practical next move using these working fields: report name, decision supported, audience, action threshold, metric definition, source field, source export, cadence, owner, caveat. </task> <constraints> Use only the source notes provided. Do not invent policy details, metrics, learner needs, compliance requirements, or business context. Separate known facts, assumptions, missing information, risks, and next actions. Flag anything that changes scope, ownership, evidence, risk, or decision rights. </constraints> <output_format> 1. Definition library setup 2. Known facts 3. Assumptions 4. Missing information 5. Ambiguous metric terms 6. LMS owner questions 7. Next setup actions </output_format>
```

### Gemini 3 family

Use a clear task, labeled input, and one example pattern. For Obsidian context, use approved excerpts, Drive exports, Google Docs, or NotebookLM source sets.

Task: Help me make progress on Set up an LMS report definition library from the notes provided. Context: Use this when an L&D team needs a governed library for LMS report definitions, source fields, owners, and caveats. Working fields: - report name - decision supported - audience - action threshold - metric definition - source field - source export - cadence - owner - caveat Example pattern: Field: Missing information Good answer: Name the specific information to confirm, who can confirm it, and why it affects the next decision. Rules: - Use only the source notes provided. - If information is missing, write "Needs confirmation". - Keep the output concise and reviewable. - End with the next best action. Source notes: [paste approved notes here] Output format: 1. Definition library setup 2. Known facts 3. Assumptions 4. Missing information 5. Ambiguous metric terms 6. LMS owner questions 7. Next setup actions

### Microsoft 365 Copilot

Use goal, context, source, expectations, and output. For Obsidian context, use approved excerpts, Word summaries, OneDrive files, SharePoint pages, Teams context, or Outlook threads.

Goal: Help me make progress on Set up an LMS report definition library. Context: Use this when an L&D team needs a governed library for LMS report definitions, source fields, owners, and caveats. Source: Use the selected document, meeting notes, spreadsheet, email thread, SharePoint file, or pasted notes as the only source. Expectations: - Work with these fields: report name, decision supported, audience, action threshold, metric definition, source field, source export, cadence, owner, caveat. - Mark uncertain items as "Needs confirmation". - Do not add facts that are not in the source. - Separate known facts, assumptions, missing information, risks, and next actions. - Summarize the top review questions for the team. Output: 1. Definition library setup 2. Known facts 3. Assumptions 4. Missing information 5. Ambiguous metric terms 6. LMS owner questions 7. Next setup actions

## Sources behind this guide

### Microsoft Lists: Create a list

<https://support.microsoft.com/en-us/office/create-a-list-0d397414-d95f-41eb-addd-5e6eff41b083>

### Google Sheets responses from Forms

<https://support.google.com/docs/answer/6281888>

### 1EdTech: Interoperability Standards

<https://www.1edtech.org/specifications>