CDW Documentation

Affirm — Power BI Report Generation SOP

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Standard Operating Procedure for generating AI Health and AI Monitoring Performance reports from the Affirm Power BI tenant.

Field	Value
Document Owner	MS Cloud AI team
Applies to	Affirm Power BI Tenant — Synergist Technologies, LLC
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1. Purpose

This Standard Operating Procedure (SOP) defines the end-to-end steps for generating, validating, and delivering Power BI reports for Affirm clients from the Affirm Power BI tenant. It covers two report templates published under the **Synergist Technologies, LLC** workspace:

- **AI Health Report** — long-range health snapshots, trend analysis, and normalized scoring for AI assets.
- **AI Monitoring Performance Report** — performance evaluation of AI assets across configurable evaluators and methods.

This document is intended to standardize the report generation process so that any qualified operator can produce consistent, accurate, audit-ready outputs without ad-hoc decisions.

2. Scope

- Applies to all Power BI report generation performed against the Affirm tenant for internal or external Affirm clients.
- Covers ad-hoc report generation triggered by client request, scheduled delivery cycles, or internal QA review.

3. Definitions & Glossary

Term	Meaning
Tenant	A Microsoft 365 / Power BI organizational boundary. The Affirm tenant is accessed by switching from your default tenant to `Synergist Technologies,` LLC.
AI Asset	An AI/LLM-powered solution being monitored, e.g., CloudGenie - Chat, Jenkins AI Copilot, SOW Analyzer.
Evaluator	A metric family used to measure an AI asset (Hallucination, Groundedness, Prompt Relevance, Response Relevance, Readability, Latency, Throughput, Toxicity, etc.).
Method	The specific technique used by an evaluator: LLMaJ (LLM-as-Judge), FRES, SMOG, Fluency, Parallel, Sequential, etc.
Normalized Score	An evaluator score rescaled to a comparable 0–100 range for cross-metric reporting.
Trending Days	Lookback window (in days) used to compute the trend % shown on AI Health snapshots.
Snapshot	A single row of evaluator output for a specific date, asset, and method.

5. Prerequisites

Before starting this procedure, confirm **ALL** of the following are in place. If any item is missing, stop and contact the Tenant Administrator.

5.1 Access Requirements

- Valid corporate identity with access to the Affirm Power BI tenant (Synergist Technologies, LLC).
- Power BI license: **Pro** or **Premium Per User (PPU)** assigned in the Affirm tenant. A Free license is NOT sufficient to view shared workspace reports.
- Assigned membership to the workspace that hosts the AI Health and AI Monitoring Performance reports (typically `affirm-reports-prod-cdw`).

5.2 Technical Requirements

- A supported, up-to-date browser: **Microsoft Edge** or **Google Chrome** (latest stable).
- Stable internet connectivity (Power BI report rendering is bandwidth-sensitive).
- Pop-ups allowed for `app.powerbi.com` (required for tenant switch and export dialogs).

5.3 Information Required From the Requestor

- Client / organization name (e.g., CDW Internal, CDW Corporation, Integration).
- Reporting period (start and end date).
- AI Asset(s) in scope (or “All”).
- Evaluator(s) and Method(s) in scope (or “All”).
- Output format requested (PDF / PowerPoint / Excel).
- For AI Health Report only: Trending Days window and whether normalized scoring is required.

<note tip>**Tip:** Capture these inputs in the request ticket before opening Power BI. Operators who confirm scope first reduce rework and avoid generating reports against the wrong filters.</note>

6. Procedure — Access the Affirm Power BI Tenant

This section is common to both reports. Complete steps 6.1 through 6.4 before moving to Section 7 or Section 8.

6.1 Navigate to the Power BI Workspace

1. Open a supported browser and navigate to the Affirm Power BI workspace URL: Affirm Power BI Report Link
2. Sign in with your corporate credentials if prompted. Complete MFA if required.

<note important>**Important:** If the link opens but reports are not visible, you are still in your default tenant. Continue to step 6.2 to switch tenants.</note>

6.2 Switch to the Affirm Tenant

1. Click your profile picture in the top-right corner of Power BI.
2. In the profile flyout, click **Switch tenant**.

Figure 1. Open the profile menu and click 'Switch tenant'.

6.3 Select Synergist Technologies, LLC

1. In the **Switch tenant** dialog, select **Synergist Technologies, LLC** from the dropdown.
2. Click **Switch**. The Power BI Home page reloads in the Affirm tenant context.

Figure 2. Choose 'Synergist Technologies, LLC' and click Switch.

6.4 Confirm You Are in the Correct Tenant

On the Home page you should see the following two reports listed under the **Recommended** section and in the **Recent** list:

- AI Health Report - CDW
- AI Monitoring Performance Report

Figure 3. Power BI Home page after tenant switch — both reports appear under Recommended and in Recent.

<note>**Both reports use the same filter pattern.**
AI Health Report and AI Monitoring Performance Report share a near-identical filter pane: Organization Name, AI Asset Name, Evaluator Name, Method Name, and a Date / Date Range filter. Mastering the filter pane once applies to both reports. The differences are summarized in Section 7 (performance) and Section 8 (health).</note>

7. Procedure — Generate AI Monitoring Performance Report

Use this report to evaluate the performance of one or more AI assets across selected evaluators and methods, over a specific reporting period.

7.1 Open the Report

1. From the Power BI Home page (after Section 6), click **AI Monitoring Performance Report** under Recommended or Recent.
2. The report opens on the **Cover** page with the Filters pane on the right.

Figure 4. AI Monitoring Performance Report — Cover page with Filters pane.

7.2 Apply the Date Filter

The **Date** filter controls the reporting window. Power BI offers four filter types; pick the one that best fits the request.

7.2.1 Filter Type — Advanced Filtering

Use when the requestor provides explicit start and end dates.

1. In the Filters pane, expand **Date**.
2. Set **Filter type** to **Advanced filtering**.
3. Configure **Show items when the value** (top condition). Operators available: `is`, `is not`, `is after`, `is on or after`, `is before`, `is on or before`, `is blank`, `is not blank`.
4. Choose **And** to combine with a second condition (typically `is on or before` for the end date).
5. Click **Apply filter**.

Figure 5. Advanced filtering — example: 'is on or after 01-04-2026 AND is on or before 30-04-2026'.

7.2.2 Filter Type — Basic Filtering

Use when the requestor needs to cherry-pick specific calendar dates.

1. Set **Filter type** to **Basic filtering**.
2. Tick the individual dates required. Use **Select all** to include every date in the dataset.

Figure 6. Basic filtering — select individual calendar dates.

7.2.3 Filter Type — Relative Date

Use for rolling windows that should auto-shift each time the report is regenerated.

1. Set **Filter type** to **Relative date**.
2. Choose the operator: `is in the last`, `is in this`, or `is in the next`.
3. Enter the numeric value (e.g., 30).
4. Choose the unit: `days`, `weeks`, `months`, `years`, `calendar months`, or `calendar years`.
5. Tick **Include today** if the current day must be included.
6. Click **Apply filter**.

Figure 7. Relative date — 'is in the last 30 days, Include today'.

7.2.4 Filter Type — Relative Time

Use only for intra-day reports. Resolution is hours or minutes.

1. Set **Filter type** to **Relative time**.
2. Choose the operator: `is in the last`, `is in this`, or `is in the next`.
3. Enter the numeric value (1 to 10000).
4. Choose the unit: `hours` or `minutes`.
5. Click **Apply filter**.

Figure 8. Relative time — 'is in the last N hours/minutes'.

<note warning>**Date filter caveat:** Mixing filter types on the same field is not supported in a single render. If you switch from Advanced to Basic, the previous values are cleared. Confirm the date range with the requestor before switching.</note>

7.3 Apply the Organization Name Filter

The **Organization Name** identifies the client whose data is being reported. The document uses “CDW Internal” as the example client.

1. Expand **Organization Name** in the Filters pane.
2. Tick the single organization in scope. Untick any others.
3. If “(Blank)” is shown, leave it unchecked unless the requestor explicitly asks for it.

Figure 9. Organization Name — example with 'CDW Internal' selected.

<note warning>**Always confirm exactly one organization is selected.** Selecting multiple organizations will mix client data into the same report. This is a data-confidentiality violation. Reviewer must verify in Section 10.</note>

7.4 Apply the AI Asset Name Filter

Select the AI Assets in scope. The report renders separate views per asset selected.

1. Expand **AI Asset Name** and set **Filter type** to **Basic filtering**.
2. Tick the assets in scope, or use **Select all**. Available assets include Azure MS Cloud Chatbot, CloudGenie - Chat, CloudGenie - KnowledgeBase, Jenkins AI Copilot, Onboarding Guide, SOW Analyzer, etc.

Figure 10. AI Asset Name — pick one or more assets, or Select all.

7.5 Apply the Evaluator Name Filter

Choose which evaluators (metric families) should appear in the report.

1. Expand **Evaluator Name** and set **Filter type** to **Basic filtering**.
2. Tick the evaluators in scope, or use **Select all**. Typical evaluators: Groundedness, Hallucination, Prompt Relevance, Response Relevance, Readability, Latency.

Figure 11. Evaluator Name — example with all evaluators selected.

7.6 Apply the Method Name Filter

Each evaluator can be computed by one or more methods. For example, Readability supports FRES and SMOG.

1. Expand **Method Name** and set **Filter type** to **Basic filtering**.
2. Tick the methods in scope, or use **Select all**. Available methods include Fluency, FRES, LLMaJ, Parallel, Sequential, SMOG.

Figure 12. Method Name — choose the methods that match the requested evaluators.

<note>**Method–Evaluator pairing:** Some methods only apply to specific evaluators (e.g., FRES and SMOG only apply to Readability). Selecting an irrelevant method has no effect on the report but adds clutter to the filter audit trail. Pick only the methods aligned to the chosen evaluators.</note>

7.7 Review the Rendered Report

1. Wait for all visuals on every report page to finish rendering. The status bar should display **Updated**.
2. Navigate through the pages in the left-hand **Pages** pane: Cover, 1- Executive, 2- Evaluator

Snapshots, 3- Details (1) … 6- Details (4), Legal Disclaimer, Glossary 1–3.
3. Visually confirm: (a) date range in the cover matches the requested window, (b) organization name is correct, © selected evaluators and methods appear on the details pages.

7.8 Export the Report

1. Click the **download / export** icon in the top toolbar (highlighted in red in Figure 13 below).
2. Choose the requested format: **PDF** (recommended for client delivery), **PowerPoint**, or **Excel data**.
3. Wait for the export job to finish. Power BI shows a notification with a download link.
4. Save the file using the naming convention defined in Section 9.

Figure 13. Export the report — the export icon is highlighted at the top-right of the toolbar.

8. Procedure — Generate AI Health Report

The AI Health Report shares the Organization / AI Asset / Evaluator / Date filter pattern with the Performance Report, plus two additional filters specific to health monitoring: **Trending Days** and **is_normalized**.

8.1 Open the Report

1. From the Power BI Home page (after Section 6), click **AI Health Report - CDW**.
2. The report opens on the **Cover** page with the Filters pane on the right.

8.2 Apply Common Filters

Apply the following filters in order, using the same procedures as for the AI Monitoring Performance Report:

- **Organization** (or Organization(s)) — see Section 7.3.
- **AI Asset** (or AI Asset(s)) — see Section 7.4.
- **Evaluators** — see Section 7.5.
- **Report Date Range** — see Section 7.2 (use Advanced or Relative date as appropriate).

8.3 Set Trending Days

Trending Days defines the lookback window used to compute the **Trend %** column shown in the AI Health Snapshots table. The default value is 7.

1. Expand **Trending Days** in the Filters pane.
2. Set **Filter type** to **Advanced filtering**.
3. Set **Show items when the value** to `is`, then enter the desired number of days (e.g., 7, 14, 30).
4. Leave the **And/Or** row empty unless a second condition is required.

5. Click **Apply filter**.

Figure 14. Trending Days — set to 7 for a weekly trend window.

<note>**Choosing Trending Days:** Pick a window proportional to the report's date range and the volatility of the metric. 7 days suits high-volume daily monitoring; 30 days suits low-volume monthly review. Avoid windows longer than the date range itself — the trend will be meaningless.</note>

8.4 Set is_normalized

is_normalized determines whether the **Actual Normalized Score** column on the AI Health Snapshots page uses normalized values.

1. Expand **is_normalized** in the Filters pane.
2. Tick **True** to show normalized scores, **False** to show raw scores, or both for comparison.

Figure 15. is_normalized — choose True, False, or both.

<note>**When to use normalized scores:** Use normalized scores (True) when comparing different evaluators or metrics that have different native scales (e.g., comparing Latency in milliseconds against Readability scores). Use raw scores (False) when the requestor needs the original measurement values.</note>

8.5 Review the AI Health Snapshots Table

Navigate to the **2- AI Health Snapshots** page. The table shows one row per Evaluator × Method × Data Type combination.

Figure 16. AI Health Snapshots — example output for AI Asset 'CloudGenie - Chat'.

Columns to verify:

- **Evaluator** and **Method** — match the filters applied.
- **Group** — semantic grouping (e.g., Semantic Quality, Relevance & Coverage, Linguistic Quality, Efficiency, Harmful Content).
- **Data Type** — Manual or Generated.
- **Actual Normalized Score** — the score for the period (highlighted in Figure 16).
- **Baseline Start Date / Baseline End Date** — the reference window for trend computation.
- **Trend % (N Day(s))** — directional change vs. baseline. Green up-arrow indicates improvement; red down-arrow indicates degradation.

8.6 Review the Cover and Evaluator Group Pages

1. Confirm the **Cover** page shows the correct Date Range, Organization, and AI Asset(s).
2. Page through **3- Evaluator_Group 1** to **17- Evaluator_Group 15** to verify each evaluator group renders without errors.

Figure 17. AI Health Report — Cover page with full filter pane (Organization, AI Asset, Evaluators, Report Date Range, Trending Days, is_normalized).

8.7 Export the Report

Follow the same export procedure as Section 7.8. PDF is the default delivery format unless the requestor specifies otherwise.

9. Exporting & Delivering the Report

9.1 File Naming Convention

Use the following pattern for every exported file:

```
{Organization}_{ReportType}_{StartDate}_{EndDate}_v{N}.{ext}
```

Example: `CDWInternal_AIMonPerf_2026-04-01_2026-04-30_v1.pdf`

- Use ISO date format (YYYY-MM-DD) for sortability.
- Increment the version (v1, v2, …) only when re-exporting the same report for the same period.
- Avoid spaces and special characters in file names.

9.2 Storage Location

- Save the exported file to the shared client delivery folder under the client's subfolder (e.g., `/ClientDelivery/CDW Internal/2026-04/`).
- Do not store exported reports on personal drives or local desktops.

9.3 Delivery

1. Hand the file to the Reviewer / QA along with a link to the original report request.
2. After Reviewer sign-off, Client Delivery sends the report to the client via the agreed channel (secure email, client portal, etc.).
3. Log delivery in the request ticket: file path, delivery date, recipient.

10. Validation Checklist (Before Sending to Client)

The Reviewer must check every item below before approving the report for delivery. Do not skip items even if they look obvious.

✓	**Check Item**
☐	You are in the **Synergist Technologies, LLC** tenant (top-left brand should match).
☐	Exactly **one** Organization is selected, and it matches the ticket.
☐	The Date / Date Range shown on the Cover page matches the requested period.
☐	AI Asset(s) selected match the ticket.
☐	Evaluators and Methods selected match the ticket.
☐	All report pages have rendered fully — no “Working on it…” spinners or blank visuals.

✓	Check Item
☐	AI Health only: Trending Days value and is_normalized selection match the ticket.
☐	No filter warning banner (e.g., “Filter affects only this page” applied where global was intended).
☐	Exported file opens cleanly in the target application (Adobe Reader / PowerPoint / Excel).
☐	File name follows the convention in Section 9.1.
☐	File has been saved to the client delivery folder, not to a personal drive.

11. Troubleshooting

Symptom	Resolution
Power BI link opens but the report is not visible.	Confirm you switched to **Synergist Technologies, LLC** (Section 6.2). If the tenant option is missing, contact the Tenant Administrator to verify your guest access.
Filters pane is empty or missing.	Click the **Filters** chevron (>) on the right edge of the report canvas. If still missing, hard-refresh the browser with **Ctrl+F5**.
Date filter shows no data.	The selected date range may be outside the dataset's refresh window. Check the **Data updated** timestamp at the top of the report; the latest data is bounded by that timestamp.
Trend % column shows blanks.	Trending Days is greater than the date range. Reduce Trending Days or extend the date range so the baseline window fits inside the dataset.
Export to PDF cuts off the right edge.	Open the report's **File → Export to PDF** using the “Current view” option, not “Active page”. Alternatively, export to PowerPoint, then save as PDF.
“License upgrade required” banner.	Your Power BI license is Free. Request a Pro or PPU license in the Affirm tenant from the Tenant Administrator.
Report shows different data on refresh.	The underlying dataset was refreshed between renderings. Note the **Data updated** timestamp in the file name suffix so the delivered file is reproducible.
Multiple organizations appear selected.	**Stop.** Clear all filters using the eraser icon at the top of the Filters pane, then re-apply Section 7.3 carefully. Do not export until exactly one organization is selected.

12. Recommended Practices & Tips

- Always **clear all filters** (using the eraser icon at the top of the Filters pane) before starting a new client's report. Stale filters from a previous session are the #1 source of mis-delivered reports.
- Apply filters in the order listed in this SOP — Date → Organization → AI Asset → Evaluator → Method — to minimize report re-renders and to keep an auditable trail.
- Take a screenshot of the Filters pane before exporting. Attach it to the request ticket as evidence of the filter set used.
- If the requestor is unclear about Evaluator or Method, default to **Select all** and discuss the resulting report with them, rather than guessing.
- Lock the date range with explicit start/end dates when delivering to a client. Avoid **Relative date** for client deliverables — relative filters produce different numbers on re-run.
- Use **Relative date** for internal recurring monitoring views where the most recent data is wanted on each open.
- Run the report twice in two browser windows when verifying parity (e.g., comparing two date ranges). Use Edge in one window and Chrome in another to detect any browser-specific

rendering issues.
- Document any filter combination that produces unexpected results and escalate to Data Engineering with a screenshot and the exact filter set.
- Never share screenshots or exported reports outside the agreed delivery channel. Both reports contain client-confidential AI performance data.

13. Revision History

Version	Date	Author	Changes
1.0	Prior to 2026	Reporting Ops	Initial draft of the Affirm Power BI report generation procedure.
2.0	15 May 2026	Reporting Ops (Enhanced)	Restructured as a full SOP: added Purpose, Scope, Roles, Definitions, Prerequisites, Validation Checklist, Troubleshooting, and Recommended Practices. Re-illustrated using existing screenshots.

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