



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
Version	1.0
Classification	Internal

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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.

4. Prerequisites

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

4.1 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").
- For AI Health Report only: Trending Days window and whether normalized scoring is required.

5. 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.

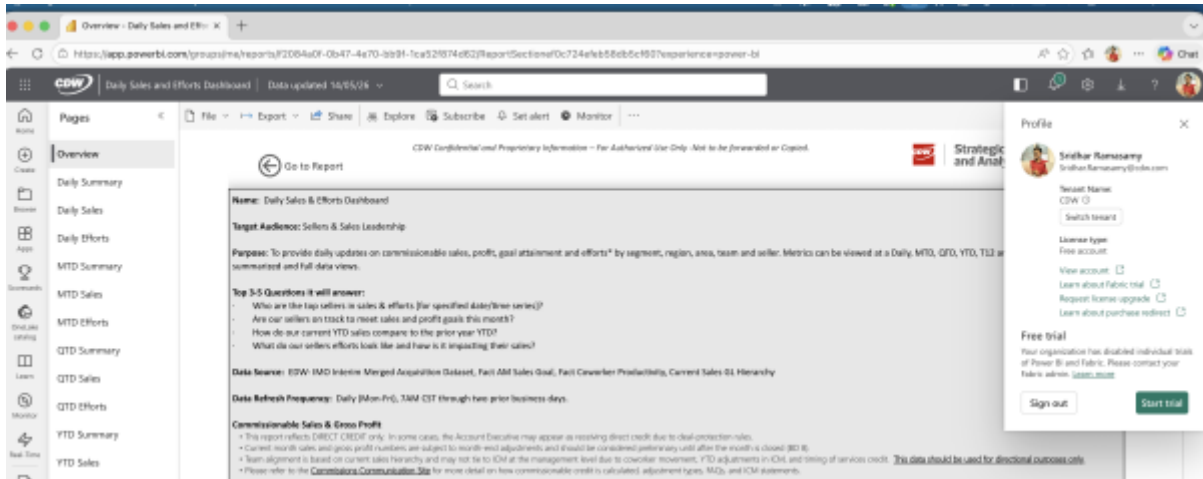
5.1 Navigate to the Power BI Workspace

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>

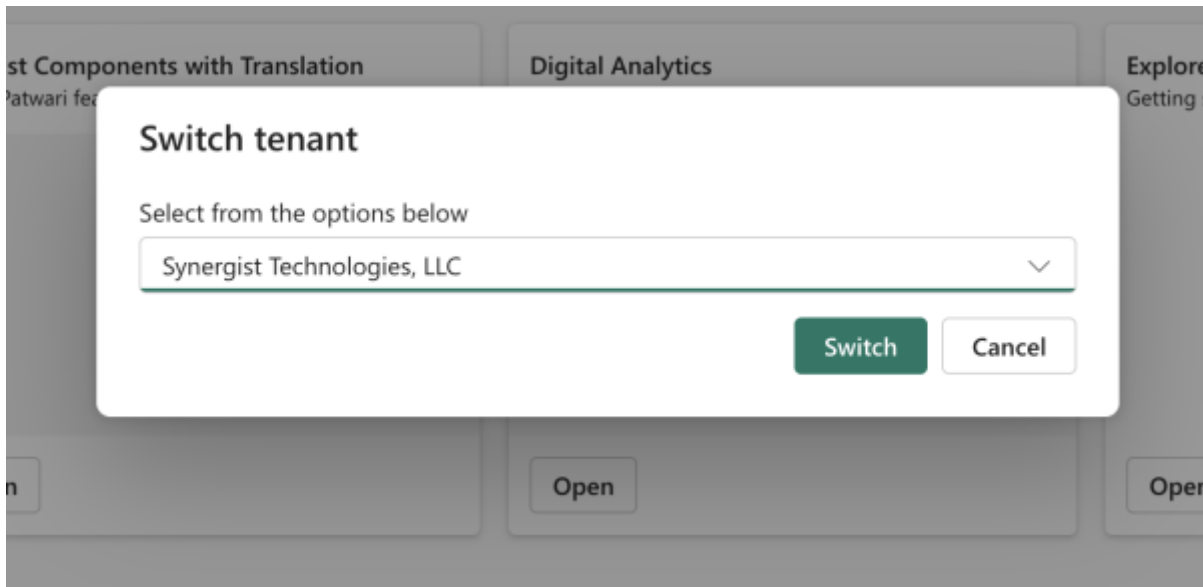
5.2 Switch to the Affirm Tenant

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



5.3 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.

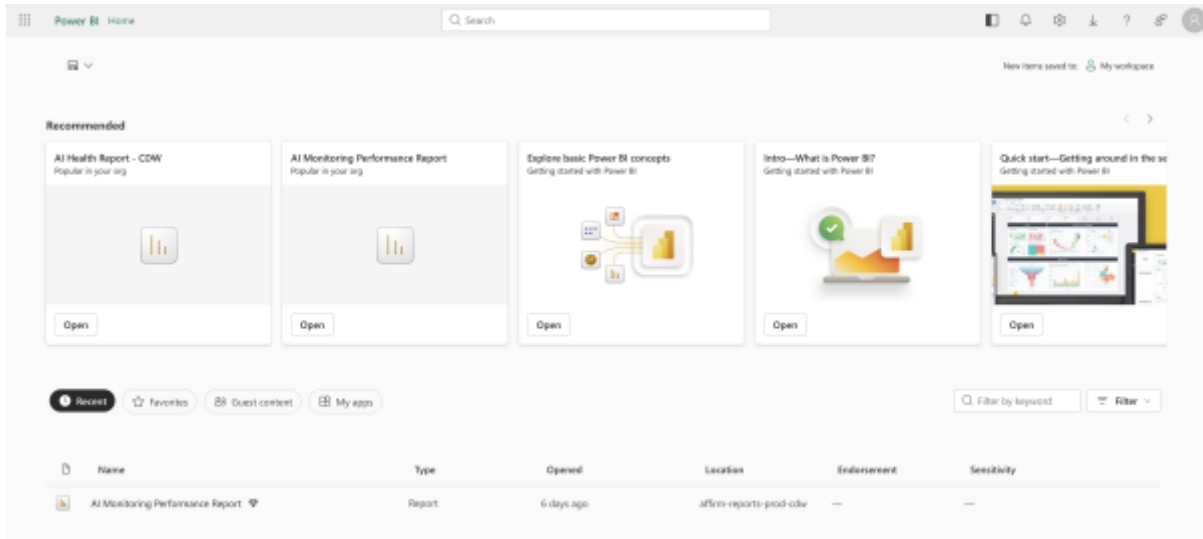


5.4 Confirm You Are in the Correct Tenant

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



<note>**Both reports use the same filter pattern.**

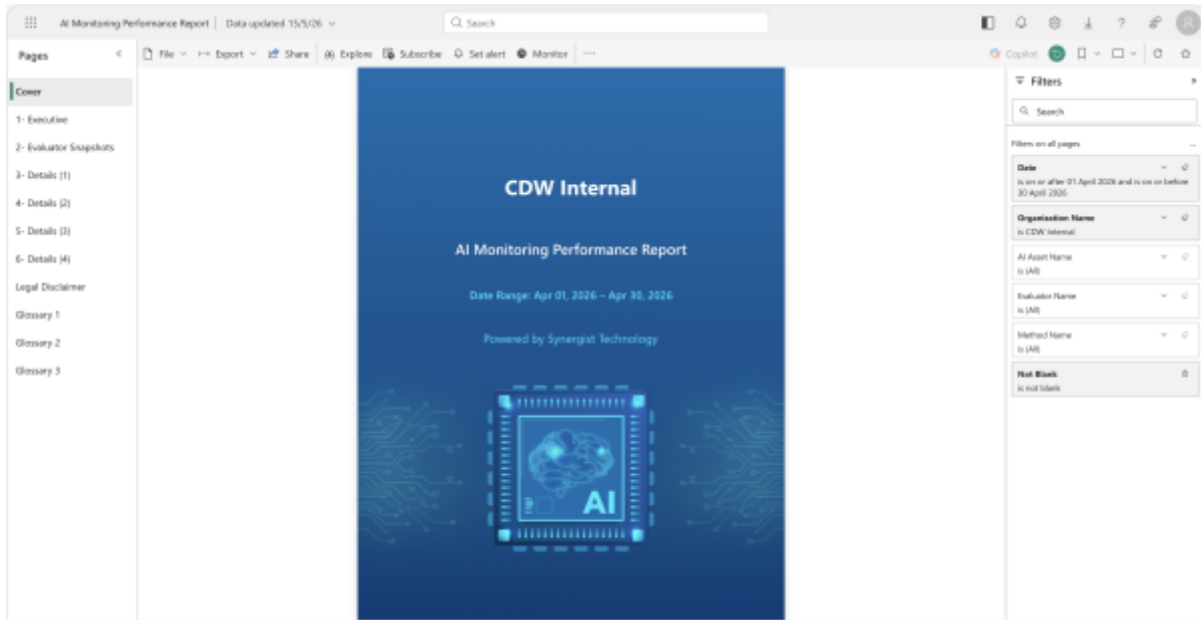
AI Health Report and AI Monitoring Performance Report share a near-identical filter pane: Organization Name, AI Asset Name, Evaluator Name, Method Name, and a Date / Date Range filter. Mastering the filter pane once applies to both reports. The differences are summarized in Section 7 (performance) and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

6. 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.

6.1 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.



6.2 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.

6.2.1 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**.

Date ^ 🗑️
is on or after 01 April 2026 and is on or before...

Filter type
Advanced filtering ▼

Show items when the value
is on or after ▼

01-04-2026 📅

12 00 AM ▼

And Or

is on or before ▼

30-04-2026 📅

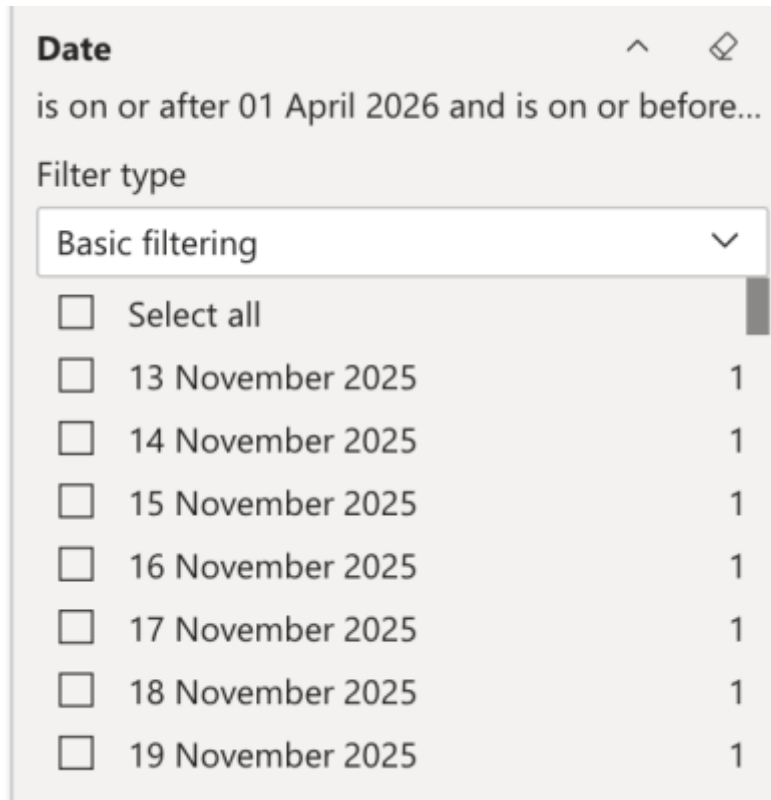
12 00 AM ▼

Apply filter

6.2.2 Filter Type — Basic Filtering

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

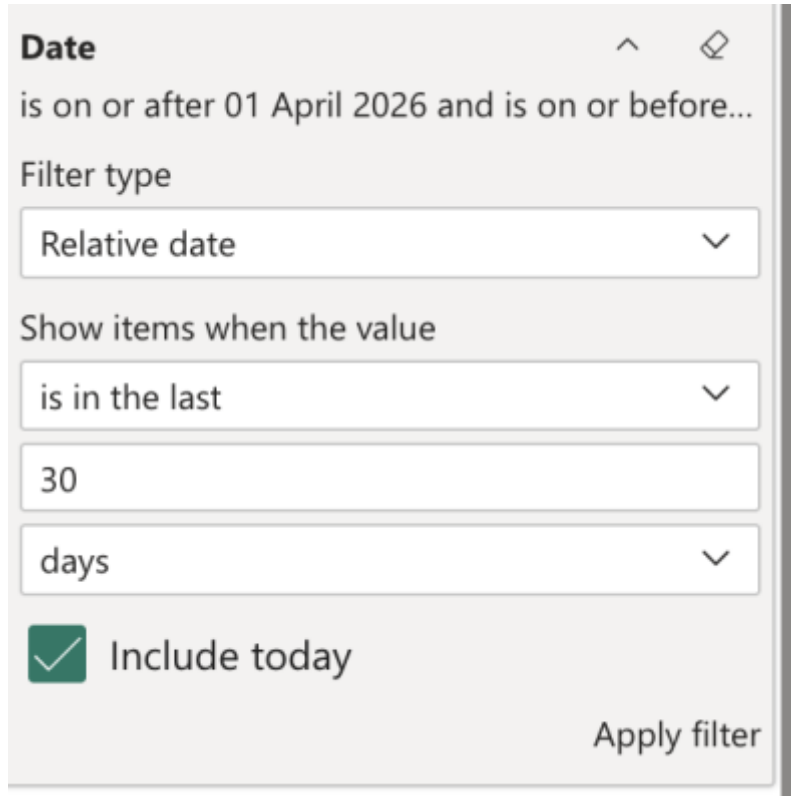
1. Set **Filter type** to **Basic filtering**.
2. Tick the individual dates required. Use **Select all** to include every date in the dataset.



6.2.3 Filter Type — Relative Date

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

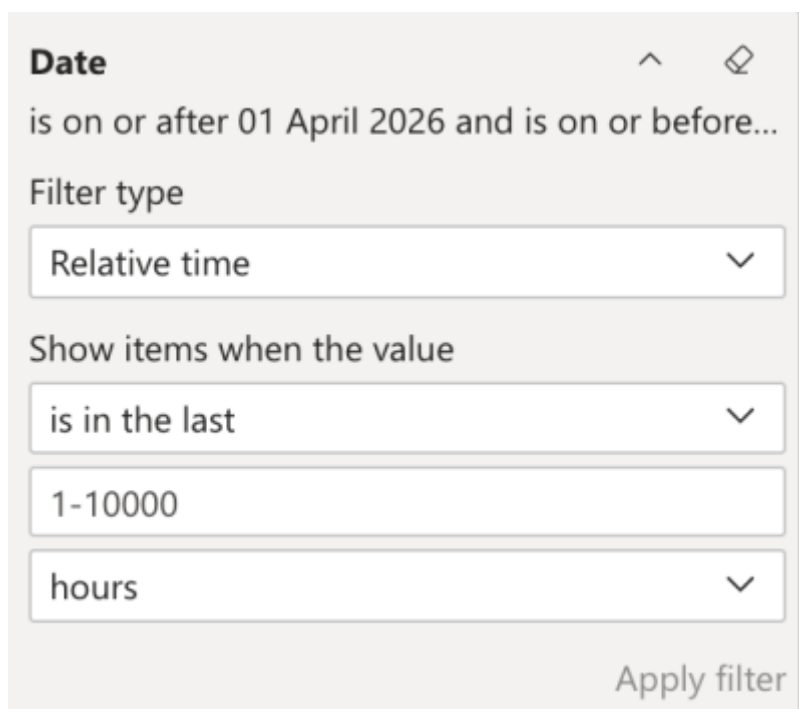
1. Set **Filter type** to **Relative date**.
2. Choose the operator: *is in the last, is in this, or is in the next*.
3. Enter the numeric value (e.g., 30).
4. Choose the unit: *days, weeks, months, years, calendar months, or calendar years*.
5. Tick **Include today** if the current day must be included.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



6.2.4 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**.

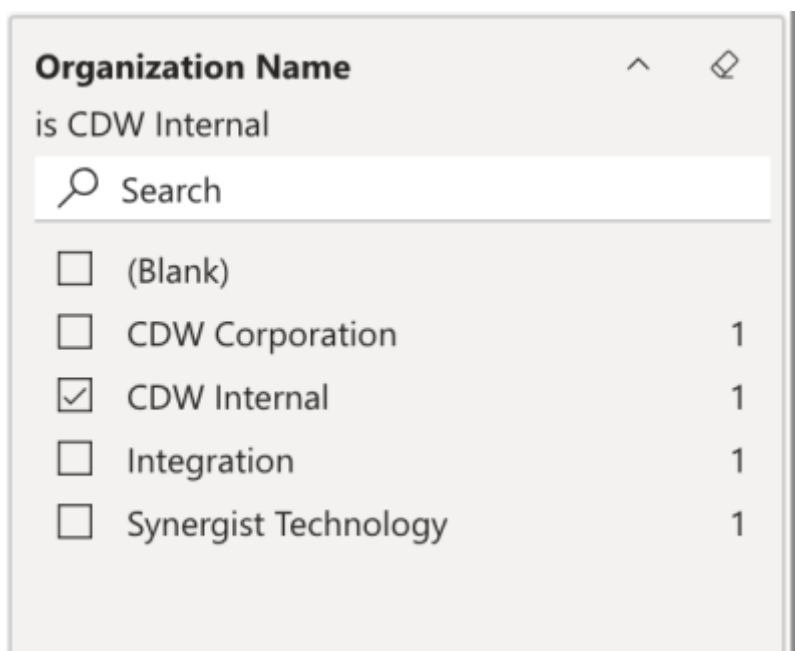


<note warning>**Date filter caveat:** Mixing filter types on the same field is not supported in a single render. If you switch from Advanced to Basic, the previous values are cleared. Confirm the date range with the requestor before switching.</note>

6.3 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.



<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>

6.4 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.

AI Asset Name ^ ◇

is (All)

Filter type

Basic filtering v

 Search

<input type="checkbox"/>	Select all	
<input type="checkbox"/>	Azure MS Cloud Chatbot	1
<input type="checkbox"/>	CloudGenie - Chat	1
<input type="checkbox"/>	CloudGenie - KnowledgeBase	1
<input type="checkbox"/>	Jenkins AI Copilot	1
<input type="checkbox"/>	Onboarding Guide	1
<input type="checkbox"/>	SOW Analvzer	1

6.5 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.

Evaluator Name ^ 🗑

is (All)

Filter type

Basic filtering v

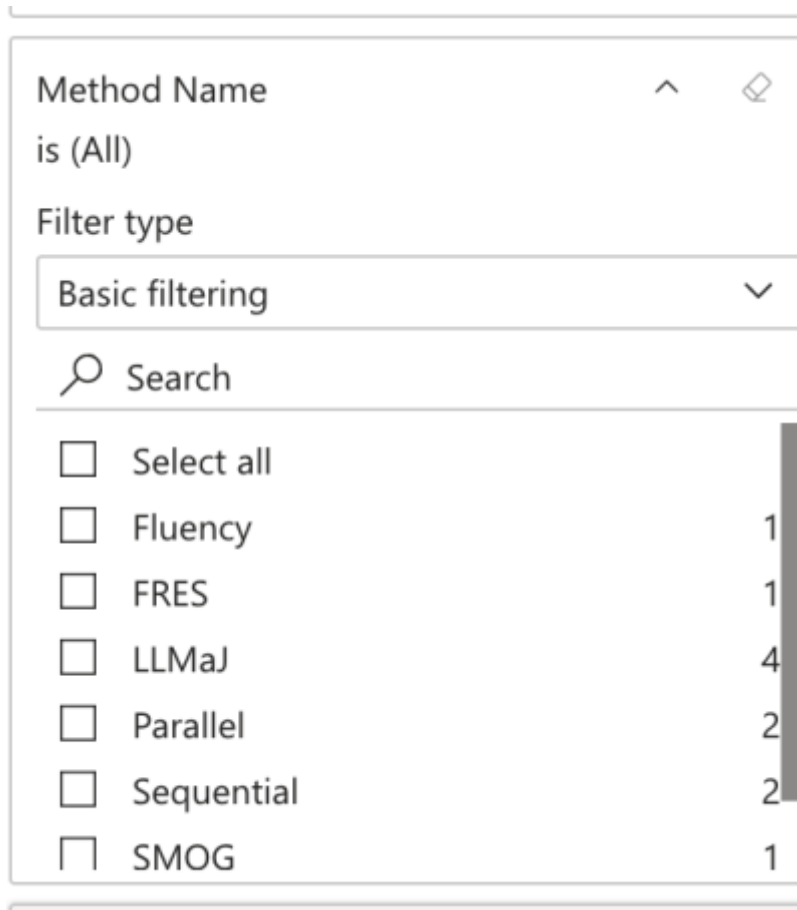
🔍 Search

<input checked="" type="checkbox"/>	Select all	
<input checked="" type="checkbox"/>	Groundedness	1
<input checked="" type="checkbox"/>	Hallucination	1
<input checked="" type="checkbox"/>	Prompt Relevance	1
<input checked="" type="checkbox"/>	Response Relevance	1
<input checked="" type="checkbox"/>	Readability	3
<input checked="" type="checkbox"/>	Latency	2

6.6 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.



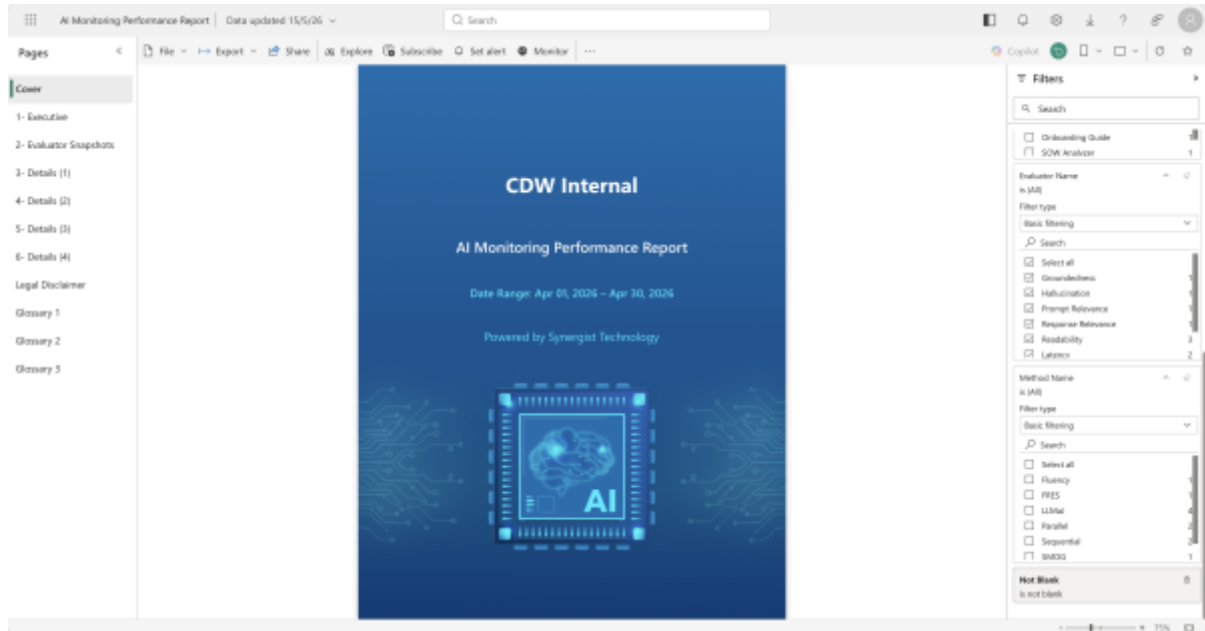
<note>**Method-Evaluator pairing:** Some methods only apply to specific evaluators (e.g., FRES and SMOG only apply to Readability). Selecting an irrelevant method has no effect on the report but adds clutter to the filter audit trail. Pick only the methods aligned to the chosen evaluators.</note>

6.7 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.

6.8 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.



7. 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**.

7.1 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.

7.2 Apply Common Filters

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

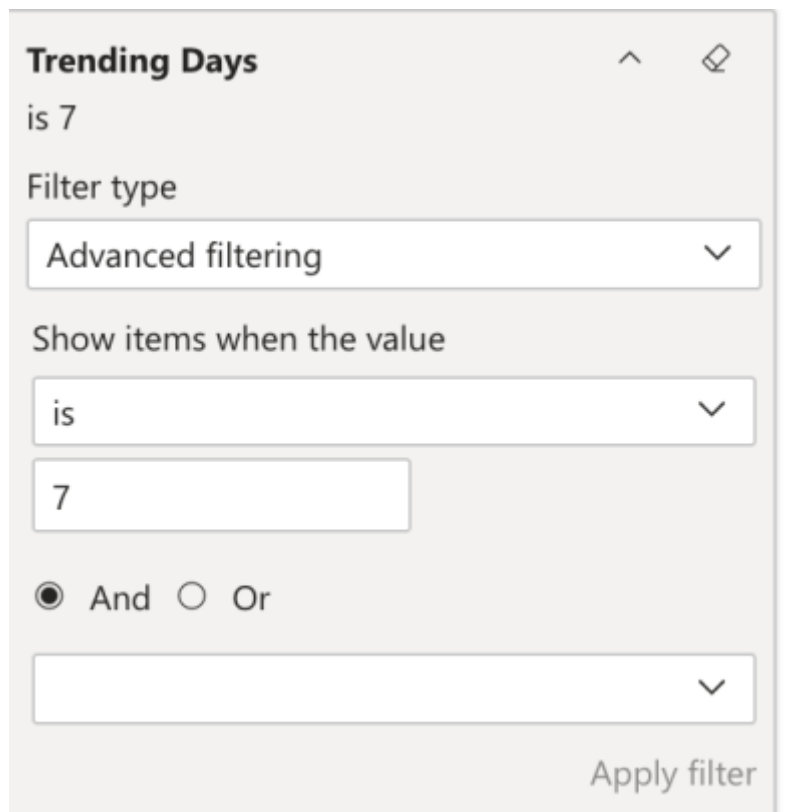
- **Organization** (or Organization(s)) — see Section 6.3.
- **AI Asset** (or AI Asset(s)) — see Section 6.4.
- **Evaluators** — see Section 6.5.
- **Report Date Range** — see Section 6.2 (use Advanced or Relative date as appropriate).

7.3 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 0.

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**.



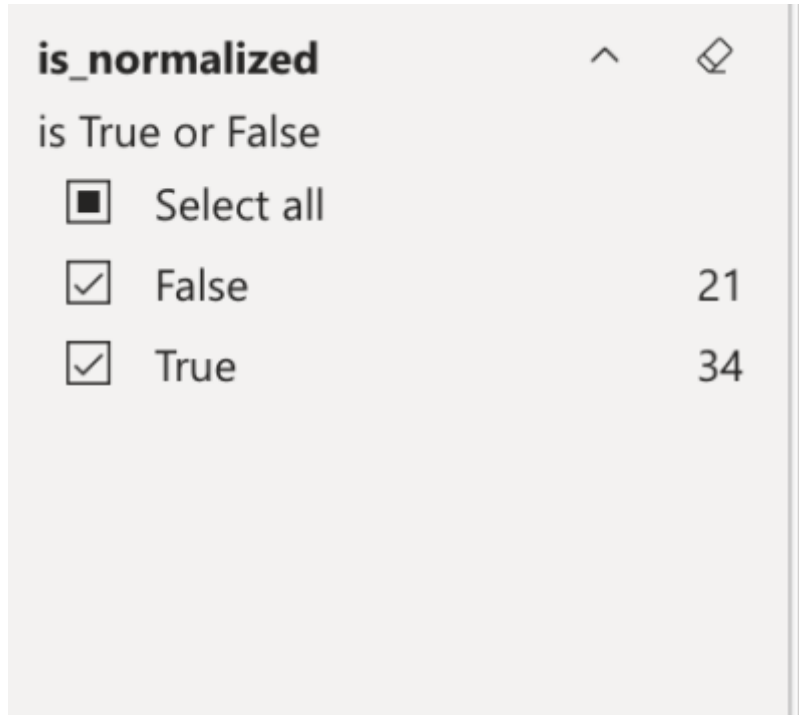
The screenshot shows a filter pane for 'Trending Days'. The filter is set to 'is 7'. The filter type is 'Advanced filtering'. The 'Show items when the value' dropdown is set to 'is'. The value '7' is entered in the text box. The 'And' radio button is selected. There is an empty dropdown menu below the radio buttons. An 'Apply filter' button is at the bottom right.

<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>

7.4 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.



<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>

7.5 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.


AI Monitoring Health Report								CDW Internal
Date Range: Jan 01, 2026 – May 15, 2026								
AI Asset(s): CloudGenie - Chat								
AI Health Snapshots								
Evaluator	Method	Group	Data Type	Actual Normalized Score	Baseline Start Date	Baseline End Date	Trend % 7Day(s)	
Hallucination	LLMaj	Semantic Quality	Manual	0.0	04-01-2026	05-13-2026	▲ +129.7 %	
Prompt Relevance	LLMaj	Relevance & Coverage	Generated	101.0	03-01-2026	05-01-2026	▲ +21.1 %	
Prompt Relevance	LLMaj	Relevance & Coverage	Generated	101.0	04-01-2026	05-13-2026	▲ +21.1 %	
Response Relevance	TRIDF	Relevance & Coverage	Generated	100.4	04-01-2026	05-13-2026	▲ +89.3 %	
Response Relevance	TRIDF	Relevance & Coverage	Generated	100.4	04-01-2026	04-30-2026	▲ +89.3 %	
Readability	FRES	Linguistic Quality	Generated	47.2	03-01-2026	04-30-2026	▲ +54.1 %	
Readability	FRES	Linguistic Quality	Generated	47.2	04-01-2026	05-13-2026	▲ +54.1 %	
Latency	Parallel	Efficiency	Generated	45.7	03-01-2026	04-30-2026	▲ +117.7 %	
Latency	Parallel	Efficiency	Generated	45.7	04-01-2026	05-13-2026	▲ +117.7 %	
Latency	Sequential	Efficiency	Generated	71.5	03-01-2026	04-30-2026	▲ +242.1 %	
Latency	Sequential	Efficiency	Generated	71.5	04-01-2026	05-13-2026	▲ +242.1 %	
Latency	Sequential	Efficiency	Generated	71.5	04-01-2026	05-13-2026	▲ +242.1 %	
Latency	Sequential	Efficiency	Generated	71.5	05-01-2026	05-13-2026	▲ +242.1 %	
Throughput	Parallel	Efficiency	Generated	68.1	03-01-2026	04-30-2026	▲ +76.2 %	
Throughput	Parallel	Efficiency	Generated	68.1	04-01-2026	05-13-2026	▲ +76.2 %	
Throughput	Parallel	Efficiency	Generated	68.1	04-01-2026	05-13-2026	▲ +76.2 %	
Throughput	Sequential	Efficiency	Generated	65.0	03-01-2026	05-01-2026	▲ +11.0 %	
Throughput	Sequential	Efficiency	Generated	65.0	04-01-2026	05-13-2026	▲ +11.0 %	
Toxicity	LLMaj	Harmful Content	Generated	100.0	04-01-2026	05-01-2026	▼ -100.0 %	
Toxicity	LLMaj	Harmful Content	Generated	100.0	04-01-2026	05-13-2026	▼ -100.0 %	

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.

7.6 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).*

7.7 Export the Report

Follow the same export procedure as Section 6.8. PDF is the default delivery format unless the requestor specifies otherwise.

8. 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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