CDW Documentation

Affirm Onboarding

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The following document is an overview of the onboarding process with Affirm. It will cover the following: what is our responsibility, what is Synergist's responsibility, and the steps that should be taken. (Note: This is a first draft and will be revised after the completion of CloudGenie onboarding)

First Steps

Onboarding with Affirm should only be done when the customer has a model with an API that they wish to monitor. If that is the case, then fill out the following questionnaire with the customer. After it is filled out send it over to Andrea Parado on the Synergist team.

- Current Affirm Questionnaire
- Andrea's email: aparado@synergist.technology

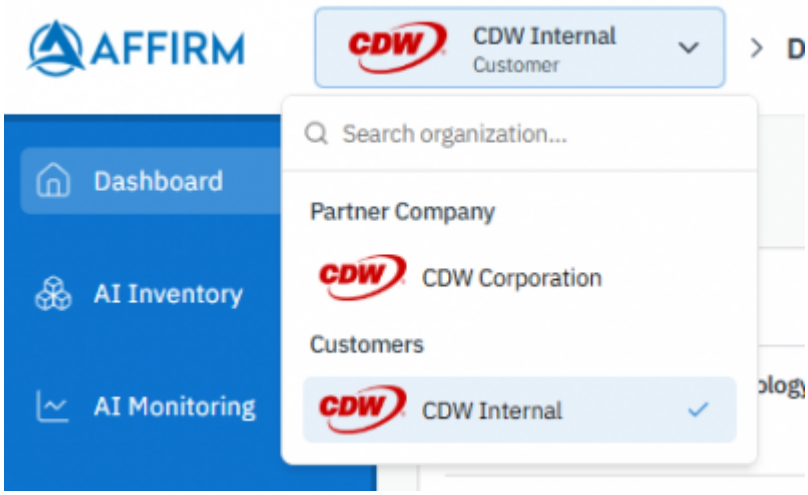
Second Steps

1. Prerequisites

A. Log in to the correct Affirm environment for the customer or application you are onboarding.

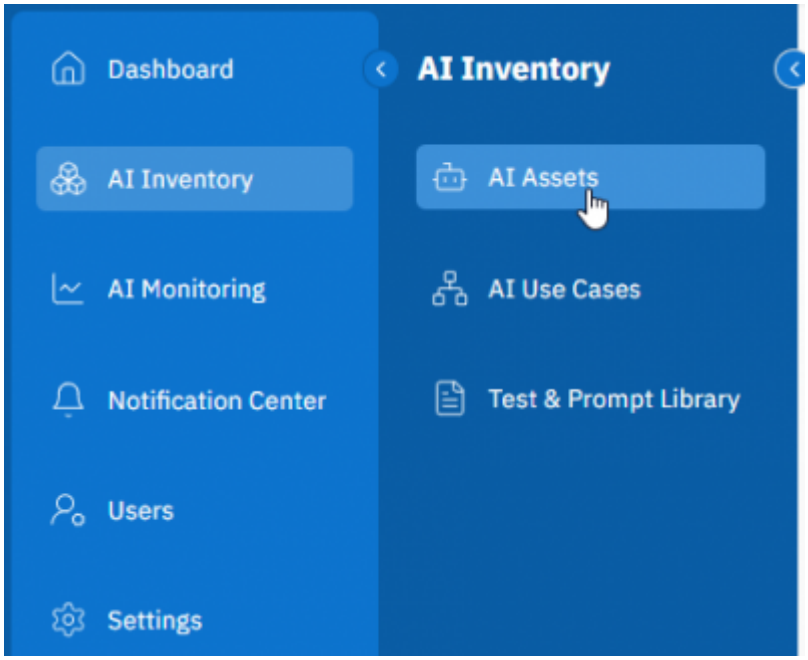
Affirm Prod

B. Before creating anything, verify that you are working in the correct organization so the asset, monitoring settings, and tests are associated with the right customer environment.

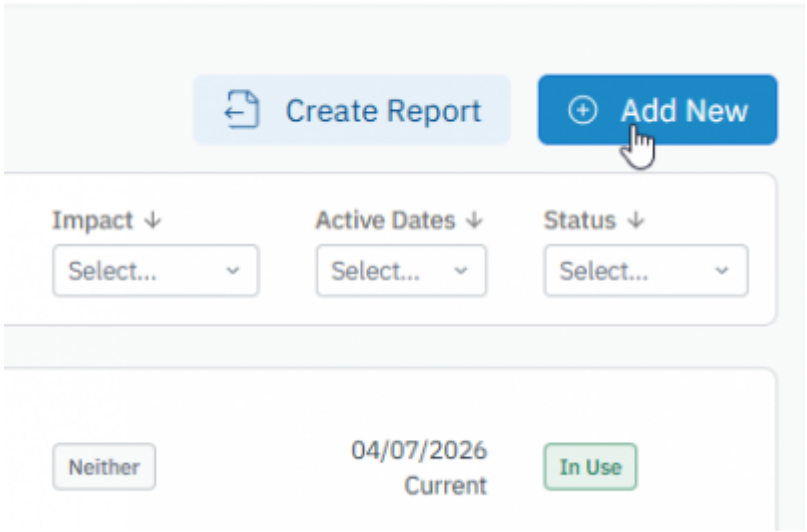


2. Create an Asset

A. On the menu open: AI Inventory > AI Assets

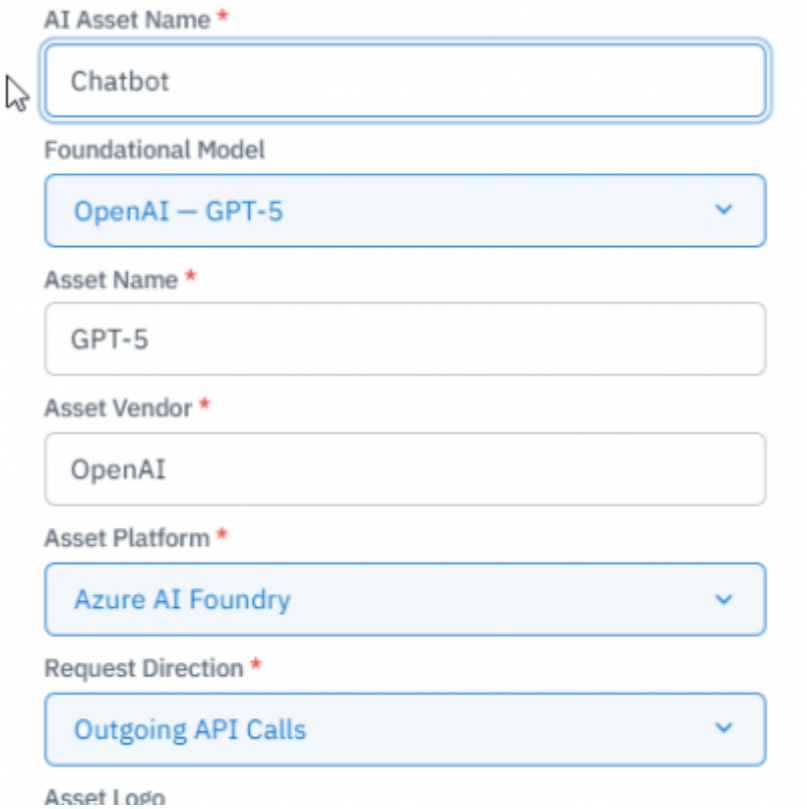


B. Create a new asset



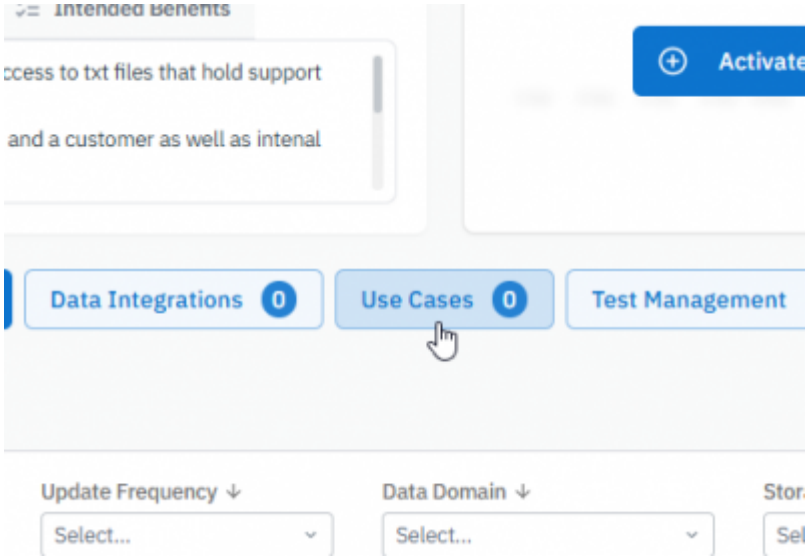
C. **Fill out the Asset card with the provided information in the intake form, then create the asset**
Enter all available information from the intake form, including the asset name, description, vendor, platform, model, and any other known application details. If the customer does not provide a description, add a clear internal description based on the application's purpose.

Be sure to populate any required ServiceNow-related fields when applicable. These may include **Location Name**, **Support Note**, and **Configuration Item**. Organization-level fields such as **Account ID** and **Account Number** should also be entered if they are required for the organization's ServiceNow integration.

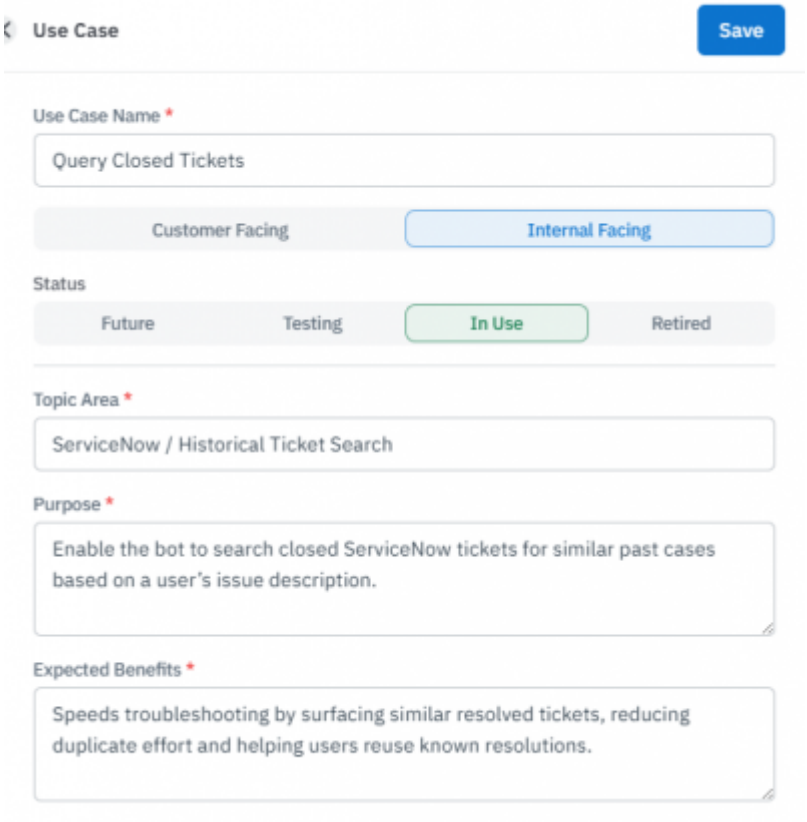


3. Create Use Cases

A. Select Use Cases



B. Create a new use case. Enter each use case as provided. The use cases will be useful to reference in the future. Use cases should be entered as completely as possible because they help document what the asset does, what it touches, and what the intended risk and business context are.



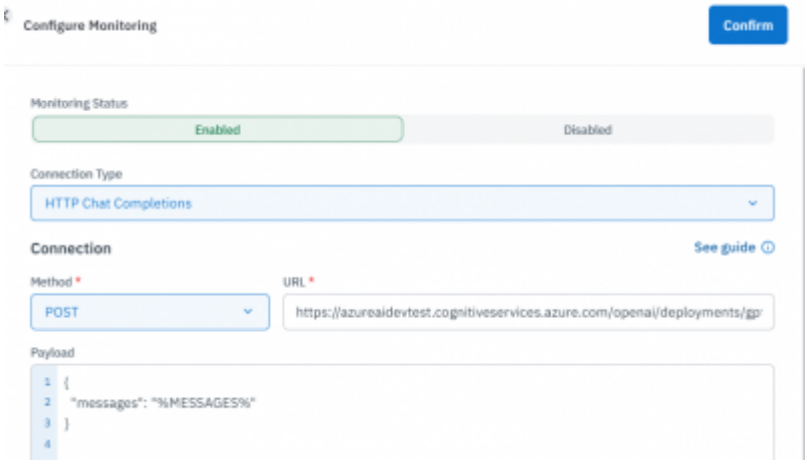
4. Set up Monitoring

A. Select Monitoring Setup and keep monitoring disabled. We will turn it on after we create a test.

Configure the monitoring with the provided information in the intake form.
Leave monitoring off while you are still building the asset and completing required fields. Save the asset first, then open Monitoring Setup from the asset page.

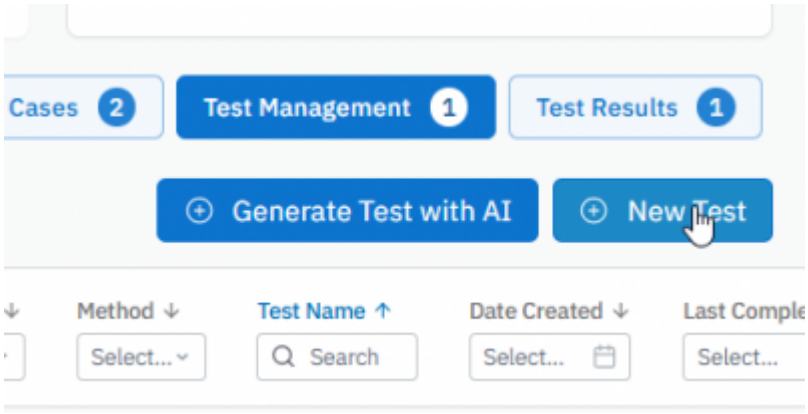
Use HTTP Chat Completions for the monitoring method unless your team has a different approved connection type. Use the full chat completions-style endpoint, not just the base endpoint, when applicable. For the payload, use the standard messages structure. The payload field may auto-format after you click out of it, so it is fine if it is initially pasted in as one line. For more help on the payload select the see guide link.

For the response path, use the standard chat completion response path that points to the returned content under choices → message → content.

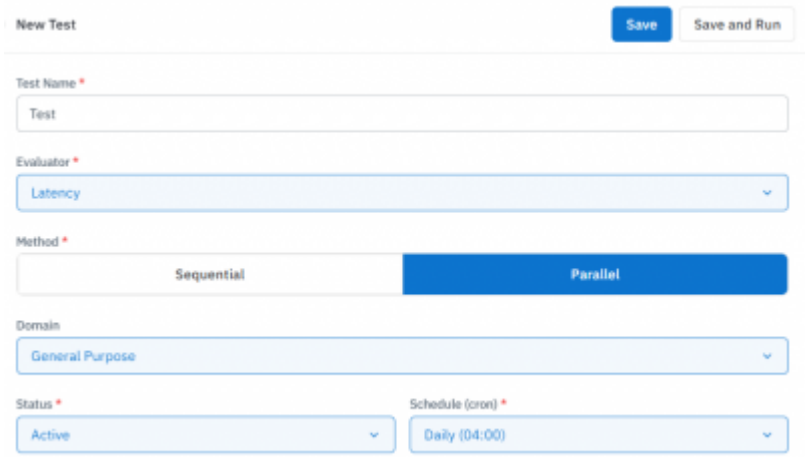


5. Create a test

A. Select test management and create a new test



B. Start with a simple latency test
For initial onboarding, begin with a Latency test. This is the easiest way to confirm the connection is working before building more advanced tests.



C. Enter a clear test name

D. Select the Latency test type and use Parallel execution

E. Set the domain
Use Informational if needed, or leave it broad if the field allows.

F. Leave the cron job inactive
Do not enable the cron job during initial onboarding. For the first test, keep it inactive.

G. Leave the default thresholds in place

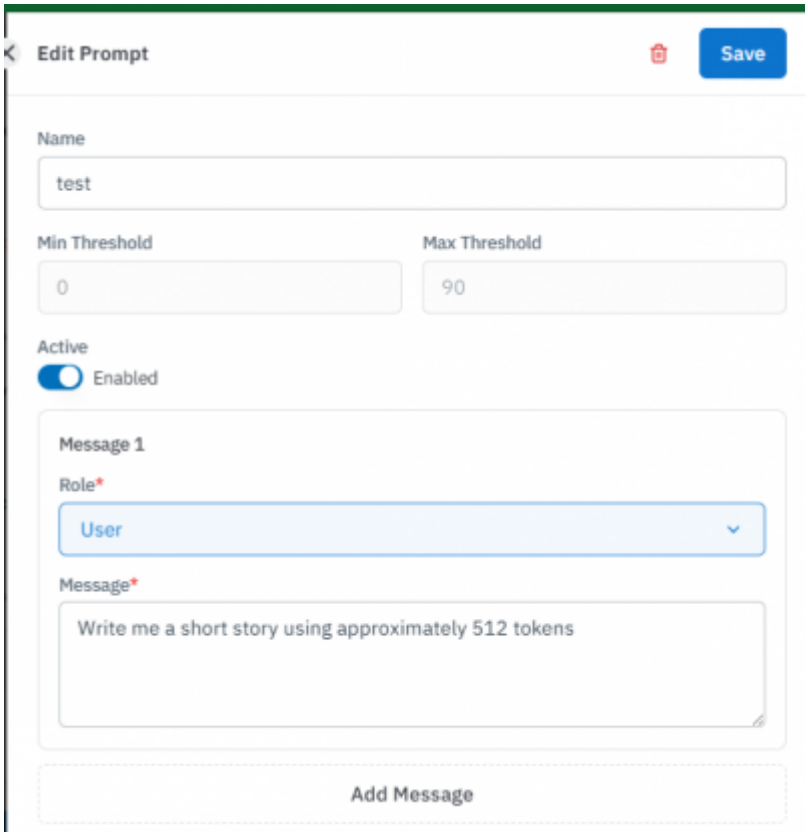
H. Set warm up runs
Use 1 or 2 warm up runs.

I. Set actual runs and threads
For the initial latency test, use:

- Actual runs: 4
- Threads: 2

This creates two simultaneous chains of prompts.

J. Enter a simple prompt
For the first latency test, the prompt does not need to mirror the application's real-world use case exactly. A simple prompt is fine if the goal is to validate performance and connectivity. An example would be asking the model to write a short story using approximately 512 tokens.

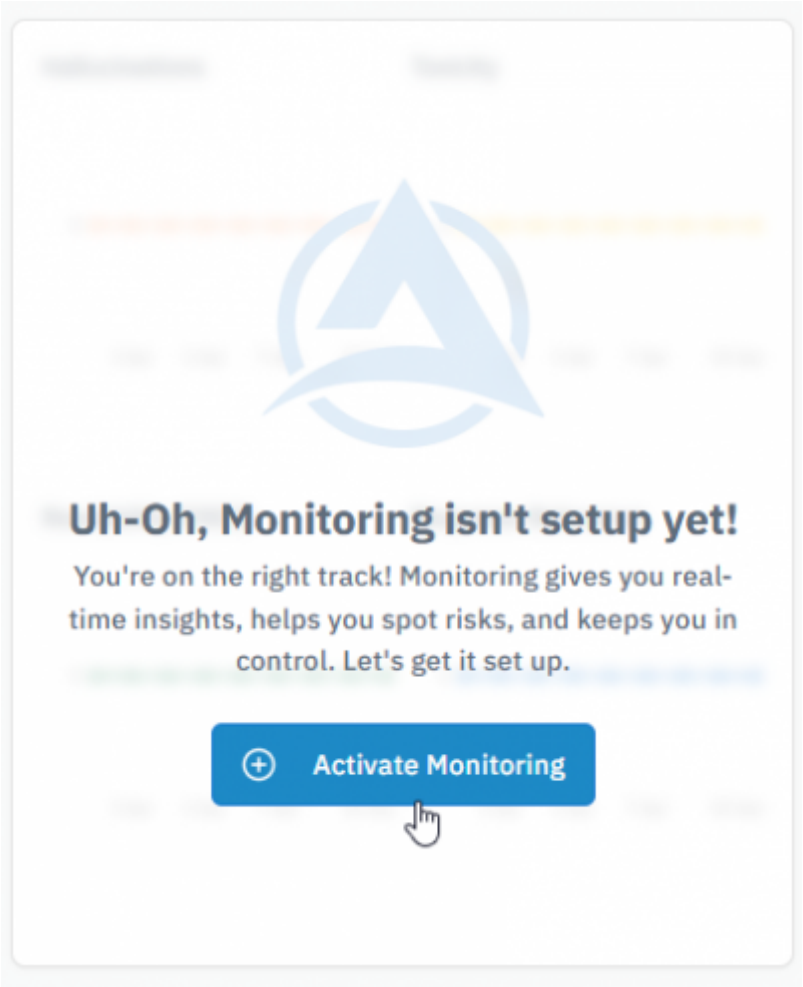


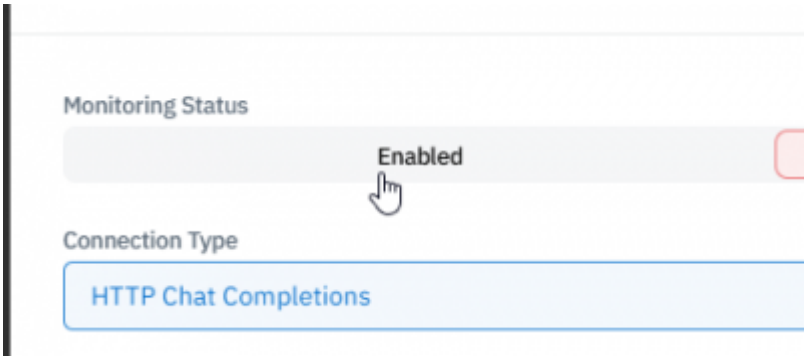
K. Save the test
Save the test once the configuration is complete

6. Turn on monitoring

A. Return to the asset and enable monitoring after setup is complete

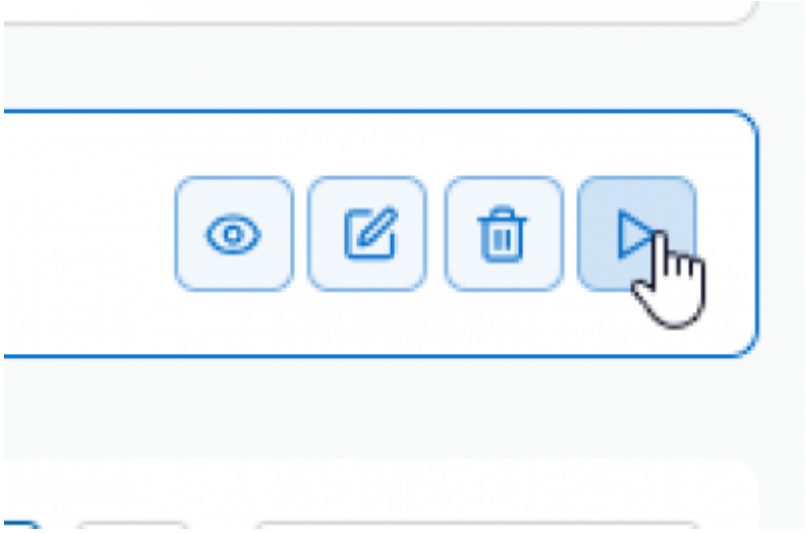
Once the asset is saved, the monitoring configuration has been entered, and the test has been created, enable monitoring from the asset page. Monitoring should be turned on only after the asset details are complete and the connection settings are in place.





7. Run the test

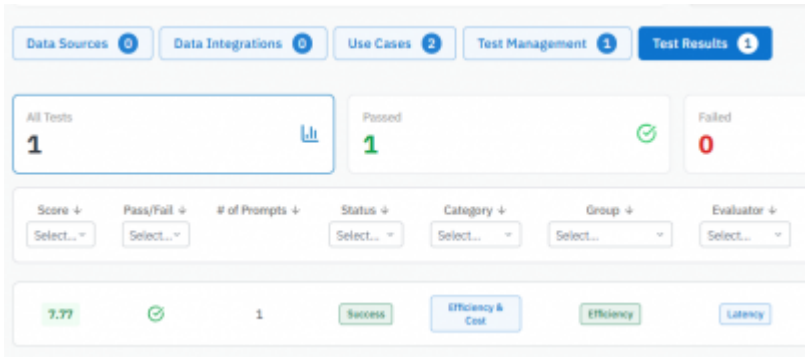
A. In Test Management, click the play icon on the far right of the test
This runs the test as a one-off validation.



B. Wait for the test to process
Allow the test a short amount of time to run. Response time may vary depending on the model, token count, and backing resources.

C. Check Test Results
After 2-3 minutes check the test results tab

D. Confirm success
If the test completes successfully, that confirms the application is connected and the monitoring setup is working correctly. If the test fails due to a latency issue, that still indicates the application is connected. If the test fails because of a connection-related issue, review the configuration and confirm that all values from the intake form were entered correctly. If all values were entered correctly, contact the customer to verify that the information they provided is correct.



8. Prompting guidance for onboarding tests

During onboarding, the goal is to create tests that validate the application and confirm it is functioning correctly. Initial tests should be designed to pass and to reflect expected behavior, not to intentionally break the application.

Additional tests such as hallucination, readability, toxicity, groundedness, or response relevance can be added later based on the asset’s purpose, target audience, and customer requirements. When creating those later tests, prompts should be tailored to what the application is supposed to do and what type of behavior matters most for that use case.

Final Steps

The final steps in onboarding is creating the right prompts to accurately monitor the model. Please reference the document on creating prompts for Affirm for more information: (creation of document TBD). After the prompts have been made the onboarding of the model to Affirm should be complete