RIVAL PERFORM ROSI

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Contents

ROSI - Rival OS Intelligence

ROSI is an AI-powered Knowledge Agent that helps users get answers faster in Perform using natural language. ROSI can retrieve live Perform data (goals, check-ins, feedback, review details when available, and user information) and return results immediately based on what you ask. ROSI can also provide product guidance and how-to support.

Depending on your organization's settings, ROSI may also include **ROSI Review Writer**, a capability that supports both managers and employees in drafting performance review content, including manager reviews and self-reviews.

Security and access: ROSI enforces role-based permissions and data segmentation. Users only receive information they are authorized to access. ROSI is designed to avoid exposing high-risk sensitive personal data.

Enablement

ROSI is disabled by default to support organizations with AI restrictions or governance requirements. Admins can enable ROSI and (optionally) enable the ROSI Review Writer capability for managers and employees.

1. Go to Admin > Settings > System Management > Enable Apps.
2. Set **ROSI Enabled** to **Yes** to enable ROSI in Perform.
3. (Optional) Set **ROSI Review Writer** to **Yes** to allow managers and employees to generate review draft content using ROSI.

When enabled, ROSI responses respect each user's existing permissions and data access in Perform.

Note: If **ROSI Review Writer** is set to **No**, users can still use ROSI for data lookup and product guidance (if ROSI Enabled is on), but they cannot generate review drafts.

How To Use ROSI

Click the ROSI icon at the bottom right corner of the page. You can:
- Select a suggested prompt, **or**
- Enter your own question in the **Ask me anything** box—for example:
  "Show me Jane Doe's goals" or "Show goal completion rates for Marketing department"

Depending on what you ask, ROSI may return:
- User profile information
- Goals, check-ins, feedback, or review history (when available)
- Stats summaries (review, goal, or feedback)

Tips
- **Be specific:** Use full names, include a timeframe, and add filters like department or goal period.
- **Default lookback:** If you don't provide a timeframe, ROSI may use a default lookback window (up to 365 days).
- **Context-aware follow-ups:** After asking about a person, goal, check-in, or review process, you can refer back using pronouns like "they" or "that process."
- **Refine date ranges:** You can adjust date ranges and ROSI will return updated results.

If ROSI doesn't return expected results:
- Narrow the request (full employee name, dept, goal period/review process name, date range)
- Confirm the data exists in Perform and the user has permission to access it
- If using Review Writer, confirm the Review Writer toggle is enabled

Review Writer

ROSI Review Writer helps managers and employees draft performance reviews using available performance data in Perform. Managers can generate or refine review drafts for their team members, and employees can generate or refine their own self-reviews.

Review Writer supports the following workflows:
- Draft a manager or self-review using recent performance data
- Refine an existing draft (paste text and request edits)
- Adjust tone, structure, or emphasis with follow-up prompts
- Copy finalized text with one click

For transparency, Review Writer includes a **Source & Evidence** section at the bottom of the output (collapsible) so you can review what information the draft was based on.

Use Review Writer:
1. Open ROSI in Perform.
2. Enter a prompt (example: "Write a review for Kayla Brady" or "Help me draft my self-review for Q4 2025").
3. Review the draft and iterate with follow-up prompts.
4. Copy the final text into the review form.

Best results: Include the employee's role and timeframe (for managers) or your role and timeframe (for self-reviews), and mention the focus areas you want covered.

Professional review guidance: Review Writer is designed to produce performance-based, constructive review content. If a prompt includes inappropriate or overly personal language, ROSI will guide users toward a professional, work-focused rewrite. Review Writer will not recommend HR actions (for example, termination, discipline, or PIPs).

Suggested Questions

RIVAL

User Details
Profile
- "Show me Michael Baxter's profile information"
- "What is the email and hire date for Taylor Phillips?"
- "Show me Michael Baxter's location"

Goals
- "Show me all goals for Michael Baxter"
- "How many completed goals does Taylor Phillips have?"
- "Show me in-progress goals for Drake Ramoray"

Tip: Include a quarter or date range—without one, ROSI defaults to a 365-day lookback.

Check-ins
- "Show me check-ins for Michael Baxter in the last 90 days/in 2025"
- "What check-ins does Taylor Phillips have?"
- "Get all check-in communications for Drake Ramoray"

Feedback
- "Show me all feedback received by Michael Baxter"
- "What feedback has Taylor Phillips given to others?"
- "Get all feedback activity for Drake Ramoray"

Reviews
- "Show me performance reviews for Michael Baxter"
- "What are Taylor Phillips's review ratings?"
- "Get review history for Drake Ramoray"
- "Help me draft my self-review for Q4 2025."
- "Refine this self-review draft to be more concise and impact-focused."

Tip: If no reviews are returned, confirm there is review history for the requested timeframe.

Stats and Analysis
Review Stats
- "Generate review stats for [named process]"
- "Show reviews for Engineering department in [named process]"
- "Which reviews are still in progress in [named process]?"

Required: Include the exact review process name as it appears in Perform.

Goal Stats
- "Generate goal stats for Goal Period 2022"
- "Show goal completion rates for Marketing department in Goal Period 2022"
- "What are the pending goals statistics for the North Carolina office for Goal Period 2022?"

Tip: For goal stats, include the goal period name.

Feedback Stats
- "Generate feedback stats for Q1 2025"
- "Show feedback for Department 3 from January to June 2025"
- "What are the feedback statistics for the Chicago office for Q4 2025?"

Help Center / Product Guidance
- "How do I set up performance goals in Rival?"
- "What is the process for conducting performance reviews?"
  "How do I give feedback to my team members?"

FAQs

System Behavior

- **What kind of models does ROSI use?** All AI models used (OpenAI and Claude) operate with zero-shot capabilities, meaning they can handle tasks without needing domain-specific training. Only the minimum required inputs, controlled by tenant-specific settings, are used to generate outputs.
- **Does ROSI use any client data for training?** No customer data is used for fine-tuning.
- **How does ROSI retrieve data?** ROSI connects to your live Perform system using a secure integration. Queries pull current data directly from your environment, including goals, check-ins, feedback, review history and ratings (when available), and user information.
- **How often is data refreshed?** Data is retrieved in real-time. There may be a slight delay if the system is under heavy load or if background syncs are still processing.
- **What if ROSI can't complete a request?** If ROSI encounters a timeout, access issue, or malformed query, it returns a general fallback message: "Unable to retrieve data right now." Error details are captured in system logs for troubleshooting.
- **Does ROSI maintain context between questions?** Yes—within a session. You can ask follow-up questions using pronouns like "she," "they," or "that goal," and ROSI will maintain context as long as the conversation remains active.

   NOTE: ROSI can review timeframes of 365 days and a limit of 5k records (e.g. goals, check-ins, feedback, or reviews) per query.
- **What's the best way to phrase a question?** Use plain language. Be as specific as possible (e.g., "Show me in-progress goals for Kayla Brady in Marketing"), and include date ranges if needed.
- **How do I enable/disable ROSI?** Client admins can enable or disable ROSI from **Admin > Settings > System Management > Enable Apps**. Use **ROSI Enabled** and **ROSI Review**.

Privacy and Security

- **How is my login session managed?** Each user authenticates with a time-limited session token; it's stored encrypted and never exposed to the model or front-end code.
- **What personal data does ROSI see?** The engine only receives minimal metadata (username, query) when generating replies. Full PII—such as SSNs, birthdates, and contact details—stays securely on your backend and is never surfaced.
- **Will ROSI ever show sensitive fields like SSNs?** No. As a precaution, ROSI will never report Social Security Numbers or other highly sensitive PII—even if your user role permits access to that data.
- **Is my employee data logged?** All API calls and queries are logged by Rival, but sensitive fields are redacted or masked before any logging occurs.
- **How long are logs retained?** Rival retains anonymized summaries of requests and responses. Anonymized request logs are retained for one year; anonymized responses are purged after 30 days.
- **Who can access the logs?** Access is tightly controlled via IAM roles and is limited to designated Operations and Security teams.
- **How is data encrypted?** All traffic is HTTPS/TLS-encrypted in transit. Cached or stored data is encrypted at rest within our secure cloud infrastructure.
- **Does the model store PII permanently?** No. Conversation context is held temporarily in memory during a session. Only the user query and username metadata are passed through for processing.

- **How are audit trails maintained?** Every user interaction—such as viewing a profile or generating a report—is logged with timestamp, user ID, and query type. Raw data is never included.
- **How do we comply with data-protection regulations?** We operate within VPC/VPN, enforce least-privilege IAM, and support data-residency controls to meet GDPR, CCPA, and other mandates.
- **Where can I get help troubleshooting ROSI?** If ROSI returns unexpected results, contact Rival Support. Error details are captured in system logs for troubleshooting.

Provide feedback on ROSI

You can provide feedback about your experience with ROSI and add a rating. Rival will review your feedback.

1. After asking ROSI your question, click Feedback ✕ .
2. Select a rating and click Next.
3. Enter comments and click Submit.

Need Help or Want to Go Deeper?

We're here to help.
- Rival Community: https://www.rivalcommunity.com
- Email support@rival-hr.com for access.