RIVAL WORKFLOW ROSI

RIVAL

Contents

ROSI - Rival OS Intelligence

ROSI is an AI-powered Knowledge Agent that helps users retrieve information and take action faster in Rival by using natural language instead of navigating pages, filters, and reports. ROSI can answer questions using live Workflow data (tasks, events, employee details, and documents) and return results immediately based on what you ask.

ROSI supports two experiences:

- **ROSI for Admins:** Ask system-wide or employee-specific questions to troubleshoot onboarding/offboarding, identify blockers, review task and event status, and generate quick summaries or reports (for example, "Show me overdue tasks in Engineering" or "What's the status of this event?").

- **ROSI for Employees (Coming soon):** Employees can ask what they need to do next, what tasks are outstanding, what documents are required, and get guidance based on portal documentation and their assigned workflow steps.

If you used CoPilot, ROSI will feel familiar—but it expands beyond product guidance by returning real-time results from your Workflow system.

## What ROSI Can Do

For Admins

ROSI supports HR Admin workflows that normally require navigating multiple pages or running reports. You can use ROSI to:

- **Find and monitor tasks** (system-wide or per employee)
  Example: overdue, completed, expired, warning-status tasks
- **Track events and timelines**
  Example: open/closed status, cancelled events, average time an event stays open
- **Retrieve employee profile details**
  Example: hire date, manager, department, authentication method
- **Locate workflow-related documents**
  Example: what documents exist for an employee
- **Generate summaries and date-based reporting**
  Example: task reports between two dates, event summaries by quarter

For Employee Portal (Coming Soon)

Employees will be able to use ROSI to:

- Check **what to do next** and what's still outstanding
- Understand **progress and due dates**
- Identify **required documents** and workflow steps
- Get answers based on employee portal documentation (including customer-uploaded documents)
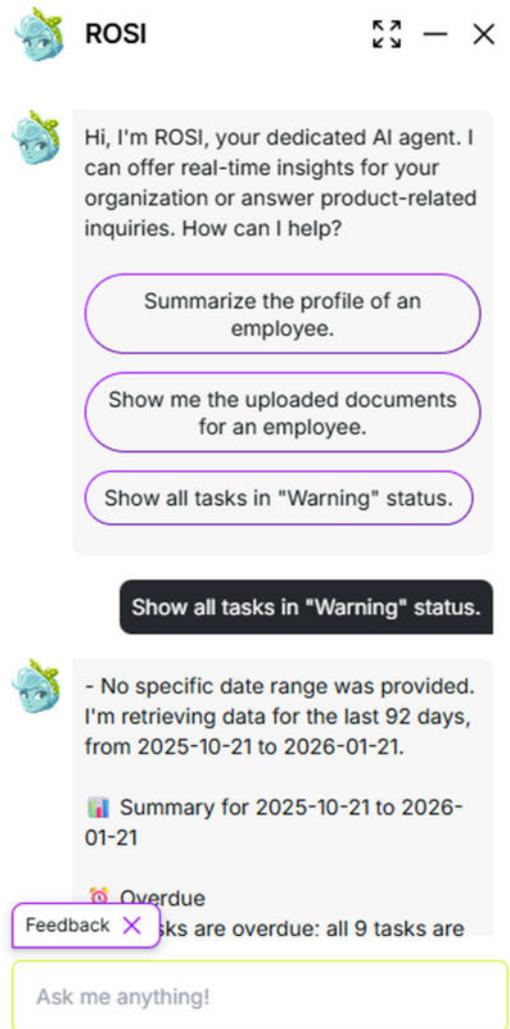
For all users

- **Live data + product guidance:** ROSI can return real-time results from your Workflow system and provide product help/how-to guidance, depending on the question.
- **Role-based access:** ROSI enforces your existing permissions and data segmentation. Users only receive information they are authorized to access.
- **PII protection:** ROSI will not return Social Security Numbers or other high-risk personal data.

How To Use ROSI

At the bottom right corner of the page, click [icon] .

You can:
- Select a suggested prompt, **or**
- Enter your own question in the **Ask me anything** box—for example:
"Show me Jane Doe's profile" or "List all overdue tasks in Engineering."

Depending on what you ask, ROSI may return:
- Employee profile information
- Task or event status updates
- Details on uploaded documents
- Aggregated reports or summaries

Tips
- Context-aware follow-ups: After asking about a person or event, you can refer back using pronouns like "they" or "that event" in your next question.
- Flexible date ranges: You can adjust start and end dates mid-conversation (within 92 days), and ROSI will return updated results.

If ROSI doesn't return expected results:
- Confirm the user has the correct **ROSI access level**
- Try narrowing the request (employee name, department, date range)
- Check whether the data exists in the system and the user has permission to access it

Who has overdue tasks?

To provide a list of employees with overdue tasks, I need a specific date range (in yyyy-mm-dd format, up to 3 months). Could you please specify the date range you are interested in?

Who has overdue tasks today?

- There are no overdue tasks today (2025-06-18).
- All tasks (2) are open with status 'Warning' but not overdue.
- The tasks are assigned to john.doe13640 and john.doe13648, each with 1 open task.

Access and Setup

ROSI supports two access levels:

- **ROSI Admin User** – Users with this privilege can use ROSI to retrieve admin-level HR information (for example, viewing other employees' tasks, events, profile data, and documents), based on their existing permissions. See **Configure ROSI Admin Access** below.

- **Standard access (default)** – All other users receive standard ROSI access when the feature is enabled. These users can use ROSI for product guidance and to access their own workflow information, but they do not have admin-level ROSI access.

Note: ROSI does not override your security model. All ROSI responses respect your existing permissions and only return information the user is authorized to access.

Enablement

Clients can manage enablement for Admins and Employees separately.

1. Go to Admin > Settings > UI.
2. Click Edit to update enablement.
3. Set the applicable ROSI setting to **True** to enable.

Enable ROSI for Employee Portal ❓	True
Enable ROSI for Admin Portal ❓	True

When enabled, ROSI becomes available to users based on based on Team privileges (ROSI Admin User) or standard access by default.

Note: To support a controlled rollout, **ROSI for Employee Portal** is expected to be **Off by default**.

Configure ROSI Admin Access

ROSI Admin access is not assigned to any team by default. Clients can manage ROSI access by assigning the **ROSI Admin User privilege** to the appropriate team(s).

To configure ROSI Admin access:

1. Go to Administration > Teams.
2. Open the team you want to grant ROSI Admin access to, or create a new team.
3. In the team's Privileges section, add the Privilege "ROSI Admin".
4. Review team members to ensure desired access.
5. Click Save.

Once assigned, members of that team can use ROSI Admin capabilities immediately.

Recommended setup

To keep access clear and auditable, clients can create a dedicated team for ROSI Admin access, such as:

- ROSI Admins
- HR Systems Admins
- Workflow Admins

Suggested Questions
For Admins
Task Management
- General Task Lookup
  - "Show me all tasks assigned to [employee name]"
  - "Show me all tasks that are overdue/completed/incomplete (system-wide)"
- Filtered Task Status
  - "Show me all overdue tasks for [employee name]"
  - "Filter by task status: completed/incomplete/expired"
  - "Which tasks are showing a warning status?"
  - "Which tasks are marked as 'Expired'?"
- Task Reporting
  - "Give me the task report from 2025-01-01 to 2025-05-01"
  - "List all overdue tasks in [department name]"

Event Management
- Per-Employee Event Tracking
  - "Show me all events assigned to [employee name]"
  - "Show me all events assigned to [employee name] that are complete/incomplete"
- System-Wide Event Filtering
  - "Show me all events that are complete or incomplete"
  - "Which events have been cancelled?"
  - "Give me an event summary for Q1"
  - "What's the average time [event name] stays open?"

User Profiles & Employment Info
- Basic Profile Details
  - "Show me the profile details for [employee name]"
  - "Get a comprehensive view of [employee name]: hire date, manager, assigned events"
- Authentication & Access
  - "What authentication method is used for [employee name] (e.g., SSO vs. standard)?"
- Targeted Profile Data
  - "Show me just the hire date and department for [employee name]"

Document Management
- "What documents have been uploaded for [employee name]?"
- "Show me all documents for [employee name]"

For Employees
- "What's my next task?"
- "What are my outstanding tasks?"
- "How many tasks do I have left to do?"
- "What's my onboarding progress?"
- "Are there any overdue tasks?"
- "What do I need to do today/this week?"
- "What documents will I need to complete my entire onboarding?"
- "Are there any tasks I need to do before ['enrolling in benefits']?"
- "What tasks will become active after I finish this one [current task]?"

Rival Product Help
- "Help me understand…" or "How do I …"

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 HR system using a secure integration. Queries pull current data directly from your environment, including tasks, events, documents, and profile info.
- **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." Full error logs are captured and reviewed by your support team.
- **Does ROSI maintain context between questions?** Yes—within a session. You can ask follow-up questions using pronouns like "she," "they," or "that task," and ROSI will maintain context as long as the conversation remains active.

  NOTE: ROSI can review timeframes of 92 days (one business quarter) and a limit of 5k records (tasks or events) per query.
- **What's the best way to phrase a question?** Use plain language. Be as specific as possible (e.g., "Show me John Smith's overdue tasks in Marketing"), and include filters or date ranges if needed.
- **How do I enable/disable ROSI?** Client admins can enable or disable ROSI from **Admin > Settings > UI**. Enablement may be configured separately for Admin and Employee Portal experiences.

|	
Enable ROSI for Employee Portal ❓	True
Enable ROSI for Admin Portal ❓	True

Privacy and Security

- **How is my login session managed?** Each admin 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 admin 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.
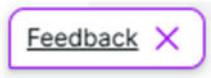
1. After asking ROSI your question, click Feedback ✕ .
2. Select a rating and click Next.
3. Enter comments and click Submit.

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.