

Client_2 OS Requirements - Phase One

Purpose

The primary objective of Client_2 OS is to replace the current fragmented administration landscape, presently managed through a mix of spreadsheets, WhatsApp messages, and emails, with a single, centralised operations platform. This manual approach has created a significant administrative burden on Client_2 Central, leading to inconsistent data and unreliable tracking. By consolidating these workflows into one application, Client_2 OS ensures that gym tasks across all levels are assigned, recorded, and validated in a standardised environment.

The system aims to automate data entry wherever possible, specifically through integrations like the Virtuagym API, while streamlining necessary manual reporting. By centralizing these inputs, the platform creates a clean, structured dataset. This transition is foundational to the business's long-term strategy, as it enables the development of a robust reporting layer and live analytics dashboards, providing Client_2 Central with real-time visibility into gym performance and compliance.

Overview

Client_2 OS is an internal operations platform that automates the lifecycle of gym administration. Instead of staff manually submitting reports, the system acts as a central coordinator: it uses pre-set "Tasks" created by Client_2 Central to automatically generate and distribute tasks to the correct gyms at the right time. This ensures that every gym's dashboard is always up-to-date with the specific tasks they need to complete today, this week, or this month.

The platform manages the flow of data from the moment a task is assigned until it is finalised and archived. It handles the "heavy lifting" of gym operations, such as calculating performance scores, tracking deadlines, and storing evidence like photos, within a secure, digital environment. By moving away from fragmented tools, the system creates a structured "pathway" for information, ensuring that every piece of data collected is formatted correctly and ready for immediate use in business reporting, and league tables.

Users

110 Admins (super_user and admin user) - Full access - Level 1

Client_2 Central - Level 1

Client_2 Franchisee - Level 2

Client_2 Gym Managers - Level 3

Client_2 Gym Staff - Level 4

Client_2OS - system level user, unable to login or interact with the application, exists for automated tasks.

Functional requirements

System overview

Client_2 OS is built as a **template-based compliance engine** that separates "Task Definitions" from "Task Records." At its core, the system acts as a central repository where Client_2 Central define the structure, scoring, and frequency of gym tasks. These definitions then act as blueprints; the system's **Automated Scheduler** uses these blueprints to generate "Live Task" instances for specific gyms at set intervals (daily, weekly, or monthly). This ensures that while a template can be updated centrally, every individual submission remains an immutable historical record of a gym's status at a specific point in time.

Checklists

Client_2 Central Admins must be able to create and edit checklists.

Client_2 Central must be able to assign a checklist to one or more facilities.

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Client_2 Central must be able to restrict a checklist to specific facility roles (e.g., managers only).

Client_2 Central must be able to enable 'submit on behalf of another facility' for a checklist. (e.g, they complete a monthly checklist for a gym, submit it, which should then sit in that gym's past tasks).

Changes to checklist definitions must not modify historic submissions; historic submissions must retain their original questions and answers as submitted.

Scheduling & Deadlines

Each checklist must have a schedule frequency, supporting at minimum: daily, weekly (select day of week), and monthly.

Each checklist must have a time of day when it is due (deadline time).

If a checklist schedule changes, future deadlines must update automatically without affecting previously logged compliance records.

Tasks

Users must have a dashboard showing 'Live Tasks' that are due in the current schedule period for their facility and role.

Each live task item must display: task name, due datetime, and a status indicator (Outstanding, In Progress, Submitted).

Users must be able to open a live task to start or resume completion, they should be able to save a task they're half way through and come back to it.

Users must have access to a 'Past Tasks' view listing submitted audits for their facility, with date filtering and pagination.

Past tasks rows must include: submission date/time, checklist name, submitted by, and completion status/score.

The system should support search and filtering of tasks by checklist name and status.

Submitting a task

Users must be able to complete a checklist submission via a multi-section form.

The form must support required field validation and clearly indicate missing/invalid answers before submission.

The submission must capture the submitting user's identity / profile name.

If 'submit on behalf of another facility' is enabled, the submission flow must require selecting the target facility.

The system must prevent duplicate final submissions for the same facility, checklist, and schedule period. E.g, once a task has been submitted for that schedule period, they should not be able to submit another one.

Users must be able to save a partially completed task as a Draft without submitting it.

Users must be able to resume a draft from the tasks dashboard and continue where they left off.

Drafts must not count as submissions for deadline compliance until they are finalised.

Drafts should be retained for a configurable period, most likely until the deadline passes.

API

Where possible the system should get the data from the Virtuagym API.

Evidence & Attachments

The system must allow uploading evidence files against individual questions, this will be in the form of images or a comment.

The system must support multiple evidence files per question.

The system must validate file size and file type, and reject unsupported uploads with clear errors.

The system must compress and store images sensibly.

Task scoring

If scoring is enabled for a checklist, the system must calculate and store an overall score (e.g., percentage) on submission.

Question configuration must support scoring rules appropriate to its type (e.g., pass/fail, weighted scores).

The system must derive and store a completion classification (e.g., Complete/Incomplete or Pass/Fail) based on configured thresholds.

Reporting & Analytics

The system must provide a real-time compliance dashboard for all "Live Tasks" across the network, with drill-down access to individual responses and evidence.

Support filtering and search by Facility, Region, Task Type, and Completion Status.

Highlight "Non-Compliant" entries and missed deadlines in a dedicated exception report.

Display a "Submission Identity" to distinguish between gym-submitted tasks and those submitted "on behalf of" by Client_2 Central.

Support custom date-range selection to compare performance metrics across weeks, months, or quarters.

Calculate and display average scores per checklist category with visual trend indicators showing performance changes over time.

Authorised users must be able to export filtered reporting data to CSV or Excel or PDF.

Automatically generate League Tables based on weighted scores, filterable by specific date ranges.

Display facility rankings against pre-defined grading thresholds (Fail, Pass, Merit, Distinction?).

Provide peer benchmarking for Level 2 and 3 users to view their score relative to the national average.

Notifications

The system must be able to send email notifications at various stages.

Email notifications must be configurable per checklist

Submission notification emails

The system must support configurable recipient rules per checklist

The system should send reminder notifications before a deadline when a task remains outstanding (configurable timing per checklist).

The system should be able to send notifications if a deadline is missed.

Data retention

How long will the data be retained for?

Collecting PII should be avoided, system will reference user by user_id rather than name or email address, users will be anonymised when they are disabled.

Current checklists and scoring spreadsheets:

Below is an example of the audits and checklists provided to us, plus some of the scoring tables and results. The tasks gym managers are required to complete will be based on the below. The performance dashboards required will be based on the below.

Client_2 Ranking System -

https://docs.google.com/spreadsheets/d/12smyU9RRNkzm89V1IPxAd2D5s0_qCpi7/edit?usp=sharing&oid=116330042011778899093&rtpof=true&sd=true

Brands Standards Audit - https://docs.google.com/spreadsheets/d/1drpM3HRai-EWEbFwHzB_nvq9Spg7xaWr/edit?usp=sharing&oid=116330042011778899093&rtpof=true&sd=true

Brands Standards Audit results -  2025 Audit Doc - Client_2 UK

Net monthly movement tracker - https://docs.google.com/spreadsheets/d/1F-zyJRxl-awRxx_d01Ec9fT13DoZphOfZlamlInM0s_c/edit?usp=sharing

Captain's Log

<https://docs.google.com/document/d/14obWOOcfTVqXXJ11TDG5HsY3g4cxbL7A/edit?usp=sharing&oid=106399901640910809070&rtpof=true&sd=true>

Cleaning checklist OWAIS

<https://docs.google.com/spreadsheets/d/1nolBtesOIdnyKpiBJskCFE7MdvoX994e/edit?usp=sharing&oid=106399901640910809070&rtpof=true&sd=true>

Daily Morning Audit Weekly

https://docs.google.com/document/d/1birRuqF71pH9BXvc0AXL56arEo_Jx_76/edit?usp=sharing&oid=106399901640910809070&rtpof=true&sd=true

Equipment Checklist <https://docs.google.com/spreadsheets/d/1RdMGJRUAHSFiDDle-0LAKOA8uYrvpup/edit?usp=sharing&oid=106399901640910809070&rtpof=true&sd=true>

Shower & Toilet Checks Levenshulme

https://docs.google.com/spreadsheets/d/1KPLdm93UBuBeF3rCwFH_AIO5r8-bdA5b/edit?usp=sharing&oid=106399901640910809070&rtpof=true&sd=true