



ActivityInfo

Streamline your Case Management System with ActivityInfo

Starting shortly, please wait!

Presenters



Alex Bertram
Executive Director



Brendan O'Neill
Commercial Director

Agenda

- BeDataDriven + ActivityInfo
- ActivityInfo for Case Management
- Demos:
 - Electronic Medical Records (EMR) template
 - Protection case management (plus MEAL) template



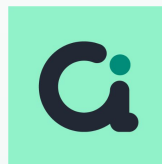
BeDataDriven + ActivityInfo

BeDataDriven mission



Provide social impact organizations with a standard, easy-to-use and comprehensive data management platform so that as many organizations as possible can become data-driven to achieve better outcomes for rights holders worldwide.

BeDataDriven pursues this mission by building and helping organizations implement ActivityInfo.



ActivityInfo



Data collection
and entry



Validation and
correction



Data
management



Aggregation and
analysis



Reporting and
dissemination



ActivityInfo deployment options



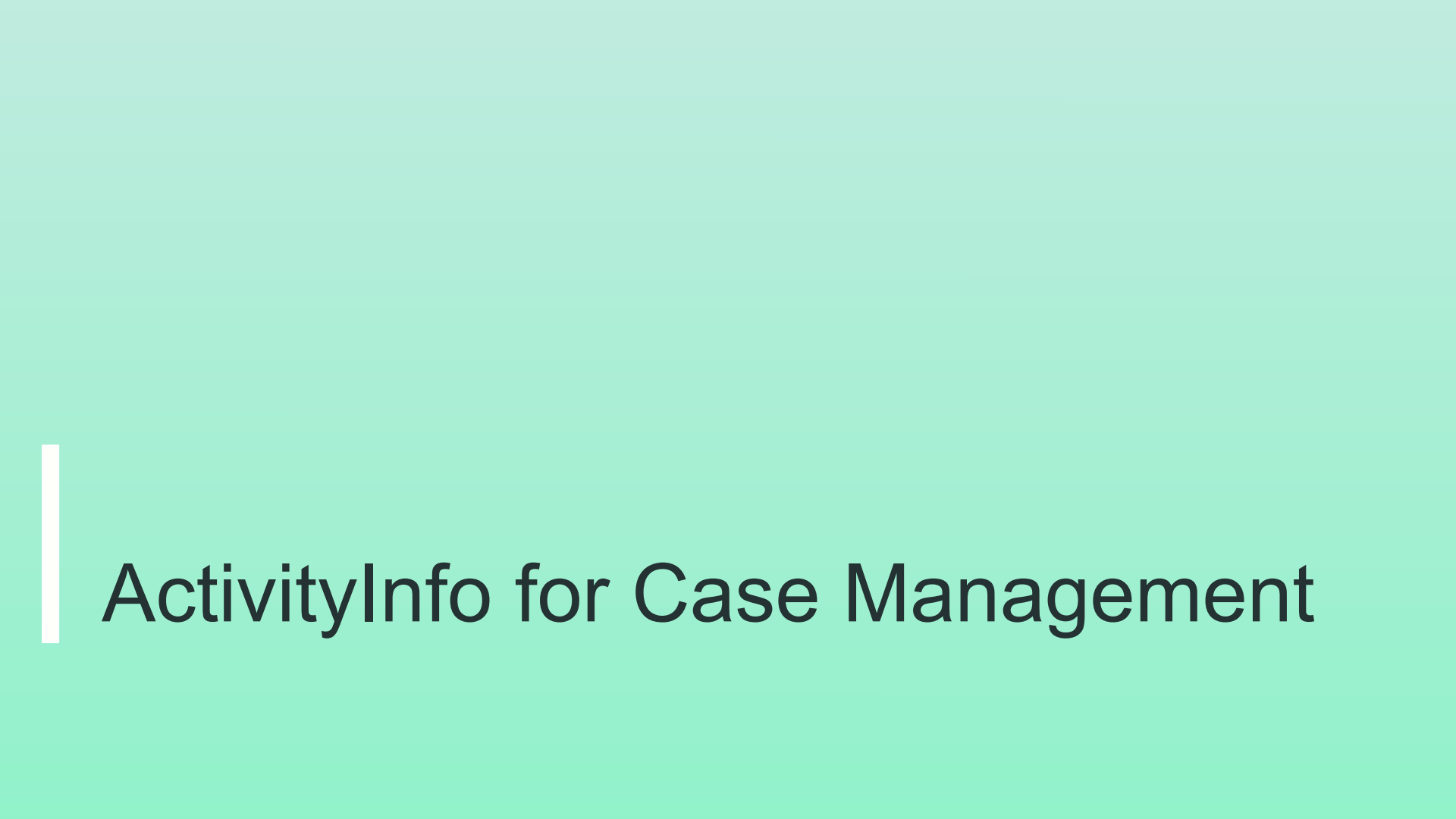
SaaS: Fully hosted by ActivityInfo in the EU — secure, maintained, and ready to use



Self-managed: Deploy ActivityInfo on your own infrastructure for full control



Sovereign Managed: We help you deploy and maintain ActivityInfo in an in-country data center or on premise



ActivityInfo for Case Management

Case Management Lifecycle in ActivityInfo

Intake / Registration

Capture new cases with unique IDs and essential details.

Assessment & Planning

Record needs, risks, and action plans using linked and conditional forms.

Implementation / Action

Track services delivered and referrals through sub-forms and linkages.

Monitoring & Follow-up

Use dashboards and reports to review case progress and quality.

Closure / Transfer

Manage case completion with controlled status workflows.

Reporting & Learning

Aggregate insights to inform program improvements.

Intake / Registration

Capture new cases and assign unique identifiers

Key Features:

- **Customizable forms** for client and case data
- **Serial** and **key fields** for unique case IDs
- **Reference fields** to link clients, households, and locations
- **Role-based permissions** for data access and confidentiality

Advantages:

- Simple data entry
- Auto-generated IDs
- Secure structure for sensitive information

Typical Users: Caseworker, Intake Officer

The screenshot displays the 'SERIAL NUMBER' configuration form in ActivityInfo. It is divided into several sections: 'Label' with a text input for 'Client code'; 'Description' with a text area for 'Add additional information about this field'; 'Settings' containing a list of checkboxes for 'Key', 'Unique', 'Required', 'Hide from entry', 'Hide in table', 'Set relevance rules', 'Set validation rules', 'Reviewer only', 'Read-only', and 'Translation'; and 'Prefix Formula' with a dropdown menu. At the bottom right, there are two buttons: 'Delete field' and 'Done'.

Assessment & Planning

Document client needs, risks, and plan interventions

Key Features:

- **Sub-forms** for assessments and action plans
- Conditional (**relevance**) and **validation rules**
- Structured **field types** for accurate scoring and timelines
- **Granular permissions** by user role

Advantages:

- Logical workflows
- Relevance-driven forms
- Clear links between assessments and actions

Typical Users: Caseworker, Supervisor

The image shows two overlapping dialog boxes from the ActivityInfo application. The background dialog, titled 'Select field type', is a light blue box with a close button (X) in the top right corner. It contains a grid of 15 dark blue buttons with white text, arranged in three columns and five rows. The buttons are: 'Serial number', 'Quantity', 'Text', 'Multi-line text', 'Date', 'Week', 'Fortnight', 'Month', 'Single selection', 'Multiple selection', 'Attachments', 'Calculated', 'Subform', 'Reference', and 'User'. At the bottom left of this dialog is a link that says 'Paste field list from spreadsheet'. The foreground dialog, titled 'Validation rules', is a white box with a close button (X) in the top right corner. It has a 'Formula editor' link in the top right. The main content area says 'Count as valid if' followed by a dropdown menu showing 'any', and then 'of the following conditions are met:'. Below this is a table with two rows. The first row has a dropdown menu showing 'Formula is true' and a text input field containing the formula 'FLOOR(YEARFRAC([Date of birth], TODAY())) >= 18'. There is a 'Delete' button to the right of the formula. Below the table is an 'Add' button. At the bottom of the dialog are three buttons: 'Duplicate field' (with a plus icon), 'Delete field' (with a minus icon), and 'Done' (with a checkmark icon).

Select field type		
Serial number	Quantity	Text
Multi-line text	Date	Week
Fortnight	Month	Single selection
Multiple selection	Attachments	Calculated
Subform	Reference	
Geographic point	User	
Barcode		

Paste field list from spreadsheet

Validation rules		
Count as valid if	any	of the following conditions are met:
Formula is true	FLOOR(YEARFRAC([Date of birth], TODAY())) >= 18	Delete

Add

Duplicate field Delete field Done

Implementation / Action

Track interventions, services, and referrals

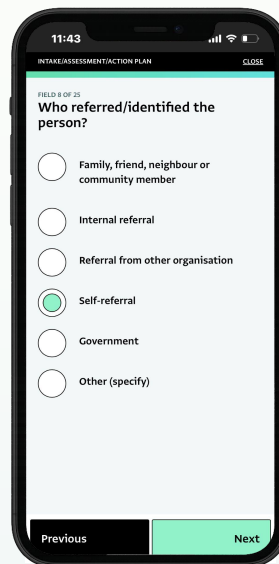
Key Features:

- **Related forms** for connectivity
- **Audit trail** for accountability
- **Offline data entry** via ActivityInfo mobile app
- **Controlled editing** permissions

Advantages:

- Easy tracking of services
- Connection between cases and interventions

Typical Users: Caseworker, Field Officer



The screenshot shows a mobile app interface for 'INTAKE/ASSESSMENT/ACTION PLAN'. The screen displays a form titled 'FIELD 8 OF 25' with the question 'Who referred/identified the person?'. There are six radio button options: 'Family, friend, neighbour or community member', 'Internal referral', 'Referral from other organisation', 'Self-referral' (which is selected), 'Government', and 'Other (specify)'. At the bottom, there are 'Previous' and 'Next' navigation buttons.

Monitoring & Follow-up

Review progress and adjust plans as needed

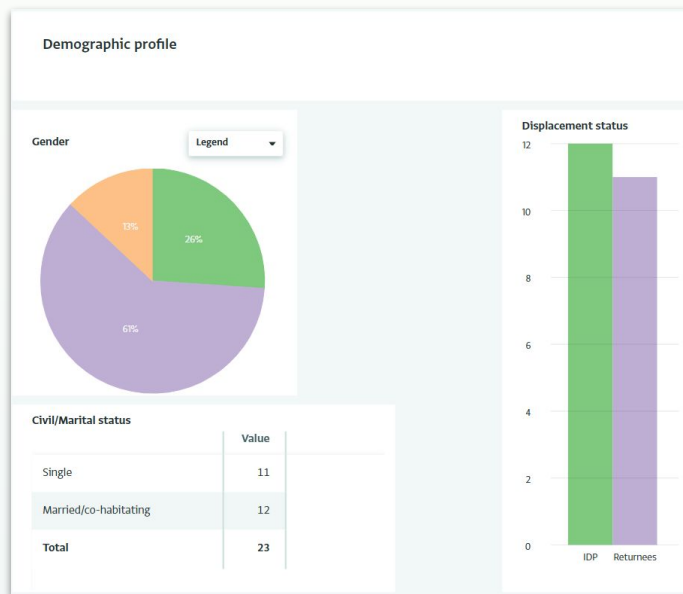
Key Features:

- Built-in **dashboards** and **pivot reports**
- **Calculated fields** for aggregation and progress tracking
- **Filters** for supervisor-specific case views

Advantages:

- Clear visibility of:
 - caseloads,
 - progress indicators
 - performance summaries

Typical Users: Supervisor, Program Manager



Closure / Transfer

Close or transfer cases once objectives are met

Key Features:

- **Status fields** to mark closure or transfer
- **Relevance rules** for closure-specific fields
- **Audit logs** and **locks** of closed records

Advantages:

- Structured closure process
- Integrity of historical data
- Clarity in case outcomes

Typical Users: Caseworker, Supervisor

The screenshot displays the 'Audit log' interface. At the top, there are filters for 'Events before 2025-11-06 12:11:54', 'Filter by event type', 'Filter by form or folder', and an 'Export' button. The main list shows four events, all performed by 'BRENDAN O'NEILL' on '2025-11-06'. The second event, 'Added a record in Case Closure in Intake/assessment/action plan', is highlighted with a green border. To the right, a detailed view of this event is shown, including the time (2025-11-06 12:11:34), user (Brendan O'Neill), form (Case Closure), and record ID (clmtr/xxdmyy1m6). It also includes a 'View record' button and a 'Record history' section showing the record was edited and then added.

Audit log

Events before 2025-11-06 12:11:54 ▼ Filter by event type ▼ Filter by form or folder Export

- 2025-11-06 12:11:44 — BRENDAN O'NEILL
Updated a record in Case Closure in Intake/assessment/action plan
[Go to form](#)
- 2025-11-06 12:11:34 — BRENDAN O'NEILL
Added a record in Case Closure in Intake/assessment/action plan
[Go to form](#)
- 2025-11-06 12:09:07 — BRENDAN O'NEILL
Updated a record in Case Closure in Intake/assessment/action plan
[Go to form](#)
- 2025-11-06 12:08:30 — BRENDAN O'NEILL
Added a record in Case Closure in Intake/assessment/action plan
[Go to form](#)

Added a record in Case Closure in Intake/assessment/action plan updated

TIME
2025-11-06 12:11:34

USER
Brendan O'Neill added

FORM
Case Closure

RECORD ID
clmtr/xxdmyy1m6 updated

View record

Record history

- 2025-11-06 12:11:44
Record edited
BRENDAN O'NEILL — BRENDAN@BEDATADRIVEN.COM
- 2025-11-06 12:11:34
Record added
BRENDAN O'NEILL — BRENDAN@BEDATADRIVEN.COM

IF THERE WOULD A CASE TRANSFER, WHAT ARE THE...
Other → Client moving to a new location; the case will be transferred to another case management organisation in that location

Reporting & Learning

Generate insights and inform program decisions

Key Features:

- **Real-time** dashboards, charts, and maps
- Export and **API integration** for advanced analysis
- **Aggregation tools** for donor and management reporting

Advantages:

- Quick access to performance data and visual summaries
- Secure aggregation of sensitive case information

Typical Users: MEAL Officer, Program Manager, Donor Reporting Staff



Indicator progress		Go to analysis
Measures	Value	
PQ-01	100.0%	
PQ-02	24	
PQ-03	24	
PQ-04	16	
PQ-05	95.8%	
PQ-11	100.0%	
PQ-12	100.0%	

Summary and Key Takeaways

ActivityInfo provides a **flexible**, **secure**, and **scalable** environment to manage the full case lifecycle — from intake to reporting — without imposing a fixed data model.

It **adapts** to your workflow and **evolves** with your program needs.



Electronic Medical Records (EMR) template



Protection case management (plus
MEAL) template

Estimated investment - full implementation

Software - €3700

- Unlimited data hosting
- Unlimited reports
- Unlimited collection links
- 5 full users
 - Information/data specialists
 - M&E staff
- 15 basic users
 - Caseworkers
 - Field officers
- Technical support

Implementation - €3125 - €6250

- External onboarding support
 - Data design
 - ActivityInfo configuration
 - System testing
 - System training

Total first-year investment

	Hours	EUR
Software		3700*
Implementation support (external)	25-50	3125-6250
Implementation support (internal)	40	Variable
<i>Total</i>	<i>65-90</i>	<i>6825 - 9950</i>

**Only annual recurring cost*

Questions?

Follow us:

LinkedIn page: <https://www.linkedin.com/showcase/activityinfo/>

LinkedIn group: <https://www.linkedin.com/groups/5098257/>