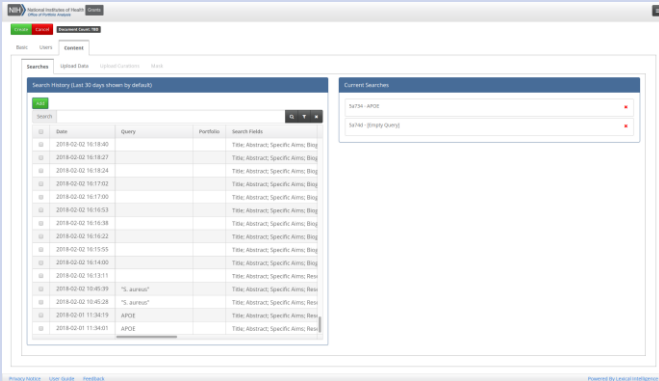


BACKGROUND

- *iSearch* provides comprehensive, easy-to-use access to a carefully curated, extensively linked data set of global grants, patents, publications, clinical trials, and approved drugs
- The Portfolio Tool allows search results to be saved with the option to manually curate with user-created fields and vocabularies
- To obtain access or for additional details, please contact: isearch@od.nih.gov

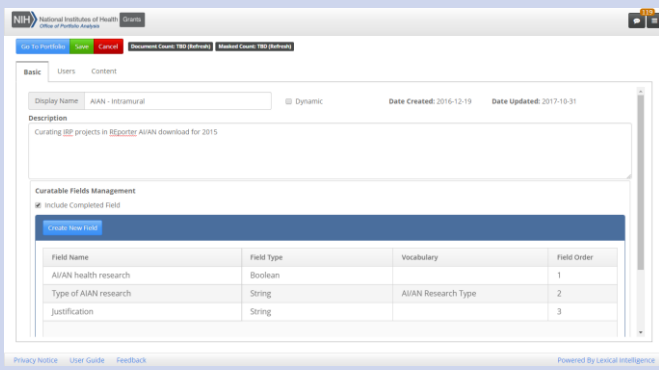
PORTFOLIO TOOL FEATURES

- Save search results from any *iSearch* module as a static dataset or set to update as new records match your search criteria
- Combine results from multiple searches using your search history
- Upload custom fields to search results (e.g., IC specific fields or results from previous coding exercises)
- Search and filter within a portfolio
- Share portfolios with other *iSearch* users
- Manually curate within the tool



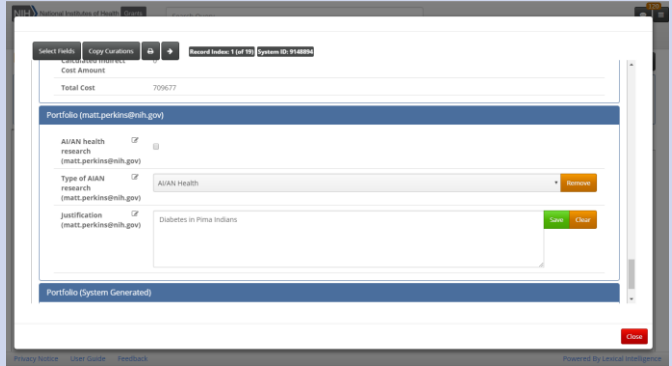
VOCABULARY TOOL

- Create custom vocabularies for use in portfolios and the Request For Information (RFI) Tool
- Define a set of response options for use in manual curation (e.g., research type, field of health research)
- Share vocabularies with other curators



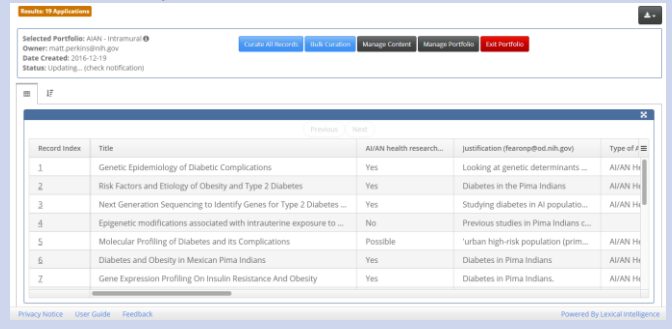
OPTIONS FOR MANUAL CODING

- Create your own user defined fields
 - Check boxes (yes/no)
 - Single or multi-value drop down lists
 - Free text
- Allow single or multiple curators for a portfolio
- Curate within the tool or upload curations and codes from other sources



BENEFITS OF USING THE PORTFOLIO TOOL

- Curate within the tool without the need for Excel spreadsheets
- Use the *iSearch* facets functionality to drill down into coded results
- Download results including totals from facet view
- Query portfolios based on values in user curated fields or uploaded data from outside of *iSearch*



FURTHER INFORMATION

- OPA iTools dashboard: <https://itools.od.nih.gov/dashboard/>
- Portfolio Tool User Guide: <https://itools.od.nih.gov/help/portfolios>
<https://itools.od.nih.gov/help/curation>
- For *iSearch* and Portfolio Tool training visit the OPA training website: <https://dpcpsi.nih.gov/eo/intranet/opa/training>
- Email: OPA-Training@mail.nih.gov
- For more about the RFI Tool contact: isearch@od.nih.gov