STScI | SPACE TELESCOPE SCIENCE INSTITUTE

EXPANDING THE FRONTIERS OF SPACE ASTRONOMY

User Documentation System & Help Desk

Ori Fox & Stacey Bright

JWST Master Class

November 2019

JWST User Documentation System (JDox)

Ori Fox

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The Philosophy Behind JDox

- User-friendly, accurate web-based JWST documentation
- Every Page is Page One (EPPO) philosophy
- “Agile” process/infrastructure (easy to update)
- Searchable via Google and internally
- Heavily cross-linked across topics
- Integrated with software tools (ETC, APT)
- Ensure a happy and well-informed JWST community

More Than Just Documentation

ITSD/Editors/Devlopers

- Annual software testing and upgrades
- Streamlined Editorial review and publishing procedure
- Website design and template layouts
- Server maintenance
- Context Sensitive Help
- APT Engineering Documentation
- Movies
- PDF Printing

Drive Science Discussions

- Data rate and volume policy
- Sensitivity calculations within the ETC
- Overheads and time charged
- Time Series Observation (TSO) allowed observation parameters
- Groups vs Integration tradeoffs

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Navigation

Finding your way around 700 articles can be tricky!

- Lots of places to enter
- Lots of places to exit
- Lots of decisions to make along the way

We're here to make it easy for you

- We provide a map
- We provide directions

Layout

General JDox Page Layout Includes:

- Top Banner

Layout

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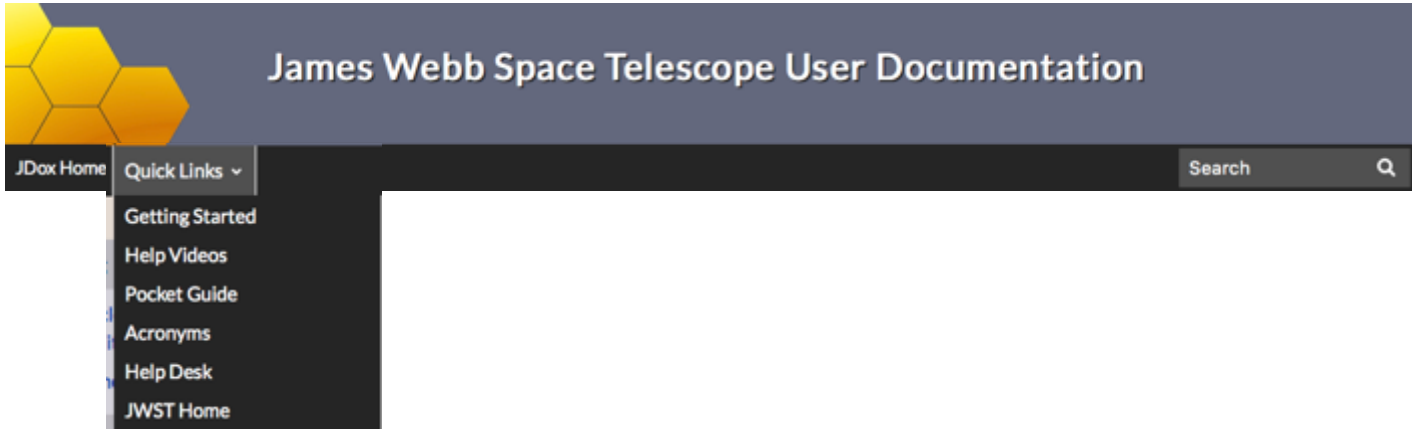
- Top Banner

Quick Links:

- Getting Started
- Help Videos
- Pocket Guide
- Acronyms
- Help Desk
- JWST Home



Layout

General JDox Page Layout Includes:

- Top Banner
- Quick Links Pull Down

Navigation Side Bar:

- “Master Site Map”
- Every article is listed
- Sorted by category
- Coherence
- “Chronological Order”
- Highlights your position in Page Tree

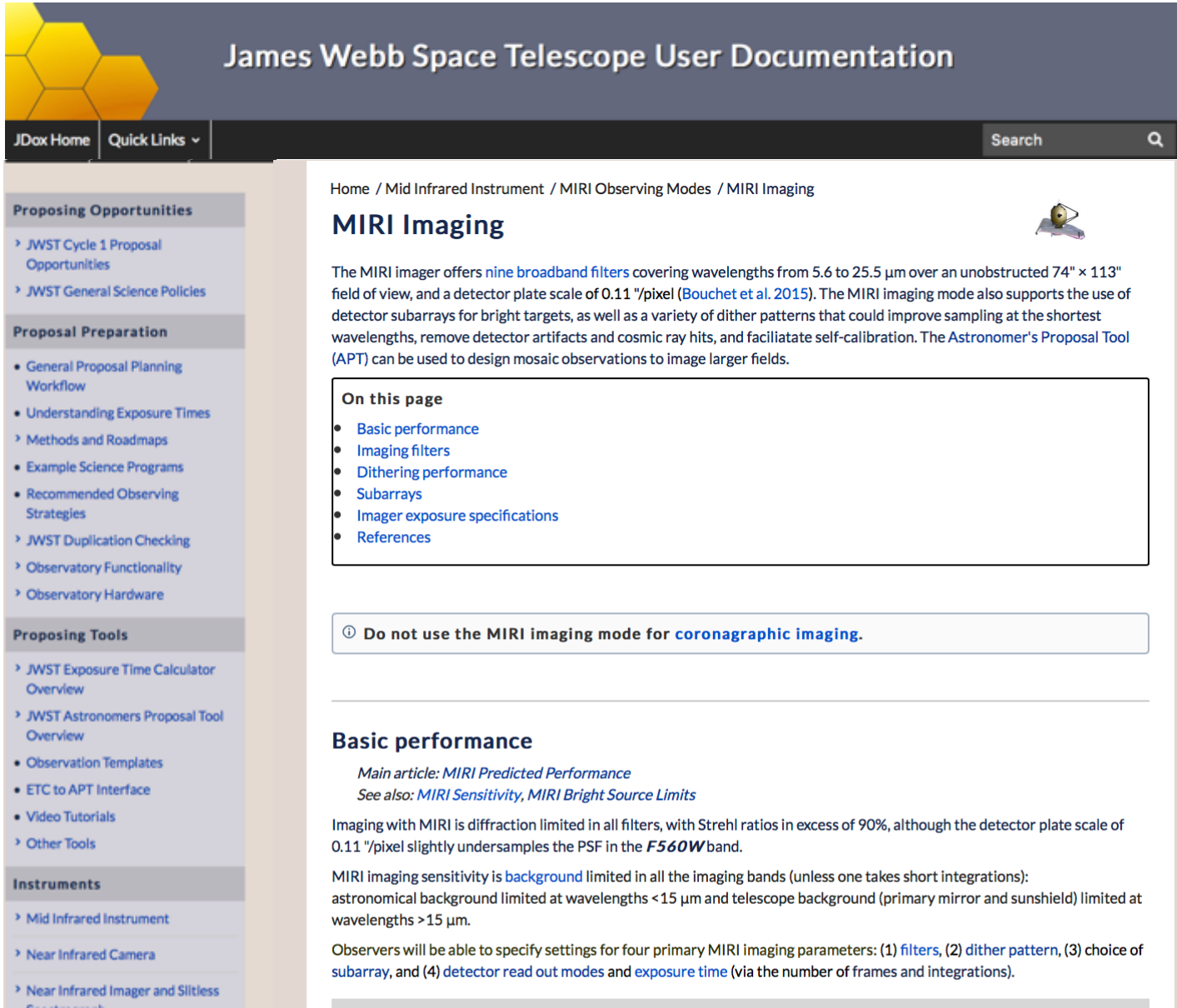
Layout

General JDox Page Layout Includes:

- Top Banner
- Quick Links Pull Down
- Navigation Side Bar

Main Article:

- Breadcrumbs give location of article
- Title
- Blurb overview of article (also Google Search)
- Table of Contents
- Main Text



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- Top Banner
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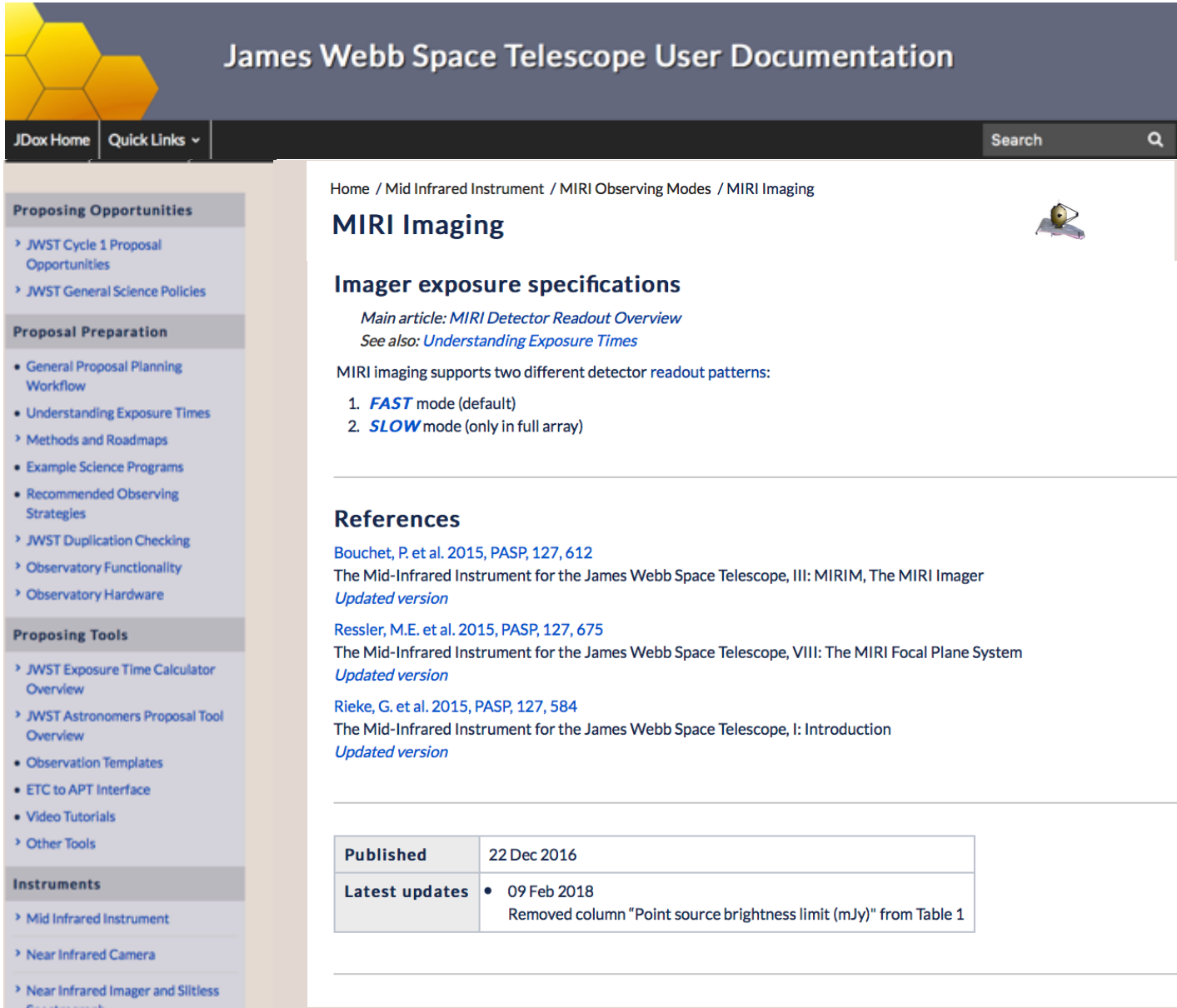
Main Article:

- Breadcrumbs give location of article
- Title
- Blurb overview of article (also Google Search)
- Table of Contents
- Main Text
- References
- Latest Updates and publishing info



Layout

General JDox Page Layout Includes:

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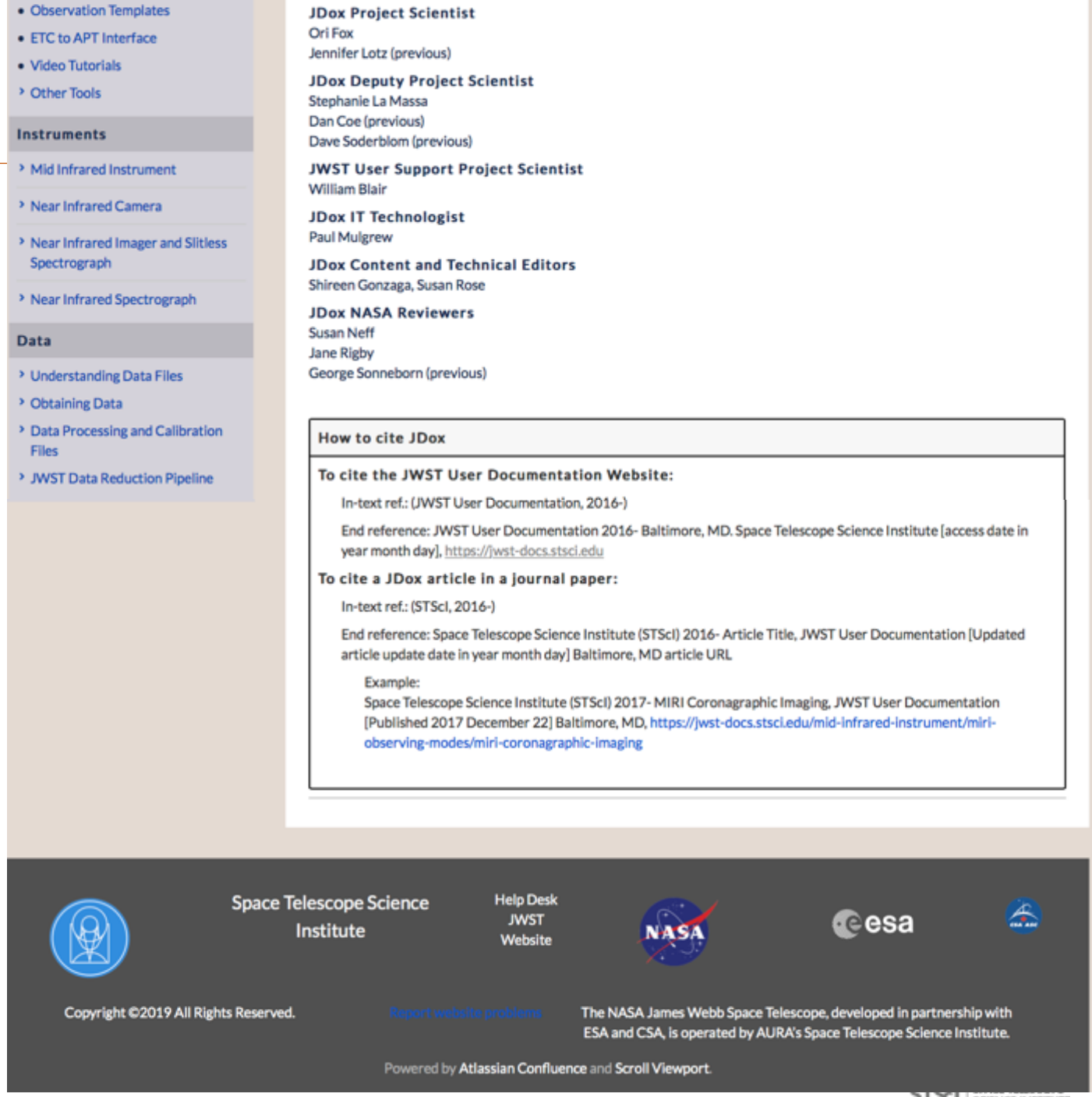
- Navigation Side Bar
- Main Article

Footnote:

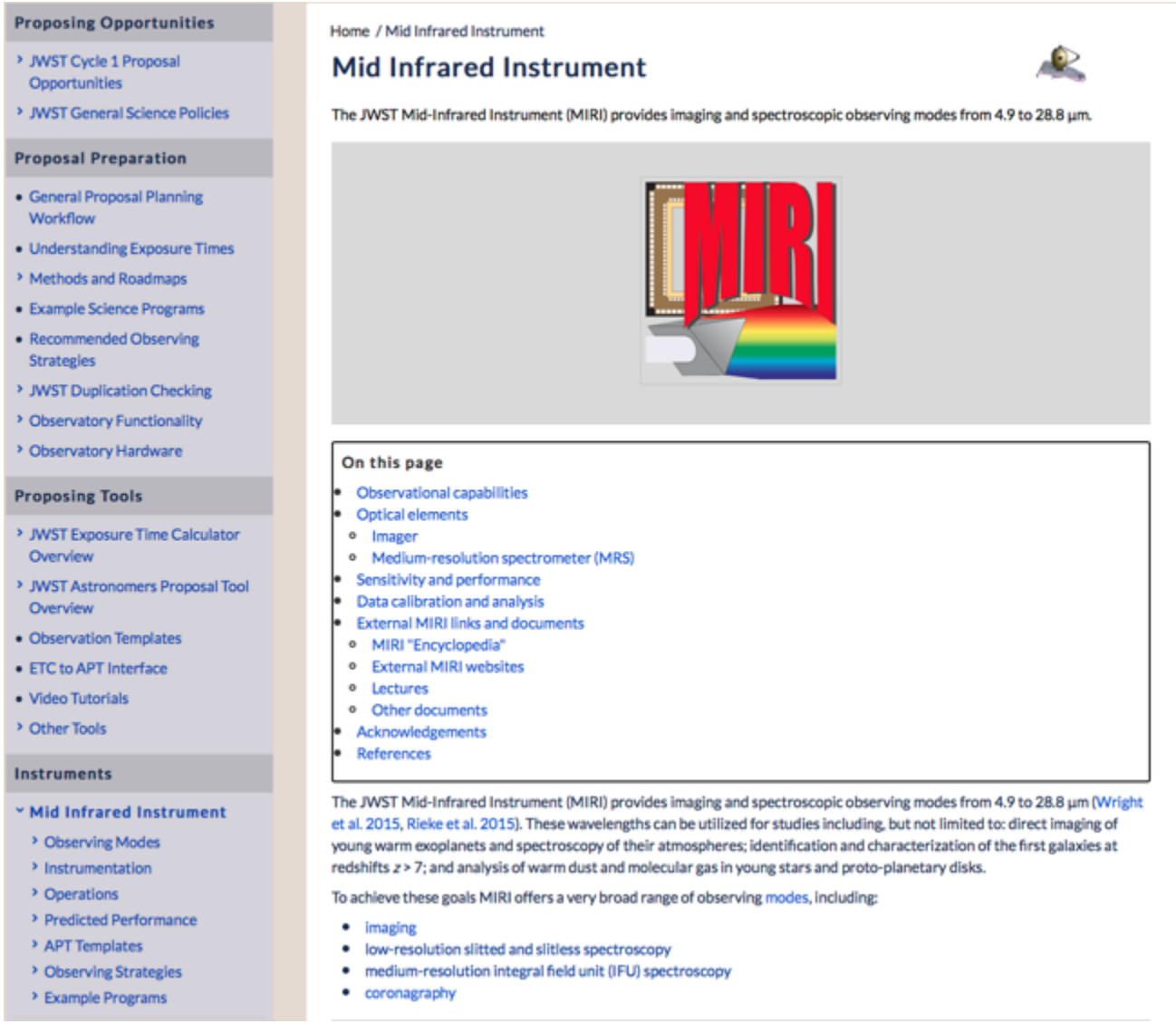
- Some important help links
- All contributors
- Copyright



Instrument Specific Instructions

Instrument Pages:

- Overview of instrument
- Various observing modes
- Instrumentation and Hardware
- Instrument specific instructions for operations (i.e., dithering, target acquisition, etc)
- Performance (i.e., bright limits, sensitivity, etc)
- APT Templates (i.e., how to fill out specific boxes within APT for each observing mode)
- Observing Strategies (how to optimize your observations in terms of SNR and minimize overheads)
- Example Science Programs (example programs explained from start to finish, with accompanying ETC workbooks and APT files to get you started)



Proposal Workflow

General Proposal Planning Workflow:

- Accessibly from Quick Links, Sidebar
- No single way to write a proposal
- Aims to give a recommended workflow

Become familiar:

- Call for Proposals and Policy (SMO)
- JWST Exposure Times
- Methods and Roadmaps
- Instrument specific pages
- Observing Strategies
- Example Science Programs

JWST Recommended Observing Strategies

These articles aim to help observers make informed choices, based on the latest test data, when preparing their programs.

The JWST offers a broad array of instruments and observing modes covering 0.6–28.5 µm. Even though observers have to use pre-defined templates, there are a variety of ways in which an observer can plan for taking data. Specific aspects like detectors usage and planning for background corrections ought to be properly considered for obtaining good data quality. This page provides links to various instrument-specific articles that offer advice for observers for selecting observing parameters.

MIRI Observing Strategies

NIRCam Observing Strategies

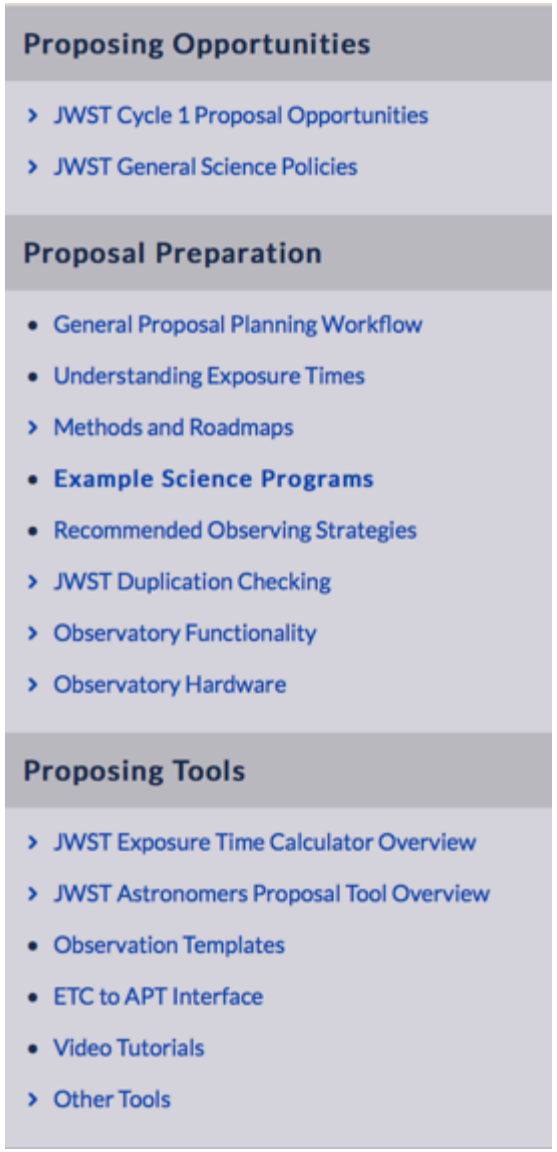
NIRISS Observing Strategies

NIRSpec Observing Strategies

Example Science Programs (ESPs)

Example Science Programs:

- Example programs explained from start to finish, with accompanying ETC workbooks and APT files to get you started
- Full list on main page
- Workbooks and Files accessible in ETC and APT
- Full description of programs and how to put together your APT and ETC files within each instrument page (see following two slides)



Proposing Opportunities

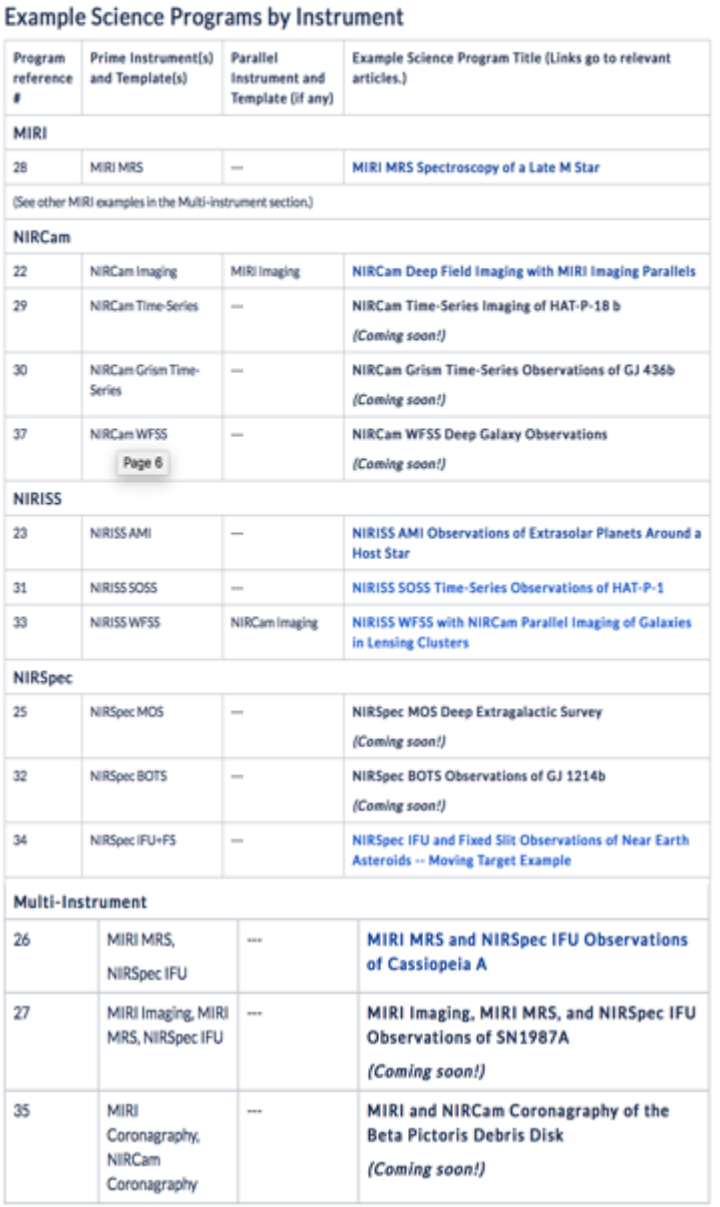
- JWST Cycle 1 Proposal Opportunities
- JWST General Science Policies

Proposal Preparation

- General Proposal Planning Workflow
- Understanding Exposure Times
- Methods and Roadmaps
- **Example Science Programs**
- Recommended Observing Strategies
- JWST Duplication Checking
- Observatory Functionality
- Observatory Hardware

Proposing Tools

- JWST Exposure Time Calculator Overview
- JWST Astronomers Proposal Tool Overview
- Observation Templates
- ETC to APT Interface
- Video Tutorials
- Other Tools

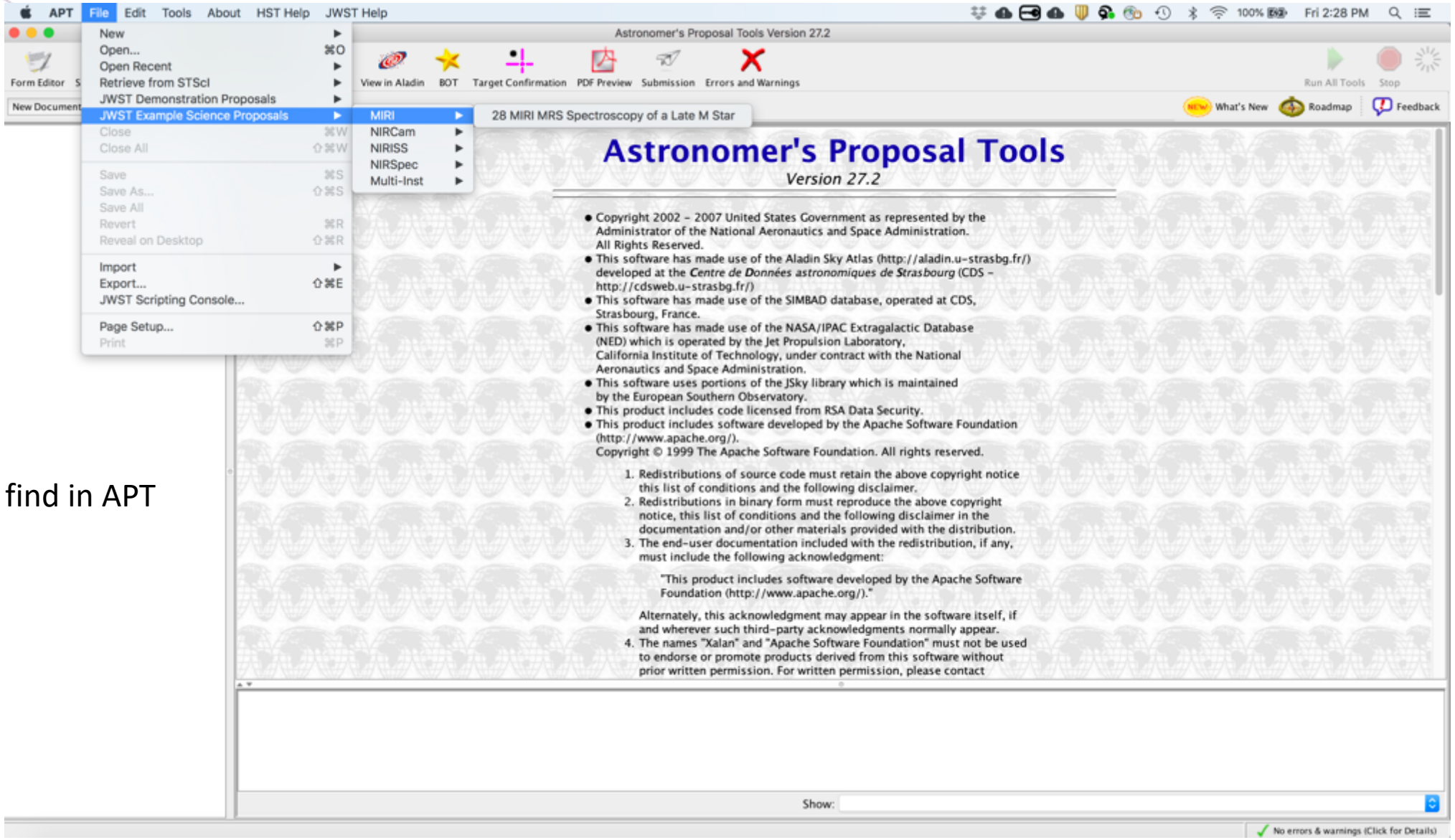


Example Science Programs by Instrument

Program reference #	Prime Instrument(s) and Template(s)	Parallel Instrument and Template (if any)	Example Science Program Title (Links go to relevant articles.)
MIRI			
28	MIRI MRS	—	MIRI MRS Spectroscopy of a Late M Star
(See other MIRI examples in the Multi-instrument section.)			
NIRCam			
22	NIRCam Imaging	MIRI Imaging	NIRCam Deep Field Imaging with MIRI Imaging Parallels
29	NIRCam Time-Series	—	NIRCam Time-Series Imaging of HAT-P-18 b *(Coming soon!)*
30	NIRCam Grism Time-Series	—	NIRCam Grism Time-Series Observations of GJ 436b *(Coming soon!)*
37	NIRCam WFSS	—	NIRCam WFSS Deep Galaxy Observations *(Coming soon!)*
NIRISS			
23	NIRISS AMI	—	NIRISS AMI Observations of Extrasolar Planets Around a Host Star
31	NIRISS SOSS	—	NIRISS SOSS Time-Series Observations of HAT-P-1
33	NIRISS WFSS	NIRCam Imaging	NIRISS WFSS with NIRCam Parallel Imaging of Galaxies in Lensing Clusters
NIRSpec			
25	NIRSpec MOS	—	NIRSpec MOS Deep Extragalactic Survey *(Coming soon!)*
32	NIRSpec BOTS	—	NIRSpec BOTS Observations of GJ 1214b *(Coming soon!)*
34	NIRSpec IFU+FS	—	NIRSpec IFU and Fixed Slit Observations of Near Earth Asteroids -- Moving Target Example
Multi-Instrument			
26	MIRI MRS, NIRSpec IFU	—	MIRI MRS and NIRSpec IFU Observations of Cassiopeia A
27	MIRI Imaging, MIRI MRS, NIRSpec IFU	—	MIRI Imaging, MIRI MRS, and NIRSpec IFU Observations of SN1987A *(Coming soon!)*
35	MIRI Coronagraphy, NIRCam Coronagraphy	—	MIRI and NIRCam Coronagraphy of the Beta Pictoris Debris Disk *(Coming soon!)*

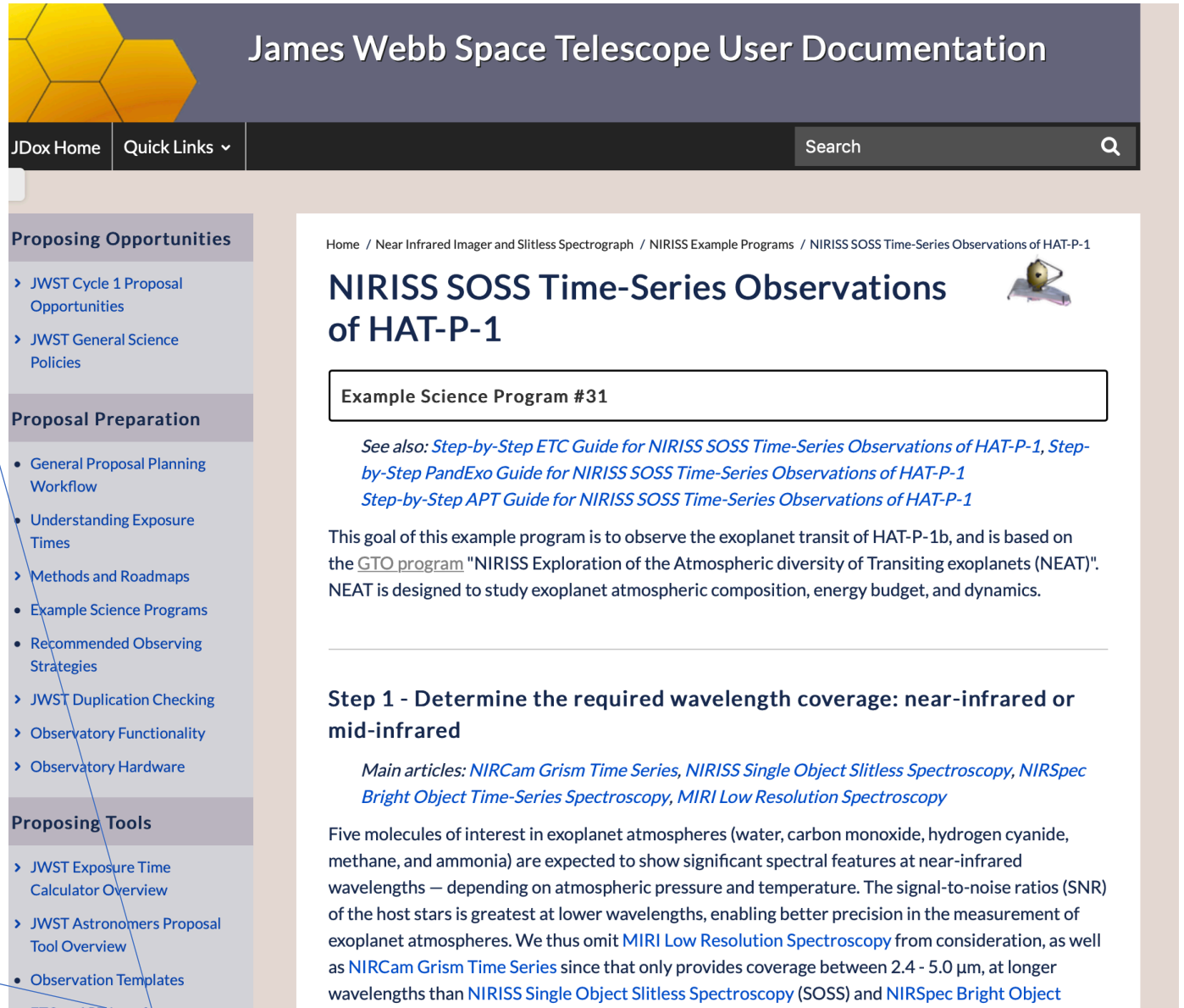
Example Science Programs (ESPs)

How to find in APT



Example Science Program

- SOSS Time-Series Observations of HAT-P-1
  - Step-by-Step ETC Guide for SOSS Time-Series Observations of HAT-P-1
  - Step-by-Step PandExo Guide for SOSS Time-Series Observations of HAT-P-1
  - Step-by-Step APT Guide for SOSS Time-Series Observations of HAT-P-1



Proposal Workflow

General Proposal Planning Workflow:

- Accessibly from Quick Links, Sidebar
- No single way to write a proposal
- Aims to give a recommended workflow

Target Visibility:

- Duplication policy (don't write your proposal if you can't observe it!)
- Visibility checker (make sure your target it up!)
- Backgrounds are different in the IR!

Determine if your targets can be observed

1. Check whether your target(s) is already planned to be observed. Duplicate observations are allowed only under certain circumstances.
2. If there is a specific window in which you need to observe your target, use the Visibility Checker to ensure that the target is visible by JWST during that window.
3. If you are planning to observe particularly faint targets, assess whether your observations will be background limited. The Backgrounds Tool will be helpful for visualizing how the background changes over time and how significantly the target visibility is constrained by this.

Use the Exposure Time Calculator to determine observing parameters

1. The Exposure Time Calculator (ETC) should be used to determine the appropriate exposure parameters (e.g., ***READOUT PATTERN*** and ***NUMBER OF GROUPS***, ***INTEGRATIONS***, and ***EXPOSURES***) needed to achieve the desired signal-to-noise ratio for your target. Video tutorials and a new user guide for the ETC are available to help you get started with the ETC.
2. Define your source(s) and scene(s) in the ETC.
3. Select an instrument and observing mode in the ETC.
4. Select instrument parameters within the instrument configuration pane on the ETC calculation page.
5. Run an ETC calculation on your defined scene.
6. Adjust the exposure time via the ***NUMBER OF GROUPS***, ***INTEGRATIONS***, and/or ***EXPOSURES*** until you obtain your desired signal-to-noise ratio (SNR):
    1. The instrument-specific observing strategies provide recommendations for how to split exposure time into ***NUMBER OF GROUPS***, ***INTEGRATIONS***, and ***EXPOSURES***, based on *observing mode*, *science use case*, *avoiding saturation*, and *minimizing cosmic ray* hits on the detector.
    2. ETC batch expansion is an efficient way to determine the SNR for a range of possible values for a given exposure parameter.

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ETC:

- Determine your exposure parameters
- You'll have a whole session on this

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Proposal Workflow

General Proposal Planning Workflow:

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APT:

- Convert your ETC numbers into an APT file
- You'll have a whole session on this

Prepare your proposal in the Astronomers' Proposal Tool

1. The Astronomers' Proposal Tool (APT) is used to set up your observing program and submit your proposal. Training examples and video tutorials are available to help you get started.

2. Fill out your proposal information in APT, e.g., ***Title***, ***Abstract***, ***Proposal Category***, ***Science Keywords***, etc.

3. Enter your proposed target(s) (or ***OFFSET*** targets if required for your observing case). Note: for the special case of the NIRSpec multi-object spectroscopy mode, targets are not input directly, but are created by the NIRSpec MSA Planning Tool (MPT). If using this ***OBSERVING MODE***, make sure to read the extensive MPT documentation.

4. Define your observing parameters in the APT Observation Template(s) relevant for your chosen instrument(s) and ***OBSERVING MODE(s)***. Here you would enter the exposure specifications (i.e., ***NUMBER OF GROUPS***, ***INTEGRATIONS***, and ***EXPOSURES***) that you determined via the ETC. If desired, add cross references to your relevant ETC workbook in the "ETC ***wkbk. calc***" field (strongly recommended if your program requires a target acquisition).

5. Make sure to define any special requirements (e.g., timing constraints, moving target, background limited observation).

6. Run the Visit Planner to ensure your observations are schedulable, and resolve any errors.

7. Run Smart Accounting to determine whether overheads associated with your program can be minimized.

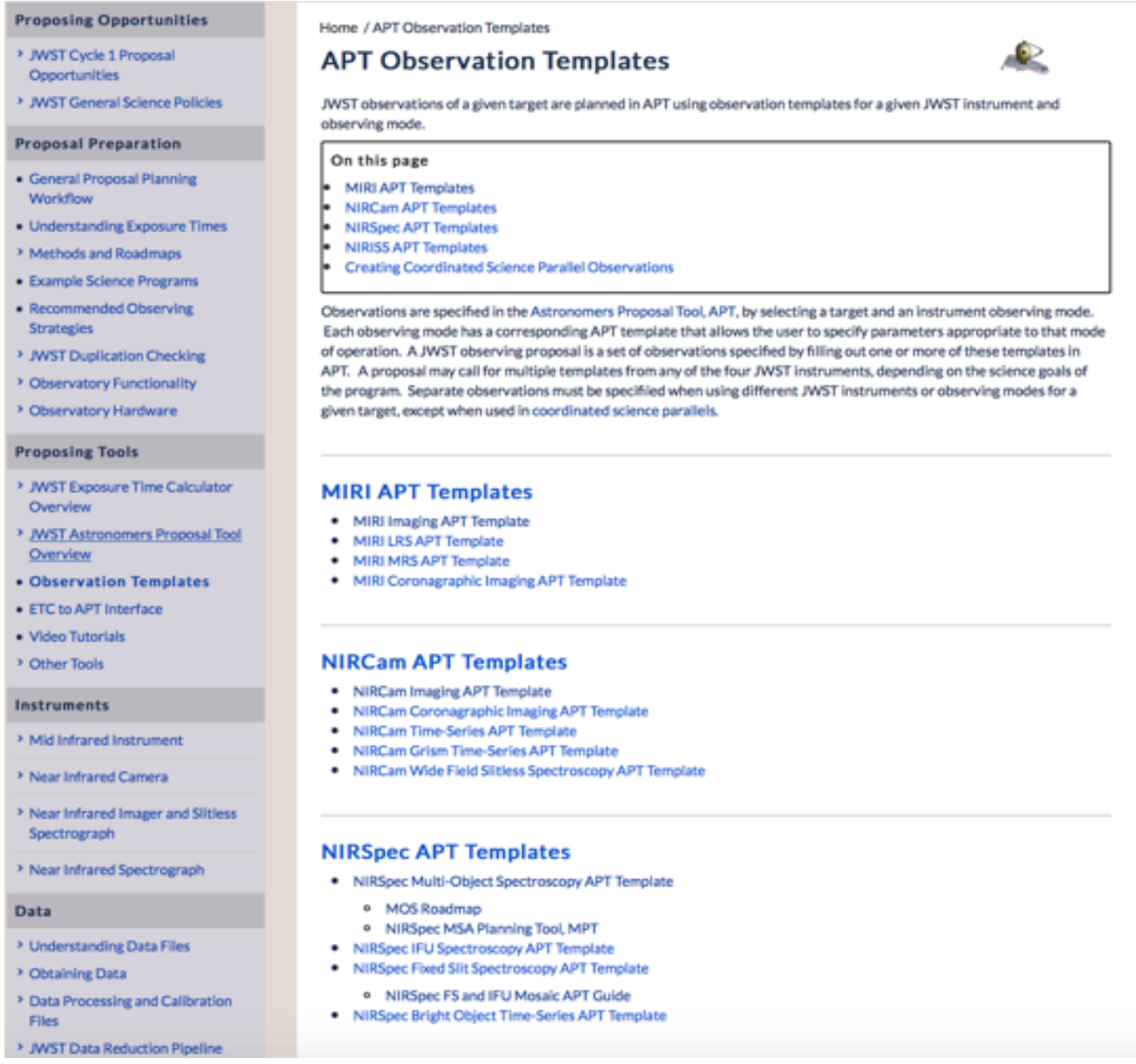
8. Complete and attach the PDF of your science justification to your APT template.

9. If APT reveals no errors with your observing program, submit your proposal!

APT Observation Templates

APT Observation Templates:

- Set of instructions for each instrument observing mode
- Defines each template variable
- Offers related links and advice for making decisions



APT Observation Templates

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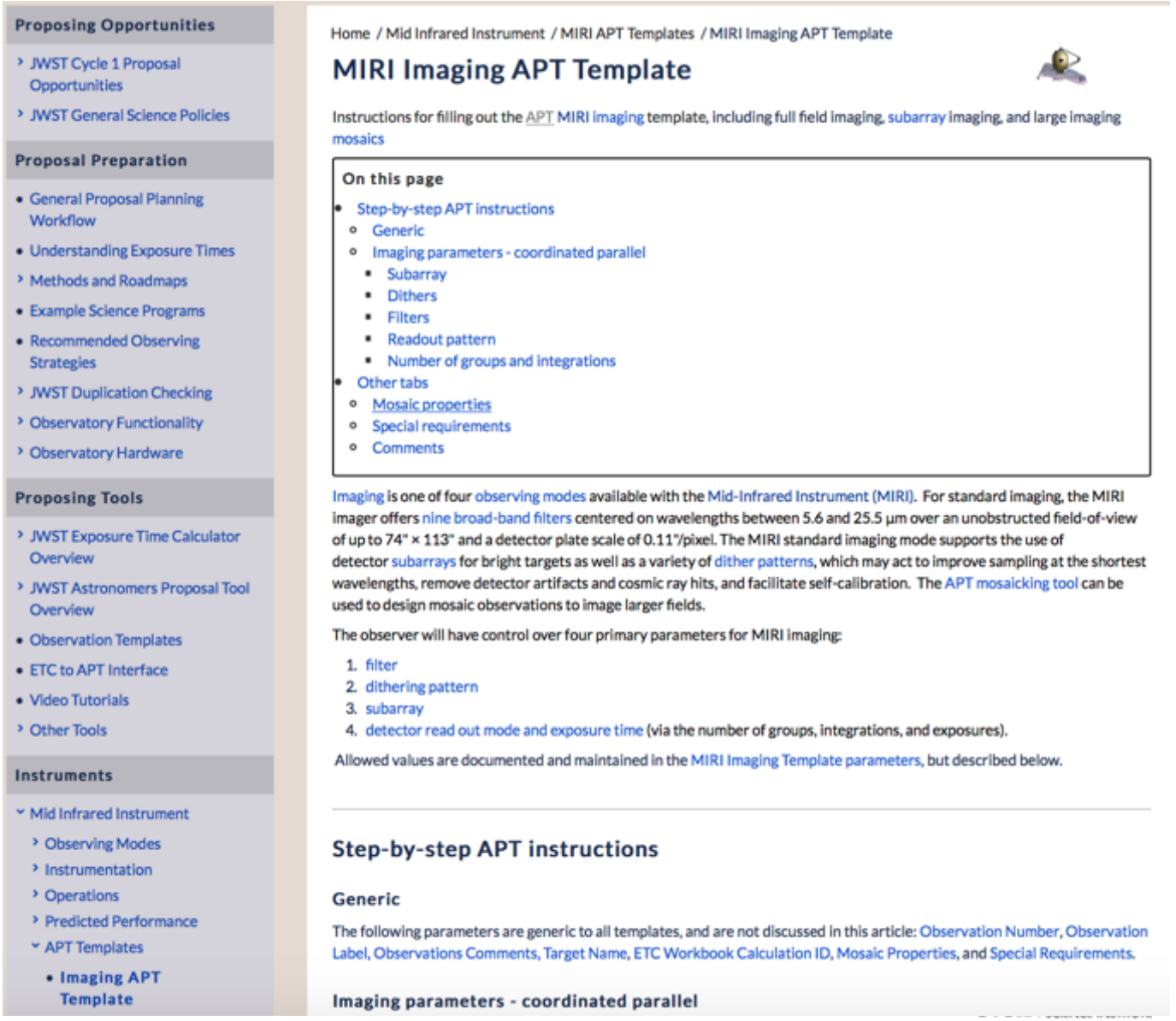
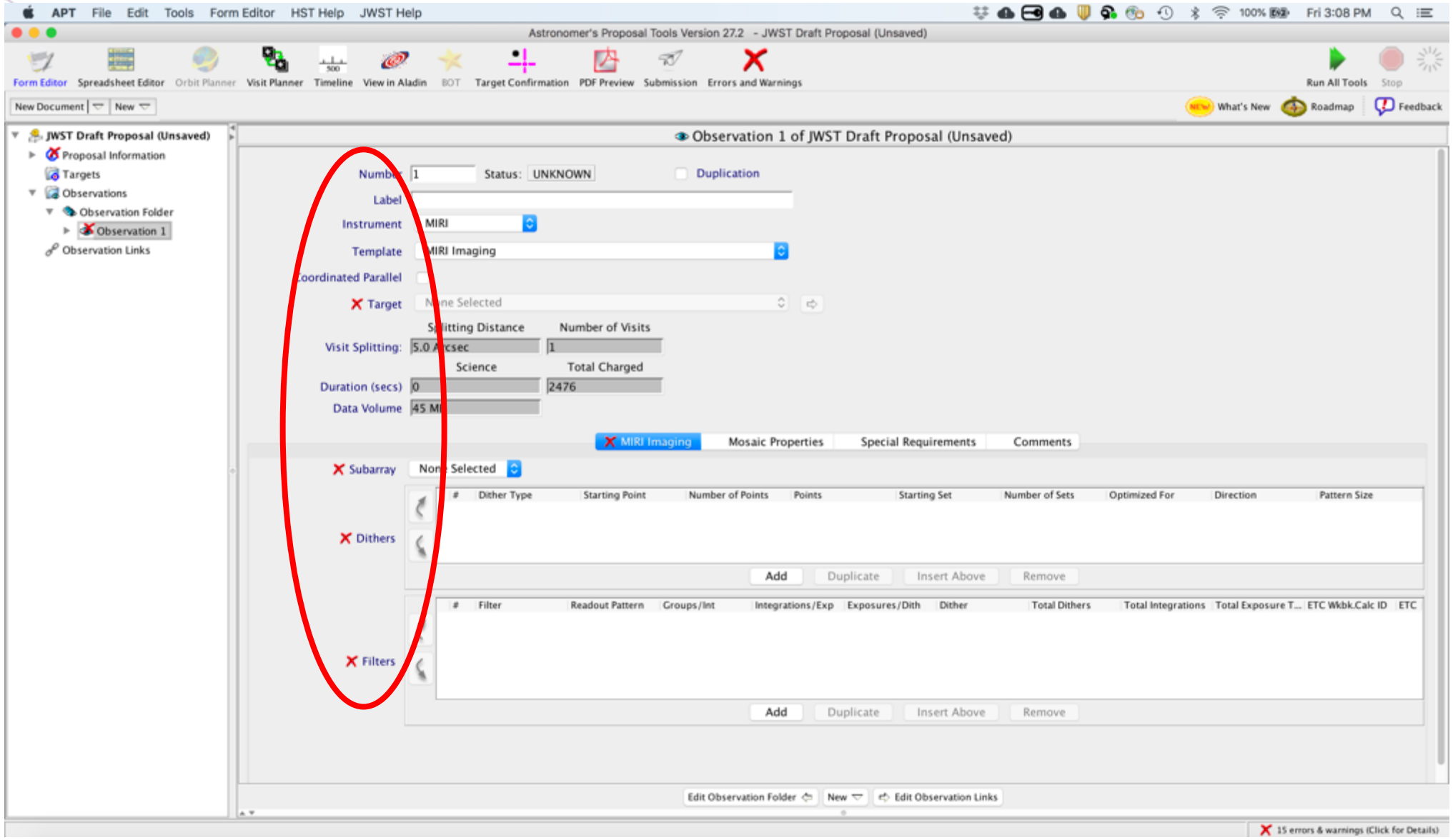


Context Sensitive Help in APT



Video help is linked directly into many articles where it is relevant. Look for the JWST Video icon:

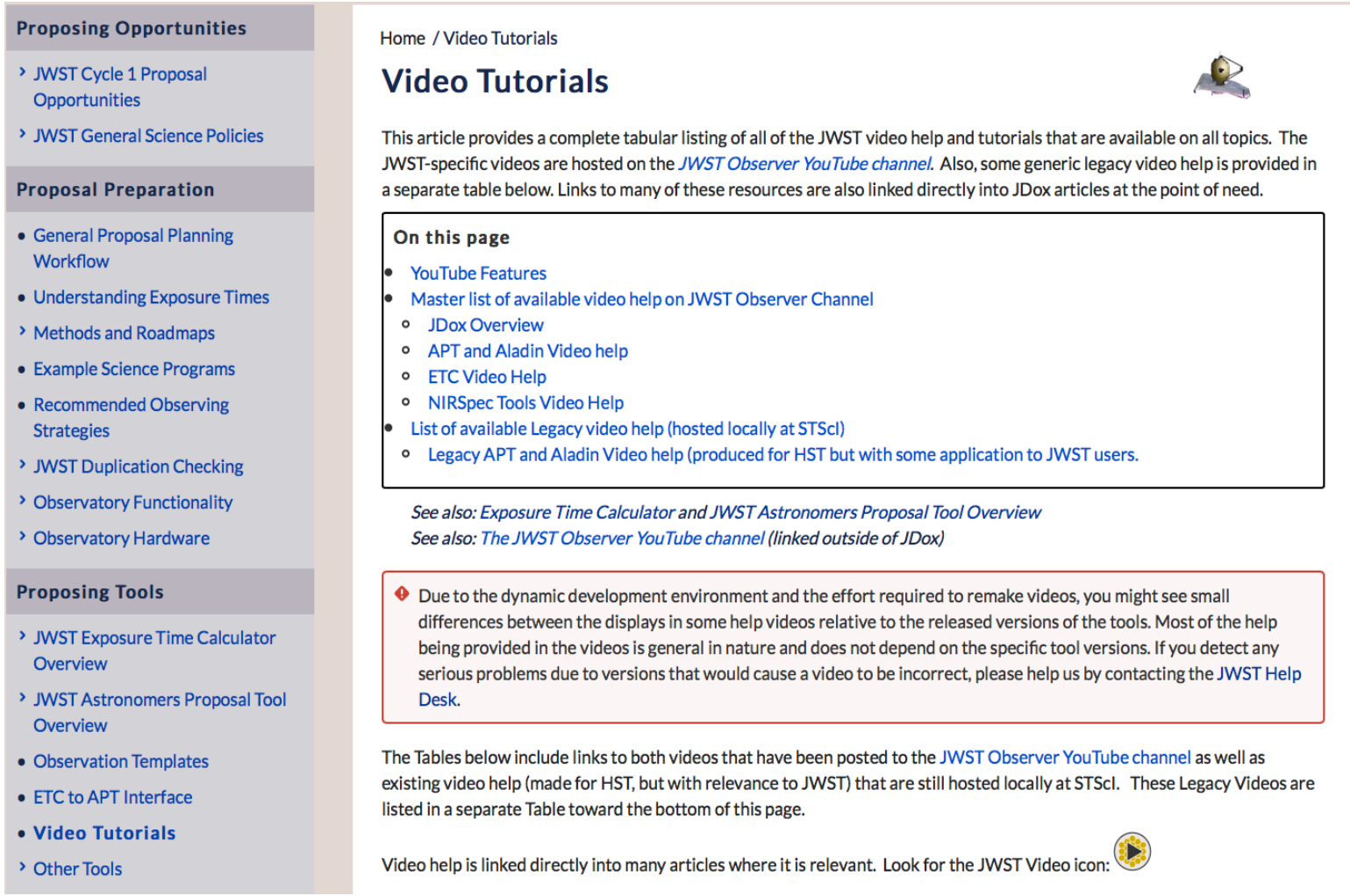
Video Tutorials

Video Tutorials:

- Helps to visualize some of the more difficult techniques in APT and ETC
- You can visit the master list here:

https://jwst-docs.stsci.edu/video-tutorials

- Video help is linked directly into many articles where it is relevant. Look for the JWST Video icon:



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- JWST Astronomers Proposal Tool Overview
- Observation Templates
- ETC to APT Interface
- **Video Tutorials**
- Other Tools

Home / Video Tutorials

Video Tutorials

This article provides a complete tabular listing of all of the JWST video help and tutorials that are available on all topics. The JWST-specific videos are hosted on the *JWST Observer YouTube channel*. Also, some generic legacy video help is provided in a separate table below. Links to many of these resources are also linked directly into JDox articles at the point of need.

On this page

- YouTube Features
- Master list of available video help on JWST Observer Channel
  - JDox Overview
  - APT and Aladin Video help
  - ETC Video Help
  - NIRSpec Tools Video Help
- List of available Legacy video help (hosted locally at STScI)
  - Legacy APT and Aladin Video help (produced for HST but with some application to JWST users.

See also: Exposure Time Calculator and JWST Astronomers Proposal Tool Overview
See also: The JWST Observer YouTube channel (linked outside of JDox)

Due to the dynamic development environment and the effort required to remake videos, you might see small differences between the displays in some help videos relative to the released versions of the tools. Most of the help being provided in the videos is general in nature and does not depend on the specific tool versions. If you detect any serious problems due to versions that would cause a video to be incorrect, please help us by contacting the JWST Help Desk.

The Tables below include links to both videos that have been posted to the JWST Observer YouTube channel as well as existing video help (made for HST, but with relevance to JWST) that are still hosted locally at STScI. These Legacy Videos are listed in a separate Table toward the bottom of this page.

Video help is linked directly into many articles where it is relevant. Look for the JWST Video icon:

Video Tutorials

Master list of available video help on JWST Observer Channel

The following Table lists the video tutorial help being prepared in support of Cycle 1 of JWST along with short descriptions for each video. Links on the video titles in the first column will connect you to each video directly. (If a title is not linked, the video has not been posted yet–stay tuned!)

Note: The JWST Observer YouTube channel also hosts Webinars, recorded JWST Town Halls from AAS meetings, and other recordings not listed here. When you go to the JWST Observer channel, be sure to SUBSCRIBE to see updates.

JDox Overview

	Length	Description
JWST Documentation Overview	7:00	This video provides a brief introduction to the JWST User Documentation System, including tips on navigation and searching.

APT and Aladin Video help

	Length	Description
APT GUI Overview	5:07	This video walks through the basics of the APT user interface and describes each of the tools within APT that are needed to prepare and submit JWST proposals.
APT Visit Planner	8:50	This video provides examples of various tasks performed with the Visit Planner tool within APT, including the use of diagnostics to fix various problems you may encounter. It concludes with an example of running Smart Accounting to minimize overheads in your proposal.
Adding Special Requirements in APT	5:45	This video provides examples of entering and editing Special Requirements in APT, including for both fixed and moving targets.
Specifying Mosaics in APT	13:41	This video demonstrates the ways of defining and manipulating mosaics within APT. Advanced sections include adding and removing tiles from a mosaic as well as other special cases.
APT Errors and Warnings	3:06	This video highlights the various ways you can get diagnostic information about errors and warnings in APT as you develop a proposal for submission.
APT Graphical Timeline	6:21	This video describes the functionality of the graphical timeline tool within APT.
Aladin Overview in APT	9:14	This video walks through the basic functionality of the Aladin visualization tool within the APT environment, and provides several examples of interactions between Aladin and APT itself.
Using Aladin and APT Visit Planner	5:00	This video shows how Aladin and the Visit Planner in APT can be used together to help prepare your proposal.

ETC Video Help

	Length	Description
ETC Home Page Overview	3:49	This video provides a good entry point for learning how to use the JWST Exposure Time Calculator (ETC). It presents the different options available on the home page for working in the ETC and provides guidance for obtaining additional information.
ETC General Overview	5:51	This video is a walkthrough that briefly presents the capabilities and layout of the JWST Exposure Time Calculator (ETC).
ETC Workbooks	4:36	This video discusses how to create a new ETC workbook, load existing example workbooks to use as starting point, and share ETC workbooks with other MyST users and collaborators.
ETC Scenes and Sources	6:27	This video demonstrates how to create scenes, add sources, and modify sources as part of performing calculations in the ETC.
ETC Backgrounds	3:15	This video describes the various ways to specify a background in the ETC.
Adding Emission Lines in the ETC	2:52	This video describes the process of adding, updating, and removing emission lines to a source continuum in the ETC.
Uploading Spectra to the ETC	3:40	This video describes how to upload user-supplied spectra to the ETC, including the proper file format to use.
ETC Batch Expansions	4:50	This video describes how to use the batch expansion feature to quickly explore a range of instrument or exposure parameters in the ETC.
ETC IFU Strategies	3:52	This video describes the two observing strategies for the MIRI MRS and NIRSpec IFU backgrounds and how to quickly fix errors when switching strategies in the ETC.

NIRSpec Tools Video Help

	Length	Description
NIRSpec Observation Visualization Tool	4:24	This video demonstrates use of the NOVT, which is used for planning NIRCam pre-imaging observations for NIRSpec MSA. The tool allows the user to visualize the NIRCam field of view with various dither patterns relative to the NIRSpec MSA footprint.

List of available Legacy video help (hosted locally at STScI)

Here are the links and short descriptions for each video. URLs are encoded in the first column.

Legacy APT and Aladin Video help (produced for HST but with some application to JWST users.

	Length	Description
The Differencing Tool	5:30	This tutorial describes using the differencing tool in APT to compare two proposals. It was made for HST but has relevance to JWST users.
Using the Find feature	3:30	This tutorial describes how to use the "Find" functionality in APT. It was made for HST but has relevance to JWST users.
How to retrieve minor body orbital elements from Horizons	2:30	This tutorial demonstrates accessing orbital elements for known moving targets from within APT. It was made for HST but works exactly the same way for JWST.
How to use the MAST Portal from APT	7:00	This tutorial demonstrates how to access and use the MAST Discovery Portal interface from APT. It was made for HST but works exactly the same way for JWST.
Using the Aladin Multiview Function	1:30	This video demonstrates the multiview functionality of Aladin.
Making APT Target Confirmation Charts	4:13	This video shows how to use APT to make target confirmation charts.

A full list of help videos.

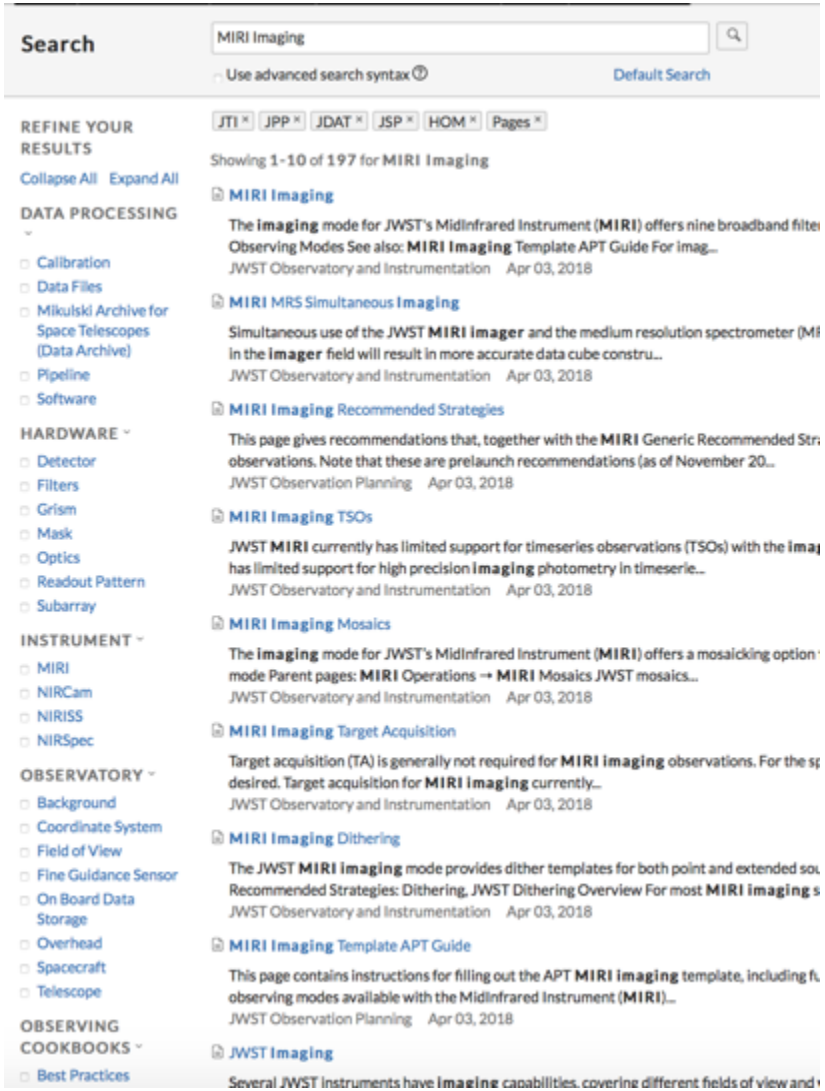
Also JWST Observer YouTube channel:

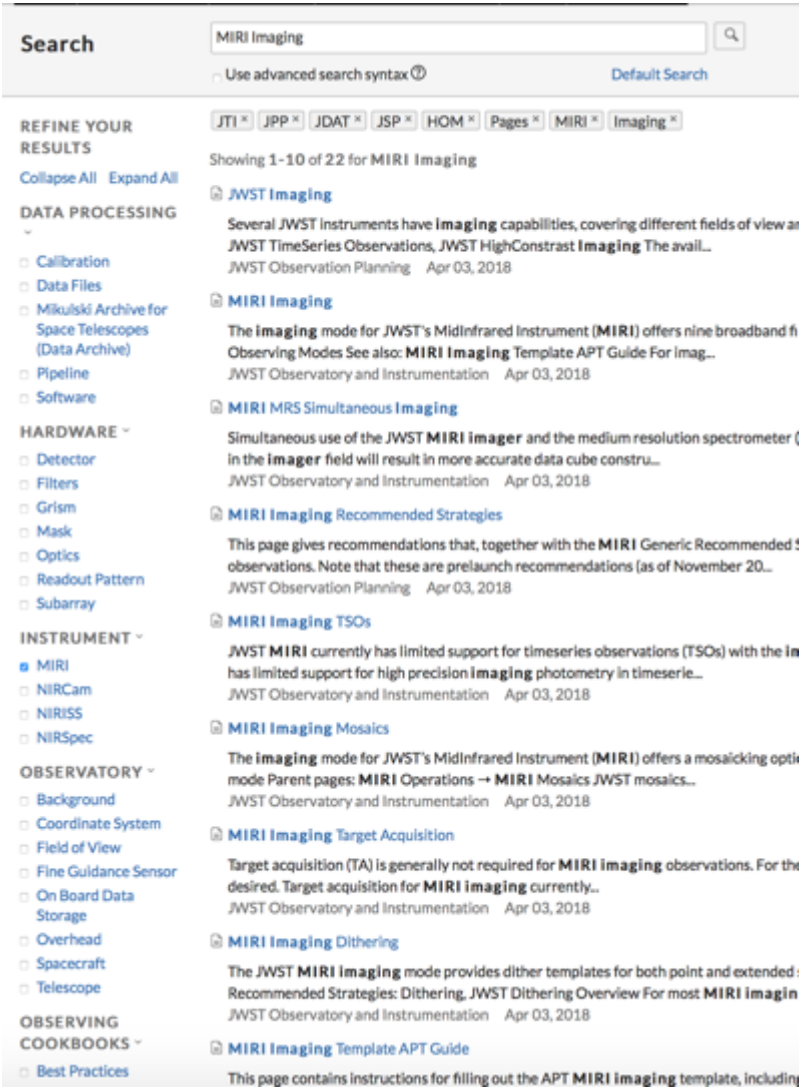
https://www.youtube.com/jwstobserver

Search and Targeted Search

Refined Search:

- If you can't find a page on the topic you are looking for, you can use the search bar
- There are often a lot of returns, since search doesn't have any weighting
- To refine the search, all articles have tags that help sort by subject matter on the left hand sidebar (like Amazon!)
- You can also use Google





JDox Summary

Progress: jwst-docs.stsci.edu is now live! (>700 articles published!)

Published:
✓ GTO Call for Proposals
✓ DD-ERS Call for Proposals
✓ Cycle 1 GO Call for Proposals (*updated info soon!)*

Content Includes:
✓ Instrument Documentation
✓ Pipeline Documentation
✓ Proposal Workflow
✓ Context Sensitve Help
✓ ETC, APT, Other Tools
✓ Context Sensitive Help
✓ Science Use Cases
✓ Observing Techniques and Strategies
✓ Instrument Best Practices
✓ Reduction Pipeline
✓ Instructional Help Videos

comments / feedback?
JWST help desk user forum:
jwsthelp.stsci.edu

JWST Help Desk

Stacey Bright

JWST Master Class

November 2019

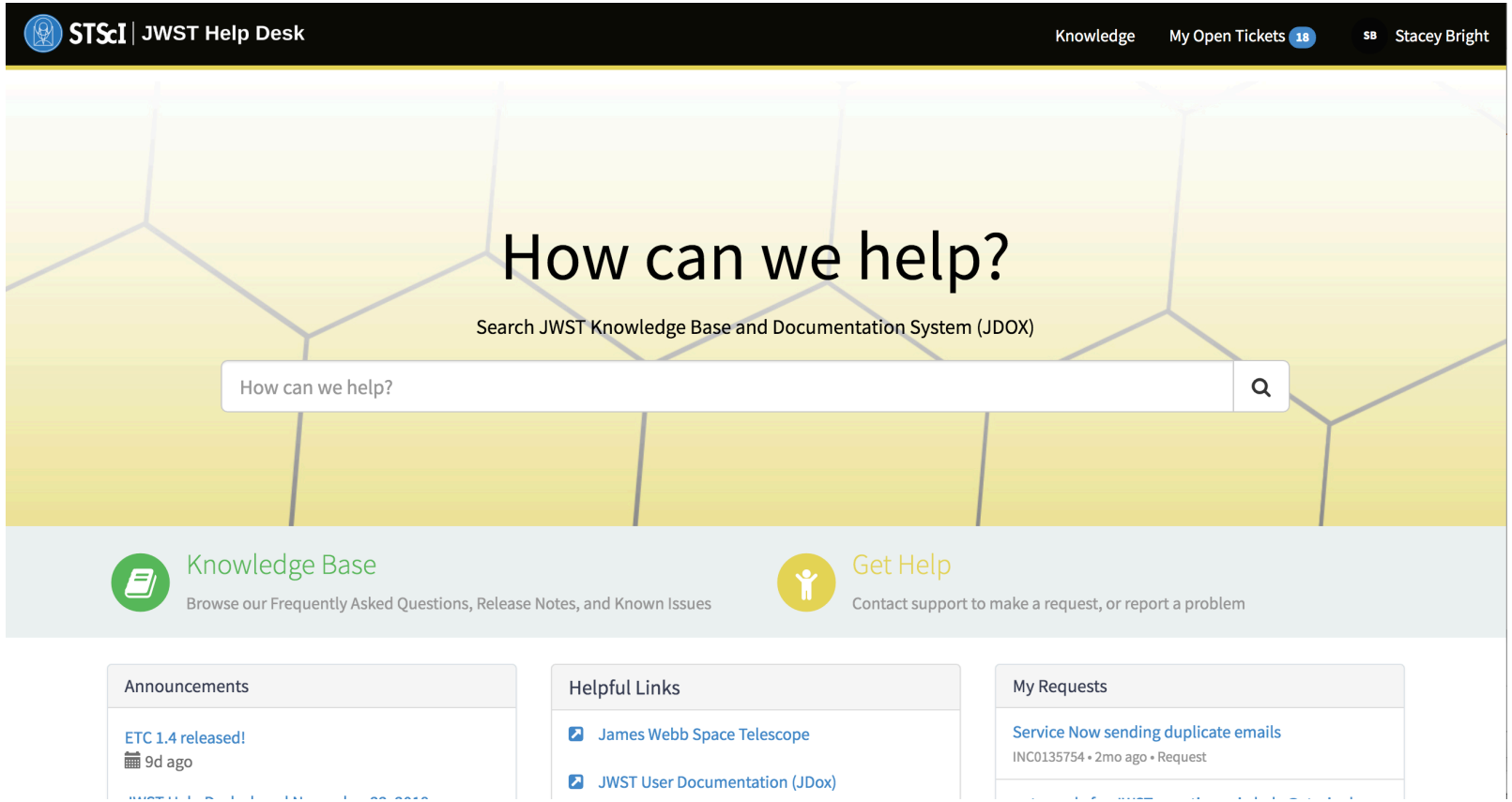
JWST Help Desk

jwsthelp.stsci.edu

JWST Help Desk

jwsthelp.stsci.edu

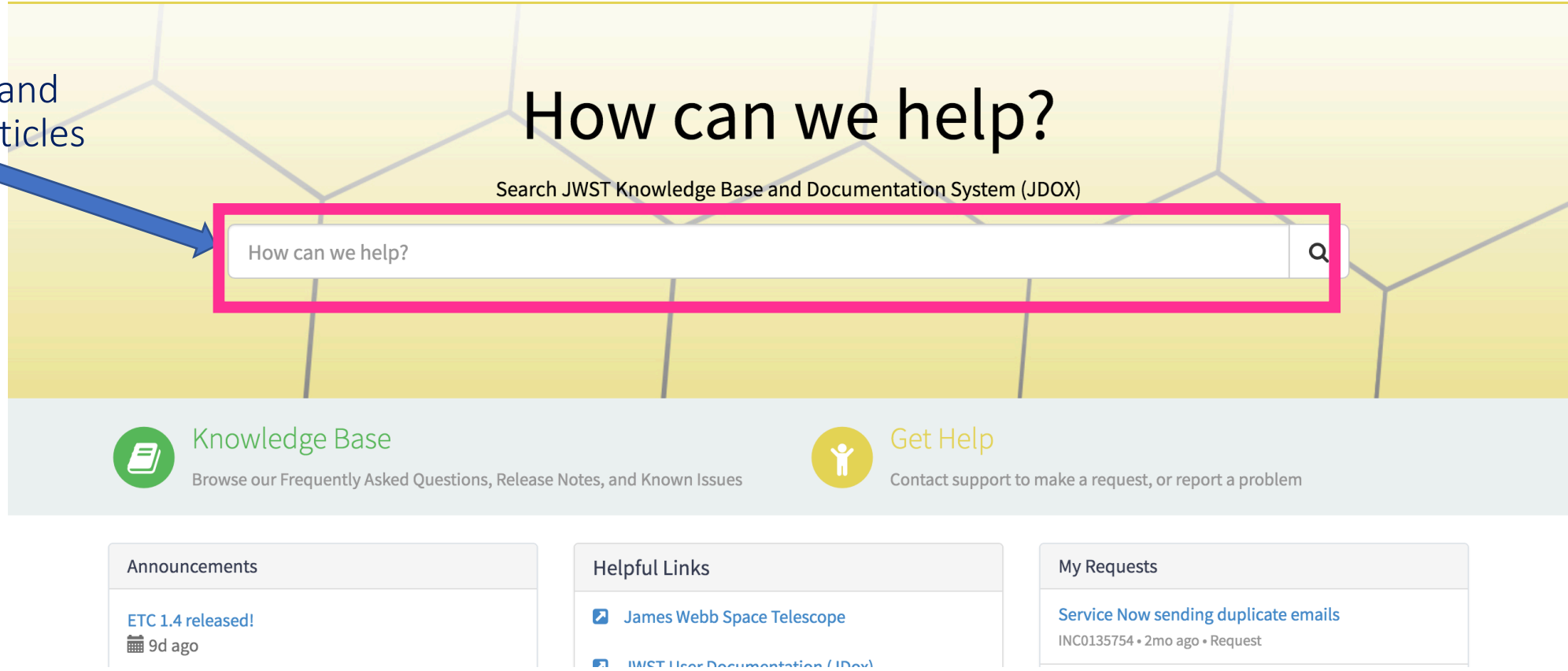
- Search for answers via JDox integration and specially written articles unique to the Help Desk
- Links, news, and announcements updated frequently
- Ask a question to be answered by an STScI fulfiller



JWST Help Desk – Searching

1. Search:

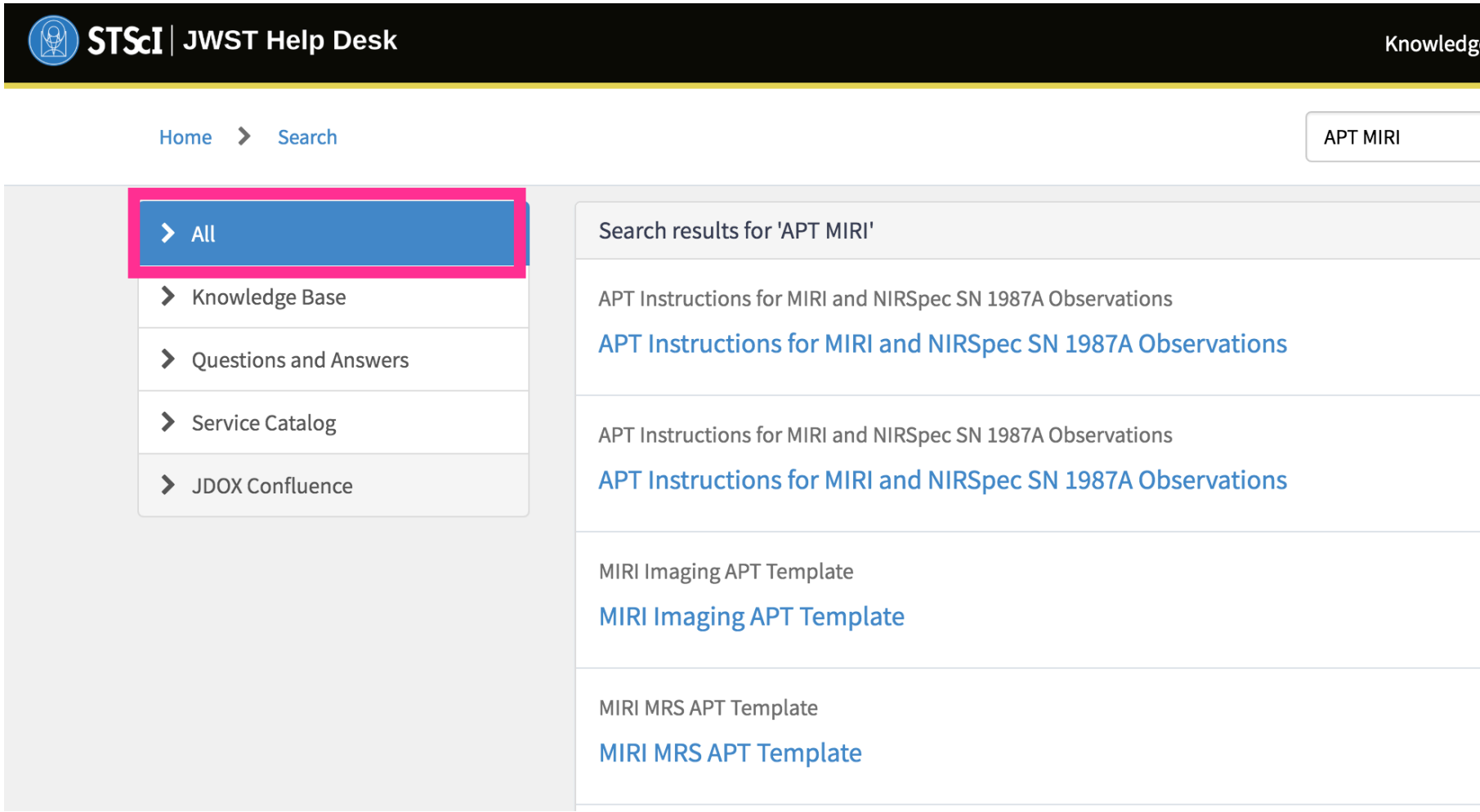
- Returns both JDox and Knowledge Base articles



JWST Help Desk – Searching

1. Search:

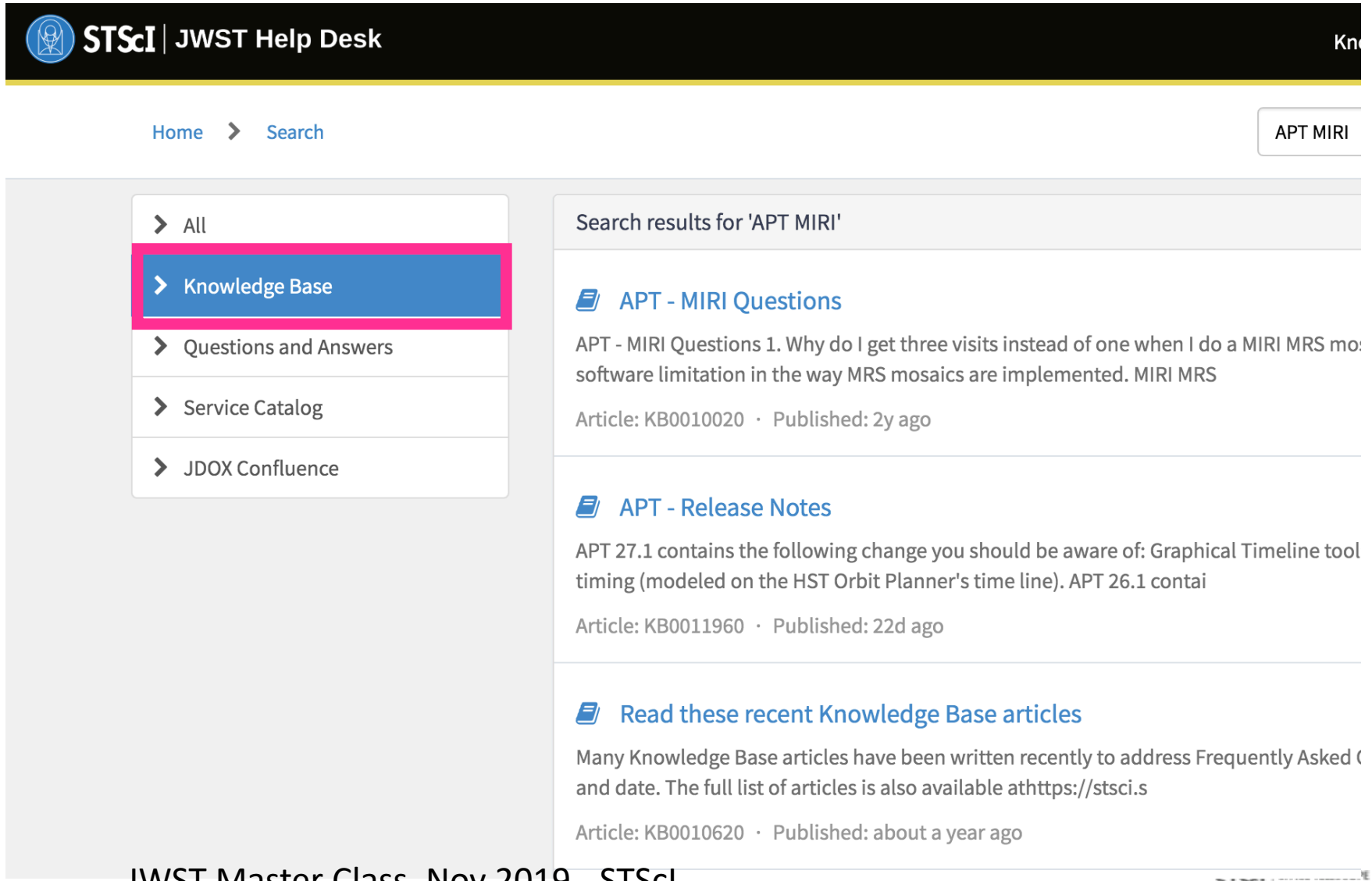
- Results show JDox articles first



JWST Help Desk – Searching

1. Search:

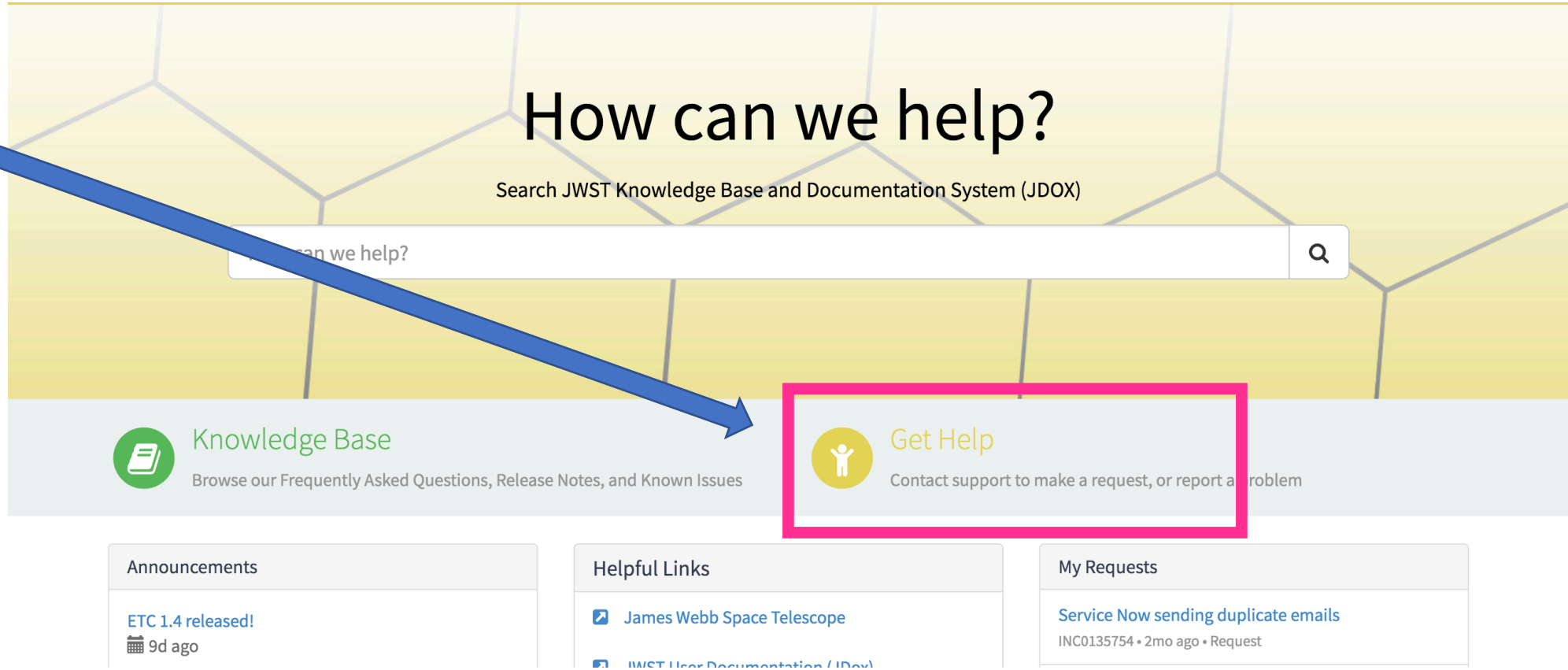
- Results show JDox articles first
- **Use sidebar tree to filter for Knowledge Base and other articles**
  - Knowledge Base articles updated frequently and answer FAQ or provide helpful tips (whereas JDox articles freeze, these are flexible)



JWST Help Desk – Getting help

2. Get Help:

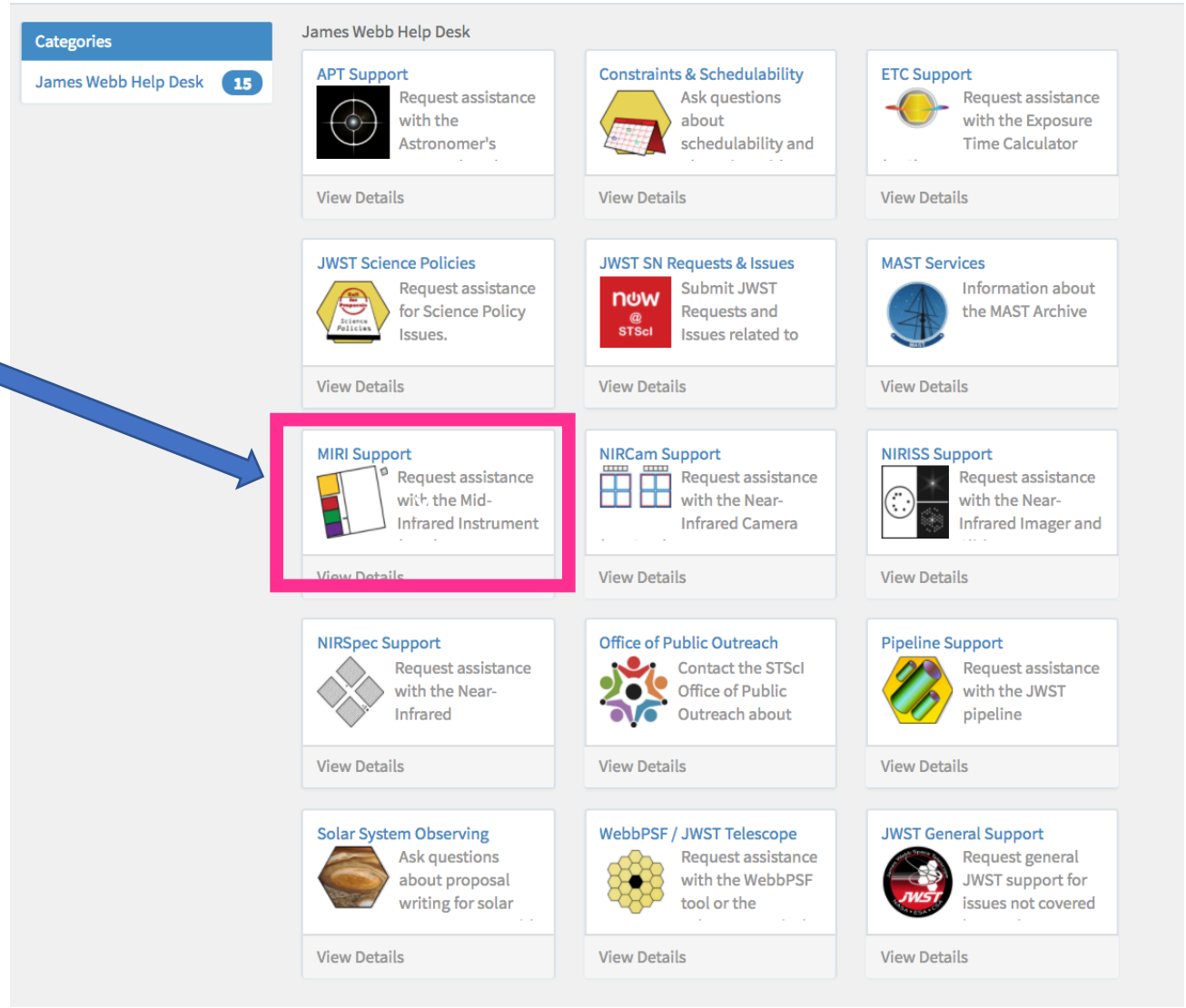
- Ask a question



JWST Help Desk – Getting help

2. Get Help:

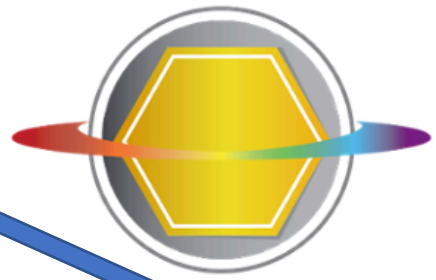
- Ask a question
- Many cards in the catalog to choose from to expedite service
- Or if uncertain choose “General Support”



JWST Help Desk – Getting help

2. Get Help:

- Card specific information/description
- Includes link to Known Issues, FAQ, videos, JDox



ETC Support

Request assistance with the Exposure Time Calculator (ETC)

The JWST ETC uses preliminary calibrations to estimate integration times and signal-to-noise ratio for common modes of observation.

Typical requests include issues with:

- Problem reports
- Interpretation of results
- Advice in specifying inputs
- Help with user interface
- ETC/APT

Please include the workbook id and the affected calculation id(s), if any.

If reporting a problem, please include the date and time that the problem occurred, as well as the web browser, browser version, and operating system. This will assist us in investigating the problem.

Useful Links:

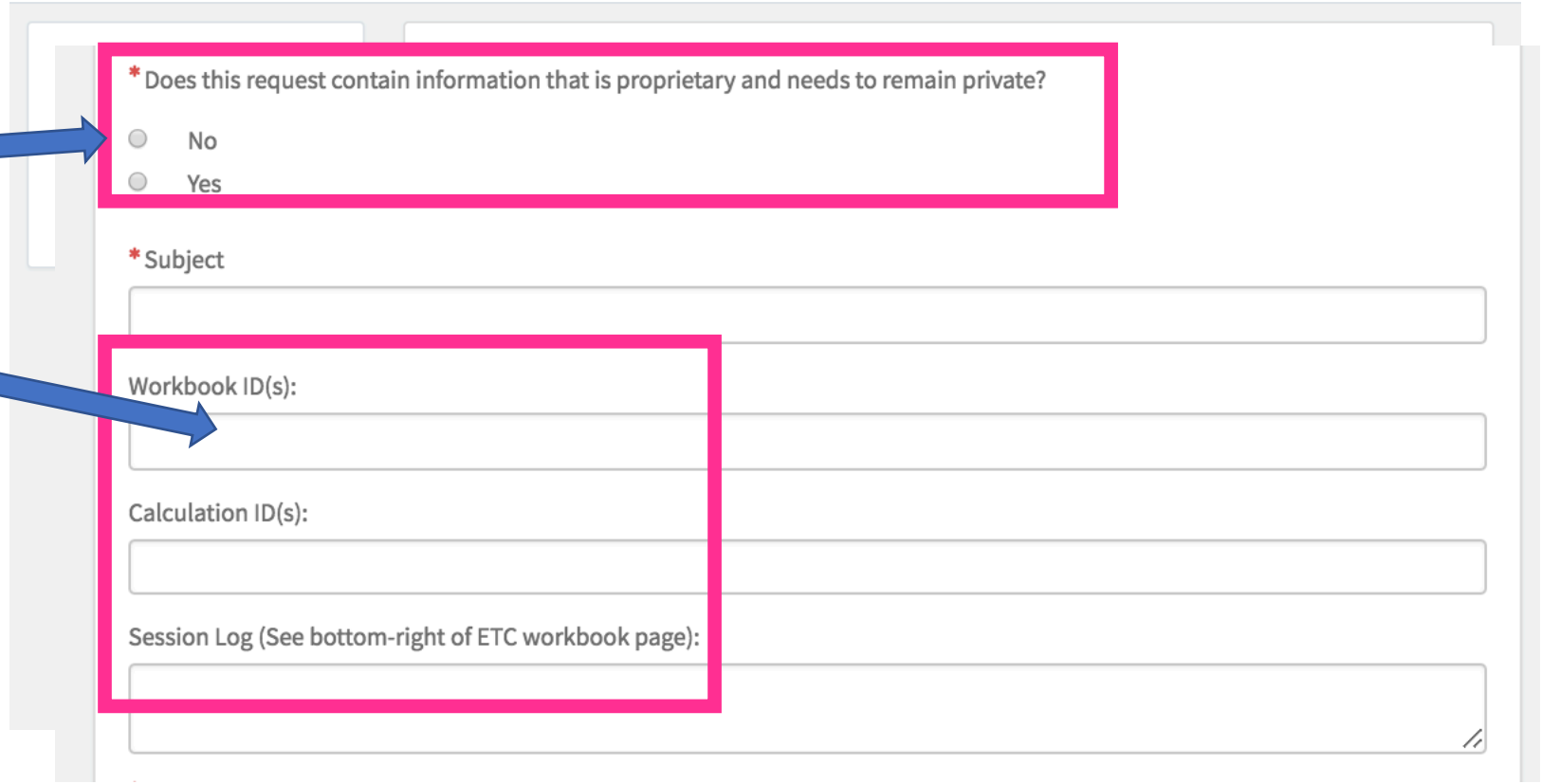
- ETC JDox Pages
- ETC Video Tutorials on YouTube
- ETC Known Issues
- ETC FAQs

General questions and user feedback are also welcome.

JWST Help Desk – Getting help

2. Get Help:

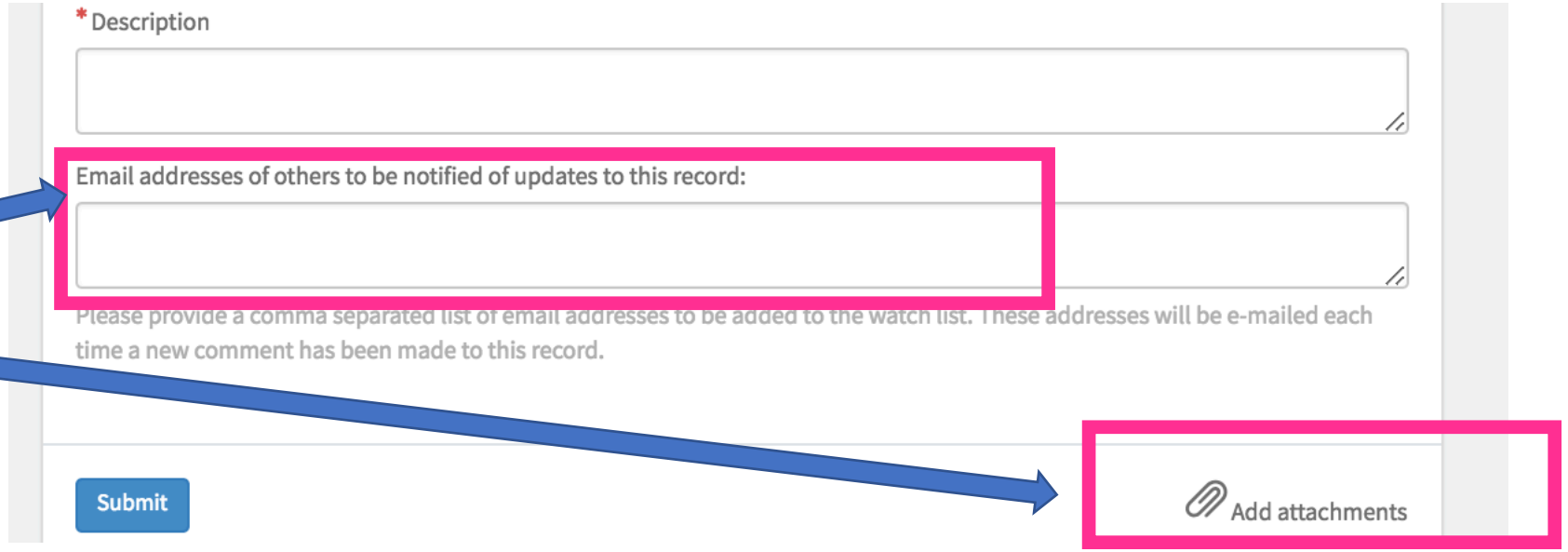
- General Information/Description
- Proprietary?
- Catalog Specific Information
  - Workbook ID, draft APT proposal, etc.
  - Allows us to answer the question more quickly if we have this information
  - Most important for APT and ETC questions



JWST Help Desk – Getting help

2. Get Help:

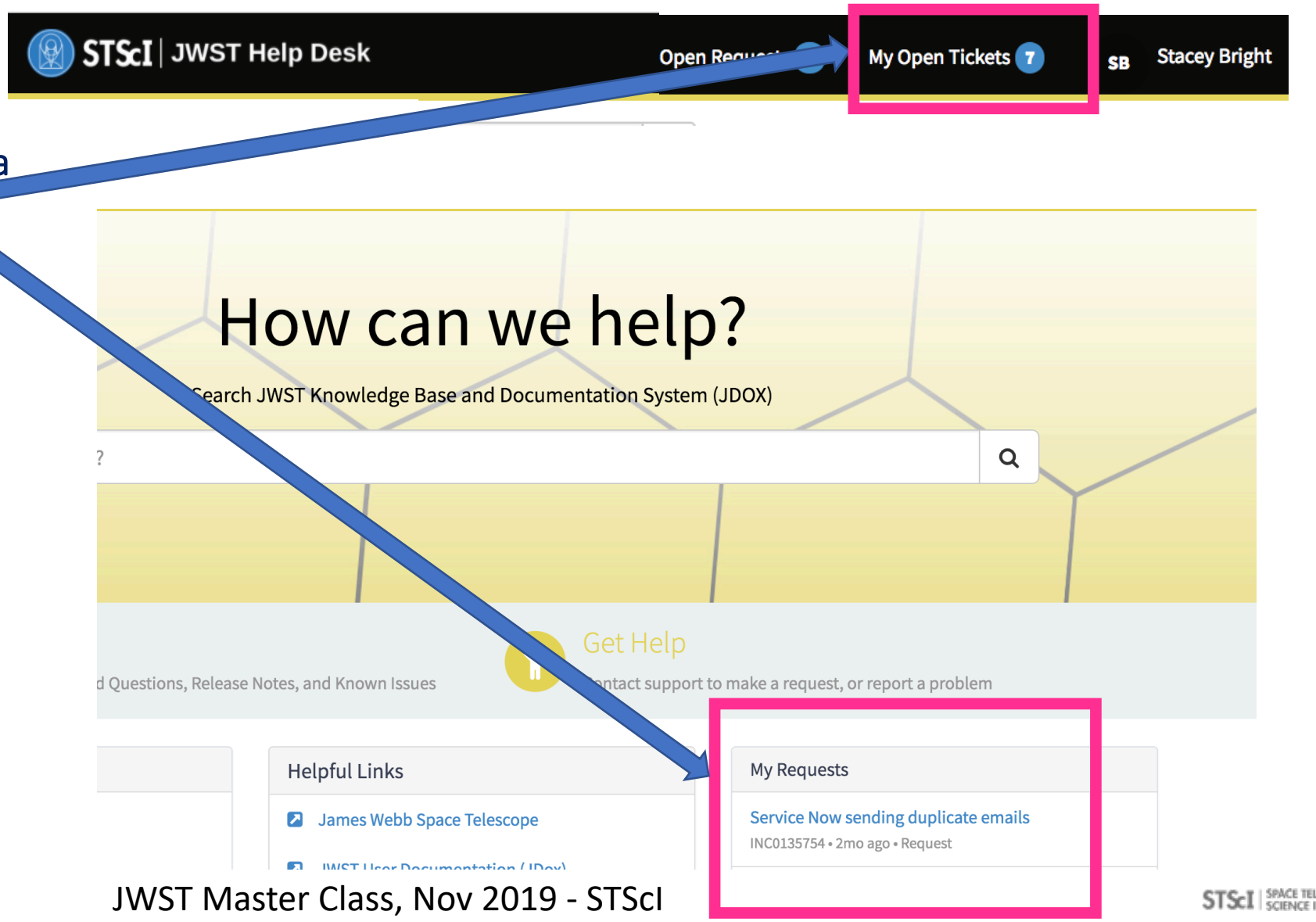
- General Information/Description
- Proprietary?
- Catalog Specific Information
  - Workbook ID, etc
- **Add collaborators**
- **Add attachments**



JWST Help Desk – Answers

3. Answers:

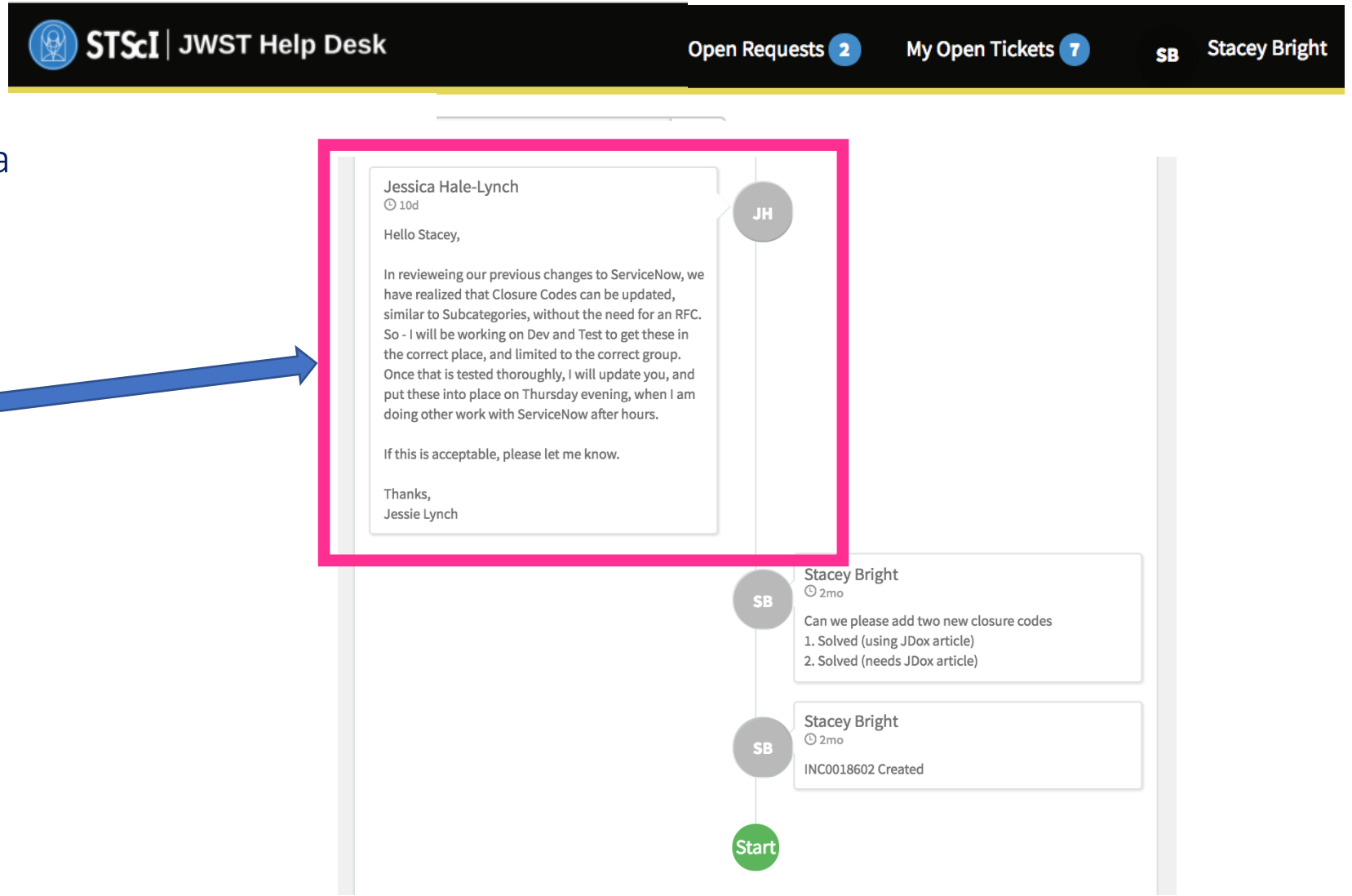
- Viewable within Help Desk via “My Open Tickets” tab or home page
- Also sent via email



JWST Help Desk – Answers

3. Answers:

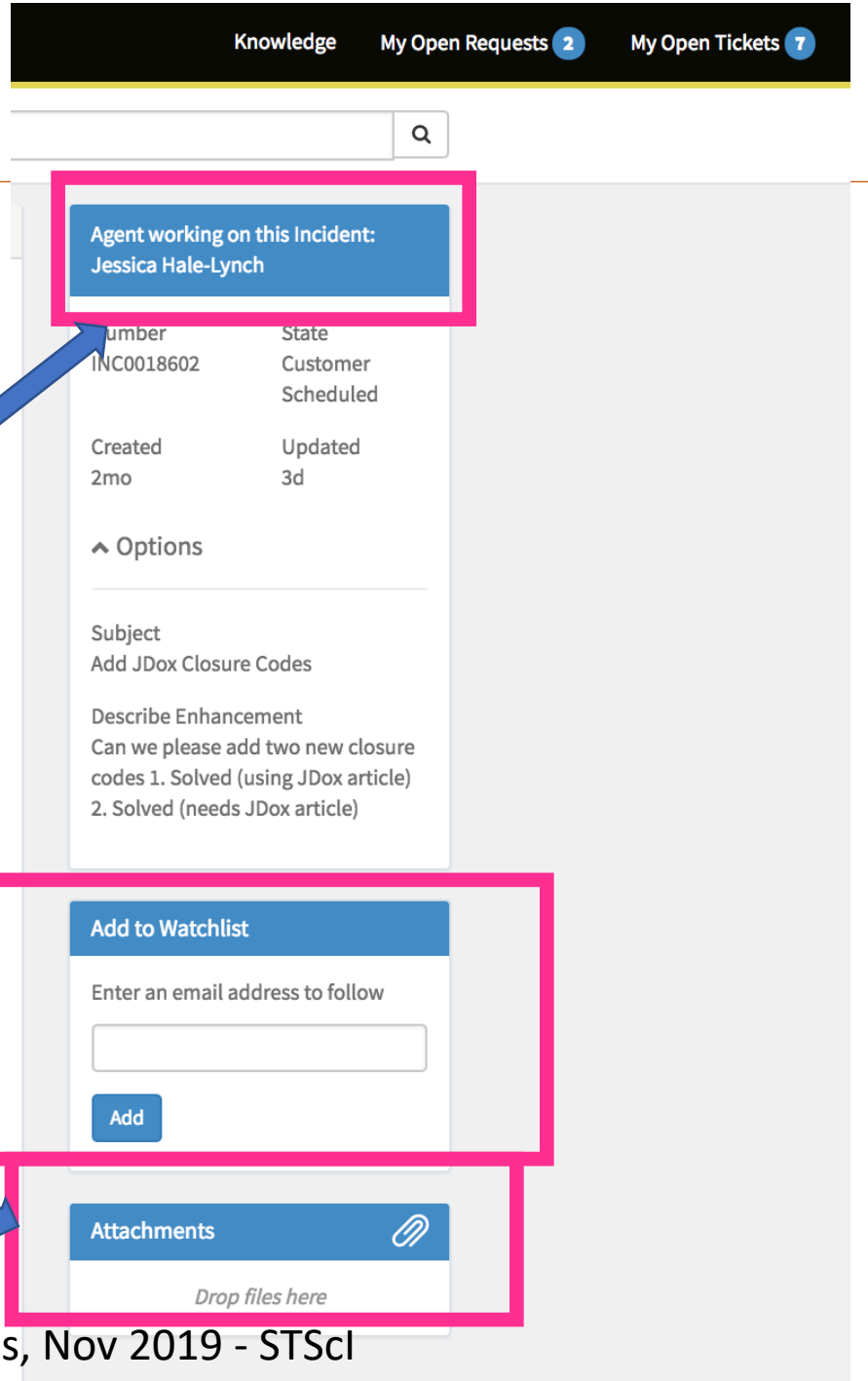
- Viewable within Help Desk via "My Open Tickets" tab or home page
- Also sent via email
- **Answers shown in chat format**



JWST Help Desk – Answers

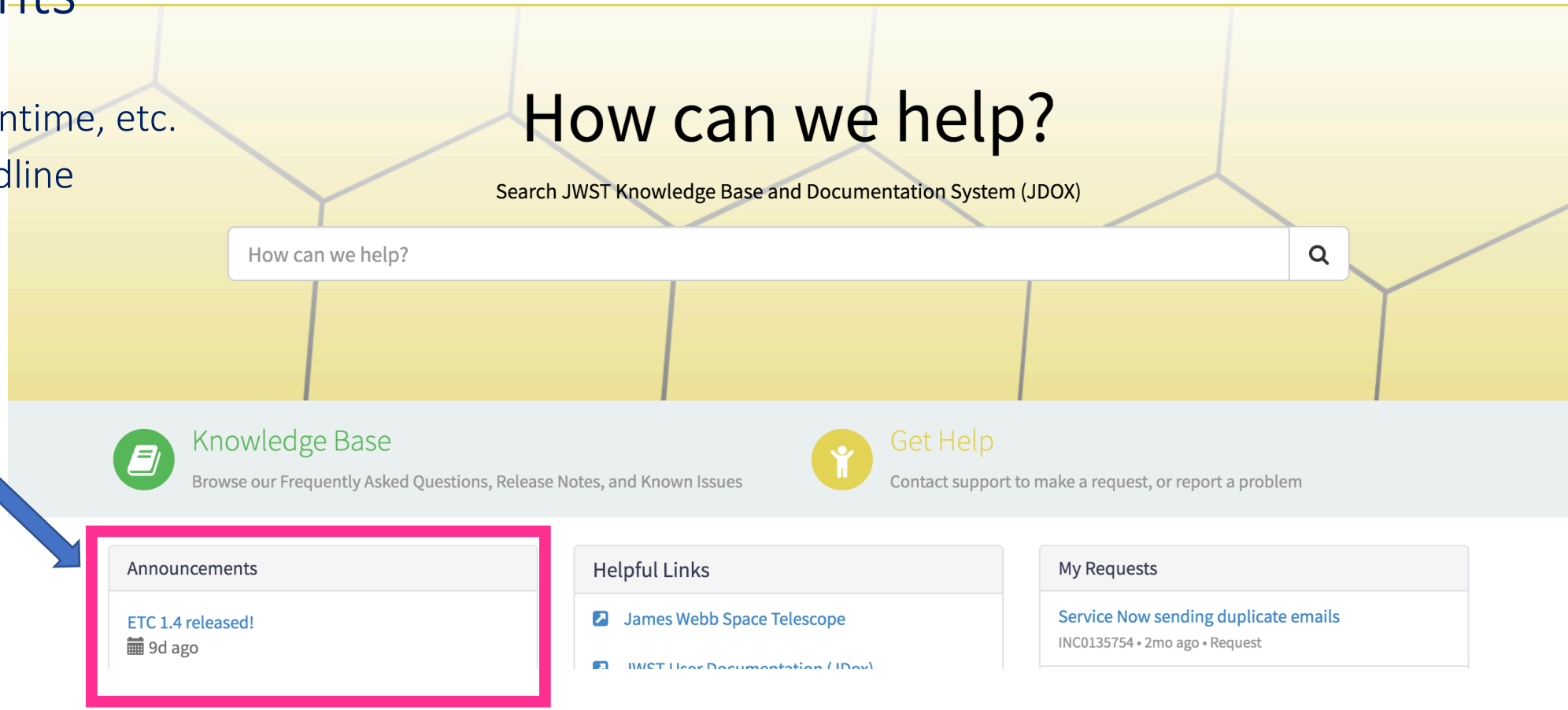
3. Answers:

- Viewable within HelpDesk via "My Open Tickets" tab or home page
- Also sent via email
- Answers shown in chat format
- **Shows fulfiller when assigned**
- **Add collaborators after submitting**
- **Upload more attachments**



4. Announcements

- Posted news
- New releases, downtime, etc.
- Helpful during deadline periods

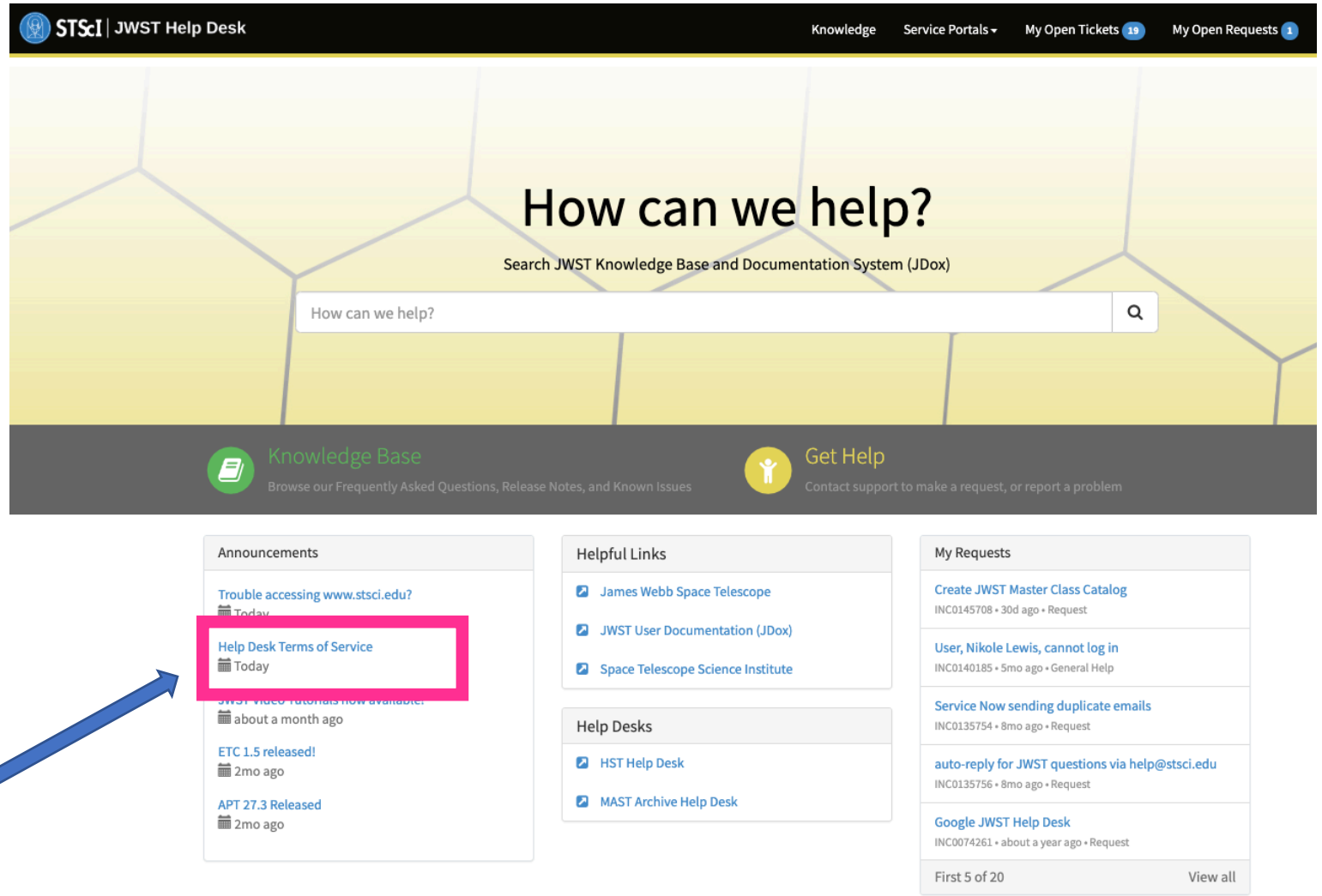


JWST Help Desk – Terms of Service

Terms of Service

Outlines expectations for both the user and us, as fulfillers

- We aim for friendly service and to answer within 2 business days
  - We don't have dedicated staff for only help desk questions
  - Resolution may take longer if the question is complex
- When using you are considered a visitor to STScI and agree to abide by "Standards of Workplace Conduct"

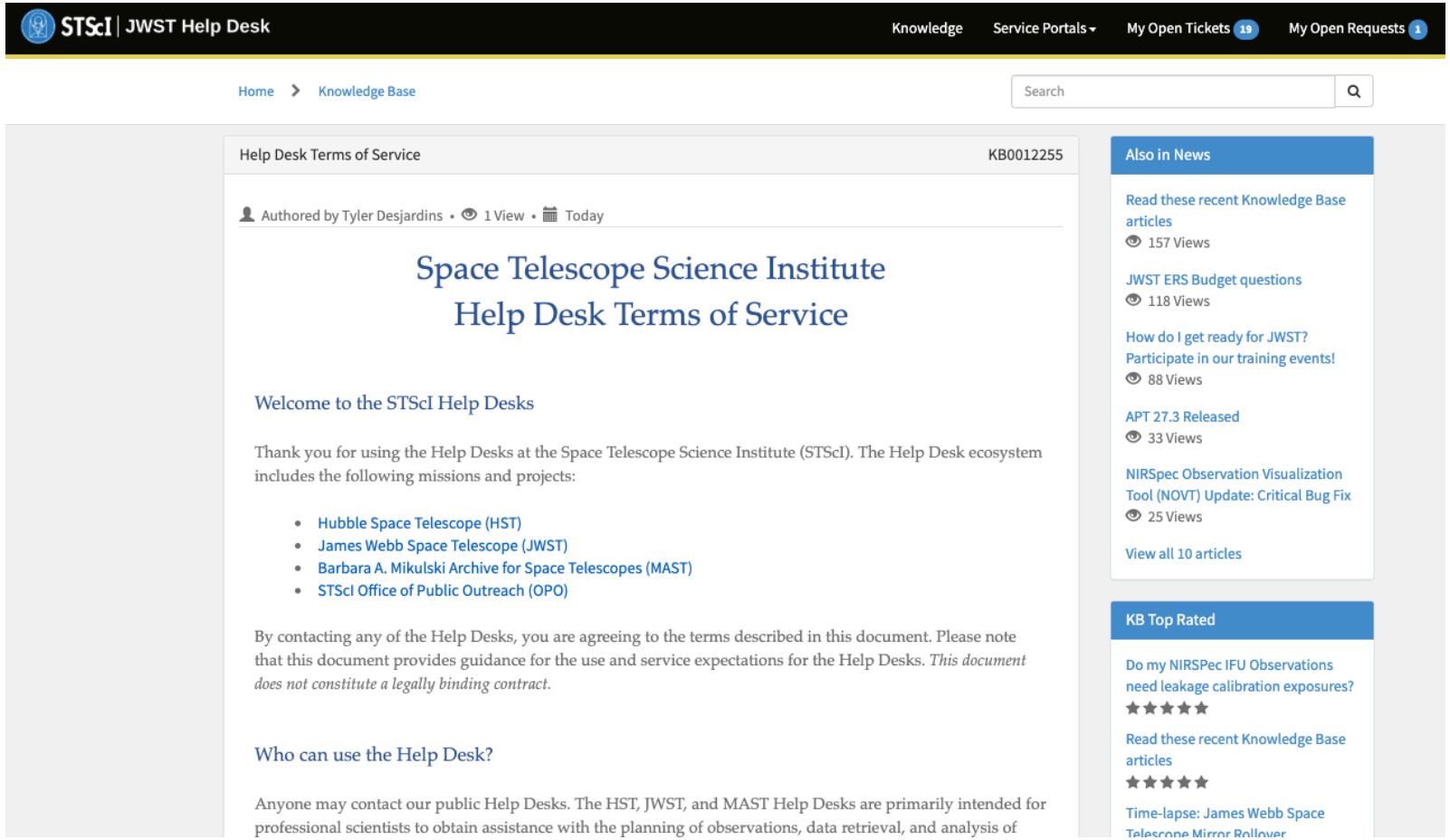


JWST Help Desk – Terms of Service

Terms of Service

Outlines expectations for both the user and us, as fulfillers

- You can provide feedback about the Help Desk by submitting using the "JWST General Card
- Feedback survey will be coming soon

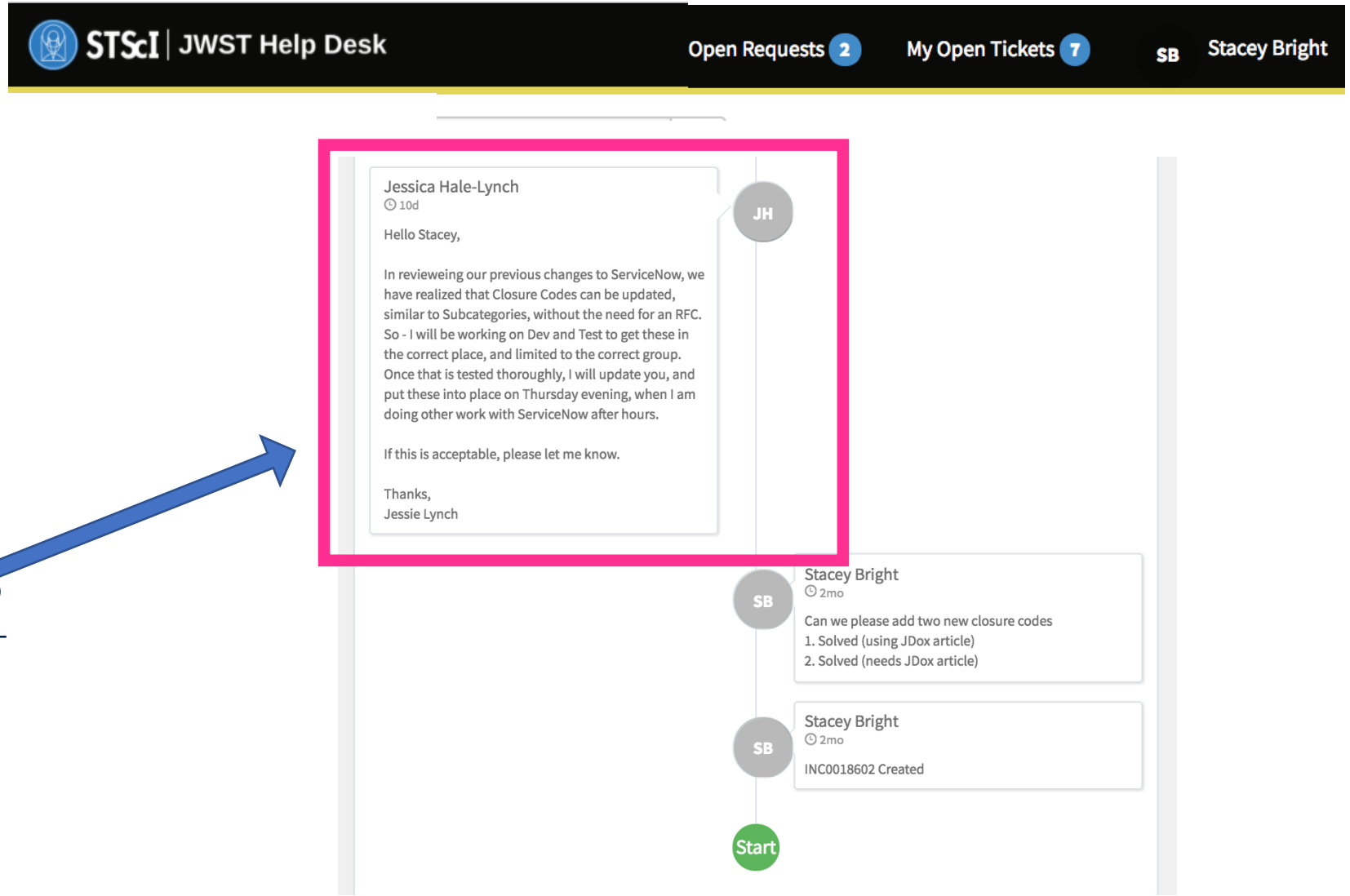


JWST Help Desk – Special Workshop Support

Workshop Support:

During your local workshop we will provide a 2-hour session where a Help Desk fulfiller will be on call to answer your questions:

- We will use the “Master Class” card to initiate one long chat that we will use to communicate during your 2-hour session

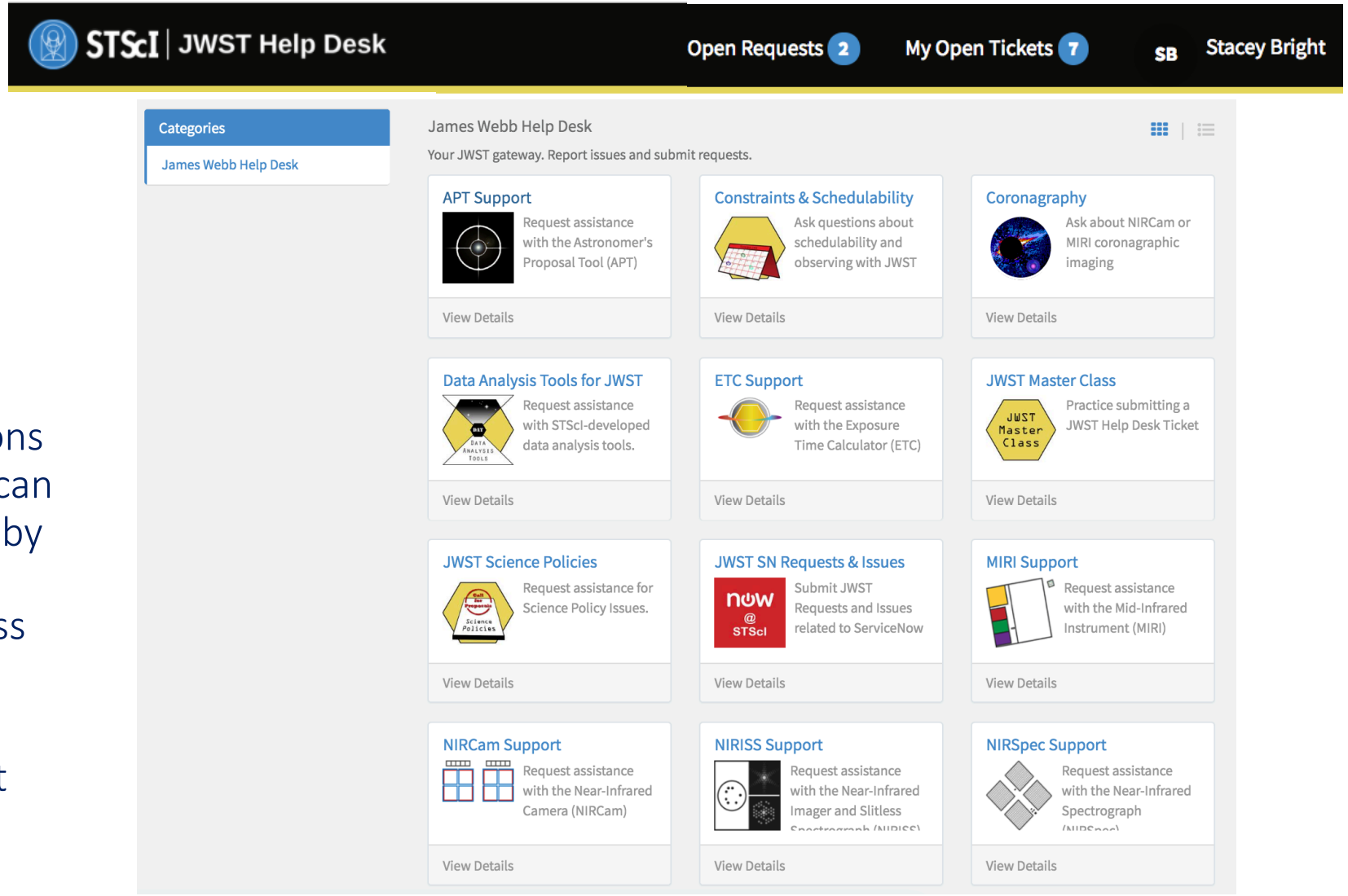


JWST Help Desk – Special Workshop Support

Workshop Support:

During your local workshop we will provide a 2-hour session where a Help Desk fulfiller will be on call to answer your questions:

- If participants have questions during the workshop they can submit questions as usual, by selecting the appropriate category (normal 2-business day turnaround)
- You can also submit a question to any category at any time throughout the workshop
- More details on Friday



JWST Help Desk – Any Questions?

jwsthelp.stsci.edu