***Integrating Science Services for Observers:***
***Beginning a Dialog with the STUC***

*October 2014*

*Janice C. Lee (Science Mission Office)*

How can STScI

*modernize*
*streamline*
*improve*

user support and documentation
for JWST,
building on experience with
HST and other observatories?

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***Outline***
*I. Motivation*
*II. Pathfinder project*
*III. Your feedback*

A typical observer's workflow:

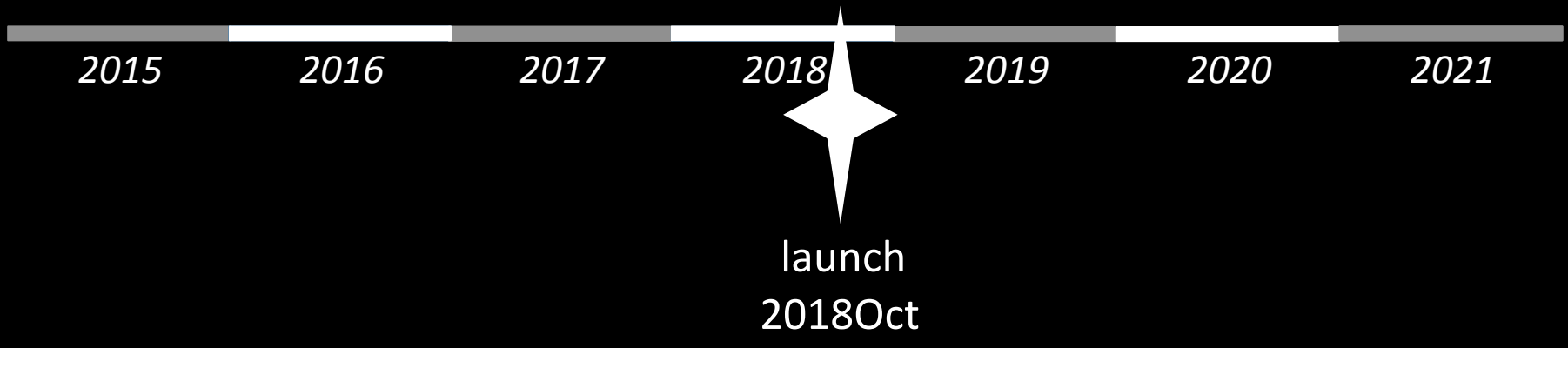
*ideation,*
*proposal/grant preparation,*
*proposal/grant review,*
*execution of observations,*
*data reduction and analysis,*
*reporting of results.*

*Develop an integrated environment of tools to facilitate process, enable astronomers to spend more time thinking about science, less time on mechanics.*

Particularly important for JWST

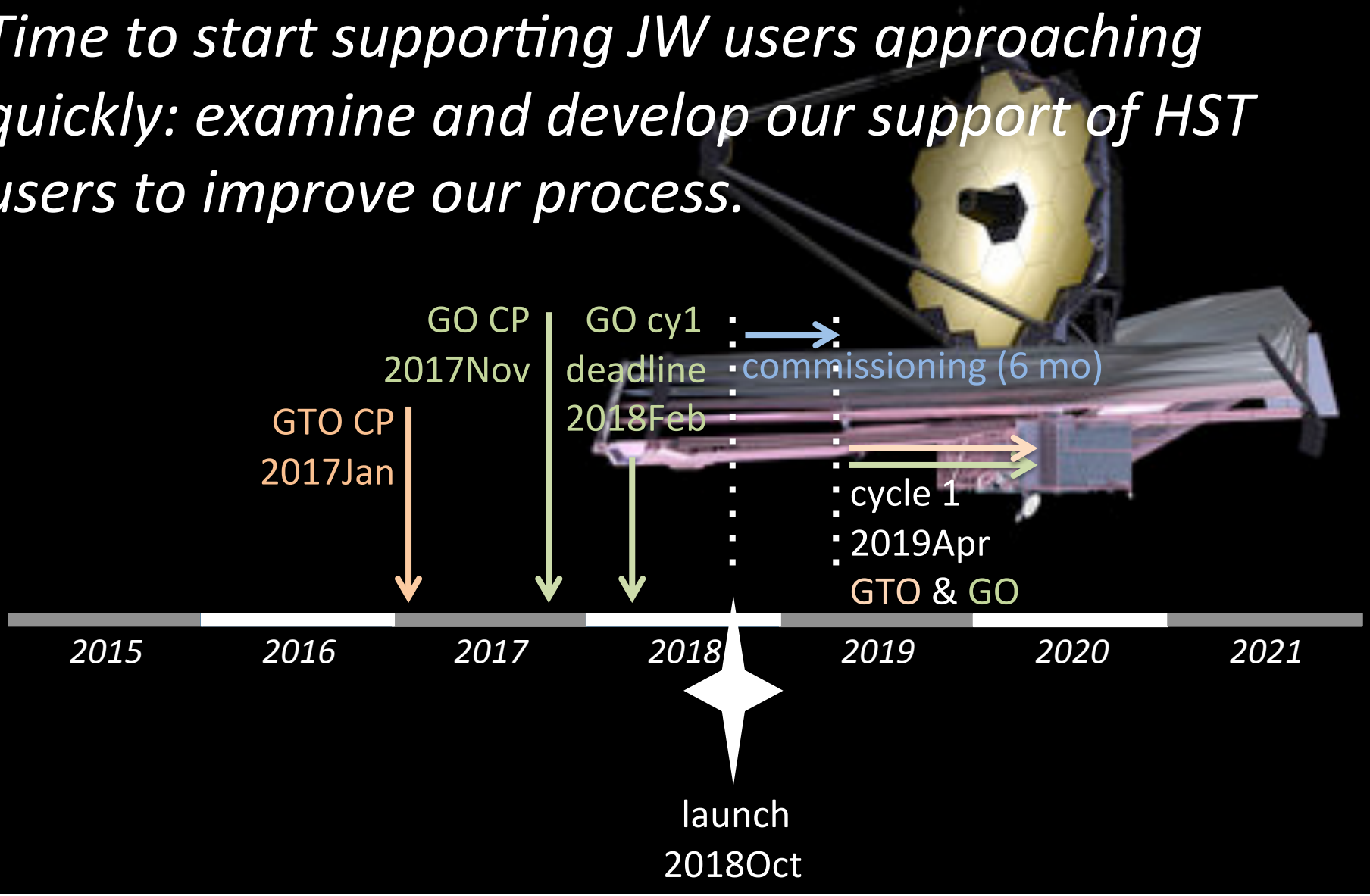
*5 year mission duration (required/minimum), with goal of 10 years.*

*Shorten intellectual cycle - help users rapidly understand/use JW capabilities, to maximize scientific productivity over first 5 years.*



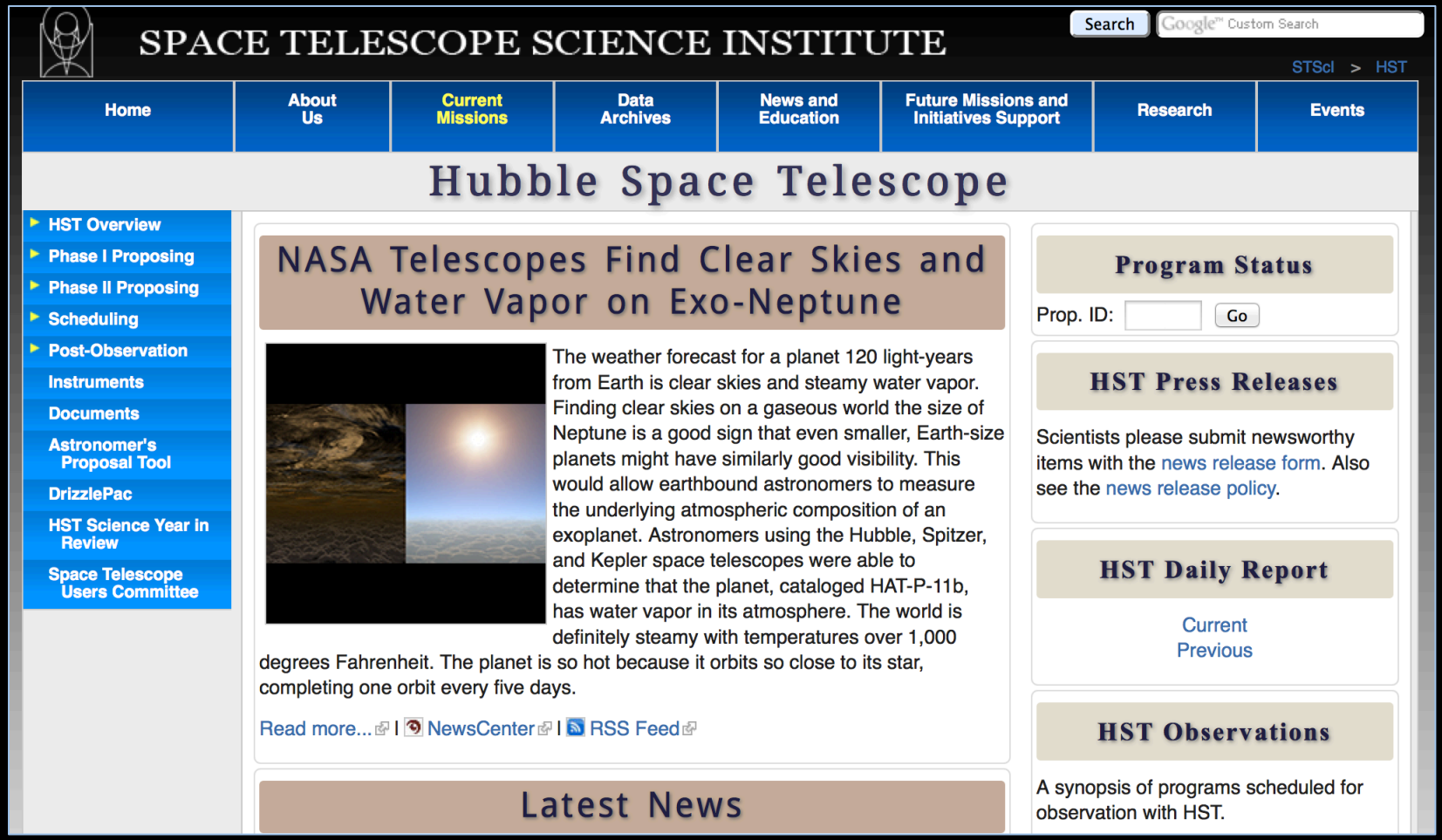
# Particularly important for JWST

*Time to start supporting JW users approaching quickly: examine and develop our support of HST users to improve our process.*



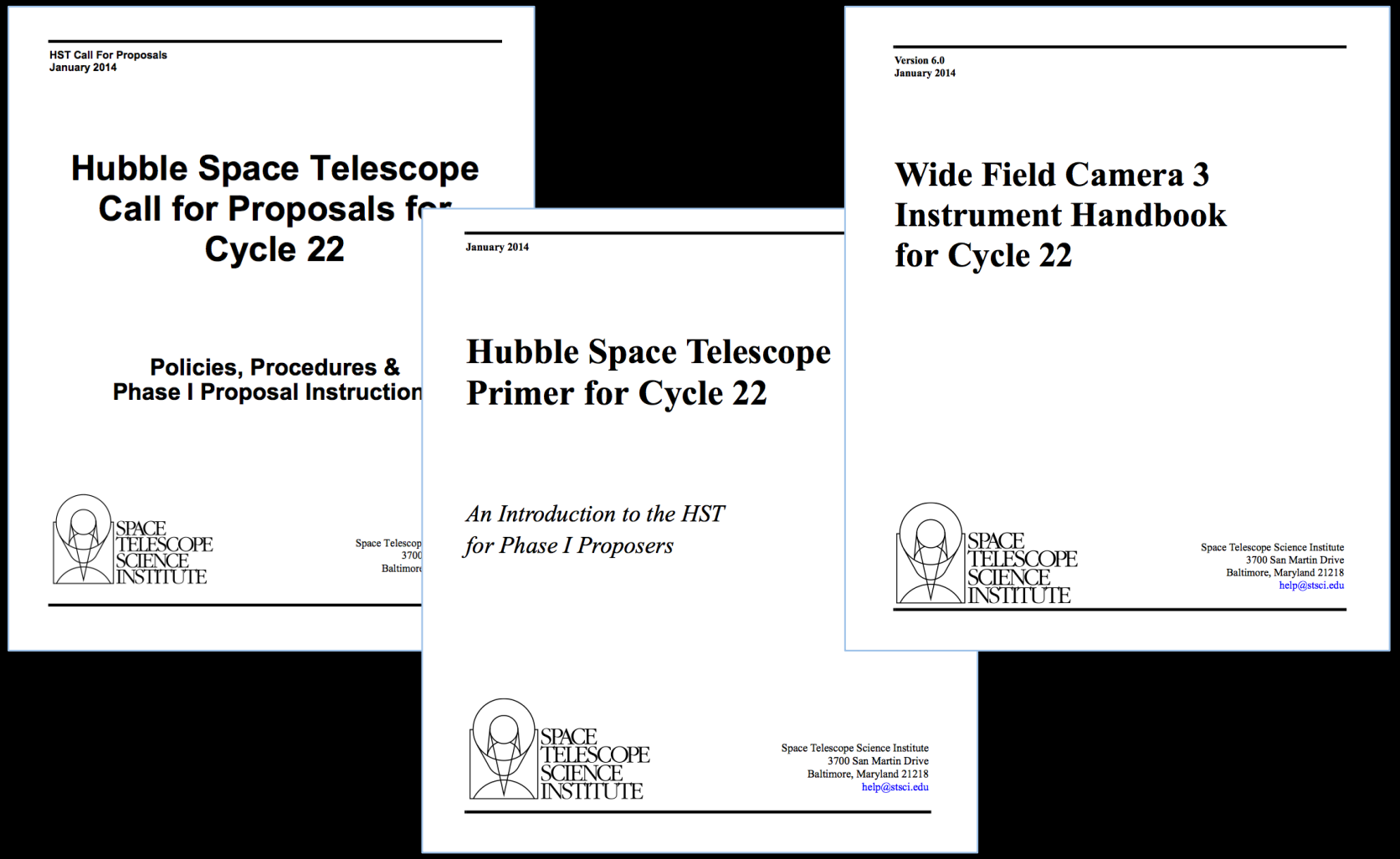
# *Major Components of HST User Support Ecosystem*

## *www.stsci.edu: Information gateway*



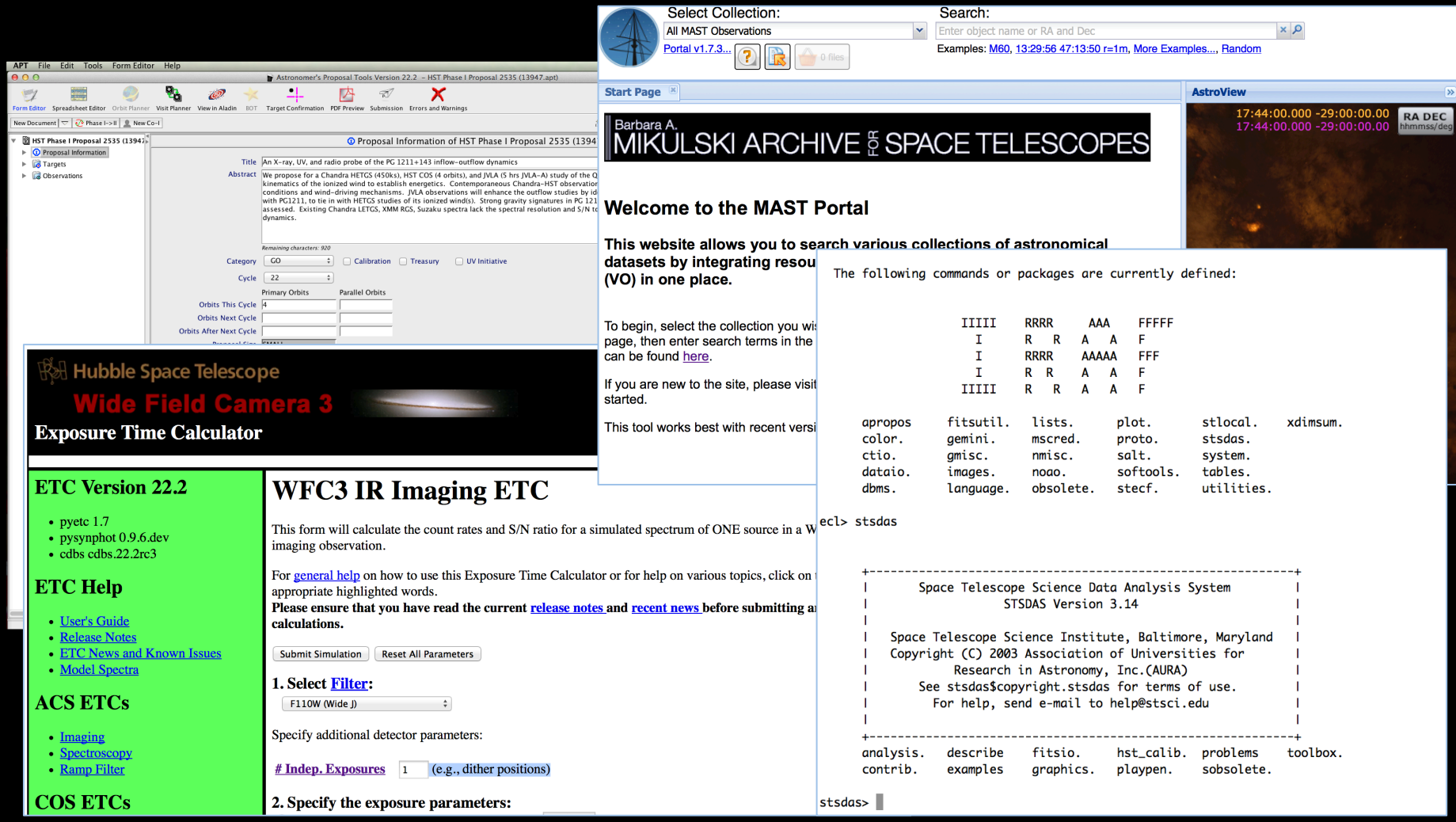
# *Major Components of HST User Support Ecosystem*

*Documentation: Call for Proposals, Instrument Handbooks, Data Reduction Cookbooks*



# *Major Components of HST User Support Ecosystem*

## *Software Tools: PRS, ETC, APT, GMS, MAST, STSDAS*



## *Major Components of HST User Support Ecosystem*

www.stsci.edu
Documentation
Software Tools

*ideation,*
*proposal/grant preparation,*
*proposal/grant review,*
*execution of observations,*
*data reduction and analysis,*
*reporting of results.*

*Are these individually organized to support an observer's workflow?*
*Can multiple points of access to information be integrated to increase workflow efficiency?*
*Is information easy to find (via navigation or search engine)?*

*Can components be knit together*
*in a customized user portal organized*
*according to observer's workflow?*

## *Pathfinder Project: Integrating Proposal Review Workflows*

First step: find reviewers!  Create tool to assist in identifying qualified proposal reviewers for recruitment.

How does this relate to the integration of science services for observers through the idea of a customized user portal?

Both require information on user background and/or interests.

*SMO: Lee, Blacker  OED: Richon, Bertch, Comer  OPO: Lussier, Godfrey*

## *Pathfinder Project: Integrating Proposal Review Workflows*

Who to invite for committee work? Process of identification varies, but can use/cross-correlate various lists:

- successful proposers in previous cycles
- astronomers who have served as reviewers in previous cycles
- generated by literature searches in ADS
- recommendations from other astronomers
- personal knowledge

Balance representation desired:

- Expertise within field
- Gender
- Institutional and geographic diversity
- Previous experience on HST panels
- Career stage
- Collaboration groups/networks

## *Pathfinder Project: Integrating Proposal Review Workflows*

Scale of HST Proposal Selection Process Enterprise

- >1000 proposals, with 1 in 6 success rate
- Recruit ~150 reviewers for 14 panels in 5 broad subject area
- Success rate is <50%. Invitations to 300 reviewers. Invite others as declines are received (or as reviewers drop out) ensuring that demographic balance is maintained. (reference: ~1600 AAS full members in US)

Process would benefit from searchable database of user attributes.

## *Pathfinder Project: Integrating Proposal Review Workflows*

Benefits of user database tool to help identify qualified reviewers:

- Makes the reviewer selection process more efficient – in 2017+ we may need to run proposal reviews for both HST and JWST.
- Helps democratize the panel selection process by enabling sample selection of potential reviewers in a more objective manner.
- Maximizes the size of the candidate pool from which reviewers are drawn.
- Helps ensure that number of informed scientific viewpoints represented is as diverse as possible.
- Facilitates the analysis of demographic trends.

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## *Pathfinder Project: Integrating Proposal Review Workflows*

Benefits of database development for panelist selection as a pathfinder for customized user portal? Provides specific use case for:

- development of a profile interface for ST users
- unification of several user attribute collection points at stsci.edu under new profile interface
- development of back-end database to hold attributes.

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## *Pathfinder Project: Integrating Proposal Review Workflows*

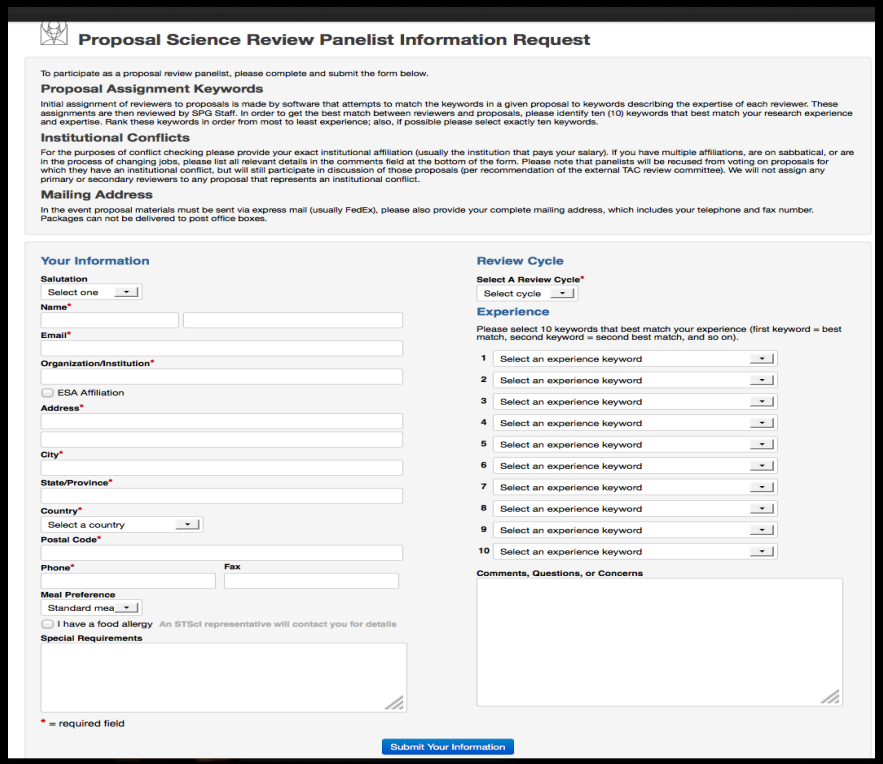
Benefits of database development for panelist selection as a pathfinder for customized user portal? Provides specific use case for:

- development of a profile interface for ST users (operational)
- unification of several user attribute collection points at stsci.edu under new profile interface (integration of two points completed)
- development of back-end database to hold attributes. (database + search tool in beta testing for Cycle 23)

*SMO: Lee, Blacker OED: Richon, Bertch, Comer OPO: Lussier, Godfrey*

# *Pathfinder Project: Integrating Proposal Review Workflows*

Unification of attribute collection points:



**Proposal Science Review Panelist Information Request**

To participate as a proposal review panelist, please complete and submit the form below.

**Proposal Assignment Keywords**

Initial assignment of reviewers to proposals is made by software that attempts to match the keywords in a given proposal to keywords describing the expertise of each reviewer. These assignments are then reviewed by SPG Staff. In order to get the best match between reviewers and proposals, please identify ten (10) keywords that best match your research experience and expertise. Rank these keywords in order from most to least experience; also, if possible please select exactly ten keywords.

**Institutional Conflicts**

For the purposes of conflict checking please provide your exact institutional affiliation (usually the institution that pays your salary). If you have multiple affiliations, are on sabbatical, or are in the process of changing jobs, please list all relevant details in the comments field at the bottom of the form. Please note that panelists will be recused from voting on proposals for which they have an institutional conflict, but will still participate in discussion of those proposals (per recommendation of the external TAC review committee). We will not assign any primary or secondary reviewers to any proposal that represents an institutional conflict.

**Mailing Address**

In the event proposal materials must be sent via express mail (usually FedEx), please also provide your complete mailing address, which includes your telephone and fax number. Packages can not be delivered to post office boxes.

**Your Information**

Salutation: Select one

Name*

Email*

Organization/Institution*

ESA Affiliation

Address*

City*

State/Province*

Country*: Select a country

Postal Code*

Phone* Fax

Meal Preference: Standard mea

I have a food allergy An STScI representative will contact you for details

Special Requirements

* = required field

**Review Cycle**

Select A Review Cycle*: Select cycle

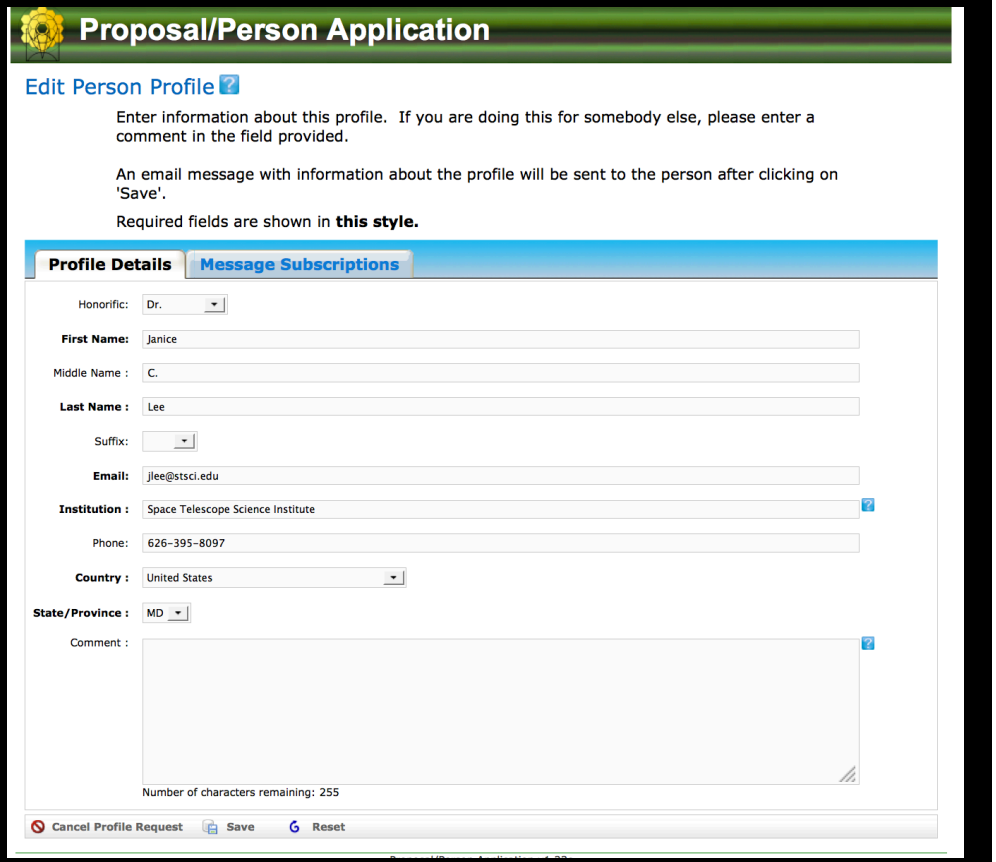
**Experience**

Please select 10 keywords that best match your experience (first keyword = best match, second keyword = second best match, and so on).

1 Select an experience keyword
2 Select an experience keyword
3 Select an experience keyword
4 Select an experience keyword
5 Select an experience keyword
6 Select an experience keyword
7 Select an experience keyword
8 Select an experience keyword
9 Select an experience keyword
10 Select an experience keyword

Comments, Questions, or Concerns

Submit Your Information



**Proposal/Person Application**

Edit Person Profile

Enter information about this profile. If you are doing this for somebody else, please enter a comment in the field provided.

An email message with information about the profile will be sent to the person after clicking on 'Save'.

Required fields are shown in **this style.**

Profile Details | Message Subscriptions

Honorific: Dr.

**First Name:** Janice

Middle Name : C.

**Last Name :** Lee

Suffix:

**Email:** jlee@stsci.edu

**Institution :** Space Telescope Science Institute

Phone: 626-395-8097

**Country :** United States

**State/Province :** MD

Comment :

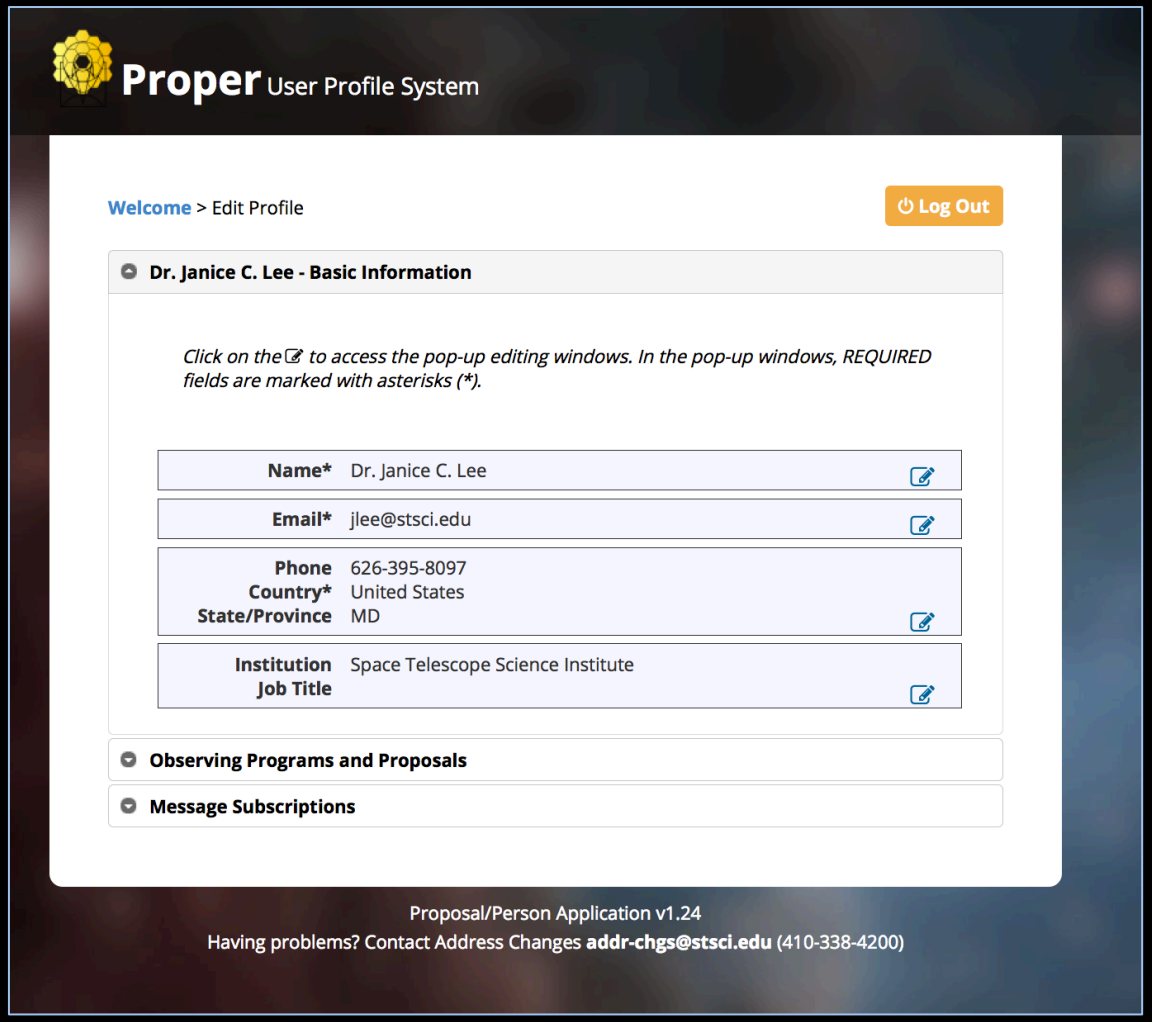
Number of characters remaining: 255

Cancel Profile Request | Save | Reset

*SMO: Lee, Blacker OED: Richon, Bertch, Comer OPO: Lussier, Godfrey*

# *Pathfinder Project: Integrating Proposal Review Workflows*

Unification of attribute collection points:
live at https://profile.stsci.edu

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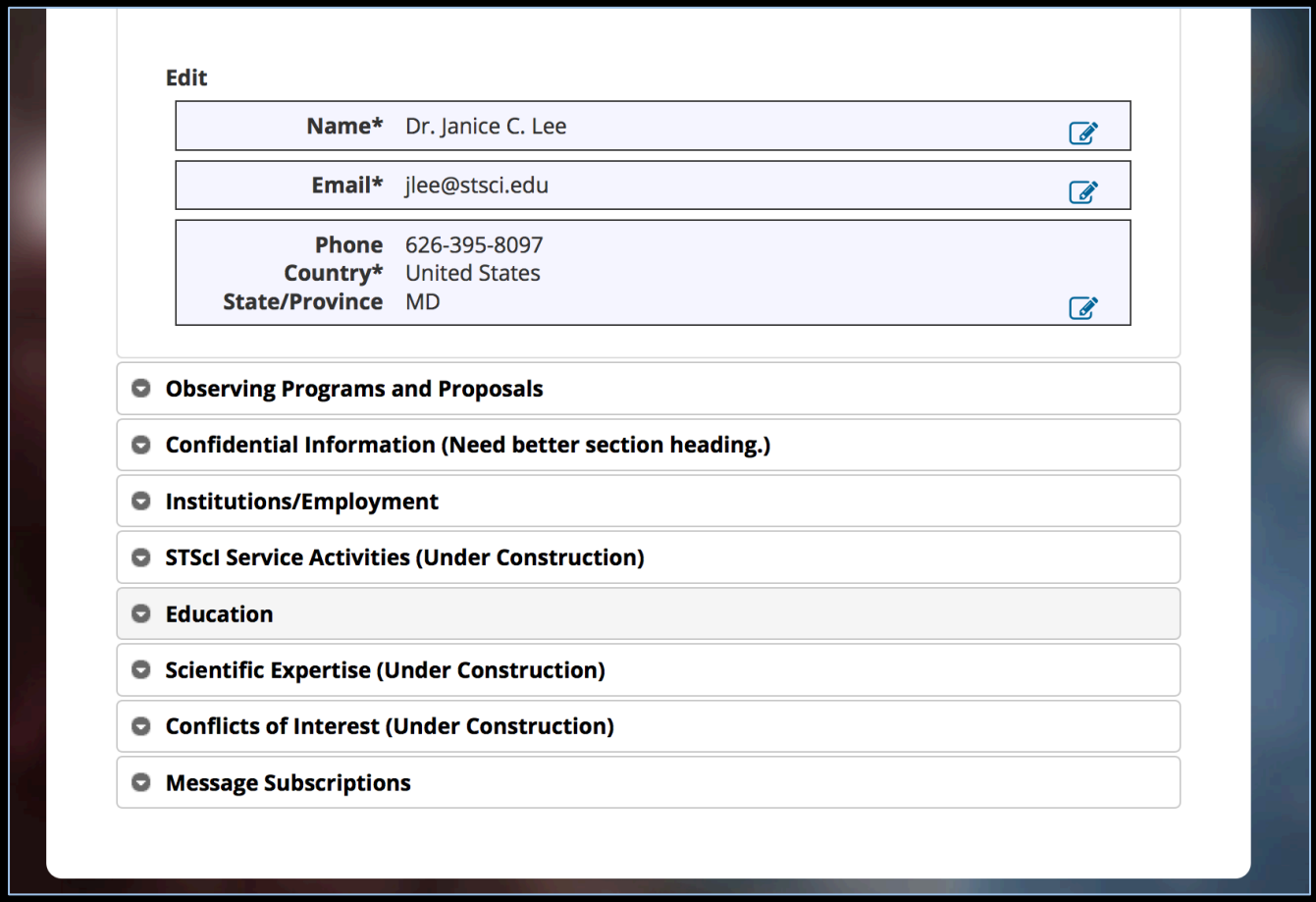
# *Pathfinder Project: Integrating Proposal Review Workflows*

Unification of attribute collection points:
https://profile.stsci.edu
Additional sections in Jan 2015 for HST reviewers

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https://profile.stsci.edu can provide foundation
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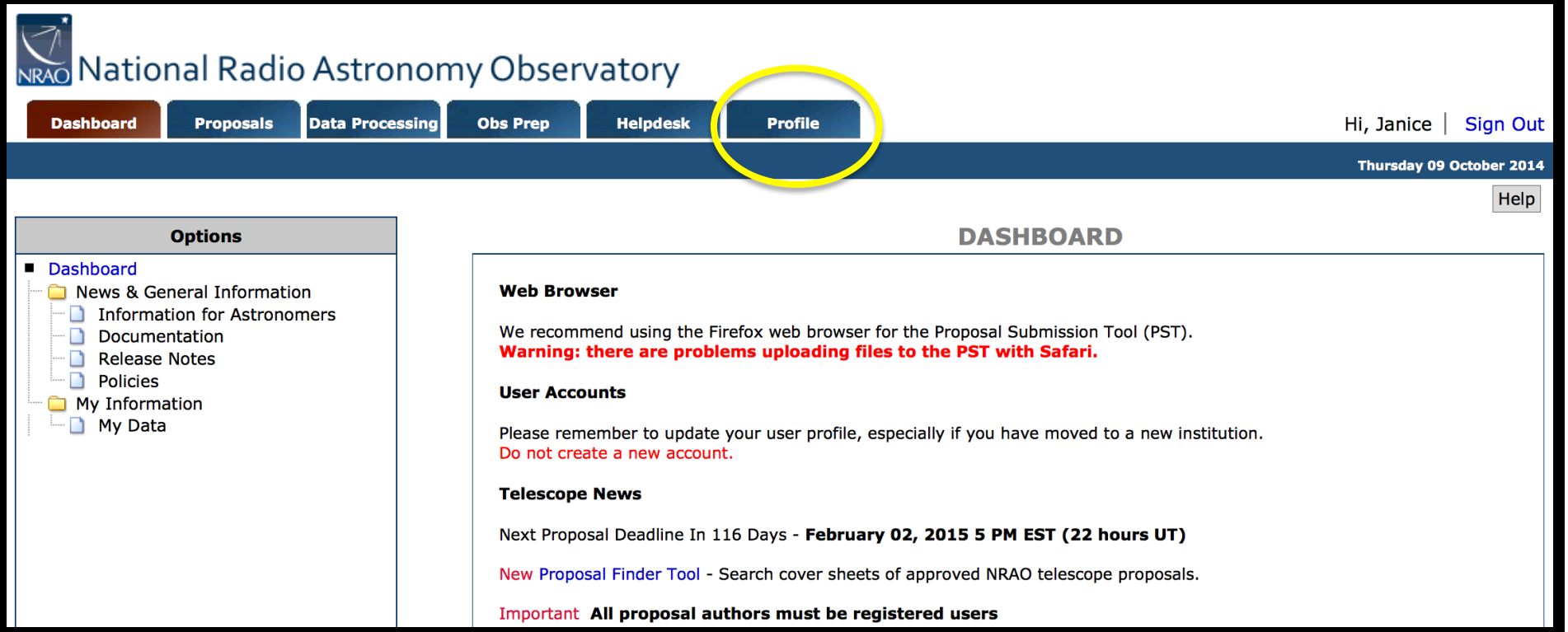

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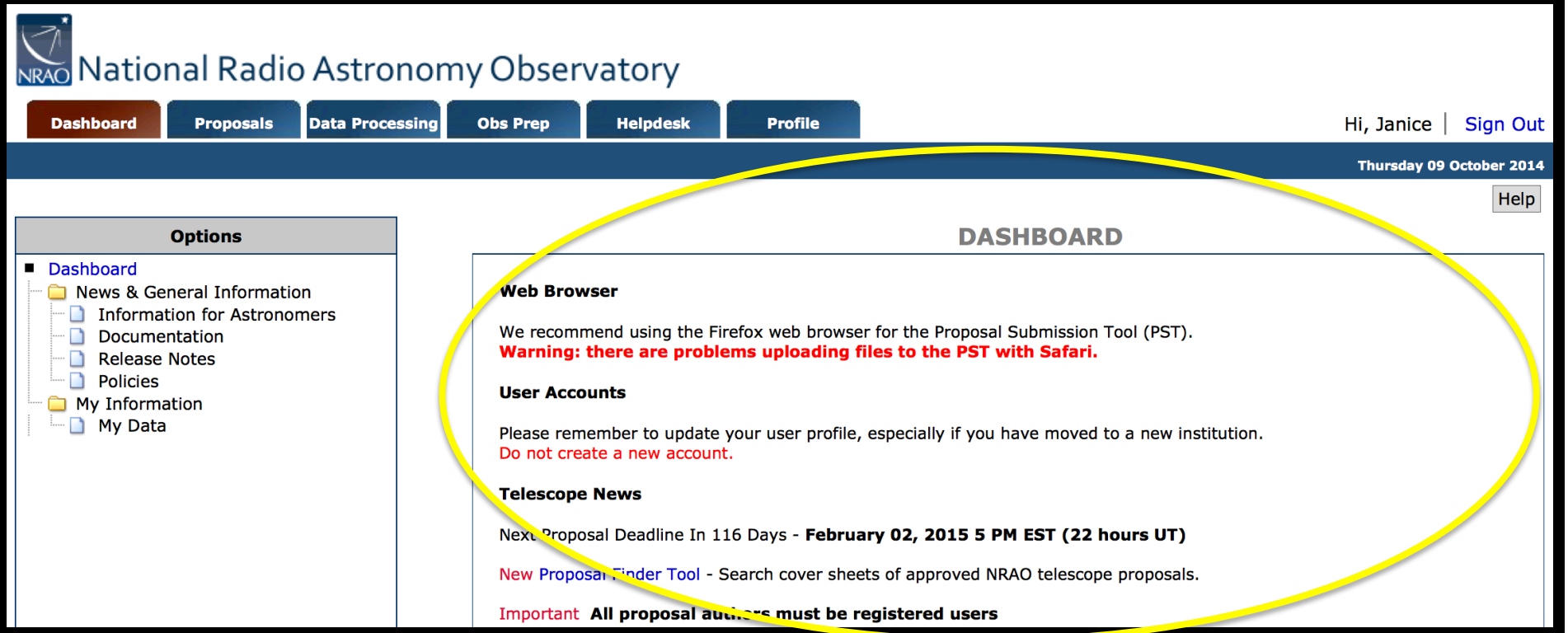


Next: Try basic customized dashboard/newsfeed based on user attributes to streamline communications with panelists and panelist workflow.

We invite:

General feedback on HST user support.

Discussion of the portal concept.

Features of other portals that might be appropriated should we develop an ST user portal.

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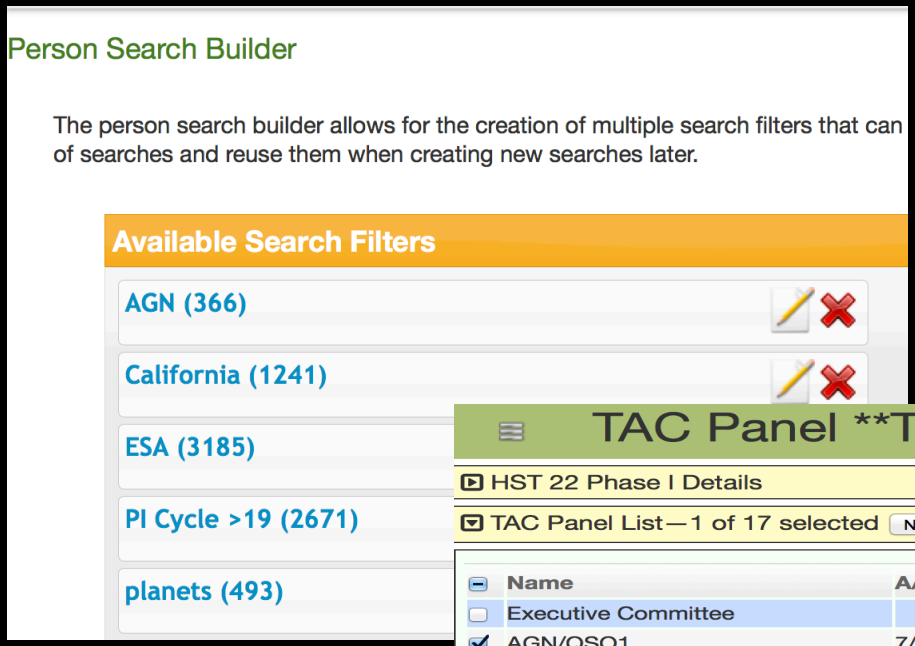
Extra slides

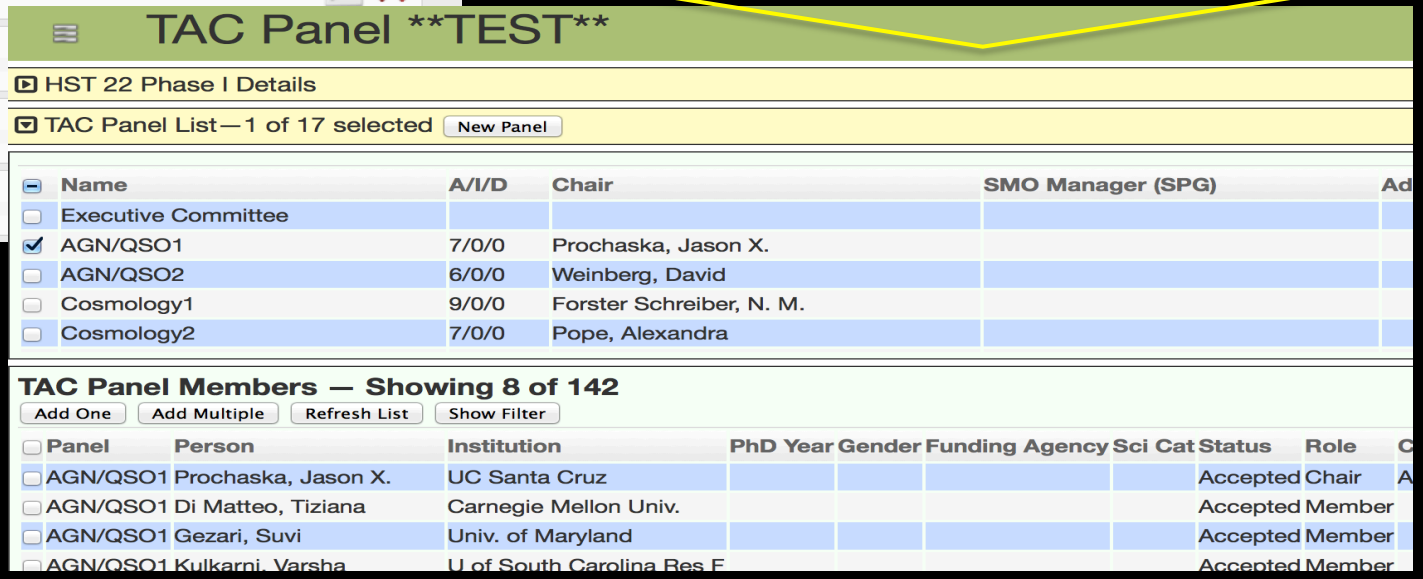
# *Pathfinder Project: Integrating Proposal Review Workflows*

TAC Panelist Section Tool
v1.0 (beta) for Cycle 23 Testing




Database Search Tool

Panelist Management Tool

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