

PFS Commissioning & Operation Work Flow

Yuki Moritani, Kiyoto Yabe, Naoyuki Tamura, and Atsushi Shimono
(PFS Project Office, Kavli IPMU)

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1 Overview

1.1 Work-flow overview

The ultimate goal of the PFS validation & commissioning work-flow is to optimize the PFS performance and validate the goodness for scientific use. To achieve this goal, we proceed the PFS commissioning following this outline:

1. Integrate PFS subsystems of which the performances have been validated by the PFS collaborators.
2. Operate the system and confirm their functions on the telescope.
3. Characterize the system, e.g. by calibrating the coordinate systems to put the fibers on the targets with required accuracy.
4. Evaluate the on-sky performance and validate it.
Firstly we focus on verifying the performances at given telescope positions, rotation angles even if we cannot confirm the same performance at all positions.

5. Finally, stabilize the instrument performances.

We optimize software, re-configuration sequence, calibration and so on. We validate the performance at any telescope pointing or time.

The latest top-level requirements are described on the following page:

<http://sumire.pbworks.com/w/page/76118150/System%20level%20requirements>

See also the compliance matrix in section 1.3.

The work-flow of the PFS commissioning (Fig. 1) consists of five parts:

1. Validation of MCS (labeled with M-#, see section 2.1)

- Validation of MCS basic functions.
- Pre-study of the coordinate transformation using pinhole array or FMOS/PIR or pinhole array on POpt2.

This part requires only MCS.

2. Validation of PFI (labeled with P-#, see section 2.2), basically prior to SpS delivery at Subaru.

- Alignment of WFC with the primary mirror.
- Telescope pointing analysis.
- AG camera validation.
- Confirmation of PFI–MCS relation (registration of Fixed Fiducial Fibers in F3C).
- Make the first-pass distortion map using AGCs (sky).

This part requires only PFI basically, but some sequences need MCS, too.

3. Validation of SpS (labeled with S-#, see section 2.3)

- Validation of image quality and stability in the SCR.
- Characterization of SMs.

This part requires SMs and SCR. We don't need the telescope to carry out this part.

4. Validation of FoCCoS–Cable B (labeled with F-#, see section 2.4)

- Validation of cable connection.
- Confirmation of fibers ID on MCS and SpS.

This part requires all subsystems: MCS, PFI, Cable B and SpS.

5. Commissioning all systems (labeled with A-#, see section 2.5)

- Cobra calibration.
- PSF characterization.
- Make the second-pass distortion map using fibers (sky).
- Validation of all observational sequence.

- Performance verification.
- Stabilization of the instrument performance and operation.

This part requires all subsystems: MCS, PFI, Cable B and SpS.

During the commissioning procedure, we also verify the software sequence for observation (acquisition, fiber configuration, guiding, and exposure) at suitable commissioning sequences. We also verify the data reduction pipeline (DRP).



1.2 Subsystem I & T (TBD)

1.2.1 I & T at Subaru

Each subsystem is delivered to Subaru separately. After the delivery, collaborators will re-assemble modules (if needed) and test their performance. In this section, the brief summary of I&T of subsystems are described. See the documents by collaborators (TBA) for detailed procedure of I&T.

Table 1 summarizes schedule and place of I&T of subsystems. The validated functions before shipping (or before commissioning) is listed in table 2. The file named `PFS_AIT_Subaru.pptx`¹ summarizes The required source, layout of working space and other configurations of I&T process in Hawaii

Table 1: Subsystem I&T time and place.

Subsystem	Year/Month	I&T Place (Hilo)	I&T Place (Summit)
PFI	2018/10–2019/01	Simulator lab.	Instrument Lab. & Observation floor
MCS	2017/07–2017/09	Simulator lab.	Observation floor
SpS-SM1	2018/02–2018/03		IR4 (SCR)
SpS-SM2	2018/11–2018/12		IR4 (SCR)
SpS-SM3	2018/11–2018/12		IR4 (SCR)
SpS-SM4	2019/07–2019/08		IR4 (SCR)
Cable B	2018/06–2018/08	TBD	TBD

PFI PFI is shipped after assembled at ASIAA, so it doesn't need to be re-assembled at Subaru. However, field element will be disassembled for protection, so that it will be integrated again at the Summit. The I&T story board at the summit is in preparation but the currently assumed test items are as follows:

1. Fiber transparency tests
2. Rotational test for Cable Wrapper
3. Power on/off test (fiducial fiber illuminator etc.)
4. Image acquisition (central camera, fiducial fiber viewing cameras, and AG cameras)
5. Cobra circular motion test
6. Dot position check
7. Cobra convergence test with dummy MCS
8. AG camera test for dark and noise
9. Integration of Field Element

¹http://sumire.pbworks.com/w/file/111633073/PFS_AIT_Subaru.pptx

These test are carried out using test stand on which PFI will be shipped, and dummy MCS. Because the tilt mechanism is not assumed to be delivered so far, the test should be limited compared to AIT phase at ASIAA.

After the above tests are passed, PFI will be installed to POpt2, and the the same tests are repeated, except for the cobra circular motion test.

Test items for software — control individual modules, telemetry, communicate with MLP1/STS etc.

MCS After AIT at ASIAA, MCS will be shipped to Subaru without disassembling. The optical alignment of the subsystem will be checked using laser at Hilo base, then the subsystem will be transported to the Summit.

At the Summit, the image quality will be checked with the pinhole array. ASIAA will also adjust the alignment of MCS with respect to the prime focus, because MCS will be mounted to CsBox only “mechanically”. Such a test enables us to use time efficiently before PFI arrival, and to save time after PFI arrival, which is expected one year later than MCS arrival, because we should align MCS with the prime focus firstly. After the alignment, the image quality will be also checked under the more realistic observational condition (e.g. dome seeing). This test will be performed using the pinhole array can be equipped on POpt2. Note that the I&T process using Popt2 with pinhole array will be done combining to MCS commissioning process (M-3).

Test items for software — control individual modules, telemetry, communicate with STS etc.

SpS After AIT at LAM, four modules are shipped to Subaru two by two. The modules are re-assembled in SCR on the IR4 floor, and the following test will be carried out (TBC):

- Thermal function (cooling down /warming up)
- Image quality
- Characterization of spectrograph (optional: TBD)

Test items for software — control individual modules, telemetry, communicate with STS etc.

Cable B After shipped to Subaru, the light-path will be tested firstly. It is still to be discussed, but we will also execute FRD measurement with simple equipment for some fibers as aliveness test. Then the cable is installed to the telescope, while the fiber connection monitoring system is installed to the IR3 floor. It is desirable to measure FRD on the telescope, but details are to be discussed. The details is TBC.

Test items for software?

1.2.2 Complementarity between subsystem I& T and the commissioning

To be written.

Table 2: The list of validated functions before the commissioning.

No	Functions	No. of Table 3	Succ.?	Req.	Notes
PFI (including Cable C)					
P01	Instrument rotator moves from -278° to $+278^\circ$.	8			
P02	Positioning error of A&C camera is ~ 2.8 um.	25			CDR
P03	PFI has 97 fiducial fibers.			REQ-F0C-L3-267	CDR
P04	All fiducial fibers can be back-illuminated.	28, 30		REQ-L3-PFI-008	
P05	Science fibers home position is measured in the accuracy of 50 um PTV.	34, 35			Relative position to a fiducial fiber near the center.
P06	Science fibers rotation center is measured in the accuracy of 50 um PTV.	34, 35			Relative position to a fiducial fiber near the center.
P07	Perimeter fiducial fibers position is measured in the accuracy of 50 um PTV.	34, 26			Relative position to a fiducial fiber near the center.
P08	Field element dots position is measured in the accuracy of 50 um PTV.	34, 35			Relative position to a fiducial fiber near the center.
P09	The position of AG camera fiducial fibers is measured in the accuracy of 10 um PTV.	26			Relative to nearest perimeter fiducial fiber.
P10	The position of AG camera sensors is measured in the accuracy of 10 um PTV.				Relative to nearest perimeter fiducial fiber.
P11	The focus position of science fibers is measured in the accuracy of 12 um PTV.				Relative to designed focus position.
P12	The focus position of perimeter fiducial fibers is measured in the accuracy of 12 um PTV.				Relative to designed focus position.
P13	The focus position of AG camera sensors is measured in the accuracy of 12 um PTV.				Relative to designed focus position.
P14	The tilt of science fibers is measured in the accuracy of 0.17° PTV.				Relative to a fiducial fiber near the center.
P15	The tilt of perimeter fiducial fibers is measured in the accuracy of 0.17° PTV.				Relative to a fiducial fiber near the center.
P16	The tilt of AG camera sensors is measured in the accuracy of 0.17° PTV.				Relative to a COB rear surface.
P17	P05-P16 are achieved with rotation angle of $0, \pm 60^\circ$ and El. $90, 60, 30^\circ$				CDR

Table 2: The list of validated functions before the commissioning.

No	Functions	No. of Table 3	Succ.?	Req.	Notes
P18	The cobra positioner converge to requested x/y position in the accuracy of 10 μ m PTV.	34, 35			
P19	P19 is achieved with rotation angle of $0, \pm 60^\circ$ and El. $90, 60, 30^\circ$				CDR
P21	AG camera shall acquire image.				
P21	Fiducial fiber viewing cameras shall acquire image.	6			
P22	Center camera shall acquire image.	7			
P21	PFI shall be operated remotely via MHS.	4, 10			
...	
MCS					
M01	The FoV is large enough to see all science and fiducial fibers at a time.	16, 17		REQ-MET-2	MCS covers 462mm in diameter at the focal plane (CDR).
M02	The fiber centroid cam be measured within the error of 5 μ m (RMS) for all fibers.	15, 16, 17, 26		REQ-MET-6	< 4.46 μ m RMS (CDR)
M03	MCS completes one cycle of image acquisition, data read, and measurement within 5 seconds in average.	18		REQ-MET-7	< 3 seconds (CDR)
M04	MCS shall be operated remotely via MHS.	1,3			
...
SpS (including Cable A)					
S01	The blue detector shall be cooled down to operating temperature (173 ± 0.5 K)			SPS-REQ-307, SPS-REQ-202, SPS-REQ-95	
S02	The red detector shall be cooled down to operating temperature (173 ± 0.5 K)			SPS-REQ-307, SPS-REQ-203, SPS-REQ-95	

Table 2: The list of validated functions before the commissioning.

No	Functions	No. of Table 3	Succ.?	Req.	Notes
S03	The nir detector shall be cooled down to operating temperature (110 ± 0.5 K)			SPS-REQ-307, SPS-REQ-204, SPS-REQ-95	
S04	All camera units cover 2394 science fibers in their readable area.				
S05	SpS shall back-illuminate science fibers.	29, 30			
...
Cable B					
F01	Cable shall deliver 2394 light source from PFI to SpS.	14		REQ-F0C-L3-267	
F02	Cable connection should be monitored remotely.	14		REQ-F0C-L3-043	
...

1.3 Achieved PFS Functions during the Commissioning (TBD)

Table 3 shows achieved PFS functions and related commissioning sequences (compliance matrix). Column 1 lists the priority of the functions (TBD).

Table 3: The list of achieved functions during the commissioning.

No	Pri.	Functions	Success Criteria	#Sq.	Succ.?	Notes
Fiber Allocation						
1	A	Initial check of subsystems	MCS can communicate with MHS	M- 1, M- 3		
2	A		MCS can take image with required performance (dark, noise,etc.)	M- 1, M- 3		
3	A		All mechanical and environmental sensors of MCS can be read	M- 1, M- 3		
4	A		PFI can communicate with MHS	P- 1, P- 3		
5	A		AG cameras can take image with required performance (noise, dark, etc.)	P- 1, P- 3		
6	A		Fixed fiducial cameras can take image with required performance (noise, dark, etc.)	P- 1, P- 3		
7	A		Center camera can take image with required performance (noise, dark, etc.)	P- 1, P- 3		
8	A		Instrument rotator moves from -270° to $+270^\circ$	P- 1, P- 3		
9	A		Cooling system works	P- 1, P- 3		
10	A		All mechanical and environmental sensors of PFI can be read	P- 1, P- 3		
11	A	Installation of subsystems	MCS is installed on the Cs focus meeting required accuracy (tilt < 0.14 degree, decenter of optical axis $< 45\text{mm}$ in x,y each)	M- 2		
12	A		PFI is installed in POpt2 meeting required repeatability ($< 200\mu\text{m}$ in lateral, $< 100\mu\text{m}$ in focus, < 15 arcsec in tilt)	P- 1, P- 5		repeatability of focus and tilt is not measured in P- 5
13	A		POpt2 is installed on the prime focus with accuracy of 10 μm	P- 2		Specification of Mit-subishi
14	A		Cable B is connected with PFI and SpS correctly (fiber ID, throughput?)	F- 1, F- 2		

Table 3: The list of achieved functions during the commissioning.

No	Pri.	Functions	Success Criteria	#Sq.	Succ.?	Notes
15	A	Pre-study of coordinate transformation	Algorithm of coordinate transformation works (accuracy: 50 um)	M- 4		
16	A	Measurement of fibers centroids	Spot size is ~ 2.6 pix on entire FoV at various Elevations and rotator angles	P- 4		
17	A		Centroids can be measured within the accuracy of 5 um (1.5 pixel)	P- 4		
18	A		Measurement process is done within 5 seconds	P- 4		
19	A	Telescope pointing and tracing	Telescope can be focused with error of 10 um	P- 7		
21	A		WFC is aligned to Primary Mirror within the shift of 0.5mm and tilt of 1 arcmin	P- 7		
23	A		Telescope Pointing Analysis can be done with error of XXX	P- 9		
24	A		PFS can acquire field and start auto guiding within 15 seconds	P- 6		
25	A		Telescope can track a field with error of $\lesssim 0.1$ arcsec in both RA and DEC directions using A&G camera	P- 6		
26	A	Registration of fixed fiducial fibers	Positions of the fixed fiducial fibers measured on F3C within the accuracy of 5 um (TBD)	P- 8		P- 7 is needed prior to P- 8
27	A	First-pass sky-PFI distortion map	Fiber allocation error is < 50 um	P- 10		
28	A	Back illumination of fibers	Fixed fiducial fibers are back-illuminated	P- 1		
29	A		Science fibers are back-illuminated	A- 1		
30	A		Brightness of science and fixed fiducial fibers is the same on MCS	A- 1		
31	A	Cobra initial movement	Cobra can move anyhow	P- 3		
32	A	Calibration of Cobra	Cobra parameters are calibrated	A- 1		
33	A	Cobra movement	Cobra can move everywhere in their patrol area	A- 1		
34	A	Second-pass sky-PFI distortion map	Fiber allocation error is $< \sim 10$ um (TBD)	A- 3		

Table 3: The list of achieved functions during the commissioning.

No	Pri.	Functions	Success Criteria	#Sq.	Succ.?	Notes
35	A	Fiber configuration	95% of 2394 fibers can be allocated to their targeted position within 105 seconds	A-4		
36	A	Fiber re-configuration	Fibers are reconfigured within 105 seconds with the accuracy of 10um (TBD)	A-5		
Spectrograph						
37	A	Initial check of subsystems	SCR and SpS can communicate with MHS	S-1		
38	A		The temperature of SCR is controlled stably (3-5 degC)	S-1		
39	A		SCR ans SpS Can recover from power failure mode	S-1		
40	A		All 12 detectors can take images within expected noise.	S-1		
41	A		SpS can change LR/MR mode in RED arms	S-1		
42	A		SpS can open/close shutters	S-1		
43	A		All mechanical and environmental sensors of SMs can be read	S-1		
44	A		The input light can be focused on the detectors (EE is 50% in 3 x 3 pixels and 90 % in 5 x 5 pixels in 90% of detector area)	S-1		
45	A	Characterization	Wavelength coverage is 380-650 nm in BLUE arms	S-2		
46	A		Wavelength coverage is 630-970 nm in RED(LR) arms	S-2		
47	A		Wavelength coverage is 710-885 nm in RED(MR) arms	S-2		
48	A		Wavelength coverage is 940-1260 nm in NIR arms	S-2		
49	A		Spectral resolution is >2300 at 520 nm (BLUE)	S-2		
50	A		Spectral resolution is >2800 at 810 nm (RED, LR)	S-2		

Table 3: The list of achieved functions during the commissioning.

No	Pri.	Functions	Success Criteria	#Sq.	Succ.?	Notes
65	A	Long-term exposure	S/N is proportional to \sqrt{t} during long-term exposures (~ 10 hours)	A- 5		
?	?	Beam-switching mode	TBD			Current plan doesn't include validation for BS mode

1.4 Expected Number of Nights for Validation & Commissioning (TBD)

The PFS commissioning requires several “engineering observation runs”, during which a few sequences are executed step by step. We estimate the number of required runs and working-days for the PFS validation & commissioning procedure. There are 15-day works for which night time is not required, and 37-day works for which the night time is essential. Among the latter, 15-day works require dark night, in later phase of the commissioning, where we shall validate the instrument performance. We arrange the working process to use the telescope time as effectively as possible. In total, **9 runs of 41 working days** will be required for the commissioning. Here, we take account into the weather factor of 70 % uniformly for nighttime sequences. We also include the uniform 20 % technical margin into each sequence for unseen situations.

In addition, 2 nights will be required for Mitsubishi to test the updated software to control the telescope. Also, to check the performance the algorithm for PFI alignment (P- 7), 0.5 (TBC) night will be used as HSC engineering run in the S17B semester. Combined with these numbers, **43.5 working days** will be required for the PFS commissioning.

The expected numbers of working-days for each run and its breakdown is as below. Figures 2 – 8 display the rough schedule of run 1–9, from installation of subsystems before the engineering observation to uninstallation of them after the run. Here, sequences which requires dark night-sky are colored by navy, while ones requiring night-sky even bright/grey by blue. Sequences we can carry out even in the daytime are colored by pink. Table 4 summarizes these numbers with schedule on the assumption of the current timeline of the project (as of January 2017).

Note that we don’t count the required days for validation of SpS (seq. S-#) for the above estimation, because the telescope time is not occupied with PFS during its validation.

Breakdown of individual runs are as follows.

Run 0: 0.5 day

- 0.5 day for check performance of the algorithm for PFI alignment, which is used in the process P- 7.

Run 1: 4 days (Figure 2)

- 1 day (daytime) for M-1 – M-3: (1) check MCS functions standing by, (2) install MCS to the Cassegrain focus, and (3) check MCS functions on telescope
- 3 days (daytime) for M-4 : (1) pre-study the coordinate transformation system

Run 1 has AIT work by ASIAA:

- 1 day (daytime) for alignment the MCS to the prime focus
- 3 days (nighttime) for image quality test, study of dome seeing under observational configuration. (1) pre-study the coordinate transformation system

Note that telescope can be used for other Ns/PF instruments on the night when MCS is installed (seq. M-1 – M-3).

	pre-run	Day 1	Day 2	Day 3	Day 4	post-run
Telescope work	MCS install = M ₁ –M ₃	pinhole/POpt2 install				pinhole/POpt2 uninstall
Daytime	M ₁ –M ₃	preparation	M ₄	M ₄	M ₄	inspection
Nighttime		ASIAA AIT (alignment)	ASIAA AIT (IQ)	ASIAA AIT (IQ)	ASIAA AIT (IQ)	

Figure 2: Time table of Run 1.

Run 2 : 7 days (Figure 3)

- 1 day (daytime) for P-1 – P-3, P-5 : (1) check PFI/POpt2 standing by, (2) install POpt2 to the prime focus, (3) check PFI functions, and (4) measure x/y offset of PFI rotation center on MCS
- 0.5 day (daytime) for P-4 : (1) verify MCS performance
- 1.5 days (nighttime) for P-6 : (1) verification of A&G camera functions
- 1.7 days (nighttime) for P-7 : (1) correct WFC shift/tilt with respect to the primary mirror
- 1.5 days (daytime) for P-8 : (1) confirm fixed fiducial fiber positions on F3C (refine the PFI-MCS relation)
- 0.8 days (nighttime) for P-9 : (1) Telescope Pointing Analysis
- 0.7 day (daytime) for F-1 : (1) connect Cable B to PFI and SpS (SM1/2/3)
- 1.3 day (daytime) for F-2 : (1) confirm the fiber identifications (SM1/2/3)
- 1.5 days (daytime) for A-1 : (1) calibration of Cobras (SM1/2)
- 1.0 days (1.0-day nighttime) for A-2 : (1) PSF measurement through the entire system (SM1/2/3)

In addition, run 2 has 2-night work by Mitsubishi for test of software for telescope control. Note that we assume that we can coordinate with Mitsubishi to proceed individual day-time works in parallel.

	pre-run	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	post-run
Telescope work	MCS install	PFI install =P1–P3,P5							PFI uninstall
Daytime		P1–P3,P5 preparation	P4, F1 (Trouble shooting)	F1, F2 (Trouble shooting)	F2 (Trouble shooting)	A1 (Trouble shooting)	A1, P8 (Trouble shooting)	P8 (Trouble shooting)	inspection
Nighttime		Mitsubishi	Mitsubishi	P6	P6,P7	P7	P7,P9	A2	

Figure 3: Time table of Run 2.

Run 3 : 6 days (Figure 4)

- 0.8 days (nighttime) for P-7 : (1) correct WFC shift/tilt with respect to the primary mirror (confirmation)
- 0.7 days (nighttime) for P-9 : (1) Telescope Pointing Analysis (confirmation)
- 4 days (nighttime) for P-10 : (1) 1st-pass distortion map
- 1.5 days (daytime) for A-1 : (1) calibration of Cobras (SM3/4)
- 2.0 days (1.5-day daytime and 0.5-day nighttime) for A-2 : (1) PSF measurement through the entire system (SM1/2/3)

	pre-run	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	post-run
Telescope work	MCS install	PFI install						PFI uninstall
Daytime		A1 preparation	A1,A2 (Trouble shooting)	A2 (Analysis & Trouble shooting)	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	inspection
Nighttime		P7,P8	P8,P10	P10	A2,P10	P10	P10	

Figure 4: Time table of Run 3.

Run 4 : 5 days (Figure 5)

- 2 days (nighttime) for P-10 : (1) 1st-pass distortion map
- 3 days (nighttime) for A-3: (1) 2nd-pass distortion map

	pre-run	Day 1	Day 2	Day 3	Day 4	Day 5	post-run
Telescope work	MCS install	PFI install					PFI uninstall
Daytime		preparation	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	inspection
Nighttime		P10	P10	A3	A3	A3	

Figure 5: Time table of Run 4.

Run 5 : 4 days (Figure 6)

- 0.2 day (daytime) for F-1 : (1) connecting Cable B to PFI and SpS (SM4)
- 1.3 day (daytime) for F-2 : (1) confirmation of the fiber identifications (SM4)
- 1.5 days (1.0-day daytime and 0.5-day nighttime) for A-2: (1) PSF measurement through the entire system (all SMs)
- 3.5 days (nighttime) for A-3: (1) 2nd-pass distortion map

	pre-run	Day 1	Day 2	Day 3	Day 4	post-run
Telescope work	MCS install	PFI install				PFI uninstall
Daytime		F1,F2 preparation	F2,A2 (Analysis & Trouble shooting)	A2 (Analysis & Trouble shooting)	(Analysis & Trouble shooting)	inspection
Nighttime		A2,A3	A3	A3	A3	

Figure 6: Time table of Run 5.

Run 6 : 5 days (Figure 7)

- 2 days (nighttime) for A-3: (1) 2nd-pass distortion map
- 3 day (dark-night) for A-4 : (1) performance verification I

	pre-run	Day 1	Day 2	Day 3	Day 4	Day 5	post-run
Telescope work	MCS install	PFI install					PFI uninstall
Daytime		preparation	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	inspection
Nighttime		A3	A3	A4	A4	A4	

Figure 7: Time table of Run 6.

Run 7 : 4 days (Figure 8)

- 2 days (dark-night) for A-4 : (1) performance verification I
- 2 days (dark-night) for A-5 : (1) performance verification II (stabilization)

	pre-run	Day 1	Day 2	Day 3	Day 4	post-run
Telescope work	MCS install	PFI install				PFI uninstall
Daytime		preparation	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	inspection
Nighttime		A _{4,5}	A _{4,5}	A _{4,5}	A _{4,5}	

Figure 8: Time table of Run 7.

Runs 8 and 9 : 4 days (Figure 9)

- 4 days (dark-night) for A-5 : (1) performance verification II (stabilization)

	pre-run	Day 1	Day 2	Day 3	Day 4	post-run
Telescope work	MCS install	PFI install				PFI uninstall
Daytime		preparation	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	(Analysis & Trouble shooting)	inspection
Nighttime		A ₅	A ₅	A ₅	A ₅	

Figure 9: Time table of Runs 8 and 9.

Table 4: Expected days for commissioning. Note that Year/Month in column 2 are just roughly set assuming the latest schedule of each subsystems and that scientific operation will start in the S20B semester.

Run	Year/Month	#days	seq.	daytime	night (dark)
0	S17B	0.5***	P7(*)	0	0.5 (0.5)
1	S18A or S19B	4	M1–3 M4 ASIAA	(1**) 3 0	0 (0) 0 (0) 4 (0)
2	2019/02	7***	P1–P3,P5 P4 P6 P7 P8 P9 F1 (SM1,2,3) F2 (SM1,2,3) A1 (SM1,2) A2 (SM1,2,3) Mitsubishi	1 0.5 0 0 1.5 0 0.7 1.3 1.5 0 0	0 (0) 0 (0) 1.5 (0) 1.7 (0) 0 (0) 0.8 (0) 0 (0) 0 (0) 0 (0) 1.0 (0) 2 (0)
3	2019/04	6	P7 P9 P10 A1 (SM3,4) A2 (SM1,2,3)	0 0 0 1.5 1.5	0.8 (0) 0.7 (0) 4 (0) 0 (0) 0.5 (0)
4	2019/06	5	P10 A3	0 0	2 (0) 3 (0)
5	2019/08	4	F1 (SM4) F2 (SM4) A2 (all SMs) A3	0.2 1.3 1.0 0	0 (0) 0 (0) 0.5 (0) 3.5 (0)
6	2019/10	5	A3 A4	0 0	2 (0) 0 (3)
7	2019/12	4	A4 A5	0 0	0 (2) 0 (2)
8	2020/03	4	A5	0	0 (4)
9	2020/06	4	A5	0	0 (4)
in total 41 (43.5***)					

* Check algorithm at HSC engineering run.

** Telescope can be used for other instruments

*** The number combined with run 0 and Mitsubishi's work

1.5 Relationship among Individual Sequence

Some sequences can be carried out in parallel, but some should in series. Table 5 shows the relationship among the individual sequences. The rows are commissioning sequences related to each sequence in the columns. “X” means required sequences. For example, prior to the sequence M-3, M-2 (and hence M-1) should be succeeded.

Table 5: The relation of commissioning sequences.

	M1	M2	M3	M4	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	S1	S2	F1	F2	A1	A2	A3	A4	A5
M1																							
M2	X																						
M3	X	X																					
M4	X	X	X																				
P1																							
P2					X																		
P3					X	X																	
P4	X	X	X		X	X	X																
P5	X	X	X		X	X	X																
P6					X	X	X		X														
P7					X	X	X		X	X													
P8					X	X	X		X	X	X												
P9					X	X	X		X	X	X												
P10					X	X	X		X	X	X		X										
S1																							
S2															X								
F1					X	X	X																
F2	X	X	X		X	X	X								X		X						
A1					X	X	X		X	X	X				X		X	X					
A2	X	X	X		X	X	X								X		X	X	X				
A3	X	X	X		X	X	X		X	X	X	X	X	X	X	X				X			
A4	X	X	X		X	X	X		X	X	X	X	X	X	X	X				X	X		
A5	X	X	X		X	X	X		X	X	X	X	X	X	X	X				X	X		

2 Details of Work Flow

2.1 Validation of MCS

M- 1 Off-Telescope (stand-by) characterization of MCS [Daytime]

In this step, the basic functions of MCS are checked before installation to the telescope.

Firstly, we turn on the power of MCS computer and electronic chassis. Then we check the following functions:

- MCS can read CMOS sensor with expected performance.

- dark level: No detectable dark current at 20–25 [decC] with 1.1 sec. exposure time
- noise level: $6.4e^-$
- background level: **how much??**
- shutter: We take several images changing the exposure time to confirm the mechanical shutter works properly.

These values are cited from the CDR slides (**MCS camera system.pdf**).

- MCS can read environmental and mechanical (?) sensors.
 - 7 temperature sensors (**where**)?
 - **flow meter?**

In addition, we will send command on Subaru side (Gen2), so that we can validate ICS performance as follows:

- MHS communicates with between Gen2
- IIC interprets Gen2 commands and send MCS proper commands through MHS
- Subaru (STS and Gen2) refers MCS status
- Subaru (Gen2) receives MCS image

Note that once MCS is powered on, it will be connected to the power supply and Subaru network. The telemetry is monitored during stand-by. Considering this fact, we can skip this step from the second and more times for commissioning run.

After validating the above performance, we will take calibration data (bias, dark, and flat) of CMOS sensor. Note that this process will be skipped in this step, and be carried out in the step [M- 3](#) instead.

Designated Tool for this step We will prepare commands to check MCS functions. This will be used as health check of the subsystem.

Success Criteria

All MCS basic functions are verified — power, CMOS sensor, telemetry.
 ICS can control the instrument communicating with Gen2.
 Required long time to analyze the data?: No.
 —We can check the functions in real time.

M- 2 MCS installation to the Telescope [Daytime]

In this step, MCS is installed to the Cassegrain (Cs) Focus of the Subaru telescope. MCS is attached to MCBox, which is installed to the flange of the Cs focus. This means that the MCS position is determined by how accurate MCBox is attached to the Cs focus. The requirement **REQ-MET-9** demands the accuracy of the MCS position with respect to the optical axis; decenter within 45mm (x/y each), and tilt within 0.14 degree. Subaru demonstrated the repeatability of mounting MCBox in 2015 (report by Y. Minowa: [NDTN-20150714²](#)), resulting in the following performance:

²MCBox_repeatability_report.pdf

- Tilt: < 10 arcsec
- Shift(X,Y): $< 50\mu\text{m}$
- Shift(Z): $< 0.5\text{mm}$
- Rot. : 0.0015 degree (shift by $0.24 \mu\text{m}$ at the edge of MCS FoV)

This result implies the MCS will be installed well with the required accuracy, if it is installed in the normal way. Note that we don't measure the repeatability indeed in the commissioning sequence.

Success Criteria

MCS is mounted to Cassegrain focus with the required accuracy ($\leq 45\text{mm}$ offset in x/y direction, and ≤ 0.14 degree tilt).

Required long time to analyze the data?: No.

M- 3 Check of Basic Functions of MCS on the Telescope [Daytime]

— MCS is operated on the telescope for the first time. —

After installation to the telescope, basic functions of MCS are checked again, but on-telescope condition in this sequence. During installing operation, the power of MCS will be off, so we should turn on the MCS electric devices again.

Then we check the following functions (the same as M- 1):

- MCS can read CMOS sensor with expected performance.
 - dark level: No detectable dark current at 20–25 [decC] with 1.1 sec. exposure time
 - noise level: $6.4e^-$
 - background level: how much??
 - shutter: We take several images changing the exposure time to confirm the mechanical shutter works properly.

These values are cited from the CDR slides (MCS camera system.pdf).

- MCS can read environmental and mechanical (?) sensors.
 - 7 temperature sensors (where)?
 - flow meter?

After the basic functions are confirmed to work, the calibration data (flat, bias and, dark?:TBC) of CMOS sensor shall be obtained, if they are not taken in the step of M- 1. The stability of calibration data can be examined using the data in multiple runs.

Designated Tool for this step We will prepare commands to check MCS functions, the same as [M- 1](#).

Success Criteria

All MCS basic functions are verified — power, CMOS sensor, telemetry.

The calibration data (bias, flat, and dark?) of CMOS are acquired.

Required long time to analyze the data?: No.

— We can check the functions in real-time

M- 4 Study Focal Plane using MCS [Daytime]

In this process, we study the distortion of the focal plane using MCS, and check validity the PFS coordinate-transfer system. This process is planned to use time efficiently after the PFI arrival, because, according to the current schedule (as of January 2017), MCS will be delivered to the Subaru telescope a year earlier PFI.

In this sequence process , we will:

1. Align MCS on MCBox with respect to the Prime Focus (WFC). [ASIAA work]
2. Verify image quality. [ASIAA work]
3. Study dome seeing effect. [ASIAA work]
4. Demonstrate MCS-PFI coordinate transformation, and
5. Study distortion map in detail

Note that the first three items is proposed by ASIAA in MCS CDR document : ([MCS_I&T.pdf](#), and [PFS MCS Delta CDR.pdf](#)),

Regarding the image quality, the similar test will be done in the process [P- 4](#), where science and fiducial fibers are used. Hence, if the image quality will be validated well enough in this process, we can skip [P- 4](#).

Since PFI will not available for this process, we have two options as an alternative. One is Echidna positioner system of FMOS/PIR, and the other is pinhole array equipped to POpt2. Table [6](#) summarize the specifications of Echidna on FMOS/PIR and pinhole on POpt2 as well as their usefulness for tests in this sequence. **At discussion on AIT work in October 2016, it was decided that we will use pinhole array on POpt2.**

In the case of FMOS/PIR The field of view of FMOS/PIR ($\sim 150\text{mm} \times \sim 150\text{mm}$, corresponding to ~ 30 arcmin in diameter) is much smaller than that of PFS, and their optics and mechanics are different from each other. Besides, only 32 fibers out of 400 can be back-illuminated simultaneously. These facts imply that Echidna on FMOS/PIR is not suitable for the MCS alignment and image quality test. Nonetheless, the procedure of coordinate transformation shall be studied well.

MCS measures fiber positions somewhat converted to MCS frame, and then positions are transferred to them on focal plane. On the other hand, FMOS fiber positioner (Echidna) measures fiber positions on the focal plane. By comparing measured fiber positions by MCS and the coordinate transformation system, with those by Echidna, MCS function of measuring the fiber positions is

verified. At present, Echidna can position fibers with the accuracy of $\sim 35 \text{ um}$ ³. We set the goal in accuracy of fiber positioning 50 um for pre-study, the same as 1-st pass distortion map (P-10).

The procedure of the measurement is as follows:

1. Decide which fibers to move and which fibers not to move (like fixed fiducial fibers). Figure 10 shows an example.
2. Built distortion map of PIR from the MCS viewpoint (the form of D_2 for FMOS/PIR). With all fibers back-illuminated, we take the fiber image at home position by MCS. We also have the physical positions of FMOS fibers. Using these positions, we will determine the form of the distortion map.
3. Define F3C for FMOS. In order to distinguish with F3C for PFS, we name the defined coordinate “F3C(PIR)”. “F3C(PIR)” is practically the same as the positions measured with the spine camera of Echidna. With fixed fibers back-illuminated, we take fibers image by both MCS and Echidna, and then the positions of fixed fiducial fibers on F3C are measured.
4. Take all fibers image by MCS and calculate their position
 - (a) Using image of fixed fibers, determine the transformation from MCS coordinate to F3C(PIR) coordinates, that is, the parameters of D_2 for FMOS/PIR).
 - (b) Using images of the rest fibers, calculate the positions on above coordinate frame.
5. Measure fiber positions of FMOS/PIR, and compare with those derived on F3C(PIR)
6. Executing the above procedures for several fiber configurations at a various Elevation (EL) and Rotator angle (ROA), study the stability of the measurements. We may be able to study the effect of local surface error of corrector lens for coordinate transform by changing fiber configurations. Here the error due to temperature and dome seeing is included. We also examine these effect.

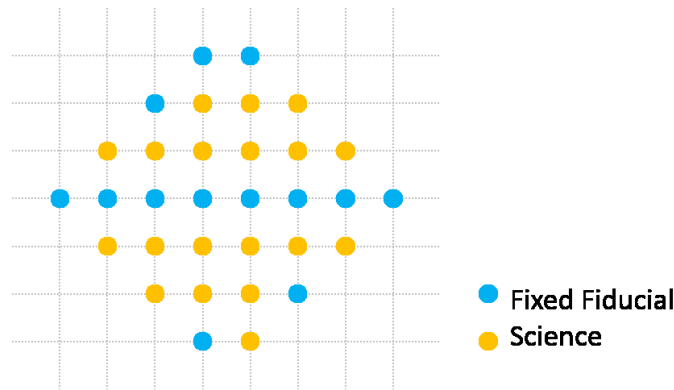


Figure 10: Example of the arrangement of FMOS/Echidna back-lit fibers. 32 fibers can be back-illuminated at a time.

³Originally the fiber allocation was achieved with the accuracy of $\sim 10 \text{ um}$. Recently the encoder of X position of sky camera was broken, which have added $\sim 25 \text{ um}$ for fiber positions.

Because the corrector lens are different between PIR and WFC, we cannot study a effect of WFC surface figure error itself if we use FMOS. However, similar study will be performed by changing the fiber configurations (TBC).

In the case of pinhole array on POpt2 If pinhole array can be attached on the POpt2, we can of course align MCS and test image quality. Also we can study transfer coordinate system in the similar procedure above. WFC has a ring-patterned local surface error with a pitch of 6mm, we can study the effect of the local surface error on WFC distortion by using pinholes with the smaller pitch, or rotating pinholes slightly.

Supposing that we will have pinhole mask with holes arranged at fiducial fiber position and hexagonal position of 4 mm (half of the pitch of Cobras), we will study the coordinate transform in the following procedure.

1. Distortion map is determined with WFC as-built model.
2. Take pin holes array images by MCS. Choose one of the holes in the patrol areas and calculate their position on F3C.
3. Compare the calculated positions with the design.
4. Choosing the another holes, repeat 2.
5. Executing the above procedures at a various Elevation (EL) and Rotator angle (ROA), study the stability of the measurements. Since the existing as-build models are at only three elevations (EL=90°, 60°, and 30°), we will modify the distortion map using the data at other elevations.

Although the pinhole array prepared by ASIAA has the 8mm pitch (partly 2mm), we can use the ASIAA pinhole for the above by rotating the instrument slightly. The movement accuracy of the instrument rotator of POpt2 is 8 arcsec, enough smaller than angle corresponds to 8 mm at the field edge (at 250 mm radius, $\sim 1.8^\circ$). This pinhole size is $\sim 356\text{mm} \times \sim 356\text{mm}$, which covers $\sim 75\%$ of FoV of WFC. The diagonal length 497.84 mm is larger than the circumscribed circle of AG cameras (496 mm in diameter). Therefore, distortion shall be studied well.

To minimize (and measure) the effect of dome seeing, we will take 100 frames for a given position. Assuming that it takes ~ 10 seconds, it will take about 20 minutes to obtain the data at a given position. For study of distortion map, we will take data at 7 elevation angles (with 10° step from EL=90° to 30°). To cover the entire FoV, we have to arrange the pinhole array at three azimuth angles. It will, therefore, take 7 hours to obtain the data. To study the effect of WFC surface figure error on the coordinate transformation, we will take 5 sets of 100 frames by moving the instrument rotator slightly. If we will study this at 5 elevations (with 15° step from EL=90° to 30°), it will take about 8.3 hours. In total, 2-day are required for this step.

Back-up plan If MCS would deliver at Subaru just before the arrival of PFI, we will not have enough time to practice the procedure of the coordinate transformation. As back-up plan, we will use the camera which was used to measure dome seeing in 2012.

According to the report (<http://sumire.pbworks.com/w/file/70195197/domeseeing3v1.pdf>), the camera was equipped to the Casagrain focus with NexStar4SE telescope. In this configuration, the camera covers 100 mm \times 120 mm of FMOS focal plane, which is large enough to illuminate 32

Table 6: Specifications of Echidna on FMOS/PIR and pinhole on POpt2, and their usefulness. Note that we assume that pinhole mask is the same type as ASIAA.

Specifications	Echidna on FMOS/PIR	Pinhole on POpt2	Requiring Test Items
Size at focal plane	$\sim 150\text{mm} \times \sim 150\text{mm}$ (at field center)	$\sim 356\text{mm} \times \sim 356\text{mm}$ ($\sim 75\%$ PFI FoV)	distortion
Optics and mechanics	FMOS specific	WFC + POpt2 itself	alignment, image quality, distortion, MCS-PFI coordinate transformation
Expected focal-plane spatial sampling rate	$\sim 35 \text{ um}$	$\sim 10\text{um}$ (at field edge)	distortion
RMS spot radius on MCS detector(*)	$\sim 10 \text{ um}$ at field center, $\sim 20\text{um}$ at field edge	$\sim 9\text{um}$	image quality

* : MCS CDR document (PFS MCS Delta CDR.pdf by S.-Y. Wang.)

fibers, because neighboring fibers have 7mm separation. The FWHM of the spot size on the camera will be 2.6 pixel, which is the same as that of the PFS fibers on MCS.

Designated Tool for This Step For function of MCS-PFI coordinate transformation, we will use the first version for the scientific operation. For measurement of spot measurement, we will use MCS software itself. To check coordinate transformation algorithm, we will prepare a software to choose the fiducial spots and science spots.

Success Criteria

MCS measures the fiber position consistent with pinhole array spacing at various telescope positions. The accuracy is less than 50 um.

Required long time to analyze the data?: Yes.

—It should take time to compare the positions derived with MCS with pinhole array, and mature the coordinate transfer algorithm. Once we obtained the data, we can use the same data to mature the algorithm.

2.2 Validation of PFI

MCS will be delivered to the Subaru telescope one year before PFI delivery. Hence, working process for PFI validation are considered assuming that we can install MCS to the Cassegrain focus.

P- 1 Check of basic functions of PFI / POpt2 on stand-by condition [Daytime]

In this step, we check basic functions of PFI and Popt2 before installation to the telescope. Firstly we check basic functions of PFI prior to installation to Popt2. Namely,

- Fiducial fiber illuminator: turn on/off
- Calibration lamp: turn on/off (it can be turned on /off by local computer)

- AG cameras: read image (bias/dark) with expected noise level. We also check that the images is sent to VLAN and Gen2.
- Fiducial cameras can read image (bias/dark) with expected noise level
- Center camera can read image (bias/dark) with expected noise level
- Telemetry sensors can be read
- Network connection
- Cooling system

The above functions of PFI, except for the turning on/off calibration lamp, are controlled from Gen2 through MHS

After the basic functions are checked, we install PFI to POpt2. When PFI is installed to POpt2, REQ-SYS-648 claims PFI should be set within the accuracy of ± 20 μm . This requirement is flowed down to L3-PFI-042, claiming the requirement for installation alignment accuracy with respect to the rotator coordinate:

- within 200 μm in radial translation
- within 100 μm accuracy in focus
- within 15 arcsec tilt (80 μm @ outer ring of positioner frame w/ diameter of 1108 mm)

These requirements are for absolute positions. In addition to them, the repeatability within ± 20 μm is required, and we lay weight on the repeatability.

The repeatability of the installation is determined by the tolerance of POpt2 gear support and PFI positioner frame. According to the HSC experience, the repeatability of installation of the camera dewar is quite well (less than 30 μm with 0.21 mm gap between the dewar and the gear support). If we take the same procedure⁴, we will be able to achieve the same repeatability.

After the installation of PFI to Popt2, then the following functions are checked.

- rotator: can mechanically rotate from -270 [deg] to + 270 [deg]

At this point, the functions are controlled by agccActor, fccActor, fvcActor and pebActor, that these modules (actors) and their communication with Gen2 via MHS are also validated. **How about Cal. lamp?**

Refer the requirement for pre-installation check-out to L3-PFI-037.

Designated Tool for This Step We will prepare a command sequence to check the basic functions. This sequence will be used as PFI health check.

Success Criteria

All PFI basic functions are available and characterized.
 PFI is installed to POpt2 within the required accuracy.
 Required long time to analyze the data?: No.
 —We can check the functions in real time.

⁴some explanation is described here: NDTN-20150925-NTakato-Inner_diameter_of_PFI_interface_of_POpt2.pdf

P- 2 P-Opt 2 installation to Telescope [Daytime]

In this step, P-Opt2 is installed to the Prime Focus of the telescope.

According to TM-N5143 (section 3.1.6), the accuracy in installing P-Opt2 to the top ring (and hence optical axis of the primary mirror) are determined by repeatability in engaging of curvic coupling. The repeatability is within 10 μm in X,Y,Z direction, and 3.4 arcsec tilt. This is small enough, compared to the required repeatability in setting PFI to P-Opt2 (see P- 1).

We also install MCS to the Cassegrain Focus, basically one (or more) day before installation of P-Opt2.

Designated Tool for This Step Nothing.

Success Criteria

P-Opt2 is installed to the telescope.

Required long time to analyze the data?: No.

P- 3 Check of basic function of PFI on the Telescope [Daytime]

— PFI is operated on the telescope for the first time. —

In this sequence, we check the functions of PFI again but on-telescope condition. Basically we repeat the same items as those in P- 1. Namely.

- Calibration lamp can be turned on/off.
- AG cameras: read image (bias/dark) with expected noise level. We also check that the images is sent to VLAN and Gen2.
- Fiducial fiber cameras can read image (bias/dark) with expected noise level.
- Center camera can read image (bias/dark) with expected noise level.
- Rotator can rotate from -270 [deg] to + 270 [deg].
- All telemetry sensors can sent proper status.
- Cooling system works.
- Network connection.

The following functions of PFI are validated using MCS by taking the fiber image.

- Fiducial fiber illuminator can be turned on/off
- Check back-illumination of science fibers (If SpS and Cable B are ready⁵)

⁵As of January 2017, three Spectrograph Modules and Cable B will be ready before PFI delivery. Therefore, back-illumination function of these three SMs are checked at run 2. The function of the last SM will be tested at run 5 after its delivery. Besides, if we have time, we can regulate the brightness of fiducial fibers and science fibers, which will be done in the step A- 1.

- MPS can move fiber positioners (Cobras) move and read their status. At this point, because Cobras parameters are not calibrated (A- 1), we should move them slightly to avoid collision.

When the basic function of AG cameras, (fixed fiducial) fiber viewing cameras, center camera and calibration lamp are verified, the calibration data (flat and bias) for these cameras shall be obtained. (We probably don't have to acquire the calibration data so frequently — at the beginning of each run is enough?)

Designated Tool for This Step We will prepare a command sequence for checking basic functions, as P- 1. Also, we will prepare a command sequence for acquiring calibration data.

Success Criteria

PFI basic functions above are checked on Telescope.

Required long time to analyze the data?: No.

— We can check the functions in real-time.

P- 4 Validation of MCS performance [Daytime]

— MCS reads fiducial/science fiber image for the first time. —

After PFI and MCS are installed to the Prime Focus and the Cassegrain Focus, respectively, the image quality of the MCS is validated finally, because at this point MCS can take the image of “fibers” in the entire field of view for the first time. We check the intensity of the spots of fiducial fibers, and confirm the S/N meets the requirement ($>$ several hundreds, according to CDR). We validate the MCS exposure and centroid measurement sequence; taking image and calculating the positions of fibers with expected time (< 5 seconds, according to CDR). Here, we need to somehow illuminate the science fibers if SpS and Cable B is not ready⁶.

After we confirm MCS can take fibers image with required S/N, we validate the MCS performance. MCS is designed to have uniform PSF with FWHM of 8.5um, or 2.6 pixel, in the entire field of view of PFI. For the accuracy of the position of the spots, the requirement is less than 5um (0.08 pixel) rms, The validation will be processed as follows:

1. Take the image of back-illuminated fiducial and science fibers, and measure the FWHM of the PSFs.
2. Take several fiber images and calculate the positions errors at a given Elevation.
3. Repeating 1. and 2. at various elevations and rotator angles, test the stability of the image quality and derived centroids.

If we take 50 frames for a given elevation and rotator angle, it will take ~ 10 minutes (see also M- 4). Assuming we test at 6 rotator angles (with 60° step from EL= -180° to 180°) for every 5 elevation (with 15° step from EL= 30° to 90°), 5 hours are required for this test. Hence, 0.5 day is enough for this step, including the time for verifying the S/N of the spots.

⁶According to the latest schedule, Cable B and SM1,2, and 3 will be delivered before the PFI arrival. We will use these SMs, and shall back-illuminate the rest of science fibers at the other end of Cable B (on IR4 floor) in some way.

Designated Tool for This Step Nothing except for statistics of the measured values. For measurement of centroid and FWHM, we will use MCS software.

Success Criteria

MCS can take fiber image and measure fiber positions.

The spot size is $\sim 8.5\mu\text{m}$ (2.6 pixel) in the entire field of view.

Position of all fibers is estimated within the accuracy of $5\mu\text{m}$.

Required long time to analyze the data?: No.

— We can analyze FWHM and centroid accuracy on relatively short-timescale.

P- 5 Measurement of PFI x/y offset [Daytime]

In this step, we measure offset of PFI in x/y direction by deriving its rotator center on MCS. By measuring this at several runs, the repeatability of installing PFI to Popt2 (and then PFI positions w.r.t. rotator axis) are verified, taking account into the expected repeatability of decenter of MCS ($< 50\mu\text{m}$, see M- 2) and installing Popt2 to the top ring ($\leq 10\mu\text{m}$, see P- 2)

The measurement is carried out in the following procedure:

1. Firstly, we take several back-illuminated fiducial fibers images at a given rotator angle at aiming Elevation and Azimuth in order to measure the stability of the centroid ⁷.
2. Then we take fiducial fibers images at various instrument rotator angles. The series of spots of individual fibers is fit to concentric circles centered at the rotator axis. In other words, the position of rotator axis on the MCS (x_{rot}, y_{rot}) can be measured from the circles.
3. (x_{rot}, y_{rot}) with respect to the center of MCS is compared with the prediction or the value at the last PFI installation. If the new (x_{rot}, y_{rot}) is quite different from the previous value, we might have to adjust PFI to POpt2.
4. We also check dependence of (x_{rot}, y_{rot}) on telescope Elevation.

The first (x_{rot}, y_{rot}) is possibly different from that measured later, because we will align the WFC w.r.t the primary mirror in P- 7. In the current commissioning plan, the repeatability in z direction is not be measured.

Designated Tool for This Step We will prepare a tool to measure the center of concentric circles from quires images.

Success Criteria

PFI x/y offset is measured and confirmed offset from the previous operation is smaller than $20\mu\text{m}$.

Required long time to analyze the data?: No.

— We should measure x/y offset in short time scale for operation.

⁷The accuracy and stability of centroid are measured in the step P- 4, but it should be measured here for sanity.

P- 6 Validation of Auto Guide Cameras [Nighttime]

— AGCs acquire star image for the first time, and the telescope is guided using AGCs for the first time. —

Six Auto Guide cameras on the edge of FoV are used for many purposes:

1. Acquisition and Guidance of the field
2. Auto Guiding
3. Focusing
4. Telescope Pointing analysis
5. Alignment of WFC+PFI with the prime mirror

To enable these functions, in this process we validate basic functions of AG cameras — (1) focusing, (2) pixel scale and orientation of each sensor on the sky, and (3) auto guiding, that is, measuring the centroid and sending position error to the telescope.

Focusing Firstly, we seek on-focus position. The focusing procedure is proposed by Jim Gunn (PFI:336). With a glass plate covering half area of the detector, AG camera has two focus positions. Hence, the cameras can take out-focus/ in-focus image simultaneously, when the PFI is at focus. Measuring the spot size of stars at the area with and without glass plate, s_+ and s_- , we calculate focus positions. Namely, $\delta f = (s_+^2 - s_-^2)/(4\alpha\Delta)$, where Δ is 150 μm from the current design. The parameter α shall be calculated using simulated data (TBC), and in the commissioning sequence, we shall optimize the parameter α . If 4 out of 6 cameras can take pair of stars (in/out), the error of estimation of focus seems $\sim 10\mu\text{m}$ (Jim's document: PFI:336).

To determine α , we

1. Slew the telescope to a given field.
2. Seek on-focus position changing z direction. Here either area with or without position is used.
3. Move focus position by 1.40 mm, then measure spot sizes (s_+ and s_-). In the current design, AG camera detectors locate 1.40mm back-ward from the best position of scientific fibers (see reference for REQ-SYS-1390).
4. Repeating step 1.–3. at a various telescope position, derive α .
5. After deriving α , slew telescope to a given field, and seek focus position using AG camera. Changing the focus position around on-focus position, estimate position accuracy.

Assuming 10-sec exposure, it will take ~ 10 minutes to execute step 1.–3. for a given field. Here we set 7 different focus positions. The same number is used to measuring the focusing accuracy (step 4.). If we visit three fields every 15° from El.= 30° to El.= 75° to derive α , it will take 120 minutes. Another 40 minutes are needed to measure focusing accuracy. Therefore, ~ 3 hours are required for this step, including time for analysis.

Pixel scale and orientation on the sky Secondary, we measure pixel scale and orientation of the AGCs in the following sequence. Because AG cameras locates every 60° , we have to measure the orientation individually (see below).

1. Slew the telescope to the star clusters, and measure the pixel scale by the astrometry of stars on sensors.
2. Put slight offset on the telescope in R.A and Dec. direction individually, and check the orientation of the x/y direction. (And we can also check pixel scale by comparing two shifted images.)

The derived pixel scale and orientations are implemented to the software module for acquisition and guidance.

Assuming that it takes 5 min for one exposure from slewing telescope to acquiring images, it takes 5×4 (position) $\times 6$ (sets) = 120 min in total. Here, 4 positions are needed to measure the x/y direction: the origin and with offset of either R.A or Dec.. To measure the direction easily, we will move InR so a given AGC as to have PA of 0 degree. Therefore 6 sets are needed. Note that if there are any fields for the two opposite AG cameras to have enough number of stars, we can reduce to 3 sets. Including the time to execute astrometry and calibration, 150 minutes = 2.5 hours are needed to this test.

Auto guiding Finally, we validate the AGC functions as the guiding and confirm that the tracking error meets the requirement (**How much?**). For auto guiding, one or two AG camera are used to measure the position error of the telescope, and another camera is used to measure focusing.

Validation is done following standard procedure for Acquisition and Guidance and Auto Guide:

1. Slew telescope to a given field
2. Execute Acquisition and Guidance sequence — measure the position of the star on AG cameras, calculate position error (dRA, dDec) and d(InR), send telescope these errors, and correct the position.
3. Start Auto Guiding — measure the position of the star on Ag cameras, calculate position error (dRA, dDec) [and d(InR)], send telescope these errors. At the same time, some AG camera measures focus position. Focus should be corrected if it gets out-focus, but threshold and frequency is optimized during the commissioning.
4. Keeping guiding for a couple of minutes, measure the guiding error.

We check these functions at several telescope positions. Assuming that it takes 15 min including optimizing the parameters for calculation of the pointing errors, 2 hours are required for this test. Note that we can also validate auto guiding in later phases and as mentioned above, parameters for correcting focus will be optimized during the commissioning.

Because in this sequence we have star image on AGCs and control the telescope accordingly, we can validate communication between Gen2/MLP1 and MHS/AGCC.

Designated Tool for This Step Spot size and spot position are measured by ICS module (Auto Guide Camera Controller). Using these values, a script is needed for seeking on-focus position using either in-focus or out-focus area. Also, a script to measure the orientation of the camera is needed. Astrometry should be done using specified script.

Success Criteria

Acquisition and Guidance, focusing, and Auto Guiding can be executed using AGCs. The focus is measured with the accuracy of ~ 10 μm

Pixel scale and orientation of the x/y pixel direction on the sly are measured.

Required long time to analyze the data?: No.

— We shall analyze the data in real-time.

P- 7 Check focal plane shift/tilt [Night-time]

To have good image quality on the focal plane, WFC (and hence the instrument) need to be aligned in x/y/z and tilt with respect to the telescope primary mirror. The misalignment of WFC with the primary mirror in x/y causes coma aberration across the field. That in z defocuses images. A tilt error induces coma aberration and focal plane tilt. So it is important to minimize these errors to keep good image quality during observation. This alignment is carried out by Hexapod on POpt2 that can adjust the x/y/z and tilt of the assembly of WFC and PFI (see section B). In this process we optimize the Hexapod position for PFS.

We use out-focused ($\Delta D5=0.5\text{mm}$) image of the bright star on AGCs to measure shift and tilt of WFC with respect to M1 and correct them. The shift and tilt are featured by ellipticity and 3-rd order moment vector, respectively. Measuring these values, we correct the shift and tilt of WFC. The goal of correction is that shift is less than 0.5mm, and that tilt is less than 1 arcmin, with which the spot size (RMS) is less than 15 μm . [See Yoko Tanaka's report detailed procedure (WFC_position.pdf: in Japanese)]

The alignment procedure is as follows:

1. Check focus, and defocus by $\Delta D5=0.5\text{mm}$.
2. Slew the telescope to bright stars.
3. Acquire the image. To measure tilt and shift of WFC, 6 defocused image are needed on every AG camera. Since there is a constraint on position of the spot on the camera, and bright stars are needed to achieve $S/N \sim 100$, we acquire 6 images by rotating the instrument or moving the telescope.
4. Measure ellipticity and 3-rd order moment vector from 6 images, and estimate correction values. Apply correction.
5. Repeat 3 and 4 a few times until shift and tilt meets the requirement.

Assuming it takes about 3min including positioning, one iteration needs about 20 min. According to Yoko Tanaka's study, four iterations on average are needed to alignment. Therefore, it takes 80min for one position.

The parameters of Hexapod for alignment is registered as a function or table with respect to the elevation. Therefore, we measure the Hexapod parameters at several elevations. Given we measure them 5 positions (e.g., EL=30, 40, 50, 60, 75) and repeat three times at each elevation, 800 minutes, or 20 hours are needed for the correction. In the current plan, we will derive the function of Hexapod parameters with 2 sets of measurement at the run 2. At the next run, we will execute the other 1 set to check the registered function, and modify if needed. Note that it will be fine visit apart of 5 positions above to check the alignment, but it will be better to modify the functions with measurement at all 5 positions.

Designated tools for this process This process needs designated scripts (1) to get 100 x 100 pixels data from FITS image, (2) to measure shift and tilt and correct them, and (3) to determine the function of Hexapod's parameters with respect to the elevation, or create tables. Yoko Tanaka from Subaru is preparing the script (2), and (3) [TBC]. PFS is supposed to prepare the script (1).

Note that performance of Tanaka algorithm will be tested before PFS engineering runs using HSC, in the S17B semester (run 0).

Success Criteria

Misalignment of WFC and M1 is corrected (shift: 0.5mm and tilt 1 arcmin)
 Hexapod position at several elevation are measured and registered as correction parameters.
 Required long time to analyze the data?: No.
 — We shall analyze the data in real-time to align WFC.

P- 8 Refine of the PFI – MCS relation [Daytime]

Once the alignment of WFC with the primary mirror is confirmed at a given telescope position (P- 7), we can confirm and refine PFI–MCS relation using fiducial fibers in this sequence (see also section 4.3).

Prior to the integration, the focal plane from the viewpoint of MCS (F3C–MCSC relation) has been calculated with ZEMAX, using the WFC as-built model. (the function form: TBD) Using this formula, we calculate the positions of fixed fiducial fibers on F3C.

The physical positions of fixed fiducial fibers on focal plane, on the other hand, will be measured during the PFI I&T process at ASIAA before shipment. By comparing derived positions with the physical positions, we refine the position of the fixed fiducial fibers on F3C.

We will carry out this process as follows:

1. Take the images of back-lit fixed fiducial fibers with MCS, and transform the centroid on MCSC to F3C.
2. Compare measured fixed fiducial fiber positions with physical positions. Here, we aim at getting these positions consistent with each other by 10 um RMS (TBC). If the positions of fixed fiducial fibers are consistent between F3C and physical position, the position on F3C are registered. The positions with terrible discrepancy shall be excluded from F3C.
3. Check dependency of the offset of fiducial fiber positions at various RoA and El, although the offset is negligible given that PFI should be solid. If the displacement of given fiducial fibers is quite large and randomly, we should exclude those fibers from F3C.

At this point, the transforming function from the MCS coordinate to the F3C coordinate is defined. If we take ~ 10 – 20 images to measure fixed fiducial fiber position on F3C, ~ 15 minutes is quite enough. Including comparing positions, updating the coordinate transformation (and hence softwares), 1 day is enough for this process.

Once MCS-F3C transformation is confirmed, MPS can send command for moving the Cobras to dot position. We verify this command, by taking the images with the fibers on-/off- dots after the Cobra calibration [A- 1](#).

Designated Tool for This Process A tool for plotting physical positions and F3C positions, to compare them easily. Centroids on F3C will be derived in the standard way for coordinates transformation (by Fiber Positioner Sequencer).

Success Criteria

PFI-MCS relation is calibrated and MCSC-F3C transformation is confirmed.

Fixed fiducial fibers position on F3C is consistent with physical position by 10 μm RMS (TBC),

Required long time to analyze the data?: No.

— We shall analyze the data in real-time.

P- 9 Telescope Pointing Analysis [Night-time]

— **PFS send Az/El offset measured using AGC to the telescope for the first time.** —

Although there are originally 1-, 5-, 32-points Telescope Pointing Analysis (TPA) functions on the Subaru telescope, PFS can execute only 1- TPA⁸. Here, the number shows the numbers of stars to be observed at a given field. PFS uses the same mount correction coefficients as HSC, and they are updated when HSC executed TPA. (Operator can decide whether to update for PFS.)

By executing 1- TPA, offset angles for Az/EL are estimated. These offset are used the additional parameters for mount correction coefficients for PFS.

For 1- TPA, the telescope control system drives the sequence as below:

1. Slew the telescope to set a certain star on the one of the AG camera.
2. Take its image by AG camera.
3. calculate the Az/El offset, by measuring offset of the star from where it should be.
4. Repeat step 1.–3. for different stars. We will visit every 30 degree in the azimuth direction and every 15 degree in elevation from 30 – 75 degree. In total , Az/El offsets are measured at $12 \times 4 = 48$ field of view.
5. Average offset measured at sequence [3]. Update Az/El offset value of mount correction efficients, as the additional parameter.

Assuming it will take 300 sec to obtain the data in a given field, 4 hours (300×48 seconds) are required. We derive mount correction efficients in a run, and check them in another run. In total, it will take 8 hours to complete this process.

Check how much does the difference of the scale b/w FoV center and edge effect??

⁸It is noted that 1-TPA for PFS doesn't seem Subaru standard manner.

Designated Tool for This Process It depends on ICS software (MAC: MLP1 AGCC Converter) has this function (TBC).

Success Criteria

Obtain Az/El offset value of mount correction efficiencies.

Required long time to analyze the data?: No.

— We shall analyze the data in real-time.

P- 10 First Pass Distortion Map [Night-time]

In the PFS operation we need to convert sky coordinate (Sky Catalogue) to another convenient to position fibers (F3C). For this coordinate transformation we have a “0th-pass” distortion map from the optical model with the as-built WFC & model of atmospheric refraction (including the differential effect), prior to the commissioning.

In this process, we calibrate the distortion map purely by the AGCs with no fibers involved (First pass distortion map). This process comprises two major sequences: calibration of the sky scale, and astrometry on AGCs.

Calibration of the Sky Scale Firstly, we calibrate the sky scale on F3C (focal plane). For this calibration we measure the position of A&G camera relative to their two fixed fiducial fibers.

We proceed this sequence as follows:

1. Slew the telescope to have a star in the center of either half area of a given A&G camera. To proceed step 2. easily, rotate PFI for the target camera to locate PA=0. Note that the center of the A&G camera cannot be used because of the shade of the glass plate.
2. Move the telescope to have the AG fixed fiducial fiber pointed to the star. Then execute the raster scan around the fixed fiducial fiber and calibrate the distance between A&G camera and the fiber.
3. Repeat 1. and 2. for the other half area of the AG camera.
4. Repeat 1.–3. for all fixed fiducial fiber of all 6 A&G cameras.

Because one A&G camera has two fiducial fibers on both sides in the azimuth direction, the raster scan should be carried out using both fibers. Therefore, we shall do $12 \times n$ raster scan in total.

Assuming that we take 9 images for each AG fixed fiducial fiber (3” grid), it will take 10 minutes to take a set of raster scan images, including the moving telescope, readout, etc. Therefore, 10×2 (areas) $\times 2$ (fibers) $\times 6$ (cameras) = 240 minutes (6 hours) is required for this sequence.

Typical exposure time of fiducial fiber viewing camera.

Astrometry Secondary, we make distortion map by images from the 6 AG cameras. The total field of view of the A&G camera is $5.5 \text{ arcmin}^2 \times 6 = 33 \text{ arcmin}^2$. AG camera is lightly out of focus when we focus the telescope; a half region of camera is inside, while the other half outside. However, the accuracy in calculation centroids of a spot is $\sim 3\mu\text{m}$, referring estimation by Jim Gunn: Focus Offsets, Sensitivity, and Star Counts for AG Cameras (ver. 2015.05.18), is small enough to make the distortion map (accuracy: $\sim 50\mu\text{m}$).

We proceed this sequence as follows:

1. Take deep images (~ 60 sec exposure: TBD) of bright stars with good astrometry. We take 3–5 images for statistics.
2. Derive distortion of AG cameras by measuring the positions of stars on camera and comparing with catalogue. Update the distortion map of the entire FoV by interpolating with the new A&G distortion map.
3. Repeat 1.–2. at various elevation and azimuth and refine the map as a function of El, Az, and ROA. At present, we will visit from EL=30, 45, 60 and 80deg, and 2–4 Az positions at every elevation (TBD).

Using the calibrated data, the transformation from Sky Catalogue to F3C is refined. The new distortion map is called “1st-pass” distortion map.

Assuming it will take ~ 15 minutes for a given field, 80 fields will be visited in 20 hours. We will execute this process at two tun. At the first run, we will calibrate sky scale and do astrometry using ~ 50 fields to make the first distortion map. Using the first distortion map, we visit the several fields to check this map and update if needed. At this point, we can configure the science fibers and take spectra to demonstrate the instrument performance. So we take fiber spectra for a couple of fields.

Designated Tool for this Process A method is needed to analyze AG camera images for astrometry, and analyze raster scan data of the fiber viewing cameras. **To do: Check output from fvcactor. If it outputs intensity of the fiber spot, the method will be simple..**

Success Criteria

The “1st-pass” distortion map is obtained with the accuracy of 50um

Required long time to analyze the data?: Yes.

— It shall takes time (one month?) to astrometry of A&G Camera, derive distortion map, measure sky scale on F3C.

2.3 Validation of SpS

S- 1 Validation of the Basic function of SCR and SpS [Daytime]

SpS modules (SM1, 2, 3, and 4) are operated in the designated room called SCR (Spectrgraph Clean Room) on the IR4 floor, where the temperature is controlled from 3 degC to 5 degC. The Camera Assemblies are cooled down in the cryostat. On the below floor (IR3), the compressors will be used during the operations. Under such a condition, the following functions of SpS assemblies as well as SCR functions should be verified:

- The temperature in SCR can be controlled stably in the range from 3 degC to 5 degC.
- All SMs can switch Medium-Resolution mode and Low-Resolution mode (red arm).
- All SMs can open and close blue and red shutters.

- All SMs can move all other mechanical part. **Name**
- All SMs can back-illuminate the fibers (by looking from GANG connectors of cable A?)
- All SMs can read telemetry sensors
- All SMs can read their all detectors within expected noise – dark, bias.
- The spots are on-focus in the detector.
- We check the image quality and stability at a certain temperature and vibration [cf. Validation Roadmap by LAM: tests stability (2.5.8)]. Repeat temperature cycle and check repeatability. The image quality is defined in the requirements **REQ-SpS-47 (Test)**, which declares that the Ensquared Energy in more than 90% detector area should be (1) 50% within 3 x 3 pixels, and (2) 90% within 5 x 5 pixels.
- We demonstrate power failure mode
- The exposure sequence works.

Designated Tool for This Process We will prepare commands to check SpS functions. This might be used as health check of the subsystems (TBD).

Success Criteria

All basic function of SCR and SpS is verified.

S- 2 Characterization of SpS [Daytime]

In this process, we characterize the SMs using arc lamps and continuum lamp. Here we will use Dummy Cable B module [see `DummyCableB-MainDocument.pptx` (PFS-SpS:01680) for details] which is used for the integration by LAM⁹. **Note that LAM also has a plan for characterization as their AIT work¹⁰, although these characterization are not mandatory test items. Coordination between AIT work and the PFS commissioning work is in progress.** According to the document by Sandrine Pascal (LAM; `PFS-DummyCableB.V1.0.pdf`), Dummy Cable B has 4 sets of 7 fibers and 8 sets of single fibers. We can use 5 out of 8 sets at a time.

PSF and spectral distribution measurement We take arc-lamp image and continuum lamp image, and measure PSF and spectral distribution of various fibers on the detectors, respectively. These images are sent to DRP development team, who will analyze them in detail. **Fiber configurations for measurement is TBD.**

⁹To achieve characterization well, lamps with large wavelength coverage would be ideal. We need black body lamp for throughput measurement, but should input the light from slit or GANG connector.

¹⁰See their document for validation roadmap (`LAM.PJT.SUM.DS.1024.1-4.VerificationRequirements.pdf`); λ coverage — 2.5.3: checked by centring the image. R — 2.5.4: extrapolated by FWHM of the spot for testing image quality (maybe only center?).

Spectral resolution We take the arc-lamp images, and measure FWHM of the spots. Then we estimate spectral resolution including wavelength dependence, and compare with specifications. The requirement for the spectral resolution (REQ-SpS-42 (Analysis)) is:

- >2300 @ 520 nm (blue)
- >2800 @ 810 nm (red, LR), >5000 @ 810 nm (red, MR)
- >4100 @ 1110 nm (nir)

We will characterize at least 4 fibers at the outer-most and inner-most of up and down areas, and all 3 sets of 7 fibers.

Wavelength coverage We take continuum and measure the effective area for signal, and take arc-lamp image and derive pixel-wavelength relation. Then we estimate wavelength coverage using the relation, and compare with specifications. The requirement for the wavelength coverage (REQ-SpS-41 (Analysis)) is:

- 380–650 nm (blue)
- 630–970 nm (red, LR), 710 - 885 nm (red, MR)
- 940–1260 nm (nir).

As spectral resolution, we will characterize at least 4 fibers at the outer-most and inner-most of up and down areas, and all 3 sets of 7 fibers.

Throughput Given that throughput will be measured at LAM before shipping to Subaru (discussion in the 8th collaboration meeting in December 2016), this measurement is probably optional. For the condition of experiment at laboratory is more stable than at the summit.

Nevertheless, in this paragraph the procedure is described for throughput measurement. We illuminate GANG connector with a black body lamp, and take fiber images. We count the intensity of the detector, and measure throughput of the SpS itself. We compare the measured values with specifications, which is estimated by combining the performance of each element (LAM). If measured throughput is inconsistent with analyzed one, consider possible causes (vignetting, background etc.) For this measurement, the stability of the black body lamp (TBD) is needed.

The requirement for the throughput of SpS (REQ-SpS-48 (Analysis)) is in Table 7:

Designated Tool for This Process A tool for FWHS measurement is needed. For throughput measurement, illuminating system including light source is needed.

Success Criteria

SpS is characterized. These characters is consistent with expected by specification. [Required long time to analyze the data?: Yes.](#)

— No, but we don't need to analyze on real time for this process. This process doesn't require the telescope, either.

Table 7

wavelength	Throughput [%]	
	requirement	goal
380	14	19
440	38	49
550	39	50
650	33	50
790	42	56
980	36	47
1260	35	45

2.4 Validation of FoCCos

F- 1 Connection of Cables [Daytime]

In this step, we connect Cable C–B (PFI) and Cable B–A (SpS)¹¹. We check the connection of of the Cables with the fiber monitoring system. Alternatively, we can also confirm the connection of the Cables by taking the calibration lamp image.

Success Criteria

Cable B is connected to PFI (Cable C) and SpS (Cable A) correctly.

F- 2 Confirmation of Fibre-Slit Relationship [Daytime]

In this process, we check fibre-slit relationship. It is defined in e.g.

<http://sumire.pbworks.com/w/file/76743299/FiberMapping.pdf>. There are four cables connecting PFI and SpS (Cable B), each of which deliver lights to four spectrograph module.

The ID of Cobra positioner and position on the Spectrograph detectors is checked by hiding a given fiber by the field element dot. The detailed procedure is as follows:

1. Move all fibers out of the dots.
2. Back-illuminate fibers by each Spectrograph Module, and take the MCS image. At this point, we check the fiber mapping in unit of Spectrograph Module. On the other hand, take flat image. In this step, we have four MCS image and four SpS images with all fibers illuminated (Images set A).
3. Move given two fibers (i, j) to be obscured by dots, and take MCS image and SpS image (Images set B).
4. Move one of these two fibers (j) out of the dot and another fiber (k) onto the dot. Take MCS image and SpS image (Images set C).

¹¹The connection of Cable B–A may be not off so often once it has connected.

5. Comparing image sets A, B, and C, identify three fibers. Fiber i is hidden for both B and C, j is hidden for B, and k is hidden for C.
6. Repeat 3.–5. for other three fibers (i', j', k') .

If the relationship is different than the expected one, update the relationship. It seems simpler to modify the position on the camera, fixing the positioner ID.

There are 2394 fibers in total, among which 600 fibers are assigned to SM 1 and 2 each, and 597 fibers to SM 3 and 4. Hence, 200 or 199 series of the image sets B,C are required. (Image set A is shared for all fibers.) We can check fibers for different modules, once we confirmed their IDs in unit of SMs (in step 2.).

Assuming that it will take ~ 3 minues to get a series of image sets, 1 day is required for this process. Because SMs other than SM4 will be available at run 2, another 1 day will be needed at run 5.

Note that we will move cobra to dots before calibration, but it should be safe considering that the position will have been calibrated during I&T at ASIAA¹².

Designated Tool for This Process Nothing. At present, it is planned to simply subtract the images to find which fiber is hidden.

Success Criteria

Fiber positions on PFI and SpS are confirmed.

2.5 Commissioning of All Systems

A- 1 Measurement of Cobra Center Positions and Other Parameters [Daytime]

In this process, we measure the center position and other parameters of the fiber positioner “Cobras”. In order for MPS to send commands for moving Cobras, MPS should obtain firstly the following parameters (Figure 11):

- $\mathbf{X}_{c,k} = (x_{c,k}, y_{c,k})$: center position of the positioner
- $a_{1,k}$: arm lengths of θ stage
- $a_{2,k}$: arm lengths of ϕ stage
- $\theta_{CW,k}$: CW limit of θ stage (angle or position)
- $\phi_{CW,k}$: CW limit of ϕ stage (angle or position)
- $\theta_{CCW,k}$: CCW limit of θ stage (angle or position), and
- $\phi_{CCW,k}$: CCW limit of ϕ stage (angle or position).

¹²If the accuracy of calibration will be poor and is risky to move positioners before calibration, we disconnect the Cable B and A, and check identification by illuminating each holes.

Note that these parameters are calculated in F3C. We shall derive these parameters in this phase using back-illuminated fibers.

Prior to the measurement, we should confirm that the science fibers can be back-illuminated, that is, the Back Illumination Assembly in the SpS subsystem does work (see P- 3, where we can do this step alternatively). At this point, we regulate the brightness of back-illumination. The brightness of back-illuminated fibers are set based on that of the science fibers illuminated in the strobe mode, whose brightness is fixed ($1 \text{ [W m}^{-2} \text{ sr}^{-1}] \pm 20\%$). Firstly, we shall regulate the brightness the brightness of the fiducial fibers comparing with that of science fibers illuminated in the strobe mode. Secondary, we shall adjust the brightness of science fibers back-lit in the normal mode to that of fiducial fibers.

After tuning the brightness of the light sources, we shall back-illuminate the science fibers in the normal mode. Firstly, we take fiber image without “Cobra” moving for coordinate transformation. We shall take fibers image using MCS in both short-exposure and long-exposure mode (~ 1 second) with “Cobra” rotating. Because one MCS image has arcs of illuminated fibers, we combine the images, or use the spot positions which MCS measures. We shall measure the centroid of the positioner, arm lengths, and minimum and maximum positions of each stage, by fitting the spots with a circle on F3C. Here, we move θ and ϕ stage individually to determine these parameters. The detailed procedure is presented in SSN-00021-001+-MPSconfiguration.pptx (by Atsushi Shimono).

Derived parameters are sent to MPS, which can move cobras everywhere at this point. Then, we also validate the following items:

- If the SpS and Cable B are installed, the science fibers are moved to the home position several times to test good repeatability ($\sim 1\mu\text{m}$)
- Dots can be obscure the Fibers. We move the fibers to the dot positions and turn on the calibration lamp. Take fibers image by MCS and compare with that of home position, where the fibers are not obscured. If dots and ”move-to-dot” command work, the spots in MCS is fainter than those with the fibers at home position.

Note that we should take care to avoid collisions in this process, although this depends on how much the cobra parameters will be updated by this calibration¹³. According to the current schedule, Cobra parameters for SM1,2 will be calibrated at the run 2, while those for SM3,4 will be calibrated at the run 3. Therefore, it is safe to set not-targeted Cobras around the home position, or inside enough before calibration. Because three SMs expect for SM4 will be ready at the runs 2 and 3, we shall back-illuminate fibers of SM4 somehow (maybe illuminate from the Cable A).

To avoid contamination by neighboring Cobras, we separate 3 or 4 groups for calibration. We estimate 1-day for calibration of cobra parameters of SMs 1,2 and SMs 3,4 each.

Designated Took for This Process The tool is needed for measuring the centroid of the positioner, arm lengths, and minimum and maximum positions of each stage. For coordinate transformation from MCS to F3C, we use the software module FPS (Fiber Positioning Sequencer).

¹³We should take care about collision in the process F- 2, although the possibility is much less, because we will move a several fibers at a time.

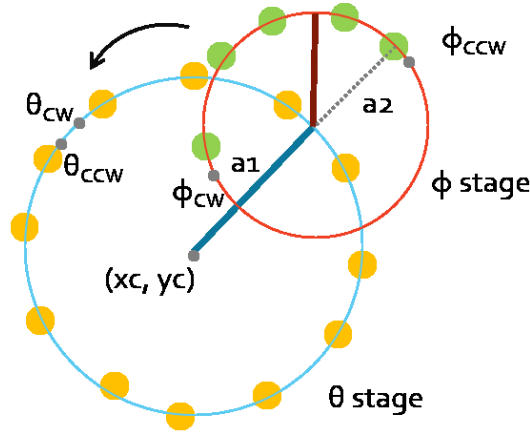


Figure 11: Schematic picture of Cobra parameters. Orange and green spots imply the positions of blinking fiber in F3C. Light-blue and red circles indicate fitted circles for fiber spots.

Success Criteria

The brightness of back-lit fibers are regulated.

Parameters of each Cobra ($x_{c,k}, y_{c,k}, a_{1,k}, a_{2,k}, \theta_{0,k}, \theta_{m,k}, \phi_{0,k}, \phi_{m,k}$) are measured and stored to MPS.

Required long time to analyze the data?: No.

— We shall analyze the data in real-time. In addition, cobra parameters will be stored in short time scale.

A- 2 Characterization of PSF and Spectral Distribution [Daytime/Nighttime]

— The light is delivered from the primary mirror to the detectors for the first time.

In this step, we measure PSFs and the spectral distribution on the detectors. As twist of fiber changes, PSF depends on telescope positions as well as Cobra position in its patrol area. This step is similar to step S- 2, but the data includes all optics and systems; namely, Primary Mirror — WFC, — Field Element — Cable C — Cable B — Cable A — SpS, and all connectors between them.

PSF/spectral distribution image will be sent to 2D DRP team of Princeton University, who will characterize them in detail. We will check basic properties of PSFs such as FWHM etc., though.

This sequence consist of three step: (1) principal characterization, (2) measurement of sky spectra, and (3) characterization according to Cobra movement. The arc/flat lamp on PFI is used to measure PSFs/spectral distribution of all fibers. We therefore also check the uniformity of the calibration lamps, and validate the calibration sequence.

Principal Characterization As soon as PFS can deliver light from the primary mirror to the Spectrograph detector, we will take arc and flat. As of the writing (June 2016), it can be done during PFI check on Telescope (P- 3), because PFI, Cable B and two SMs will be delivered. In order to

look into the PSF, we shall dithered flat as well. Dark and bias data is needed for calibration. Check wavelength resolution, wavelength coverage for all fibers.

Once Cobra calibration is carried out, sparse arc and flat shall be taken in order to look into the PSF wing. How sparse is TBD, but we can estimate AIT data at LAM. Current plan¹⁴ by Robert Lupton from Princeton University (2D-DRP team) is every other fibers and every 10th fibers with shorter and longer integrations.

Measurement of Sky Spectra We will take arc and continuum image with changing telescope elevation and/or RoA. For example,

- RoA = $-270, -180, -90, -60, 0, +60, +90, +180, +270$ (9 positions)
- Elevation = $30, 45, 60, 75$ (4 positions)

If we take 3 types fiber configuration (e.g. full, a little sparse, very sparse), there are $3 \times 4 \times 9 = 108$ configurations in total. Assuming that it takes 5 minutes to configure, and acquire a couple of images, it will take 9 hours for a series of either arc or continuum images. As time will be limited, we will firstly characterize PSFs in operation RoAs at every elevation angles, and then study other RoAs. If we take images at 9 RoA positions at El=60 degree, and 3 RoA operational positions at other elevations (18 telescope positions in total), it will take 4.5 hours. In the current plan, required time is estimated assuming measurement at 18 positions. Ideally, as sky condition changes during a night, we shall revisit to a given elevation and RoA every hour or so.

By comparing the properties of PSF such as FWHM, we examine dependency and repeatability of the spots on telescope pointing. In the PFS operation RoA is limited from -60 deg to $+60$ deg, considering that impact of twisted fibers on FRD. During the commissioning, however, we shall check the PSFs in wider range of RoA. If the impact is enough low at wider RoA, we can have more flexibility of operation (e.g. constraint due to dots.).

Characterization according to Cobra Movement In this sequence, we also examine PSF variance with respect to the Cobra rotation angles (θ, ϕ). Here, we use calibration lamps with the telescope pointing at zenith. If we change Cobra positions by 60 degrees, namely

- $\theta = 0, +60, +120, +180, +240, +300, +360$ (0, +360 mean limit angles)
- $\phi = 0, +60, +120, +180$ (0, +180 mean limit angles)

We will take $3 \times 7 \times 4 = 84$ sets of data, for 3 fiber configurations. We will take $3 \times 7 \times 4 = 84$ sets of data, for 3 fiber configurations. It will take 7 hours to acquire a series of arc data. We shall take images while Cobras are moving.

During the commissioning phase, SMs 1, 2, and 3 will be delivered ahead of the delivery of PFI. Therefore, we can repeat the same test for the first three SMs when SM4 will be tested. Alternatively, if we can characterize PSF well for the first SMs, we can limit the PSF test for the last SM, in order to minimize the telescope time.

In either case, the test using sky shall be limited, for example

¹⁴In his draft, he requested to observe semi-crowded fields before we can target objects for demonstration and PR. May be it can be done during later phase of P-10, if it is acceptable accurate fiber positioning is crucial.

- RoA = $-60, 0, +60$ (3 positions)
- Elevation = $30, 60$ (2 positions)

In this case, it will take 0.5 hours for either arc or continuum data.

Designated Tool for This Process Detailed analysis will be done by 2D-DRP team (Princeton). For PFS commissioning, a tool for measure FWHM is needed.

Success Criteria

The dependency of PSF and spectral distribution on Telescope elevation and RoA is measured.
 Required long time to analyze the data?: No.
 — Detailed PSF characterization is mainly carried out by 2D-DRP team, and we will proceed to the next sequence in parallel with analysis.

A- 3 Second-Pass Distortion Map [Night-time]

After the process P- 10, the science fibers should be pointed to the targets with the accuracy of ~ 50 μm (at least less than 100 μm). In this step, we will do raster scan to improve the distortion map and achieve the fiber pointing accuracy of ~ 10 μm RMS.

The process is as follows:

1. Slew the telescope to the field where enough bright stars is cataloged with good astrometry (see section 3).
2. Put these bright stars on the science fibers and take fiber spectra with the telescope moving in $3'' \times 3''$ grid, approximately three time as large as the fiber core diameters. Note that the raster with 5 position of hexagonal pattern provide denser scan than the grid (TBD).
3. Calculate the brightest position by comparing the intensity of these spectra.
4. Repeat 1.–3. for several fields at various telescope positions, and calibrate the distortion map.
5. Check the dependency of the map on wavelength, and check if ADC works correctly, by comparing the observed positions with predicted ones by ADC.

Calibrations will include the following factors:

- Telescope elevation, and azimuth
- Temperature
- Focus
- ROA
- Error in the relative position of A&G cameras to fiber positioner.
- Error in Cobras' position measured prior to integration at Subaru

- Error in Catalogue
- ADC
- etc..... (TBD)

Assuming we take 120- –150-second exposure for a given position, it will take ~ 30 minutes including slewing and fiber configuration. We will take 2 sets of $4 \text{ El} \times 4 \text{ RoA}$ positions (~ 8 hours) to study the dependence of the above parameters. We repeat 2 times of these sets using SMs 1–3 (runs. 4 and 5). Note that fibers of each SM are arranged on the focal plane to cover entire field of view, we can study distortion without SM4. However, we will check and finalize the distortion map using all SMs at run 6. In total, 5 nights are required in this process.

When the second distortion map is made, update ETS using this map, and/or update the repository for coordinate transformation (TBC).

Designated Tool for This Process A tool for measuring the brightest position from raster scan data.

Success Criteria

Second distortion map is obtained with error less than 10um.

Required long time to analyze the data?: Yes.

— It takes time (\sim one month) to improve distortion map, by analyzing raster scan data in various condition. Also it needed more than one run to check dependency of temperature and so on.

When this step is completed, the fibers shall point to the target within the accuracy of 10 um. Then, we verify the instrument performance in the following steps.

A- 4 Performance Verification I [Night-time]

- We operate full observation sequence for 900-sec exposure for the first time. —
- PFS acquire faint galaxies/stars spectra for the first time. —

The goal of this commissioning stage is to verify the performance of the integrated PFS system. At this stage, we will obtain the following data set:

Set I). A field with only blank fibers

Set II). A field with bright stars whose absolute flux is well estimated.

Set III). A field with faint galaxies and/or stars, accommodating a variety of exposure times up to ~ 10 hours.

Using the above data set, we will verify the following performances (it indicated which data set to use for each item):

- Verification of the observation sequence (Set I, II, III)
- Measurement of the total throughput (Set II)
- Verification of the absolute flux calibration (Set II)

- Verification of sky background subtraction (Set I)
- Verification of the limit of exposure time in each frame (Set I, II, III)
- Verification of observations with a long total exposure time (Set III)
- Verification of re-configuration of cobra during scientific observations (Set III)
- Verification of beam-switching mode (Set III)
- Verification of Quality Assurance procedure (Set III)
- etc.. (TBD)

Hereafter, the detailed process is described for each performance.

Verification of the observation sequence The following points, which correspond to the sequence itself that is supposed to be carried out in normal science observations, will be verified:

1. Acquisition of the target field
2. Confirmation of the guiding
3. The cobra configuration for target objects
4. Start exposure
5. Acquisition of the next target, if any

At this sequence, we test that all commands can be sent correctly. We have requirements for overheads, assuming typical exposure time of 900 seconds. According to REQ-SYS-520 (Test), the taken time from field acquisition to starting auto guiding is within 105 seconds, which this shall be confirmed in P- 6. By selecting a field where all science fibers should be allocated objects, we test whether 95 % of 2394 fibers (2275 fibers) moves to the their targets within 105 seconds REQ-SYS-517 (Test), with accuracy of < 10um. We shall take 900-sec exposure, during which the tracking error should be ~ 0.2 arcsec rms by auto guiding (0.2 arcsec rms for 10 minites and 0.6 arcsec rms for 30 minites: REQ-SYS-888 (Test)). (It seems the first time to track a field for longer period, > 10 minutes, because we execute short exposures in the previous sequences.) After exposure, it should take less than 35 seconds to readout detectors, archive the fits (including MCS data for finally configured fiber image) data and telemetry data to STARS, Subaru archiving system (REQ-SYS-519).

Success Criteria

Confirm that the normal observation sequence can be carried out.

- 95 % of science fibers can be allocated to their objects within 105 seconds, and allocation error should be less than 10 um.
- Tracking error for 10 minutes and 30 minutes is 0.2 arcsec rms and 0.6 arcsec rms.
- Reading out the detectors and archiving data are completed for less than 35 seconds.

Measurement of the total throughput The throughput is estimated using measured transmissions / reflection curve for each optical components (e.g. the primary mirror, fibers, optics for Spectrographs). The expected PFS performance is shown on the web.

<http://pfs.ipmu.jp/research/performance.html>

In this test, we measure the throughput of the entire system and compare with the prediction.

The process of the total throughput measure will be carried out as the following way:

1. Observe stars with known spectral types

This process requires a substantial number of stars whose spectral types and absolute flux are known. The spectra should have as less spectral feature in the observed wavelength range as possible, therefore F-type dwarf stars will be a suitable candidate for this measurement. The number of stars in the observations should be ideally equal to the number of fibers per one FoV. Star clusters will be a good candidates.

2. Comparison of the observed counts to the given flux density as a function of wavelength

We will compare the obtained spectra to the given spectra of the observed stars. From the given spectra, the expected counts as a function of wavelength can be calculated by assuming atmospheric transmission. By comparing the obtained counts and expected counts, the total throughput can be estimated.

3. Repeat this measurement and comparison in various conditions

The total throughput measurement should be carried out in different conditions (e.g., weather including different seeing, cobra configuration, telescope EL, and ROA, etc.). The average value will be the representative measured value of the total throughput.

4. Comparison of the obtained throughput to the expected one

If the measured value is significantly different from the expected total throughput, we might need to verify the input source. In FMOS engineering observations, they checked the total throughput measurement with celestial objects by using a black body furnace. In this case, the optimization of the set up of the blackbody furnace, such as position, incident angle, and the calibration of absolute flux, would need to be considered.

The time duration of this commissioning stage will be about 1 engineering run, i.e., about 2–3 engineering nights, taking into consideration of a weather factor.

Success Criteria

Confirm that the total throughput of PFS is as expected:

BLUE arm — ~12% (380–450 nm), ~21% (450–550 nm) and ~24% (550–650 nm)

RED arm (LR) — ~30% (630–750 nm), ~29% (750–850 nm) and ~27% (850–970 nm)

RED arm (MR) — ~26% (710–875 nm), ~28% (775–825 nm) and ~27% (725–885 nm)

NIR arm — ~17% (940–1050 nm), ~19% (1050–1150 nm), and ~17% (1150–1260 nm)

Verification of the absolute flux calibration One of the important tasks is the establishment of the absolute flux calibration process. In the normal observations of faint objects such as distant galaxies, we suppose that a certain fraction of fibers is used for flux calibration stars, for which

F-type stars are desirable. By using the flux calibration stars, the spectra of all other fibers will be calibrated. In this measurement, we verify whether the absolute flux calibration process can be made at the expected level, with the accuracy of 5 % (REQ-SYS-656 (Test)). The measurement process will be done as follows:

1. The process is closely related to the measurement of the total throughput described in the previous subsection. In this measurement, we observe a substantial number of stars whose spectral types and absolute flux are known, including flux calibration stars. The data reduction is done following the normal procedure.
2. The calibrated spectra can be compared to the given spectra. The deviation from the expected spectra can be calculated as a function of wavelength. If necessary, this measurement will be done in various different condition such as ones listed in the previous subsection, and the deviation of the flux calibration as a function of these quantities.
3. The cross-correlation to the external catalogue will be useful especially for faint galaxies. In this measurements, targets selected from the external catalogue (e.g., SDSS) will be observed and the data processing will be done in the normal procedure. We check the obtained spectra and the deviation from the external SDSS spectra.
4. Verify the following items:
 - that absolute flux calibration can be done at the desired level of accuracy (5 %)
 - the number of objects that should be used for the calibration
 - the spectral type of stars that is optimal and acceptable for the desired flux calibration
 - the optimal spatial distribution of the calibration stars on the FoV

Success Criteria

Confirm that the absolute flux calibration can be done with the accuracy of 5 %.
The number of fibers for flux calibration is determined (100–200 ? TBC).

Verification of sky background subtraction The subtraction of the sky background in the data analysis is one of the most critical tasks in the PFS projects. In this verification process, we allocate all fibers on the sky, among which we choose some of them as the sky fibers. Then we test sky subtraction by checking the reduced data of the rest fibers, selected as “scientific object”. If the sky background is subtracted perfectly, the reduced spectra should be “flat”. We also observe a substantial number of faint objects that is supposed to be observed in the actual scientific operations. In the normal and expected observations, a certain fraction of total fibers will be used for the sky background subtraction. We will estimate the residual of the sky subtraction as a function of:

1. exposure or observing time
2. airmass
3. other weather condition such as seeing
4. cobra configuration and ROA?

We verify whether the sub subtraction residual is in the range of the expected level (0.5 % accuracyREQ-SYS-679 (Analysis)) or not. Another important items to be verified is the number of the sky fibers that is required for the desired sky subtraction.

Success Criteria

Confirm that the sky background can be subtracted within the accuracy of 0.5 %.

Verification of the limit of exposure time in each frame According to REQ-SYS-732 (Demonstration), the exposure time for one frame shall range 10 sec – 1800 sec. The maximum exposure time is determined not to have too many cosmic rays, nor saturated sky emission lines. In this verification process, we will determine the maximum exposure time for one frame by taking a substantial number of frames with longer exposure (> 150 sec. TBC). The purpose of this verification is as follows:

- Check the fiber loss as a function of time
- Effects on the sky subtraction
- Check the saturation of OH emission lines
- Effects by cosmic ray on obtained spectra and data reduction process
- Check the instrument stability (c.f. FMOS instability problem during engineering observation)

Success Criteria

Confirm that the maximum limit of long exposure time (< 1800 sec) in each frame can be verified.

Verification of observations with a long total exposure time In the observations targeting very faint objects such as high-redshift galaxies, very long exposure time in total will be supposed. The signal-to-noise ratio of the obtained spectra should, ideally, increase with exposure time just as expected. In this verification process, we will carried out observations with very long exposure time in total (~ 10 -20 hours). The target is supposed to be both bright and faint galaxies. In the measurement, we will check the following points:

- The obtained signal-to-noise ratio grows as a function of exposure time following $\propto \sqrt{t_{exp}}$.
- The effect of very long exposure on the sky subtraction.

The time duration of this commissioning stage will be about 2 engineering runs, i.e., about 5–7 engineering nights, taking into consideration of a weather factor.

Success Criteria

Confirm that the expected growth of Signal-to-Noise ratio of faint targets for long exposure time

Verification of re-configuration of cobra during scientific observations TBW.

Success Criteria

Confirm whether the re-configuration of cobra during observations with long total exposure time and how often the re-configuration is needed

Verification of beam-switching mode (TBD)

A- 5 Performance Verification II [Night-time]

In the previous commissioning process (A- 4), basic instrument parameters and performance will be revealed. After this phase, a normal observational sequence can be done properly using almost the same software interface used in actual survey observations including data reduction pipeline.

In this this commissioning phase, we will stabilize the instrument operation and the performance optimizing the softwares and the operation processes for long-term survey observations. Specifically, we will conduct the following verifications:

- Long exposure of faint galaxies and stars
- DRP optimization using a wide variety of galaxies and stars
- Confirmation that there is no time change of the performance

Success Criteria

- Confirm that observation process can be done properly and stably
- Confirm that there is no time change of the instrument performance
- Confirm that a sufficient number of galaxies and stars was observed to optimize the 1D-DRP using a machine learning technique

3 Selection of Observing Fields [TBD]

In this section, we describe the preparation of target objects for the on-sky commissioning and the performance verification. We suppose three cases of target fields, 1. a field with many bright stars such as an open cluster for the raster scan, 2. a field with a sufficient number of bright stars such as an SDSS field at high galactic latitude for the throughput measurement and the verification of the flux calibration, 3. a field with faint galaxies and stars for the verification of long exposure. We briefly describe each case and possible candidate targets below.

3.1 Open Clusters as the Raster Targets

For the raster scan process, targets should be sufficiently bright and point sources for the accurate evaluation in the analysis. In addition, they should cover the entire PFS FoV and the number density should be matched to the PFS fiber density. Open clusters with sufficient bright member stars in the Galaxy are plausible targets for the raster scan.

The candidate open clusters are selected from DAML02 catalogue (Dias et al. 2002, A&A, 389, 871), which includes information on fundamental parameters (distance, apparent diameter, proper motion, age, reddening, metallicity, and so on) of ~ 2000 open clusters. Figure 12 and Figure 13 show the spatial distribution of the open clusters with the apparent diameter (d [deg.]) of > 30 . There exist ~ 130 , ~ 50 , ~ 30 open clusters with the apparent diameter of $30 < d < 60$, $60 < d < 120$, and $d > 120$, respectively. The typical number of member stars is ~ 1000 .

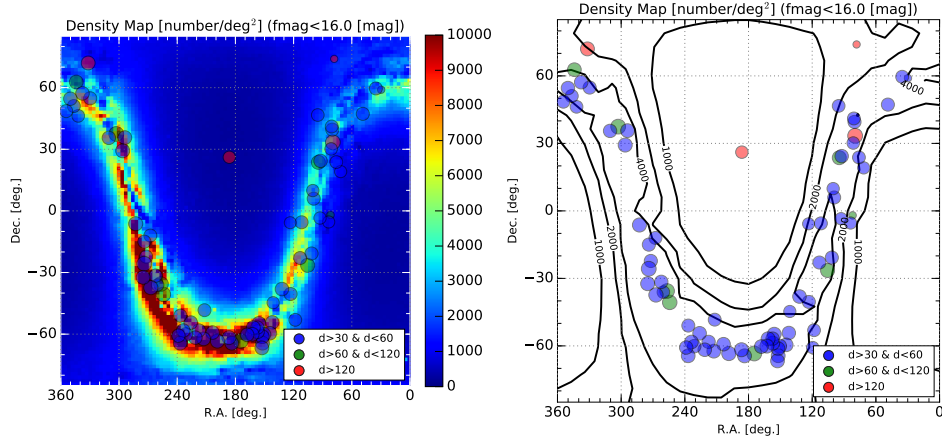


Figure 12: Stellar density with objects $f < 16.0$ mag taken from UCAC4 catalog in color map (left) and contour (right). The spatial distribution of open clusters with the apparent diameter (d [deg.]) of $d > 30$. from DAML02 catalogue is also plotted in both panels. Open clusters with $30 < d < 60$, $60 < d < 120$, and $d > 120$ are shown by *blue*, *green*, and *red circles*, respectively. The size of symbols represents the number of member stars.

3.2 Field Bright Stars

As Figure 12 and Figure 13 show, the spatial location of the available open clusters with sufficient apparent diameter for the PFS FoV is very limited. We thus consider the possibility of using normal field stars as raster scan targets in this subsection. In Figure 12 and Figure 13, the density map of stars with $f < 16.0$ mag. selected from the UCAC4 catalogue (Zacharias et al. 2013, AJ, 145, 44), which contains 113 million stars down to $R \sim 16$ mag for which the positions determined with the accuracy of < 100 mas. Although the number of available stars in one PFS FoV is limited in the high galactic latitude (b), there exist sufficient available stars of $f < 16$ mag in $b < 60$ deg.

3.3 Faint Galaxies and Stars

Basically, faint targets to verify the system performance will be selected from objects detected with HSC imaging data, which are candidate targets in the actual large survey with PFS.

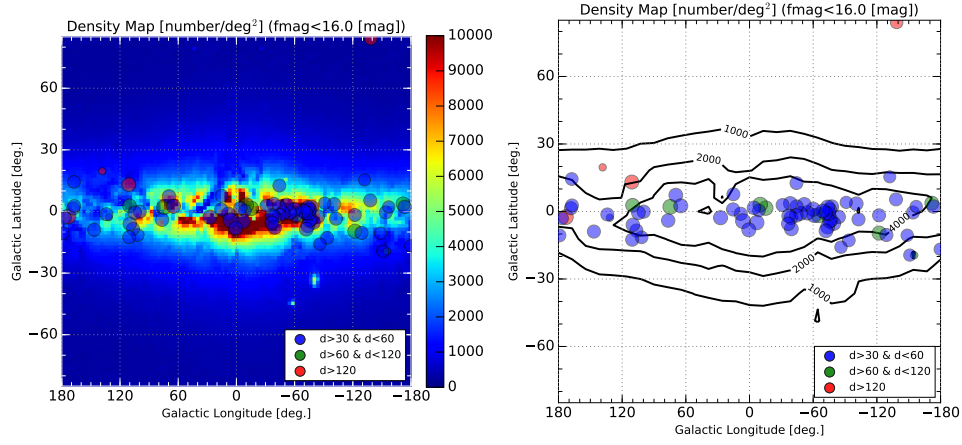


Figure 13: Similar to Figure 12, but on the Galactic longitude and latitude.

Table 8

Name	R.A. [hh:mm:ss]	Dec. [dd:mm:ss]	Diameter [arcmin]	# of members	Mag. limit [mag]
Collinder 464	05:12:39	+73:58:29	120.0	5212	TBC
Melotte 31	05:18:10	+33:22:25	135.0	14341	TBC
Melotte 111	12:25:06	+26:06:00	120.0	863	TBC
Collinder 471	22:07:06	+72:00:00	130.0	4573	TBC
ASCC 19	05:27:47	−01:58:48	96.0	2412	TBC
Collinder 89	06:18:00	+23:38:00	60.0	2971	TBC
Alessi 33	07:01:59	−26:30:12	60.0	3371	TBC
IC 2944*	11:38:20	−63:22:22	65.0	8860	TBC
Trumpler 24*	16:57:00	−40:40:00	60.0	5720	TBC
ASCC 88*	17:06:47	−35:36:00	66.0	6501	TBC
ASCC 111	20:11:13	+37:27:00	66.0	8004	TBC
ASCC 125	22:56:17	+62:45:00	66.0	2332	TBC

*: These targets cannot be observed with a good visibility.

3.4 Detailed Procedure of Raster Scan

TBW

3.5 List of Candidate Raster Fields

TBW

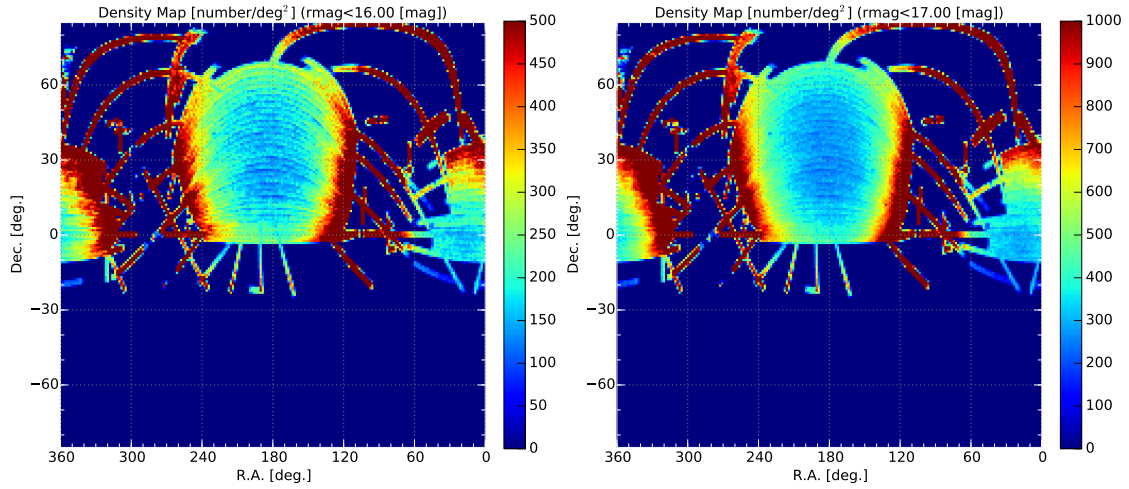


Figure 14: Stellar density with objects $r < 16.0$ mag (left) and $r < 17.0$ mag taken from SDSS DR12 catalog in color map.

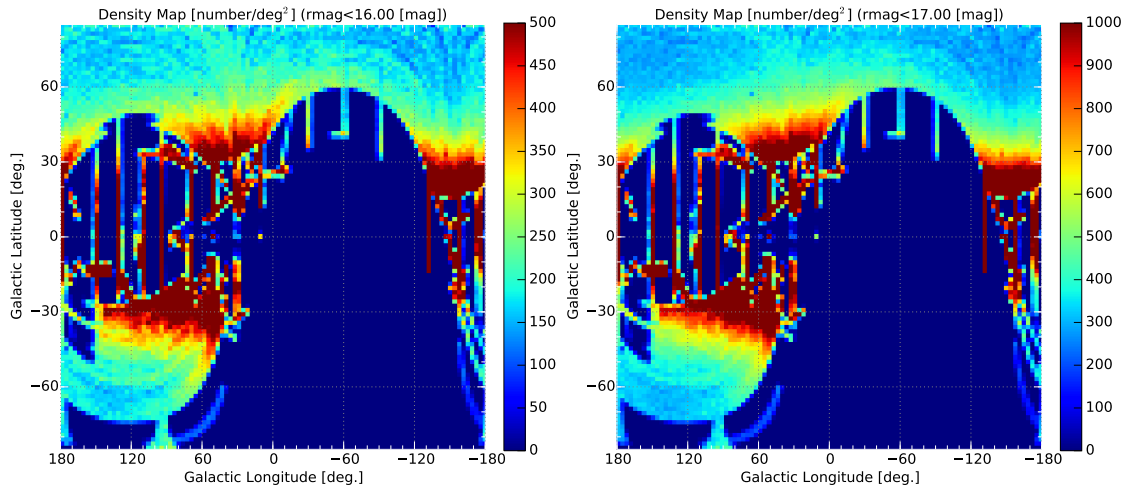


Figure 15: Similar to Figure 14, but on the Galactic longitude and latitude.

4 PFS Coordinates and Calibrations in Commissioning Procedure

4.1 Definitions of Coordinates

PFS has four coordinates used for fiber positioning: Sky Catalogue, Fixed Fiducial Fiber Coordinate (F3C), Cobra Coordinate, and Meteorology Camera System Coordinate (MCSC).

The definitions of each coordinates are as follows.

Sky Catalogue The sky targets such as galaxies and stars as well as sky backgrounds lie on this coordinates. We describe the target positions using the equatorial coordinates $\mathbf{S} = (\alpha, \delta)$ in the unit of degree. In the operation, we slew the telescope to a given field centered at $\mathbf{S} = (\alpha[^\circ], \delta[^\circ])$. In this Field of View, the sky targets have a position on Sky Catalogue as the differential from the center: $\mathbf{S}_k = (\Delta\alpha_k[^\circ], \Delta\delta_k[^\circ])$.

Fixed Fiducial Fiber Coordinate (F3C) In order to calculate fiber positions at each exposures, 97 fixed fiducial fibers are used. F3C is the coordinate from the viewpoint of these fibers. In this coordinate, sky targets and fiber positions are described in the unit of mm: $\mathbf{X}_k = (x_k[\text{mm}], y_k[\text{mm}])$. In practical, F3C is roughly defined as mean plane of the top surface of the fixed fiducial fibers. F3C resembles physical metrics of PFI (Prime Focal Instrument), but in fact it is *different* because the orientation between each fiducial fiber is constant in F3C. For example, consider the case where the Focal Plane expands along with the increase of the temperature. In such a case, the separation of the two fiducial fibers gets larger, whilst the separation in F3C doesn't change at all (see Figure 16).

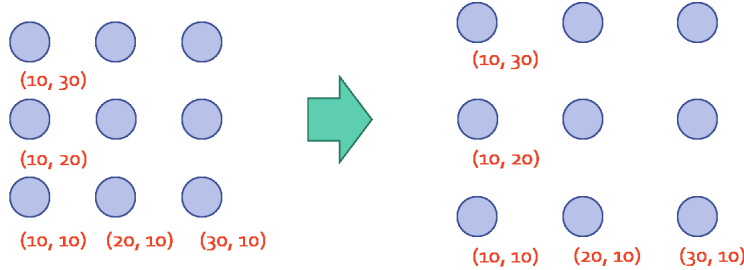


Figure 16: An example of the change in physical metrics of fiducial fibers (blue circles). The fiber positions in F3C are described in red letters.

Another example explaining the difference between F3C and the physical metrics of PFI is the case where one of the fixed fiducial fibers happens to shift from the original position (Figure 17). In such case, the positions of all fixed fiducial fibers are constant again. Measure for this case is described in section 4.4.

Cobra Coordinates The fiber positioner “cobra” is a two-axis motor; θ stage and ϕ stage. The motion of each cobra is controlled by MPS (Movement Planning Software) with the two angles of these stage in degree. We call the two angle as the Cobra Coordinates: $\mathbf{C}_k = (\theta_k[^\circ], \phi_k[^\circ])$, $[k = 1, 2, \dots, 2394]$.

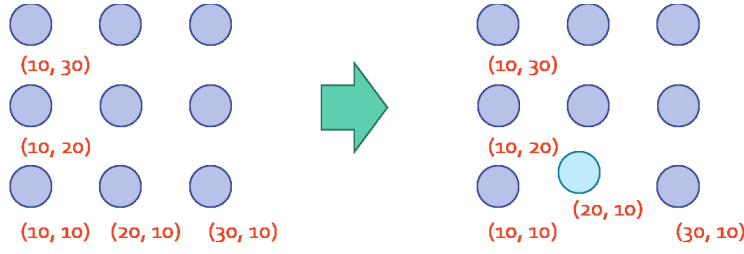


Figure 17: Another example of the change in physical positions of fiducial fibers (blue and light-blue circles). The fiber positions in F3C is described in red letters.

Meteorology Camera System Coordinate (MCSC) The subsystem Meteorology Camera System calculates centroids of back-illuminated fibers. Here, the centroids are determined as the position on CMOS sensor in the unit of pixels, equivalent to MCSC. The centroids of the fibers, therefore, is determined in MCSC as $\mathbf{F}_k = (i_k[\text{pixel}], j_k[\text{pixel}])$.

4.2 Observational Sequence and Definitions of Coordinate Transformations

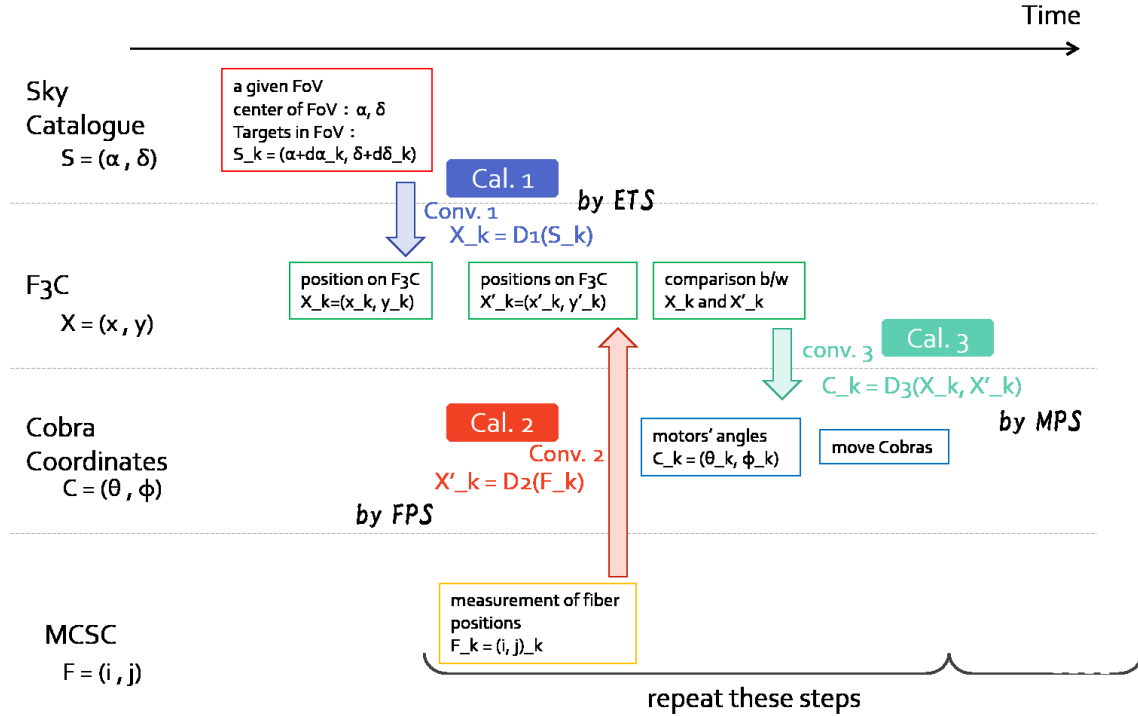


Figure 18: PFS observational sequence and coordinates transformations.

Figure 18 shows observational sequence in particular during positioning fibers, and transformations of the above coordinates. The procedure of fiber positioning is as follows:

1. ETS (Exposure Time Sequencer) calculate the target positions $\mathbf{S}_k = (\Delta\alpha_k[^\circ], \Delta\delta_k[^\circ])$ in the observed field centered at $\mathbf{S} = (\alpha[^\circ], \delta[^\circ])$.
2. ETS transforms the target positions in Sky Catalogue to those in F3C using the telescope parameters at that moment (Az, El, InR, T) . We define this transformation as D_1 . That is,

$$\begin{aligned} \mathbf{S}_k = (\alpha_k[^\circ], \delta_k[^\circ]) &\xrightarrow{D_1} \mathbf{X}_k = (x_k[\text{mm}], y_k[\text{mm}]), \\ \text{or} \quad \mathbf{X}_k &= D_1(\mathbf{S}_k). \end{aligned} \quad (1)$$

In practical, firstly ETS calculates (Az, El, InR) at a given time for the field centered at \mathbf{S} , or receives them from the telescope. Then ETS calculates $(\Delta Az[^\circ], \Delta El[^\circ])$ of each target \mathbf{S}_k , as the offset of the field center. This offset is transformed to the position on F3C using D_1 . That is,

$$\mathbf{S}_k = (\alpha_k[^\circ], \delta_k[^\circ]) \rightarrow (\Delta Az[^\circ], \Delta El[^\circ]) \xrightarrow{D_1} \mathbf{X}_k = (x_k[\text{mm}], y_k[\text{mm}]), \quad (2)$$

3. Take fiber image with MCS and measure fiber positions $\mathbf{F}_k = (i_k[\text{pixel}], j_k[\text{pixel}])$. Then FPS (Fiber Positioning Sequencer) transforms the fiber positions in MCSC to those in F3C. We define this transform as D_2 . That is,

$$\begin{aligned} \mathbf{F}_k = (i_k[\text{pixel}], j_k[\text{pixel}]) &\xrightarrow{D_2} \mathbf{X}'_k = (x'_k[\text{mm}], y'_k[\text{mm}]), \\ \text{or} \quad \mathbf{X}'_k &= D_2(\mathbf{F}_k). \end{aligned} \quad (3)$$

4. MPS calculates Cobra Coordinates to be commanded, by comparing the position of fibers \mathbf{X}'_k and targets \mathbf{X}_k . We call this transformation D_3 .

$$\begin{aligned} \mathbf{X}_k = (x_k[\text{mm}], y_k[\text{mm}]), \mathbf{X}'_k = (x'_k[\text{mm}], y'_k[\text{mm}]) &\xrightarrow{D_3} \mathbf{C}_k = (\theta_k[^\circ], \phi_k[^\circ]), \\ \text{or} \quad \mathbf{C}_k &= D_3(\mathbf{X}_k, \mathbf{X}'_k). \end{aligned} \quad (4)$$

Then move Cobras following the derived angles \mathbf{C}_k .

5. Repeat 3 and 4 until the differential between the target and the fiber positions meets the required accuracy; $\Delta r_k = \sqrt{\Delta x_k^2 + \Delta y_k^2} \leq 10 \text{ [um]}$ (TBC; REQ-SYS-553). FPS judges which fibers should be moved, and sends \mathbf{X}_k and \mathbf{X}'_k to MPS.

Formation of D_1 and D_2 is determined by the Project Office and stored to a designated repository (TBC), while D_3 is determined by JPL. During the commissioning, the transformation functions D_1 , D_2 , and defined and/or calibrated, and calibration for D_3 are executed. In the following section, these process are described.

4.3 Calibrations of Coordinate Transformation during the Commissioning

Before shipping to the Subaru, the physical positions of all fixed fiducial fibers, science fibers and A&G Cameras are measured at a given temperature during the integration of PFI in Taiwan. We shall use the positions of fixed fiducial fibers at that time as their coordinates in F3C.

Sky Catalogue to F3C transformation D_1 : In order to transform target coordinates in Sky Catalogue to those in F3C, we use the WFC as-built model $D'_{1,0}$ as the first step. Using this model, the position on PFI is calculated by Yoko Tanaka from Subaru telescope. We call this distortion map “0th-pass distortion map”. The detail of the “0th-pass distortion map” is under development. Given “0th-pass distortion map” as a polynomial function, the Sky Catalogue – F3C transformation is described as follows:

$$\begin{aligned} \mathbf{X}_k &= D_{1,0}(\mathbf{S}_k) \\ &= \sum P_{l',model} x^l(\mathbf{S}_k) y^{l'}(\mathbf{S}_k) \quad [l, l' = 0, 1, ..], \end{aligned} \quad (5)$$

where $x(\mathbf{S}_k)$, $y(\mathbf{S}_k)$ is the distance from the center of FoV in the x, y direction, respectively, which corresponds to $(\Delta Az[^\circ], \Delta El[^\circ])$ in the section 4.2.

Through the commissioning, we shall optimize these coefficients for PFS by measuring the sky distortion and the sky scale in F3C. This means we shall derive $P_{l',PFS}$, which expresses PFS distortion on the scale of F3C. Note that the distortion map likely varies with respect to the telescope parameters (azimuth Az , elevation El , instrument rotator InR), temperature T and so on. In other words, $P_{l',PFS}$ has the dependency on them; $P_{l',PFS} = P_{l',PFS}(Az., El., InR., T, ...)$ ¹⁵.

At first, in the commissioning phase P-10, the distortion map shall be updated using 6 A&G Cameras attached at the edge FoV. Taking the A&G Camera image of the fields with enough numbers of stars such as star clusters or Galactic plane, we shall measure the positions of targets on A&G CCDs. The scale of of the sky in F3C is also measured in the P-10 phase. The distance A&G camera and AG fiducial fibers in F3C is measured before shipping. We shall measure their distance in sky with raster scan around AG fiducial fibers. When P-10 is succeeded, the distortion map shall be updated as follows.

$$\begin{aligned} \mathbf{X}_k &= D_{1,1}(\mathbf{S}_k) \\ &= \sum P_{l'} x^l(\mathbf{S}_k) y^{l'}(\mathbf{S}_k) \quad [l, l' = 0, 1, 2, ...]. \end{aligned} \quad (6)$$

The updated distortion map $D_{1,1}$ is called “1st-pass distortion map”.

In order to improve $D_{1,1}$, we shall do raster scan at commissioning phase A-3, where “2nd-pass distortion map” $D_{1,2}$ shall be determined. Note that the A-3 sequence is carried out after D_2 and D_3 are determined. $D_{1,2}$ is the final map for transformation from Sky Catalogue to F3C. That is,

$$\begin{aligned} \mathbf{X}_k &= D_{1,2}(\mathbf{S}_k) \\ &= \sum P_{l',PFS}(Az., El., InR., T, ...) x^l(\mathbf{S}_k) y^{l'}(\mathbf{S}_k) \quad [l, l' = 0, 1, 2, ..]. \end{aligned} \quad (7)$$

MCS to F3C transformation D_2 : In the observational sequence, PFS determines parameters of D_2 every time when MCS takes fibers image. The form of D_2 is determined in advance using ZEMAX calculation with WFC as-built model¹⁶.

$$\begin{aligned} \mathbf{X} &= D_2(\mathbf{F}) \\ &= D_2(\mathbf{F}; P_2), \end{aligned} \quad (8)$$

where P_2 is parameters of D_2 .

¹⁵cf. The HSC distortion map ($P_{l,HSC}$) should also have such a dependency, but they use mean map. The dependency of these parameters will be checked.

¹⁶Going on.

During the commissioning (P- 8), we shall refine the positions of fixed fiducial fibers in F3C. In this commissioning sequence, we compare the positions of fixed fiducial fibers in F3C expected by $D_2(\mathbf{F}_k)$ and with those measured before shipment and check their consistency.

During the observations, P_2 is derived to minimize RMS:

$$D_2(\mathbf{F}_l; P_2) := \min(\|\mathbf{X}_l - D_2(\mathbf{F}_l; P_2)\|), \quad (9)$$

where l indicates fixed fiducial fibers ($l = 1, 2, \dots, 97$). Note that we don't adopt the least mean square method because this method weights on error in spacial map. Using derived parameters P_2 , the science fibers position is transformed to those in F3C;

$$\mathbf{X}_k = D_2(\mathbf{F}_k; P_2). \quad (10)$$

Because the positions of fixed fiducial fibers on F3C contains the measurement error in physical position during integrations (~ 10 [um]), function D_2 should take over this error even if the error of \mathbf{F}_k is small (~ 3 [um]). This error finally affects on total error in fiber positioning on targets. We shall optimize $D_{1,1}$ by doing raster scan (commissioning phase A- 3) and minimize this error.

F3C to Cobra transformation D_3 : In order to move fiber positioner “cobra”, we should know the following parameters for each positioner: center position $\mathbf{X}_{c,k} = (x_{c,k}, y_{c,k})$, arm lengths of θ stage $a_{1,k}$ and ϕ stage $a_{2,k}$, minimum positions of θ angle $\theta_{0,k}$ and ϕ angle $\phi_{0,k}$, and maximum positions of θ angle $\theta_{m,k}$ and ϕ angle $\phi_{m,k}$. Note that these parameters are calculated in F3C. In the commissioning phase of A- 1, we shall derive these parameters using back-illuminated science fibers (see A- 1 for details).

4.4 Failure Modes

In this section, the expected failure modes in coordinates transformation are described. (*still updating...*)

Unexpected displacement of the fixed fiducial fibers The coordinate transformation system adopts some kind of function to estimate errors in the result of D_2 , which is sensitive to the displacement of fixed fiducial fibers. If the conversion D_2 has a large error and a proper fixed fiducial fiber is found to have the responsibility for the error, the fiber will be excluded from F3C.

Discrepancy between the positions of fiducial fibers in F3C and those predicted by D_2 In the commissioning process P- 8, we measure the positions of fixed fiducial fibers in F3C by converting with D_2 , and compare with the original position in F3C. If there is large discrepancy between them, we can't transform from MCSC to F3C. One possibility of this error is that D_2 is not suitable, so that we should improve its form.

A Effect of the Moonlight on the PFS Commissioning

TBW.

Effect on

1. limiting magnitude of guide star.
2. number of bright star for astrometry and raster scan.
3. WFC alignment.

B Hexapod Operation

The goal of Hexapod operation is to keep the x/y alignment, focus (z), and tilt of the WFC+HSC assembly with respect to the primary mirror. The Hexapod operation can depend on EL following a look-up table (see page 19). The z adjustment can also account for the effect depending on telescope truss temperature (Ttruss) via a simple model (details of the model TBC). The look-up table comes from a result of Mirror Analysis (MA) with HSC in POpt2 (see page 47), but the Hexapod operation can be optimized for PFS (see page 46). The instructions in the look-up table and those from the model with Ttruss can be imperfect, so probably an offset will need to be given based on a focusing operation from time to time during a night.

C Optimizing Hexapod Operation

A significant part of the Hexapod operation is determined by the investigations such as MA with HSC, so the result may not be optimal for PFS. However PFS can collect information to optimize it using the AG camera images: Image quality, focal plane tilt z & tilt Asymmetry in a defocused star image or coma features in a focused star image x/y (feasibility is under investigation, see a separate report) Initially PFS will have a look-up table copied from HSC, but this will be a different entity, so according to the information from the investigation using PFS, the PFS's look-up table can be edited to modify the Hexapod operation. It is also possible to apply offsets from a different command path.

D Mirror Analysis

PFS doesn't have capability of executing Mirror Analysis (MA). According to the document describing the mirror analysis and pointing analysis for PFS (TM-N57208), PFS uses the MA data of HSC. PFS uses the same coefficients of primary mirror as those for HSC, while adds differential parameter for coefficients of secondary mirror. When HSC updates the MA, operators can decide whether they also update the coefficients for PFS.

The best x/y/z position of WFC+HSC assembly with respect to the primary mirror is investigated by observing a bright star using a Shack-Hartmann system onboard HSC. The MA is performed at several EL to have the x/y/z positions as a function of EL. The operation of actuators for primary mirror support is also optimized as a function of EL via MA. The MA is performed only at the field center, so cannot investigate focal plane tilt. Instead HSC itself is used to check the focal plane by looking at stellar images across the field of view. This determines the optimal tilt operation of Hexapod. The optimization of x/y/z and tilt can be an iterative process: Once the

tilt operation is determined, the MA is performed again to see if the best x/y/z position needs to be tweaked, and one may need to come back to tilt optimization.

E Abbreviation

General and Telescope:

Az: Azimuth

EL: Elevations

F3C: Fixed Fiducial Fibers Coordinate

IR4: IR-side forth floor in the Dome (TUE-IR floor in Subaru term)

ROA: Rotation Angle

TPA: Telescope Pointing Analysis

PFI / Popt2:

PFI: Prime Focal Instrument

AGC: Acquisition and Guidance Camera

AGCC: Acquisition and Guidance Camera Controller

COB: Cobra Optical Bench

WFC: Wide Field Corrector

MCS:

MCS: Meteorology Camera System

SpS:

SCR: Spectrograph Clean Room

SM: Spectrograph Module

SpS: Spectrograph Subsystem

Software:

DRP: Data Reduction Pipeline

ETS: Exposure Time Sequencer

FPS: Fiber Positioning Sequencer

MHS: Messaging Hub System

MPS: Movement Planning Software

PFICS: Prime Focus Instrument Control System

Change log.

- ver. 1: October 7, 2015
— Released for informal meeting in Princeton.
- ver. 2: March 15, 2016
- ver. 3: May 10, 2016 — Released for discussion with Subaru
- ver. 4: October 5, 2016
— Updates from informal meeting, and software collaboration meeting.
- ver. 5: January 7, 2017
— Update schedules of runs following the latest to-level schedule (as of Dec. 2016)
- ver. 6: April 15, 2017
— Update schedules of runs following discussion with Subaru in Jan. 2017.