

## Registering Illumina Software

### What is Software Registration?

Thank you for purchasing Illumina Software. Illumina Software is made available for your use by completing a registration process. The registration process “activates” the software and enables you to assign access to specific persons who will use it. The process has four steps:

1. Click a link in an email provided by Illumina.
2. Access the Illumina Software Registration Portal.
3. Identify a software administrator.
4. Configure software settings.

### Information You Need to Register Software

To register your subscription or software consumable (e.g. iCredits) you will need the following:

1. An Illumina order confirmation or registration reminder email.
2. Email of a person acting as software administrator (See: [“how to choose a software administrator”](#)).
3. Optional: Names of existing Illumina Software workgroups or domains.

## Step-By-Step: How-to Register Illumina Software

### Step 1: Click a Link in an Email Provided by Illumina

Below are examples of Illumina order confirmation and registration reminder emails that you should have received. Clicking on the button provided in these messages will bring you to the Illumina Software login page in Step 2.



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*Fig. 1. – Examples of Illumina order confirmation and registration reminder emails.*

If you do not have an Illumina order confirmation or registration email, then please contact Customer Care at [customercare@illumina.com](mailto:customercare@illumina.com). For additional contact information, click [here](#).

## Step 2: Access the Illumina Software Registration Portal

### NOTE: BaseSpace Enterprise & ICA Customers

The Software Registration Portal requires the use of a **different Illumina account** than the one used with BSSH Enterprise/ICA data and assets.

If you have not used the Registration Portal before, then select the link labeled **“Don’t have an account”** to create an Illumina login for the Registration Portal.

If you already have a login for Illumina Software, enter those credentials into the login screen and proceed to step 3 below.

If you do not have a login, then select the link labeled **“Don’t have an account”** to create an Illumina login.

You should choose this option if this is the first time you have registered through the Software Registration Portal.

### IMPORTANT!

The use of an institutional email with the Registration Portal is critical to retaining access to your data.

Customers have reported using non-institutional email addresses (Gmail, yahoo, etc.) has led to them losing access to their account because their institution does not have access to these types of email accounts.

Please use an email from your institution’s domain (GeneOrg.com) with the Registration Portal.

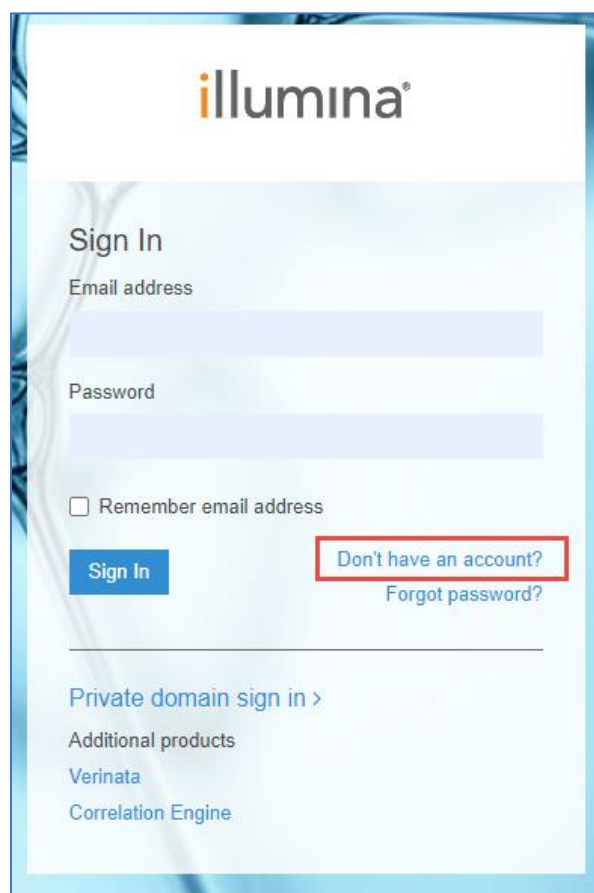


Fig. 2. – Public Domain login page

## Step 3 - Identify a Software Administrator

Once you have logged in, you will see the software registration page. This page is where the software is configured for your use. Here you assign access to a specific person who will be the software administrator.

The process contains two steps:

1. Role Verification: Confirms of your role in software registration.
2. Product Configuration: A list of Software items your company has ordered.

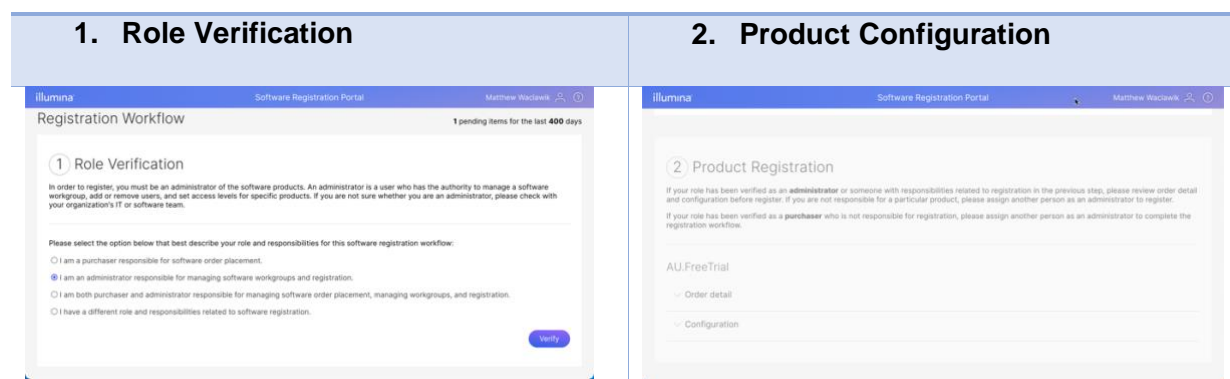


Fig. 3. – The Software Registration Page

### Step 3a. – Role Verification

This is the step where you identify your role in registering software and identify a person to be software administrator. You will need the email of the person who will serve as software administrator.

An administrator is the person who leads or organizes a software workgroup. A software administrator can add or remove users, provide access to specific products, and view all software usage data.

If you are not sure of the email that should be used for software admin, enter the email of the person who requested the software or refer to the “Choosing a Software Administrator” section below.

There are four roles available to choose from. These identify you as a purchaser, an admin, both, or neither. Select your role in your organization and press the “verify” button.

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Please select the option below that best describe your role and responsibilities for this software registration workflow:

☐ I am a purchaser responsible for software order placement.

☒ I am an administrator responsible for managing software workgroups and registration.

☐ I am both purchaser and administrator responsible for managing software order placement, managing workgroups, and registration.

☐ I have a different role and responsibilities related to software registration.

Verify

Fig. 4. – Role verification

Here are the software actions and the system notifications that are assigned to a user when they select a role and presses the “verify” button.

Selected Role	Software Actions	System Notifications
<b>Software Purchaser</b>	<ul style="list-style-type: none"><li>Enables user to invite another person to be administrator.</li></ul>	<ul style="list-style-type: none"><li>Subscription renewal reminders</li></ul>
<b>Software Administrator</b>	<ul style="list-style-type: none"><li>Identifies user as software administrator.</li><li>Enables user to configure the software.</li></ul>	<ul style="list-style-type: none"><li>Low software consumable levels</li></ul>
<b>Purchaser &amp; Administrator</b>	<ul style="list-style-type: none"><li>Identifies user as software administrator.</li><li>Enables user to configure the software.</li></ul>	<ul style="list-style-type: none"><li>Subscription renewal reminders</li><li>Low software consumable levels</li></ul>
<b>Different Software Role</b>	<ul style="list-style-type: none"><li>Enables user to invite another person to be administrator</li></ul>	

### Step 3b. – Assign another person as an administrator.

You should use the link labeled “[Assign another person](#)” to invite someone else to become software administrator if:

1. Your role is **purchaser** or a **different role** related to software.
2. You were sent an Illumina registration email incorrectly.
3. Someone else on your team should be acting as software administrator.

The images below (see *fig.5-6*) show the link labeled “[Assign another person](#)” as an administrator below each order awaiting registration.

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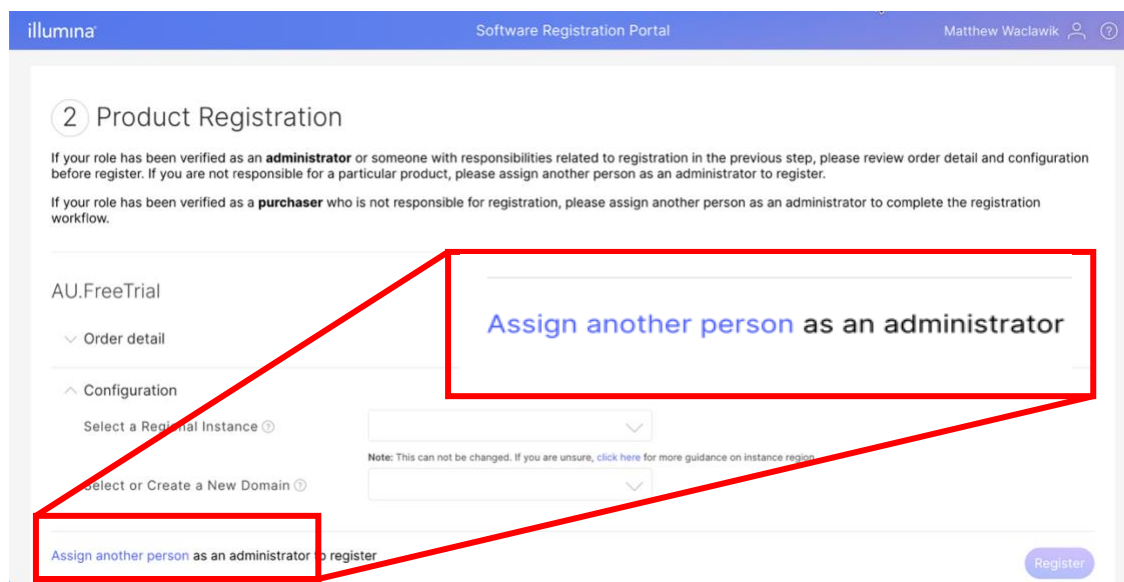


Fig 5. - The link labeled “Assign another person” as an administrator.

The modal window is titled 'Assign Administrator'. It contains a text input field for 'Enter the email address of administrator' with a placeholder 'i.e user@company.com'. Below the input field is a checkbox labeled 'Assign this person to register all pending orders'. At the bottom right are two buttons: 'Cancel' and 'Assign'.

Fig 6. - Modal window that is displayed when the link labeled “assign another person” is pressed.

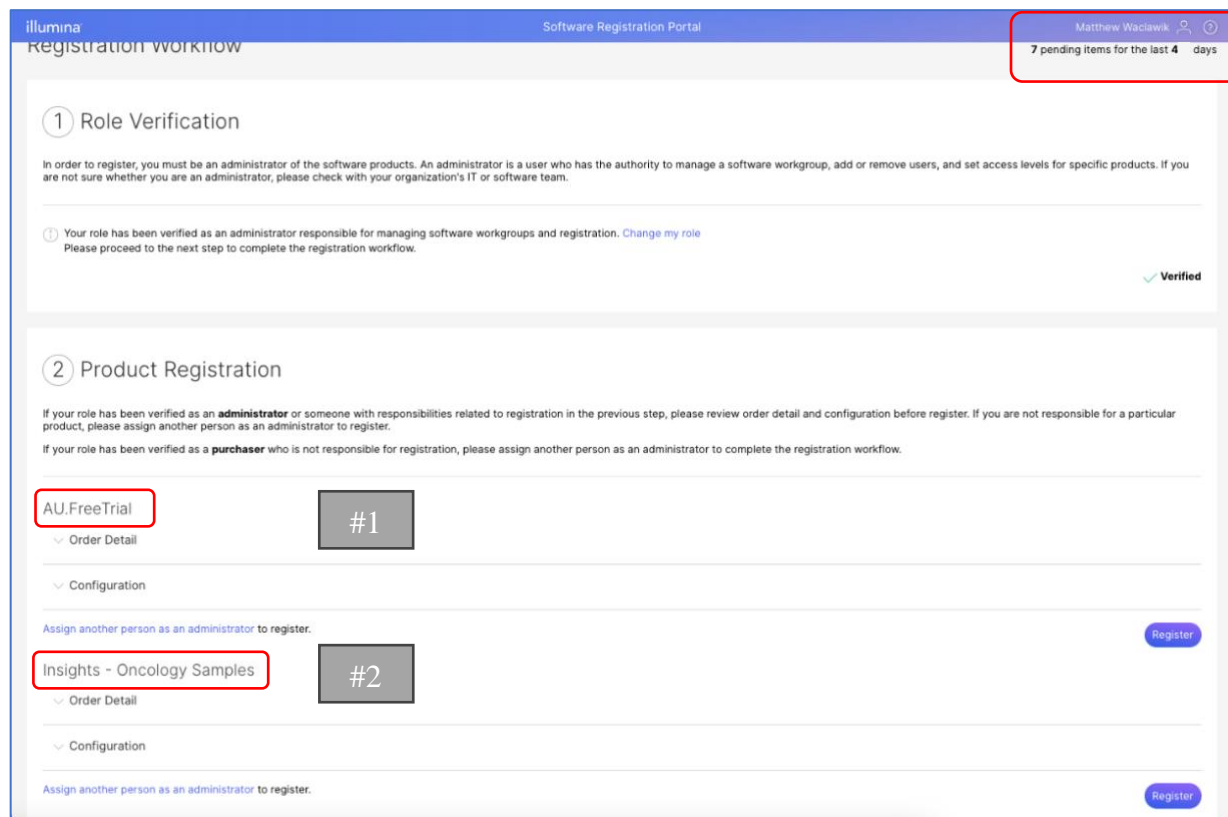
When you click the “Assign another person” link, a modal window is displayed where you can enter the email address of the person you wish to invite. Press the “Assign” button to send an email to that person containing links to the Software Registration portal.

When that person logs into the Software Registration portal and completes the software configuration steps below, the software is available for use.

## Step 4 – Configure Software Settings

### Step 4a. – View Products Pending Registration

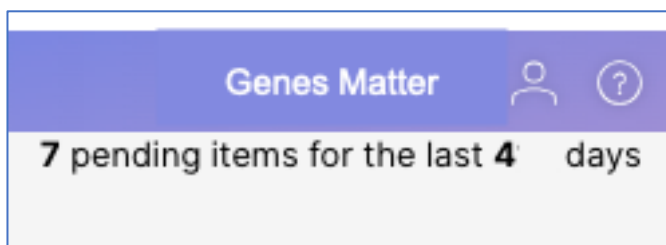
The person identified as software administrator may view and register software orders pending registration (*Fig. 7*).



*Fig. 7. – Product Registration page showing seven products pending registration*

**NOTE:** **Two** products are visible in the screen above. The five remaining products appear lower on the page.

The total number of products pending registration is noted in the upper right-hand corner of the page.



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### Step 4b. – Products Pending Registration Details

Each product listed contains two types of information for the user to select or review.

- **Order detail** information includes the dates on which the order was placed, the order, number, and the product that was ordered. This data in this section is not editable.

The screenshot shows a section titled "ICA Free Trial" with a sub-header "Order Detail". Below this, there is a table with three columns and three rows of information.

Order Date July 23rd, 2023	Illumina Contract Number test3	Illumina Contract Line Number 10
Product Number 20044874	Product Quantity 1	Purchaser Email mwacławik@illumina.com
Purchased For Dartmouth Medical School Core	Purchase Order Number 8000552203	Subscription Term 12

Fig. 8. – Order Details

- **Configuration Details** are software settings. Examples are AWS region selection or selecting/creating an enterprise domain that the software instance will be associated with.

The screenshot shows a section titled "Configuration" with two dropdown menus. The first dropdown is labeled "Select a Regional Instance" and the second is labeled "Select or Create a New Domain". Below the first dropdown, there is a note: "Note: This can not be changed. If you are unsure, [click here](#) for more guidance on instance region". At the bottom of the section, there is a link: "Assign another person as an administrator to register." and a "Register" button.

Fig. 9. – Configuration Details

Examples of configuration details for specific illumina software are shown below.



### Configuration Examples: How to Configure Illumina Software

There are two types of software that use the registration process:

1. Software Subscriptions
  - a. BaseSpace Professional Subscriptions
  - b. ICA Professional, ICA Enterprise, Illumina Connected Insights Subscriptions
2. Software Consumables
  - a. Examples: iCredits, Genome Equivalent Samples, Illumina Complete Long Reads cloud analysis, Consumption billing

The **Configuration Details** for different types of software are slightly different. The sections below contain three examples that describe how to configure each software type.

NOTE: It is important to *complete the registrations for subscriptions FIRST* before registering software consumables. Software consumables require an active subscription for them to be used.

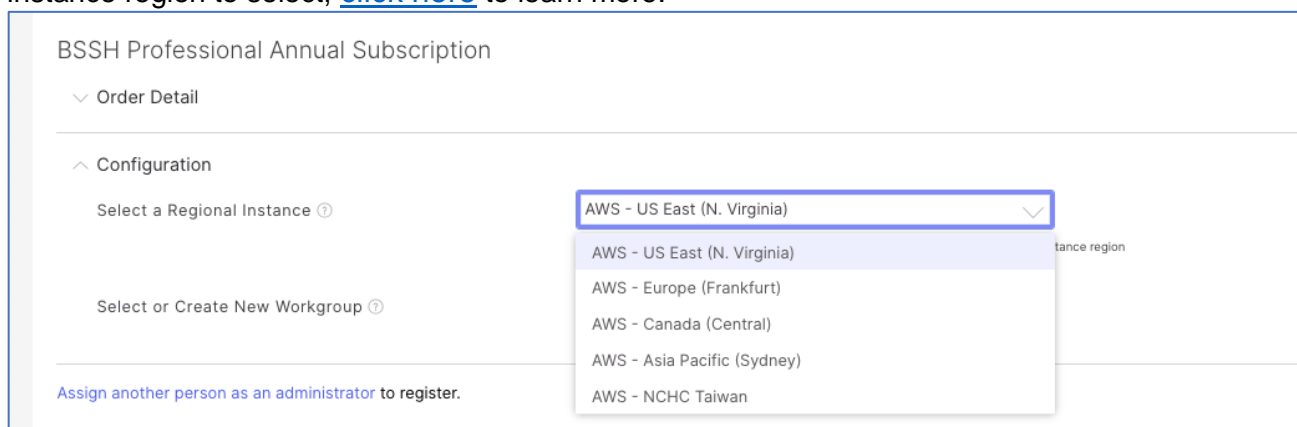
### Example 1: Configuring BaseSpace Professional Subscriptions

There are two settings to configure for this software subscription:

1. Select the Instance Region for Your Subscription.
2. Select a Professional Workgroup or Create a New Professional Workgroup.

#### Setting1 - Select the Instance Region for Your Subscription.

This selects the AWS Region where your software will be installed and run. Most administrators select a region that is close to their geographic location. If you are unsure what instance region to select, [click here](#) to learn more.



The screenshot shows the 'BSSH Professional Annual Subscription' configuration page. The 'Configuration' section is expanded, showing two options: 'Select a Regional Instance' and 'Select or Create New Workgroup'. The 'Select a Regional Instance' dropdown menu is open, displaying a list of AWS regions: AWS - US East (N. Virginia), AWS - US East (N. Virginia), AWS - Europe (Frankfurt), AWS - Canada (Central), AWS - Asia Pacific (Sydney), and AWS - NCHC Taiwan. The first option, 'AWS - US East (N. Virginia)', is highlighted. Below the dropdown, there is a link that says 'Assign another person as an administrator to register.'

Fig. 10 – Selecting an AWS Region.

### Setting2 - Select or Create a Professional Workgroup

#### Q: Why do I have to choose a workgroup?

A: Workgroups are used by some Illumina Software to control access to different customer's data and assets.

#### New and Existing Workgroups

If your login has access to existing workgroups, these are listed on the page for you to choose from. Selecting an existing workgroup will not change the user access on the account. If you do not have existing workgroups, then select the **create new** menu item and type in the name you prefer (*Fig. 11-12*). Remember to select the name of the professional workgroup you created so that it appears in your completed configuration (*Fig. 13*).

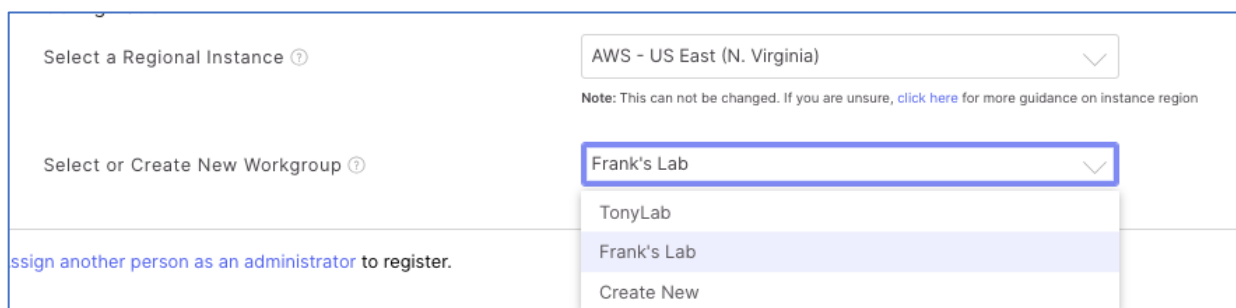
The screenshot shows a web interface with two dropdown menus. The first menu, labeled 'Select a Regional Instance', is set to 'AWS - US East (N. Virginia)'. Below it is a note: 'Note: This can not be changed. If you are unsure, click here for more guidance on instance region'. The second menu, labeled 'Select or Create New Workgroup', is open, showing a list of options: 'Frank's Lab', 'TonyLab', 'Frank's Lab', and 'Create New'. The 'Create New' option is highlighted. To the left of the second menu, there is a link that says 'assign another person as an administrator to register.'

Fig.11. – Selecting or Creating a Professional Workgroup.

If the value “**Create New**” is selected from the dropdown menu, then a modal window is displayed which enables the user to create a new workgroup name.

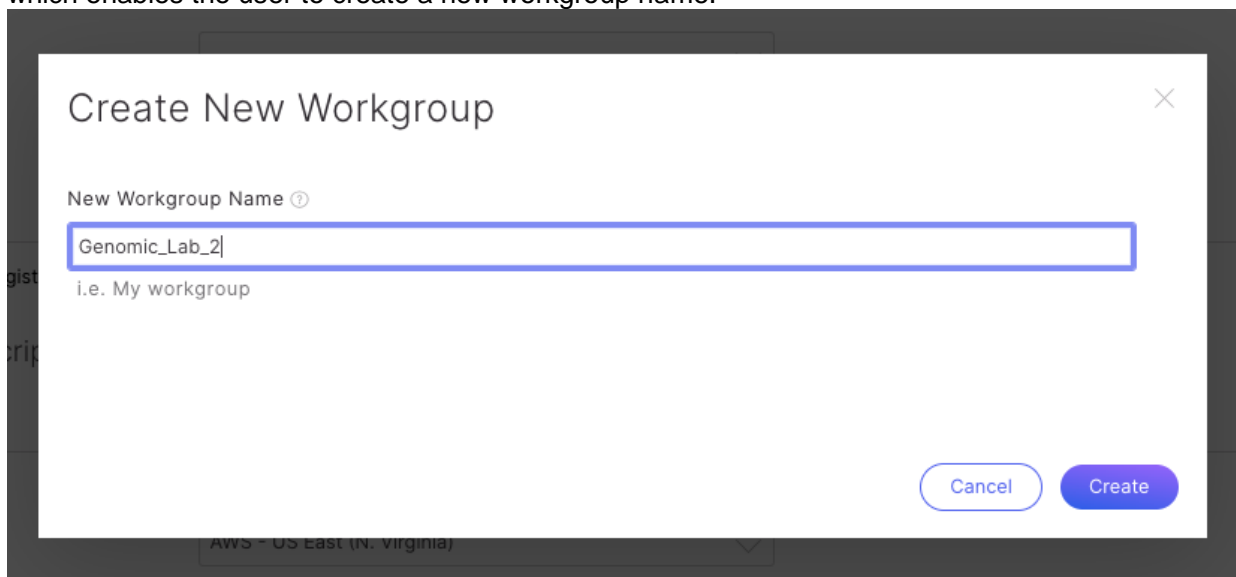
The screenshot shows a modal window titled 'Create New Workgroup'. It has a close button (X) in the top right corner. Inside the modal, there is a label 'New Workgroup Name' followed by a text input field containing 'Genomic\_Lab\_2'. Below the input field, there is a hint text 'i.e. My workgroup'. At the bottom right of the modal, there are two buttons: 'Cancel' and 'Create'.

Fig.12. – Modal window displayed when user selects **Create New** Professional Workgroup.

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BSSH Professional Annual Subscription

▼ Order Detail

^ Configuration

Select a Regional Instance ⓘ AWS - US East (N. Virginia) ▼

Note: This can not be changed. If you are unsure, [click here](#) for more guidance on instance region

Select or Create New Workgroup ⓘ Genomice\_Lab\_2 ▼

[Assign another person as an administrator to register.](#)

[Register](#)

*Fig.13. – Completed Configuration.*

### Press the Register Button

Once the configuration settings have been selected, pressing the register button at the bottom of the order item makes that software available for use. Within 15-30 minutes you will also receive a welcome notification to confirm the account details.

### Example 2: Configuring Illumina Connected Analytics (ICA) Subscriptions

There are two settings to configure for this subscription:

1. Select the Instance Region.
2. Select or Create a Domain.

ICA Annual Subscription

Order Detail

Configuration

Select a Regional Instance ⓘ

Note: This can not be changed. If you are unsure, [click here](#) for more guidance on instance region

Select or Create a New Domain ⓘ

[Assign another person as an administrator](#) to register.

Fig. 14. - The ICA software subscription order.

#### Setting 1 - Select the Instance Region

This selects the AWS Region where your software will be installed and run. Most administrators select a region that is close to their geographic location. If you are unsure what instance region to select, [click here](#) to learn more.

ICA Annual Subscription

Order Detail

Configuration

Select a Regional Instance ⓘ

AWS - US East (N. Virginia)

AWS - Asia Pacific (Sydney)

AWS - Europe (Frankfurt)

AWS - NCHC Taiwan

Select or Create a New Domain ⓘ

[Assign another person as an administrator](#) to register.

Fig. 15. - The Choose Instance Region dialog box.

## Setting 2 - Select or Create a Domain

### Q: Why do I have to choose a domain?

A: Domains are used by some Illumina Software to control access to different customer's data and assets. Examples of a domain are "dcehealth.Illumina.com" or "coreseqinc.Illumina.com". Choosing a domain is required when registering Base Space Enterprise, Illumina Connected Analytics, or Cohorts subscriptions.

### Existing Domains

If your login has access to existing domains, these are listed on the page for you to choose from. Selecting an existing domain will not change the user access on the account.

### Create a New Domain

Note: When creating a new domain, you will be considered the administrator for that domain.

Enter data for the new domain:

- **Domain Name:** Nickname that is easy to identify for the domain to be created. (ex. "My Company Name's Domain")
- **Login URL:** URL used to log into your account. For example, "yourcompanyname.Illumina.com".
- **Allowed Email:** Emails for individual users who can access the software. If the user is creating a net new enterprise domain, then their email will be added automatically to the list of emails.
- **Allowed Domain:** All allowed users should belong to this domain (ex. @company.com).
- Note: The list of the allowed emails and domains can be updated later once an administrator is logged into the account.

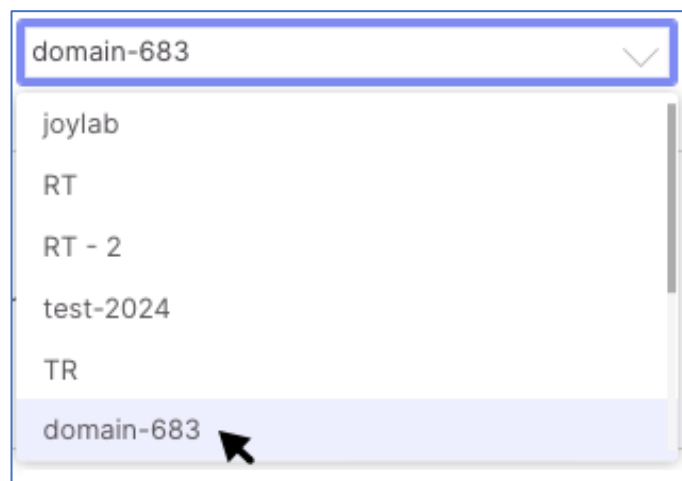


Fig. 16. – Selecting an existing domain.

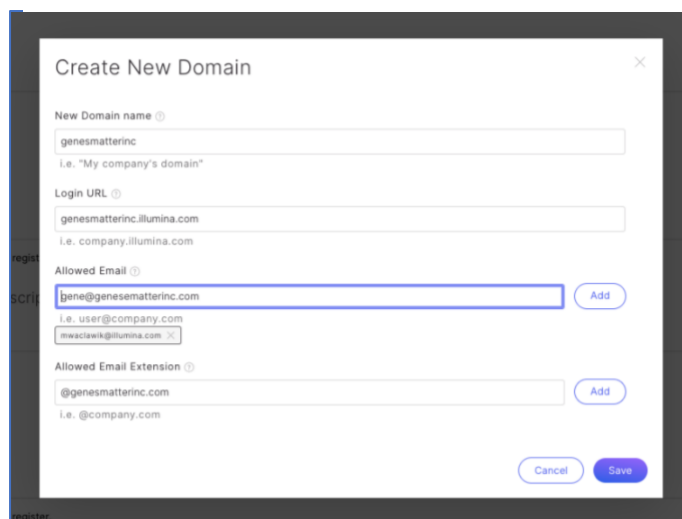


Fig. 17. – Adding new domain fields.

NOTE: The Login URL field only allows lowercase alphanumeric characters, dash (-), max 63 characters, and no spaces.



### Press the Register Button

Pressing the register button at the bottom of an order item makes that software available for use. Within 15-30 minutes you receive a welcome notification to confirm the account details.

### Example 3: Configuring Software Consumables (iCredits or Sample Analyses)

Once a subscription has been registered, then you can select software consumables and add them to your subscription. Examples of software consumables are iCredits or Sample Analyses.

- **iCredits** are the units that Illumina customers purchase to pay for cloud compute and storage resources they consume in Illumina Software
- **Sample Analyses** are the units of software sold with Illumina Product that entitle a customer to perform genomic analyses in Illumina Software. Examples of this are Illumina Complete Long Read sequencing kits or the Illumina Connected Insights service that provides cloud-based tertiary analysis.

There is only one setting to configure for this software consumables:

#### Setting1 - Select a Professional Workgroup or Enterprise Domain

##### Q: Why do I have to choose a workgroup or domain?

A: Workgroups and domains are used by Illumina Software to control access to different customer's data and assets.

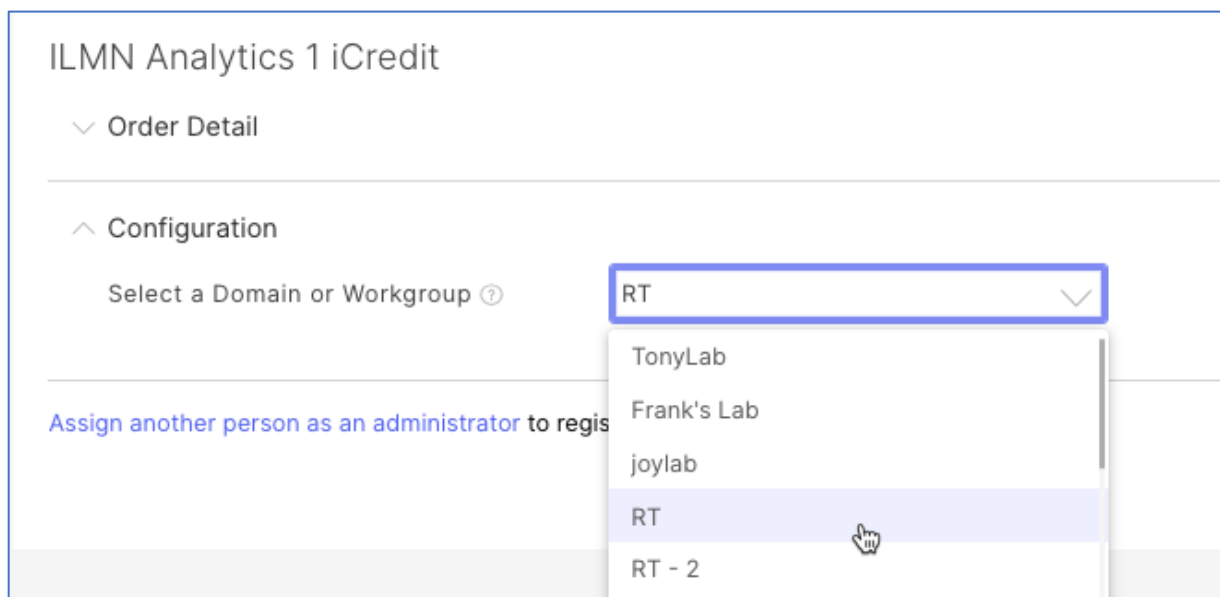


Fig.18. - Selecting or Domain or Workgroup.

#### Press the Register Button

Once the configuration settings have been selected, pressing the register button at the bottom of an order item makes that software available for use. Within 15-30 minutes you will also receive a welcome notification to confirm the account details.

## Choosing a Software Administrator (Admin.)

### Q: How Do I Choose a Software Administrator?

A: The admin email should be for a person or group that knows enough about your team's use of the software to provide team members with access to the Illumina Software product(s) when requested.

NOTE: Software administration does NOT require any advanced technical or computer skills.

### Q: What Are the Software Administrator Features?

A: The software administration features of Illumina Software are quite simple. The administrator login can:

1. Invite, remove, and manage user access to Illumina Software products
2. Organize users into "workgroups" so they can collaborate on the platform
3. Limit user access to specified email addresses
4. Limit user access to specified domains (ex: lucyhealthcorp.com)
5. View the Illumina Software usage reports

### Tips for choosing an administrator email address

1. Use the same email to register apps together if they are purchased as a solution. For example:
  - Illumina Connected Analytics and Cohorts need to be registered with the same domain and administrator email.
  - Illumina Connected Insights can only be enabled if registered with the same domain and administrator email with Illumina Connected Analytics.
2. The email you use can be an email to be shared by an informatics team, for example [sequencingcore@illumina.com](mailto:sequencingcore@illumina.com).
3. You may use the email of the person who requested the software be purchased.

The administrator email address can be changed later, if necessary. To do so, contact Illumina Technical Support.

## Troubleshooting & Frequently Asked Questions

### Q: What types of Illumina Software Need Registration?

A: There are two types of software that use the registration process to activate:

1. Software Subscriptions
  - a. BaseSpace Professional Subscriptions
  - b. ICA Professional, ICA Enterprise, Illumina Connected Insights Subscriptions
2. Software Consumables
  - a. Examples: iCredits, Genome Equivalent Samples, Illumina Complete Long Reads cloud analysis, Consumption billing

### Q: Why is selecting professional workgroups or enterprise domains required?

A: Workgroups and Domains are used by some Illumina Software to control access to different customer's data and assets. Examples of a domain are dcehealth.Illumina.com or coreseqinc.Illumina.com. Choosing a domain is required when registering Base Space Enterprise, ICA, or Cohorts Subscriptions. Here is a description of how workgroups and domains are used by Illumina Software.

Subscription Type	Location for iCredits	Description
BaseSpace Sequence Hub Pro	Professional Workgroup	BaseSpace Pro subscriptions use professional workgroups to control access to software consumables.
Illumina Connected Analytics (ICA)	Enterprise Domain	ICA subscriptions use enterprise domains to control access to software consumables.

### Q: Why do I not see my orders listed on the Order Registration page?

A: If you arrive at the Software Registration Portal page and see no orders listed, this means that the orders have not been associated with your email address.

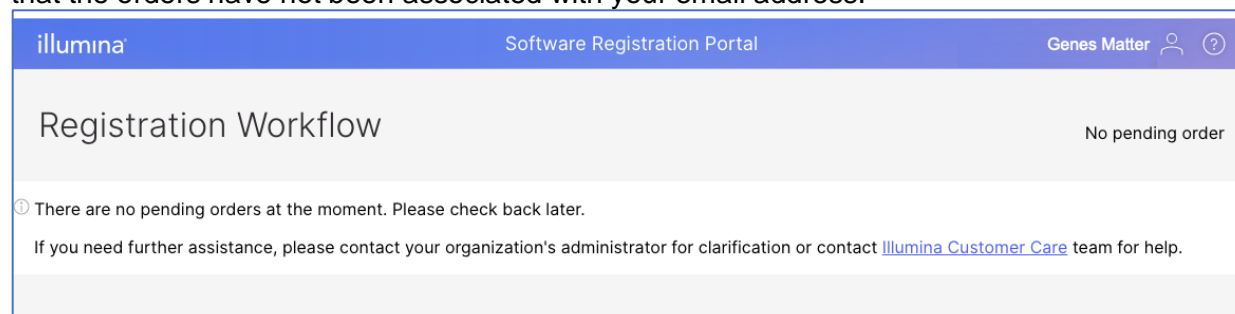


Fig. 19. - Registration Portal with no orders.



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You have most likely been forwarded an Illumina registration email and clicked on the link to get to the registration portal. The portal does not recognize your email because the person that forwarded the message did not request that your email be able to register new products.

The solution for this is to ask the person who forwarded the email to you, to log into the registration portal and add your email address using the “Add” button.

If this does not resolve the issue or you are unable to locate your order after logging in, please contact [customercare@illumina.com](mailto:customercare@illumina.com) or click on the [FAQ](#) link on the Registration Page.

### **Q: I completed my registration, why cannot I access my software?**

A: After registration is completed, a notification will be sent to your email address to confirm the account details. NOTE: Provisioning of your software in the cloud can take up to 15-30 minutes after registration is complete. When provisioning is completed, you will receive a welcome notification that includes getting started information about your subscription.