# Registration Data Request Service (RDRS) Naming Services portal (NSp) User Guide for Registrars

Version 1.1

ICANN Engineering & IT 7 November 2023



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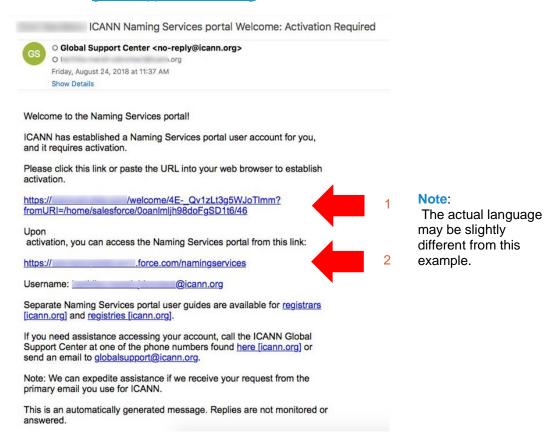
# 1 Logging into the RDRS Naming Services portal

If you already have a Naming Services portal account, skip to <u>Section 2 Accessing the RDRS Persona.</u>

## 1.1 Initial Login Setup

Before you begin, locate the welcome email in your inbox titled "Get Started with ICANN's Naming Services portal." To ensure this email does not go to your spam folder, add <a href="mailto:no-reply@icann.org">no-reply@icann.org</a> to your safe senders list.

The activation email expires within seven days. If your activation email is older than seven days, send an email to globalsupport@icann.org to receive another activation email.



- 1. Click the embedded activation link in the email to set up your password with multi-factor authentication.
- Bookmark http://portal.icann.org/ to log directly into the portal.

# 1.2 Set Up Multi-Factor Authentication

After you have clicked the link in step 1.1 above, set up multi-factor authentication on your smartphone.

- 1. On your computer, create a new password, select a forgotten password question, and choose a security image. When finished, click **Create My Account**.
- 2. On the next screen, click **Setup** under the desired method of multi-factor authentication to set it up. You can choose from three options:
  - Google Authenticator
  - Okta Verify
  - Voice call authentication (from the Naming Services portal)
- 3. Choose the appropriate platform matching your device (Android, Apple, or Blackberry) and click **Next**.
- 4. On your smartphone: If using Google Authenticator or Okta Verify, download the application from your phone's app store, open it, and use the scan barcode function to scan the barcode and receive the verification code.

**Note**: If you choose voice call authentication, you will receive a phone call with a code.

- 5. On your computer, enter the verification code from the application to complete setup.
- 6. Once you have completed the setup process, you will be directed to the portal where a popup window will appear with the Naming Services portal's Terms of Use. You must agree to these terms to use the portal.

# 1.3 Sign In

- 1. On your computer, open a browser and navigate to https://portal.icann.org.
- 2. Enter your username and password and click **Sign In**.
- 3. Enter the code from the multi-factor authentication application (Google Authenticator or Okta Verify) on your smartphone. If you choose voice call authentication, enter the code from the phone call. This is required every time you log in.

# 1.4 Basic RDRS Naming Services portal Terminology

The following terms are used in the RDRS Naming Services portal.

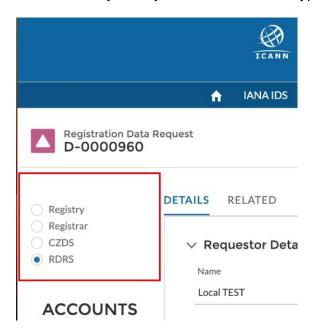
Term	Description
Account	Company or organization, such as a registry or registrar.
Contact	The individual associated with one or more accounts.
Credentialed	A person that has Naming Services portal login credentials issued by ICANN
User or User	for one or multiple accounts.
	To add a new user, email globalsupport@icann.org.
List View	A list of records within a tab filtered by common record type (e.g., Approved,
	Pending).

Role	A set of responsibilities assigned to a contact or user for a registrar (e.g., Billing
	Contact, Corporate Contact, or Registrar Primary Contact).
Subtab	The navigation groups under a main tab or within a case.
Tab	Used to navigate between objects in the Naming Services portal (e.g. Home,
	IANA IDs, Registration Data Request).

# 2 Persona (Registry/Registrar/CZDS/RDRS) Switcher

If your user has registry, registrar, CZDS, and/or RDRS account privileges, the upper left corner of the screen contains radio buttons that allow you to switch between functionalities without logging in and out. The displayed accounts and available functionalities depend on the selected persona. For example, when the registrar persona is selected, you will not see any registry accounts and cannot perform registry actions.

You will not see any radio buttons if you only have access to one type of account.



For detailed instructions on how to use the registrar portal, visit: https://www.icann.org/resources/pages/nsp-registrars-2018-03-26-en.

# 3 User Account Management

Clicking on the username drop-down in the upper right corner displays five options: **Home**, **My Info**, **Document Library**, **Support**, and **Logout**.

The **My Info** page lists your primary email and phone number. You can also view any related email addresses and accounts.

#### **3.1** Home

Directs you to the Naming Services portal home page for the persona you are logged in as. For RDRS, it will be the list of pending RDRS requests.

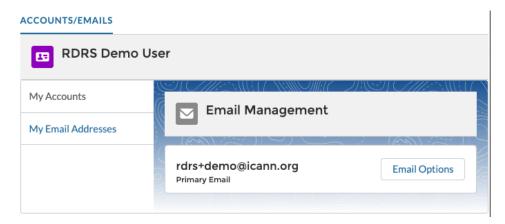
# 3.2 My Info

Lists your primary email and phone numbers. You can also view any related email addresses and accounts.

- Time Zone Displays the user's current time zone setting and provides options to update.
- My Accounts Displays all accounts associated with the user. The checked boxes indicate what accounts the user can access.



• **My Email Addresses** – Lists the different email addresses tied to an account. Click **Email Options** to see all accounts linked to one email address.



**Note:** You cannot update the information in **My Accounts** or **My Email Addresses**. To make any changes, email <a href="mailto:globalsupport@icann.org">globalsupport@icann.org</a>.

# 3.3 Document Library

View and download documents common to all credentialed users (e.g., the Naming Services portal's User Guide for Registrars, Frequently Asked Questions, etc.) Select the appropriate list view to see all documents relevant to that account (e.g., registrar documentation is under the **All Registrars** list view).

## 3.4 Support

Provides access to ICANN Global Support telephone numbers and the option to change your account settings (password, type of multi-factor authentication, etc.)

## 3.5 Logout

Choose this option when you are finished with your session to securely exit the portal.

## 4 Email Notifications

The system can notify users with RDRS account privileges of registration data requests received for domains/IANA IDs under their registrar accounts.

Users can opt in/out to these notifications by contacting <a href="mailto:globalsupport@icann.org">globalsupport@icann.org</a>.

Note: Opting in/out will include/exclude all RDRS email notifications for requests to registrars. Registrars using PGP as their delivery method for request information will continue receiving notifications if they decide to opt in.

# 4.1 Opting in for Notifications

Registrars can contact ICANN Global Support (<u>globalsupport@icann.org</u>) to update RDRS notification preferences. Note: This will only apply to daily activity notifications for registrars who have not opted in for PGP encrypted delivery.

## 4.2 Daily Activity

Notifications are sent in a single email with a summary listing the details of all requests received or canceled on the previous day (UTC) that require the registrar's review to process.

# 4.3 Monthly Aging Report

All participating registrars will receive a notification at the beginning of each month if they have RDRS requests that have been pending for more than 30 days.

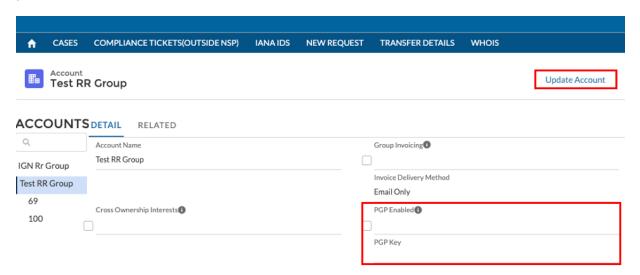
# 4.4 Expedited Review Requests

If requestors have marked their request as "expedited review request" indicating their belief that the nature of the request requires faster processing, registrars will receive notifications for submissions as soon as it's submitted. Note: This does not apply to registrars who have opted-in for PGP encryption (below) as they will receive an email for each request submitted regardless of the priority. When receiving requests marked as "expedited review request," registrars are asked, to the extent possible, to prioritize the requests for expedited handling. If the registrar determines that the "expedited" classification is not appropriate for the request, the registrar may reclassify the request in the system by clicking the "change priority" button and providing the rationale for doing so.

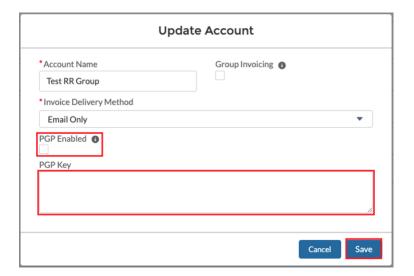
# 4.5 Encryption and PGP Email Notifications

Registrars can opt-in to receive PGP encrypted messages for all RDRS requests submitted for any of the domains/IANA IDs they manage.

To opt-in, from the registrar 'Persona' in the NSp, you can navigate to your **Registrar Group** settings (where you currently maintain Invoice Delivery and Group Invoicing preferences) by clicking on the **Registrar Group** name on the home screen. From there, in the top right corner, you can click on 'Update Account'.



You will be presented with a screen where you can select 'PGP Enabled' and enter the PGP Key to receive encrypted emails for all RDRS requests submitted for IANA IDs in your group.



# 4.5.1 Request Details

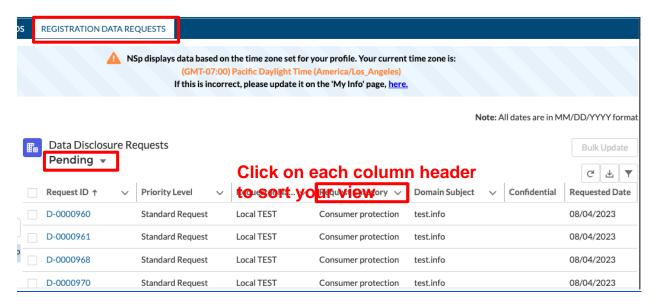
Registrars that are enrolled in PGP delivery will receive an email per request submitted for the IANA IDs they manage with all the request information included. This will need to be decrypted using the details provided as part 'PGP Enablement' above.

# 4.5.2 Canceled Request Notifications

When a requestor cancels their request, the system will send a notification to registrars enrolled in PGP delivery as soon as the cancellation is received so that registrars are aware and can take action as needed.

# 5 Home Page

After you have logged in, the default landing page is the **Pending** (requests) list view under the **Registration Data Request** tab for all IANA IDs under the Registrar Group account selected in the Accounts Pane on the left.



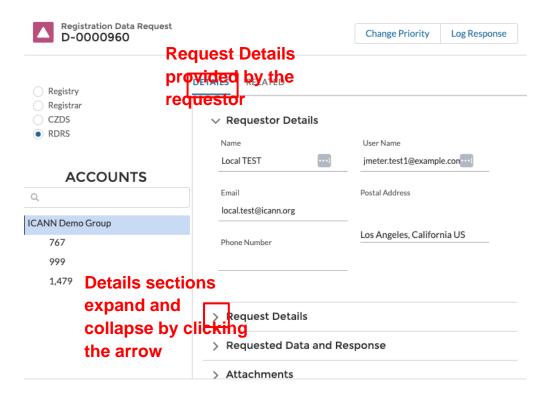
By clicking the on the list view name, you will see the different list views to select which requests to display. A list view is available to filter requests based on each status:

- All: View all registration data requests unfiltered.
  - Note: If the registrar group has any terminated IANA IDs, RDRS records for those will show up under this view.
- Approved: View all registration data requests that are currently approved.
- **Canceled:** View all registration data requests that were withdrawn by the requestor before being processed by the registrar.
- **Data Publicly Available**: View registration data requests where the requested data elements are publicly available.
- **Denied**: View all registration data requests that were denied by the registrar.
- Partially Approved: View registration data requests that were only partially approved.
- **Pending**: (default list view) This list view will show all received registration data requests that must be reviewed and processed by the registrar.

Registration data requests in "Pending" status require action from the registrar.

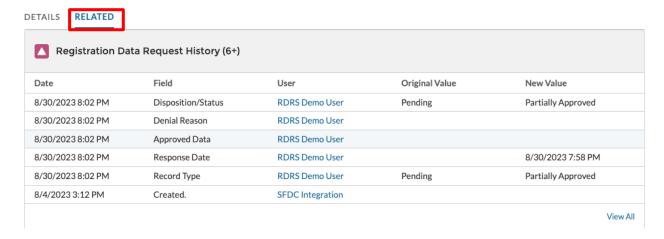
# 5.1 Registration Data Request Layout Subtabs

Once you click on the Request ID from any of the list view pages (above) you are taken to the Registration Data Request Record. Here you find two subtabs: **Detail** and **Related**.



The **Related** subtab will show the history of updates for the selected request including the date and user that applied each update.

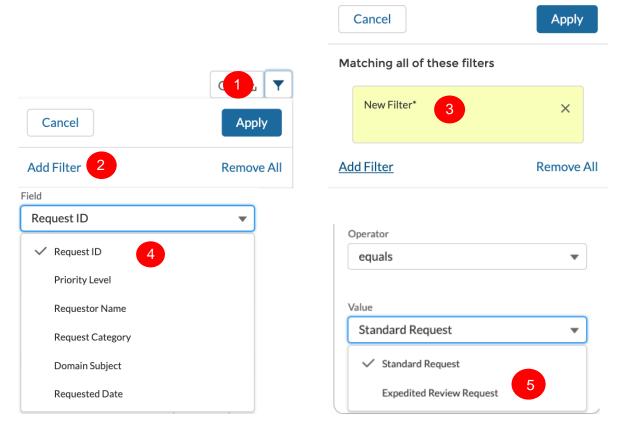
Updates are visible to requestors as well as to registrars. Updates applied to requests automatically by the system are shown in the history as applied by ICANN's SFDC Integration user.



# **6 Filtering List View Results**

Within a list view, click the funnel icon to filter records based on the download method, request ID, requestor login, requestor name, or TLD.

- 1. Click the funnel icon.
- 2. Click Add Filter.
- Click inside the New Filter\* box.



- 4. Select the field you want to filter and the operator.
- 5. In the **Value** field, enter the search terms and click **Done**. You can create multiple filters to refine your results.

The list view automatically refreshes once you click **Done**.

# 7 Editing Requests

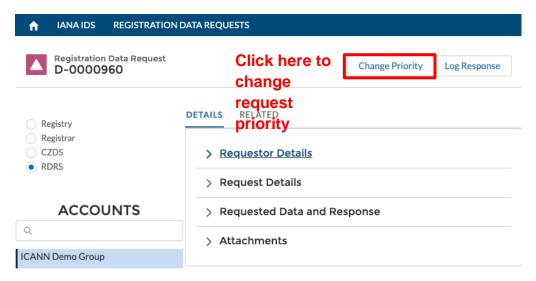
Only pending requests can be edited or responded to. All other disposition statuses are final and prevent further changes by the registrar.

## 7.1 Editing Individual Requests

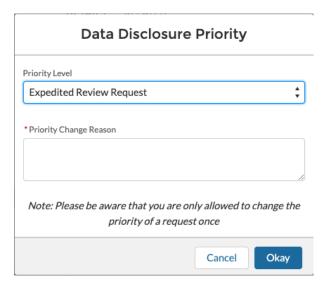
# 7.1.1 Change Priority

Registrars have the option to change the request priority set by the requestor. When doing so, the system will require an explanation for the change in priority for the request.

When viewing a request in **Pending** status, click **Change Priority** in the upper right corner.

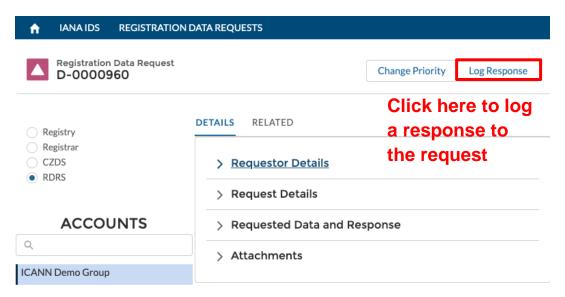


Follow the prompt to update the priority, record a reason and click **Okay**.



# 7.1.2 Logging Responses

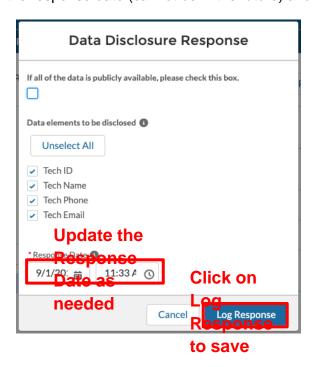
When viewing a request in **Pending** status, click **Log Response** in the upper right corner.



A prompt will appear with the data elements requested for the registrar to record the outcome of the data disclosure request.

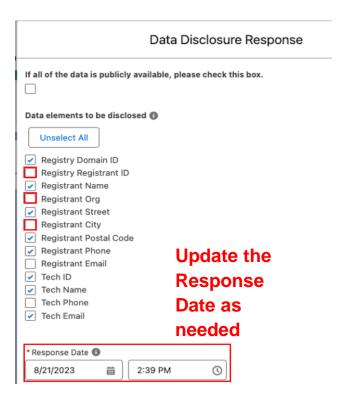
#### 7.1.2.1 Approve

If the outcome of the disclosure request is that all the data elements were disclosed, the registrar can update the response date (cannot be in the future) and click **Log Response**.

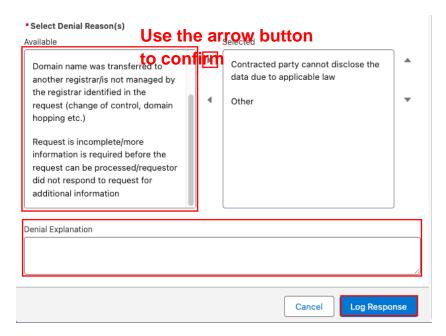


#### 7.1.2.2 Partially Approve

When only a subset of data elements is disclosed, the registrar must uncheck the elements not disclosed.

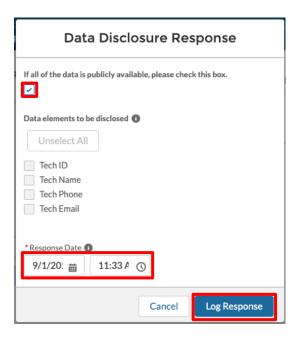


System will ask to select at least one **Denial Reason** and an **Explanation** (only mandatory if the Denial Reason selected is 'Other")



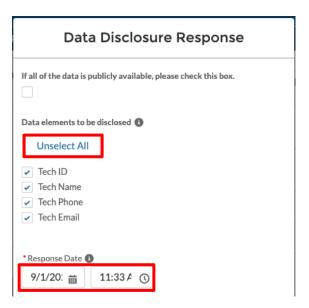
# 7.1.2.3 Data Publicly Available

When all the data elements requested are publicly available, the registrar can check the box on top of the **Log Response** screen. Registrars will not be able to select/deselect data elements individually but can update the response date and click on **Log Response** to update the request accordingly.



# 7.1.2.4 Deny

When none of the data elements were disclosed, the registrar must uncheck all the boxes. Clicking on **Unselect All** will remove all the data elements requested. The registrar can then update the **Response Date**.



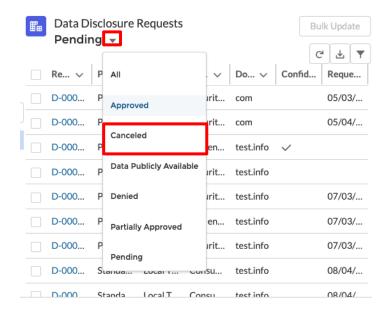
The registrar will be asked to select at least one denial reason and an explanation (only mandatory if the Denial Reason selected is 'Other").



#### 7.1.2.5 Canceled Requests

Requests canceled by the requestor before they are processed by the registrar will appear under the 'Canceled' list view in the portal. Registrars can access all canceled requests by clicking on the list view dropdown arrow (▼) and selecting Canceled.

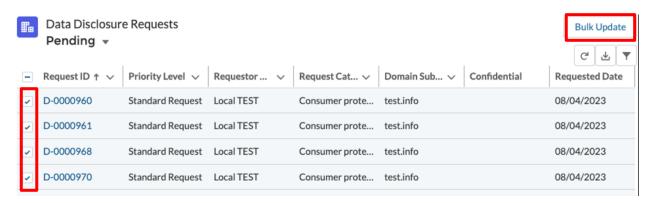
Note: Once canceled, no further action is required by the registrar.



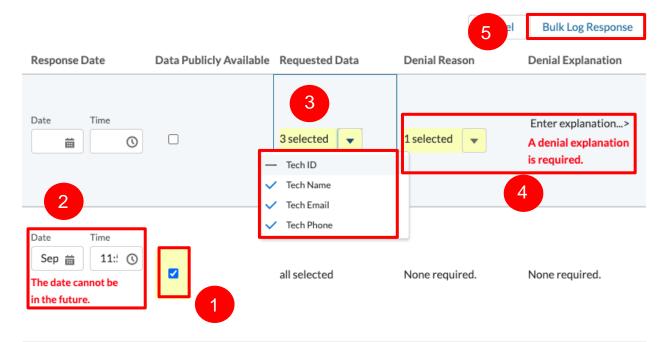
# 7.2 Bulk Respond to Requests

Multiple requests can be updated quickly. When no boxes are checked in the list views, the top right buttons are inactive.

Click the check box to the left of one or multiple records, and the **Bulk Update** button will be enabled.



On the next screen, registrars can see some details of the request (e.g., requested data, request category, priority, data requested, etc.) and are able to update things like Response Date and outcome of the request (Approve/Deny/Data Publicly Available), including Denial Reason and Explanation as applicable. Errors will be displayed as the registrar fills out each field (e.g., response date cannot be in the future, missing denial explanation). Click **Bulk Update** afterwards to save changes.

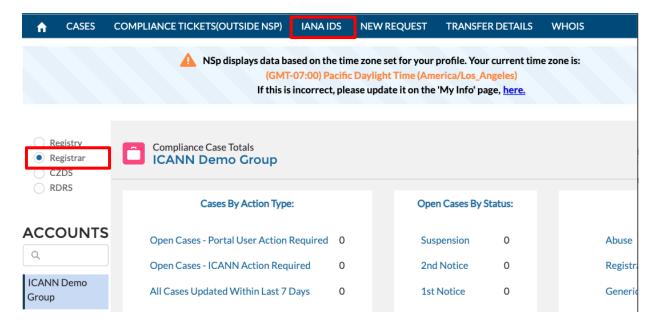


- 1. Ability to mark requests as Data Publicly Available.
- Record a response date for each request system will prompt if any errors are encountered.

- 3. Registrar can uncheck elements that were not disclosed or all if denied.
- 4. System will prompt you to enter a Denial Reason and Explanation when applicable.
- 5. Click the button at the top right to save changes to all requests at once.

# 8 Opting In/Out of the RDRS

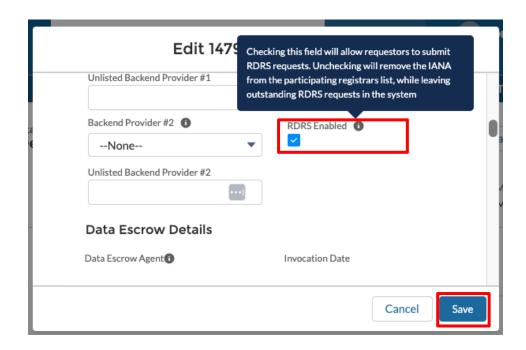
Registrars have the option to opt in/out of the RDRS directly within the NSp. To opt out, users must select the registrar persona (radio button available in the top left section available for credentialed users) and navigate to the IANA ID they want to opt in/out for.



Once on the IANA Detail page, users can either click the Edit button on the top right section or scroll down to the RDRS Enabled field and click the pencil icon to update RDRS settings.

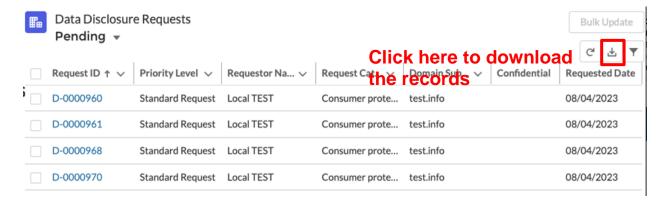
Note: Registrars will still have access and are expected to close all pending requests even after opting out of the service.





# 9 Download List View as a CSV File

The download feature allows you to download registration data requests that are displayed in the list view (limited to 200 when the page is displayed initially). To increase the number of requests to download, you must scroll down to the bottom of the list to retrieve the next set of 200 requests. For example, if the list view contains 890 records and you only want to download 450 of them, scroll to record 400, and 599 records will be downloaded. To capture all 890 records, keep scrolling down until the last desired record is displayed before clicking the download button.



Enter a file name and click **Download**.



Confirm save location and click **Download**.

Note: When you download the list view, you will only have columns displayed in the list view in the csv file.

# 10 Helpful Links

ICANN Contractual Compliance compliance@icann.org

globalsupport@icann.org ICANN Global Support

**ICANN RDRS Page** https://www.icann.org/rdrs-en

ICANN RDRS Naming Services portal

User Guide for Registrars

ICANN Naming Services portal User Guide

for Registrars

ICANN Naming Services portal User Guide

for Registries

NSp Sign In Page

Registrar Contacts Update Page

http://icann.org/rdrs-nsp-user-guide-registrars-

en.pdf

https://www.icann.org/resources/pages/nsp-

registrars-2018-03-26-en

https://www.icann.org/resources/pages/nsp-

registry-operators-2020-08-04-en

https://portal.icann.org

https://www.icann.org/resources/pages/registrar-

contact-updates-2015-09-22-en