ICANN Naming Services portal User Guide for Registrars

Version 4.0

ICANN Engineering & IT Team
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Introduction

This version of the Naming Services portal (NSp) for Registrars replaces the former RADAR system. The new portal has multi-factor authentication for increased security but still allows registrars to view a list of selected ICANN Contractual Compliance tickets sent to the registrar within the past 30 days.
1 Log into the Naming Services portal

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 no-reply@icann.org to your safe sender’s list.

The activation email expires within seven days. If your activation 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.

2. Bookmark https://portal.icann.org/ to sign into the portal directly.

Note: The actual language may be slightly different from this sample.
1.2 **Set Up Multi-Factor Authentication**

After you have clicked the link in Step 2 above, set up multi-factor authentication on your smartphone.

1. On your computer, create a new password, select a password recovery 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. You can choose from three options:
   - Google Authenticator
   - Okta Verify
   - Voice call authentication (from the Naming Services portal)

3. Choose the platform matching your device (Apple, Android, 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 in order to use the portal.

1.3 **Sign In**

1. On your computer, open a browser and navigate to [https://portal.icann.org](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 chose voice call authentication, enter the code from the phone call. This is required every time you sign in.
2 Basic Naming Services portal Terminology

The following terms are used in the Naming Services portal.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Company or organization, such as a registrar.</td>
</tr>
<tr>
<td>Contact</td>
<td>The individual associated with one or more accounts.</td>
</tr>
<tr>
<td>Credentialed User or User</td>
<td>A person that has Naming Services portal login credentials issued by ICANN for one or multiple accounts.</td>
</tr>
<tr>
<td></td>
<td>To add a new user, open a general inquiry case (see Section 5, Add a Credentialed User to Your Account).</td>
</tr>
<tr>
<td>List View</td>
<td>A list of records within a tab filtered by common record type (e.g., All Cases, All Cases Open, or All Cases Updated Within Last 7 Days).</td>
</tr>
<tr>
<td>Role</td>
<td>A set of responsibilities assigned to a contact or user for a TLD (e.g., Billing Contact, Emergency Contact, or Registry Primary Contact).</td>
</tr>
<tr>
<td>Subtab</td>
<td>The navigation groups under a main tab or within a case.</td>
</tr>
<tr>
<td>Tab</td>
<td>Used to navigate between objects in the Naming Services portal (e.g., Home, Cases, IANA IDs, Transfer Details).</td>
</tr>
</tbody>
</table>
3 Persona (Registry/Registrar/CZDS) Selection

If your user has registry, registrar, and/or CZDS 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 instructions on how to use the registry portal, visit: https://www.icann.org/resources/pages/registry-resources-2017-09-22-en.

For instructions on how to use the CZDS portal and the CZDS User Guide for Registries, visit, visit: https://www.icann.org/resources/pages/czds-2014-03-03-en.
4 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 landing page displays your primary email, primary phone number, and secondary phone number.

4.1 Home

Directs you to the Naming Services portal home page.

4.2 My Info

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

- **My Accounts** – Displays all accounts associated with the user. The checked boxes indicate what accounts the user can access.

4.3 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 group (e.g., registrar documentation is under the All Registrars list view).

4.4 Support

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

4.5 Logout

Choose this option when you are finished with your session to securely exit the portal.
5 Add a Credentialed User to Your Account

Only Registrar Primary Contacts can request credentialed users to be added to the account. Send an email to globalsupport@icann.org, and ICANN org’s Global Support Team will reply with the information needed to process the request.

Any user added to your account has full Naming Services portal functionality for the credentialed account(s) including, but not limited to, the following:

- Managing contacts.
- Viewing all cases including attachments, emails, and comments related to cases.
- Viewing IANA ID details.
6 Navigation

6.1 Tabs

The landing page contains the home icon and six tabs: Cases, Compliance Tickets (Outside NSp), IANA IDs, New Request, Transfer Details, and WHOIS.

6.2 Account Search and Global Search

The NSp contains two search bars. The far-left column contains a search panel that returns information for the accounts selected in that column. This is different from the global search bar at the top of the screen, which searches all Internet Assigned Numbers Authority (IANA) details, compliance tickets, and documents within the selected account on the left.

To use global search:
1. Select an account on the left.
2. Click inside the global search box, type your search terms, and click Search.

Global search encompasses IANA details, compliance tickets, and documents.
6.3 Accounts Column

Portal users can access all accounts displayed in the far-left column. Each account contains at least one corresponding IANA detail.

Once you have selected the account, click the IANA detail to view its information.

6.4 Account Details

Click on the highlighted account in the far-left column to view the account summary. There are two subtabs:

- **Detail** – provides account details (e.g., name of the account manager).
- **Related** – provides information on contacts associated with the account, their level of access, and any shared files. Users can also download and view the files.

6.5 List Views

A list view is a predefined group of records. Click the List View drop-down arrow "▼" to filter cases based on status.
7 Home Icon/Landing Page and Dashboard

The landing screen is a dashboard that gives you quick access to your compliance cases. Click the home icon at any time to view your case summaries.

### 7.1 Compliance Dashboard

The landing screen is a dashboard for the selected account on the left that groups your compliance cases in three different categories: action type, status, and complaint type. Click the desired hyperlink within each category to see all cases within that filter.

<table>
<thead>
<tr>
<th>Dashboard</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action Type</strong></td>
<td>Links to all open and closed cases. You can see all cases requiring input from you, as well as the cases requiring input from ICANN org.</td>
</tr>
<tr>
<td><strong>Open Cases by Status</strong></td>
<td>Organizes cases based on their compliance status (e.g., first notice, second notice, or breach). For more information about compliance case statuses, visit <a href="https://www.icann.org/resources/pages/approach-processes-2012-02-25-en">https://www.icann.org/resources/pages/approach-processes-2012-02-25-en</a>.</td>
</tr>
<tr>
<td><strong>Open Cases by Complaint Type</strong></td>
<td>Displays the total number of cases per type of complaint. The current categories include:</td>
</tr>
<tr>
<td></td>
<td>Abuse, Audit, Consent to Display Registration Data, Disclosure of gTLD Registration Data, Domain Renewal/Redemption, Domain Suspension</td>
</tr>
</tbody>
</table>
8 Cases Tab

The Cases tab displays all of your compliance cases for the account grouped into pre-defined list views. Click ▼ to search for a particular view or to see all available list views. Click on the case to view all the details regarding the case.

You can only view cases created in the portal after August 14, 2020. Cases created in the previous system and cases related to technical monitoring activities (e.g., SLA alerts, data escrow) will continue to be handled via compliance-tickets@icann.org until the system is retired.

You will receive an email every time a new compliance case is created. We encourage you to log into the portal to respond, but you can also reply directly to the email.

8.1 Cases Subtabs

Information about the case is organized into subtabs, which are the navigation groups under a main tab. Compliance cases have three subtabs, defined below.

<table>
<thead>
<tr>
<th>Subtab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>Contains the information about the complaint (e.g., the case number, the case reporter, summary, status, type of contracted party, etc.).</td>
</tr>
<tr>
<td>Related</td>
<td>Displays information pertaining to the case (e.g., history of the domain, complaint categories, related files).</td>
</tr>
<tr>
<td>Comments</td>
<td>This is the main area for registrars to interact with the ICANN org Contractual Compliance team. This section allows you to provide input on your case(s), ask questions, post a comment, request changes, and/or upload files. If you reply to a case via email, the conversations are appended to its Comments section in the portal.</td>
</tr>
</tbody>
</table>
8.2 Case Status Descriptions

Each case is assigned a status, defined below.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>After you complete all the information and click <strong>Submit</strong>, the case status changes to <strong>New</strong>.</td>
</tr>
<tr>
<td>Not Submitted</td>
<td>The service request stays in this status until all the required questions have been answered and the case has been submitted. Any information entered can be saved (you must click <strong>Save</strong>) and edited. This status does not apply to general inquiry cases.</td>
</tr>
<tr>
<td>ICANN – In Progress</td>
<td>The ICANN org has taken ownership of the case and is working on it.</td>
</tr>
<tr>
<td>Portal User Action Required</td>
<td>The ICANN org is requesting information or is requiring action from you.</td>
</tr>
<tr>
<td>Canceled</td>
<td>ICANN org has canceled the case.</td>
</tr>
<tr>
<td>Closed</td>
<td>Case has been resolved and closed.</td>
</tr>
</tbody>
</table>

8.3 Compliance Status Descriptions

Compliance cases have their own statuses, which are separate from the case status. For a description of all compliance statuses, visit [https://www.icann.org/resources/pages/approach-processes-2012-02-25-en](https://www.icann.org/resources/pages/approach-processes-2012-02-25-en).
9 Compliance Tickets (Outside NSp) Tab

The **Compliance Tickets (Outside NSp)** tab provides read-only access to a list of compliance tickets that were sent to the registrar within the past 30 days. This list is updated every Sunday between 01:00 - 04:00 UTC. Click on the Ticket ID to view its details, which include the:

- Ticket ID
- Complaint type
- Ticket's status
- Main domain name subject to the ticket (if applicable)
- IANA ID (Registrar number)

You can view your tickets in two ways:

- Select the account on the left, click the **Compliance** tab, then click the ticket ID to view the details.
- Select the account on the left, click the IANA number, then click the **Related** subtab.

For questions or to provide information related to compliance tickets in this list, reply directly to ICANN Contractual Compliance via the compliance ticket email with the ticket ID in the subject, or email [compliance@icann.org](mailto:compliance@icann.org).
10 IANA IDs Tab

The IANA IDs tab contains technical and nontechnical registrar details. The two list views are Active and Pending. Click the specific IANA detail to view its information.

10.1 Detail Subtab

The Detail subtab contains general registrar information. You can change any fields that have a pencil icon on the right side. Some fields may not be editable but instead have an information icon. Hover over the icon for instructions on how to change the information.

Note: If your country does not use postal codes, check the box next to No Billing Postal Code. The portal contains rules to validate if you have this option. For example, registrars in the United States cannot check this box since the U.S. utilizes postal or ZIP codes.

SAVED VIEWING PREFERENCES FOR IANA DETAILS

The IANA detail information is grouped into sections: General Information, Technical Details, Data Escrow Details, etc.

Click “✓” or “>” to the left of each section header to expand or collapse it.

The portal remembers your selections even after you sign out of the system. The next time you sign in or open another IANA detail, the sections will be expanded or collapsed as you last left them.

10.2 Related Subtab

The Related subtab contains any linked compliance tickets and files.
10.3 IANA Roles Subtab

The **IANA Roles** subtab allows you to assign different roles to contacts. Note that the roles can be modified only if the contacts exist in the account. For instructions on how to add new contacts to your account, visit the Registrar Contact Updates page.

Some fields, such as the Registrar Primary Contact, are greyed out and cannot be modified. For instructions on how to update these fields, visit the Registrar Contact Updates page.

To change the contact:

1. If an existing name is in the field, click the “x” on the right of the contact field.
2. Type the first few letters of the name and a dropdown will display all matching results.
3. Select the desired contact name, and that contact will be placed in the role.

   **Note**: If the contact has multiple email addresses, the same name will repeat with different email addresses. Make sure you select the contact with the correct email address.

4. Click **Save** at the bottom of the screen.

10.4 Edit Button

The **Edit** button is in the upper right of each **IANA IDs** subtab. Clicking on the **Edit** button displays a popup window that allows you to update all editable fields at once. Fields that cannot be modified are read-only.
11 New Request Tab

The New Request tab contains instructions on how to submit various new requests. These include how to: perform bulk updates, change existing accreditation, manage contacts, change Data Escrow Agents (DEA), control portal access, and any other requests.
12 Transfer Details Tab

The **Transfer Details** tab allows you to view and download a list of all accredited registrars, domain transfer-related contact information, and transfer-related details. All information is read-only.

Within a list view, click each column header to sort the information.

Click the corresponding action button to refresh, download, or filter information.

### 12.1 Download Action Button

Click **Download** to download a list of transfer-related contact information and details for ALL accredited registrars in either .csv or .xml format.

### 12.2 Filter Action Button

Click **Filter** (the funnel icon) to search for information under a specific heading or field (IANA ID, IPs for WHOIS Whitelisting, Port 43 WHOIS Server, Registrar, TEAC Contact, TEAC Phone, Transfer Contact) within a list view.

1. Click the funnel icon.
2. Click **Add Filter**.
3. 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.
13 ICANN WHOIS Tab

Clicking on the WHOIS tab redirects to the ICANN organization’s Domain Name Registration Data Lookup homepage.
14 Helpful Links

- ICANN Contractual Compliance team: compliance@icann.org
- ICANN Global Support contact email: globalsupport@icann.org
- Registrar Contacts Update page: https://www.icann.org/resources/pages/registrar-contact-updates-2015-09-22-en