ICANN CZDS Naming Services portal User Guide

Version 4.0

ICANN Engineering & IT Team
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TABLE OF CONTENTS

1 LOGGING INTO THE CZDS NAMING SERVICES PORTAL 3

1.1 Initial Login Setup 3
1.2 Set Up Multi-Factor Authentication 4
1.3 Sign In 4
1.4 Basic CZDS Naming Services portal Terminology 5

2 PERSONA (REGISTRY/REGISTRAR/CZDS) SWITCHER 6

3 USER ACCOUNT MANAGEMENT 7

3.1 Home 7
3.2 My Info 7
3.3 Document Library 7
3.4 Support 7
3.5 Logout 7

4 EMAIL NOTIFICATIONS 8

5 HOME PAGE 8

5.1 Request Layout Subtabs 9

6 FILTERING LIST VIEW RESULTS 10

7 EDITING REQUESTS 11

7.1 Editing Individual Requests 11
7.1.1 Edit 11
7.1.2 Approve 11
7.1.3 Deny 12
7.1.4 Revoke 12
7.1.5 Extend Request Validity 13
7.1.6 Deny Extension 14
7.2 Editing Multiple Requests 15
7.2.1 Bulk Approve 15
7.2.2 Bulk Deny 15
7.2.3 Bulk Revoke 17
7.2.4 Bulk Extend Validity 17
7.2.5 Bulk Deny Extension 18

8 APPROVING FTP REQUESTS FOR REGISTRY OPERATOR PROVIDED TLDS 19

9 BULK UPDATE CZDS SETTINGS FOR TLDS 20

10 CZDS DOWNLOAD METHOD 21

11 DOWNLOAD LIST VIEW AS A CSV FILE 22

12 HELPFUL LINKS 23

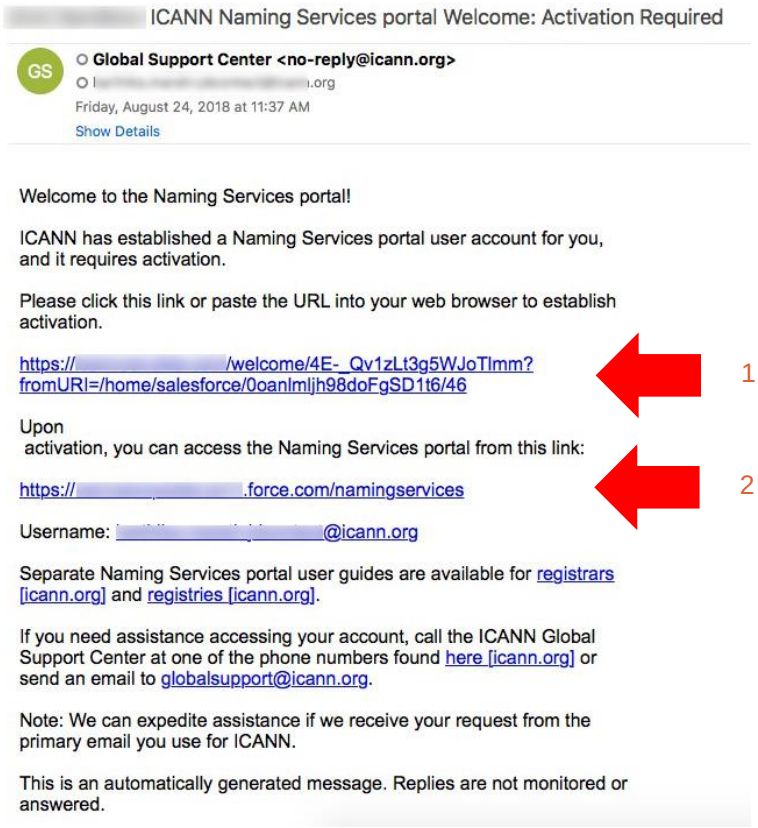
1 Logging into the CZDS Naming Services portal

If you already a Naming Services portal account, skip to Section 2 Accessing the CZDS Persona.

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 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.



[redacted] ICANN Naming Services portal Welcome: Activation Required

GS Global Support Center <no-reply@icann.org>
[redacted].org
Friday, August 24, 2018 at 11:37 AM
Show Details

Welcome to the Naming Services portal!

ICANN has established a Naming Services portal user account for you, and it requires activation.

Please click this link or paste the URL into your web browser to establish activation.

https://[redacted]/welcome/4E-_Qv1zLt3g5WJoTImm?fromURI=/home/salesforce/0oanlmljh98doFgSD1t6/46

1

Upon activation, you can access the Naming Services portal from this link:

https://[redacted].force.com/namingservices

2

Username: [redacted]@icann.org

Separate Naming Services portal user guides are available for registrars [icann.org] and registries [icann.org].

If you need assistance accessing your account, call the ICANN Global Support Center at one of the phone numbers found here [icann.org] or send an email to globalsupport@icann.org.

Note: We can expedite assistance if we receive your request from the primary email you use for ICANN.

This is an automatically generated message. Replies are not monitored or answered.

Note: The actual language may be slightly different from this example.

1. Click the embedded activation link in the email to set up your password with multi-factor authentication.

2. 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 forgot 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

7. On your computer, open a browser and navigate to https://portal.icann.org.

8. Enter your username and password and click **Sign In**.

9. 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 log in.

1.4 Basic CZDS Naming Services portal Terminology

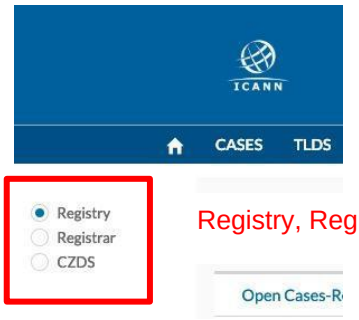
The following terms are used in the CZDS Naming Services portal.

Term	Description
Account	Company or organization, such as a registry operator.
Contact	The individual associated with one or more accounts.
Credentialed User or User	A person that has Naming Services portal login credentials issued by ICANN 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., Active, Pending).
Role	A set of responsibilities assigned to a contact or user for a TLD (e.g., Billing Contact, Emergency Contact, or Registry 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, TLDs, CZDS Request).

2 Persona (Registry/Registrar/CZDS) Switcher

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.



Registry, Registrar, and CZDS

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

For detailed instructions on how to use the registry portal, visit: https://www.icann.org/resources/pages/registry-resources-2017-09-22-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 landing page displays your primary email, primary phone number, and secondary phone number.

3.1 Home

Directs you to the Naming Services portal home page.

3.2 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.

- **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, see the Naming Services portal User Guide for Registries Section **Error! Reference source not found.**, **Error! Reference source not found.**.

3.3 Document Library

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

3.4 Support

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

3.5 Logout

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

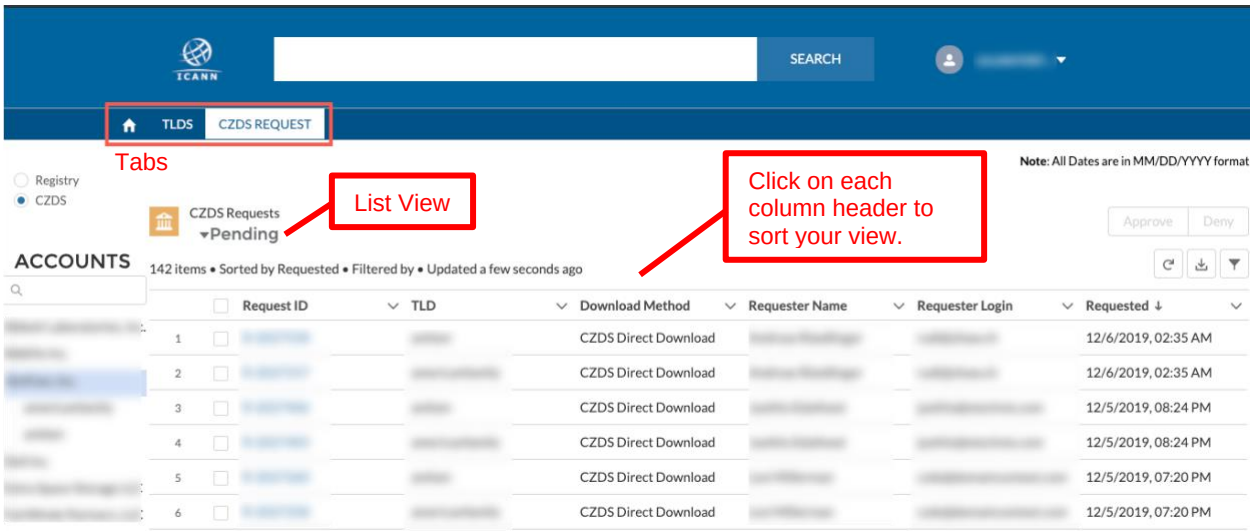
4 Email Notifications

The system can notify users with CZDS account privileges of zone file access requests received for TLDs under their TLD accounts. Notifications are sent in a single email with a summary listing the details of all requests received on the previous day (UTC) that require the registry operator's review to approve or deny.

Please note that for TLD(s) configured for automatic approval of zone file access requests, the daily summary will not be sent. You may request to enable or disable CZDS email notifications for your user account by sending a general inquiry to Global Support.

5 Home Page

After you have logged in, the default landing page is the **Pending** (requests) list view under the **CZDS Requests** tab for all TLD accounts 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:

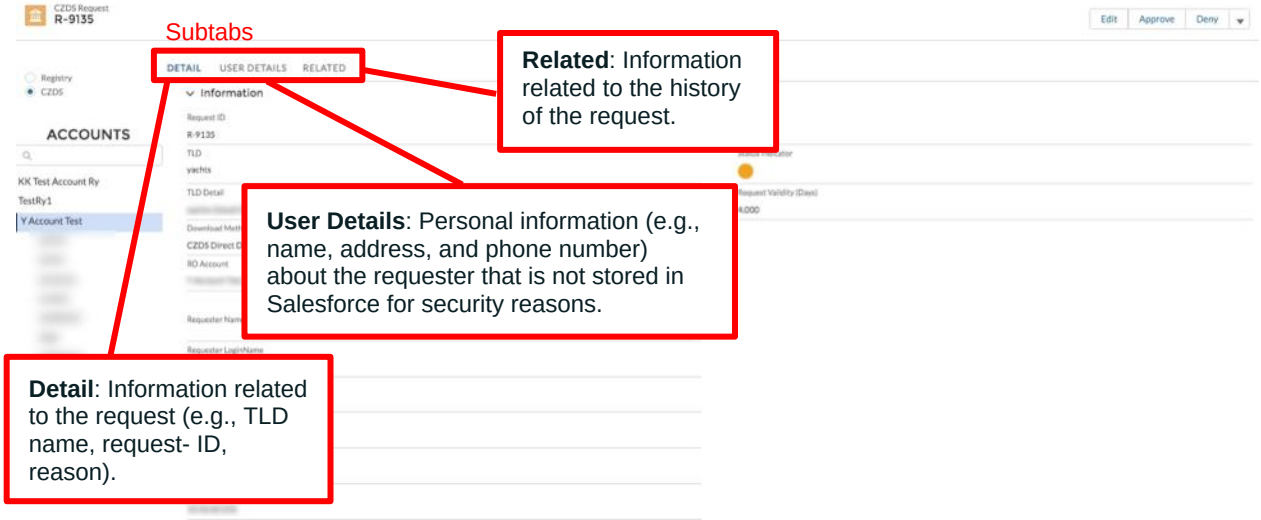
- **Approved:** View all zone file requests that are currently approved.
- **Approved - Extension requested**: View approved requests near expiration, for which the requester has asked to extend validity and access for another term.
- **Canceled:** View all requests that were withdrawn by the requester before being approved or denied by the registry operator.
- **Denied**: View all requests that were denied by the registry operator.
- **Expired**: View requests that expired after the validity days have passed.
- **Pending**: (Default list view) This list view will show all received requests that must be reviewed to approve or deny access to the corresponding TLD zone file.
- **Revoked**: View all requests that were approved but then revoked by the registry operator.

Requests in "Pending" status and "Approved - Extension Requested" status require action from the registry operator to approve or deny access to the zone file.

Please note that when the corresponding TLD has the "CZDS Auto Approve" option enabled, new requests and extension requests will be automatically approved by the system at the time they are received without any user interaction.

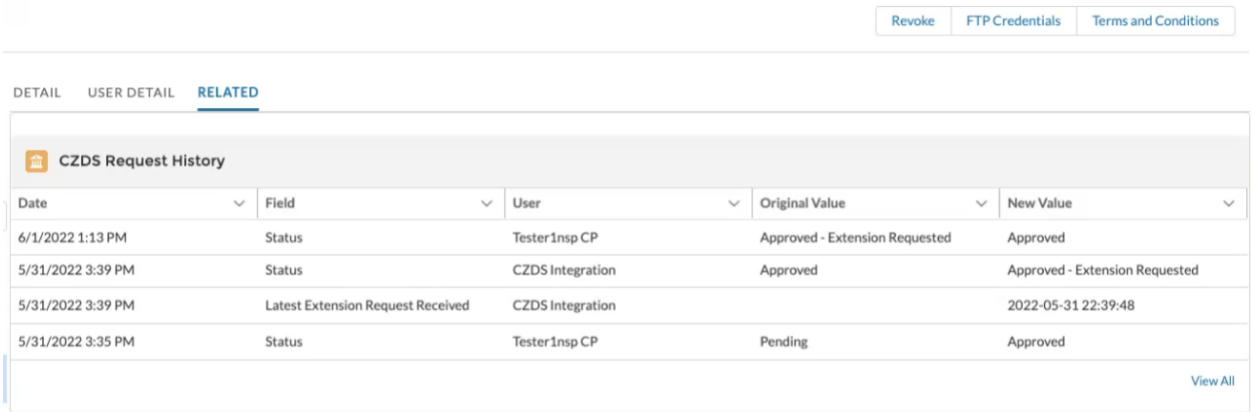
5.1 Request Layout Subtabs

Once you click on the Request ID from any of the list view pages (above) you are taken to the CZDS Request Record. Here you find three subtabs: **Detail**, **User Details**, and **Related**.



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

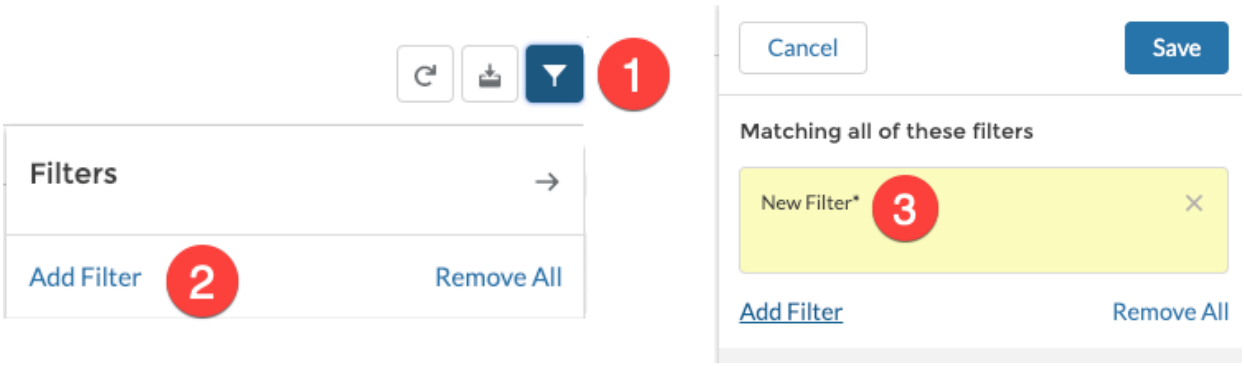
Updates applied to requests automatically by the system (upon registry operator's approval or for automatic events such as expiry dates) are shown in the history as applied by ICANN's CZDS Integration user.



6 Filtering List View Results

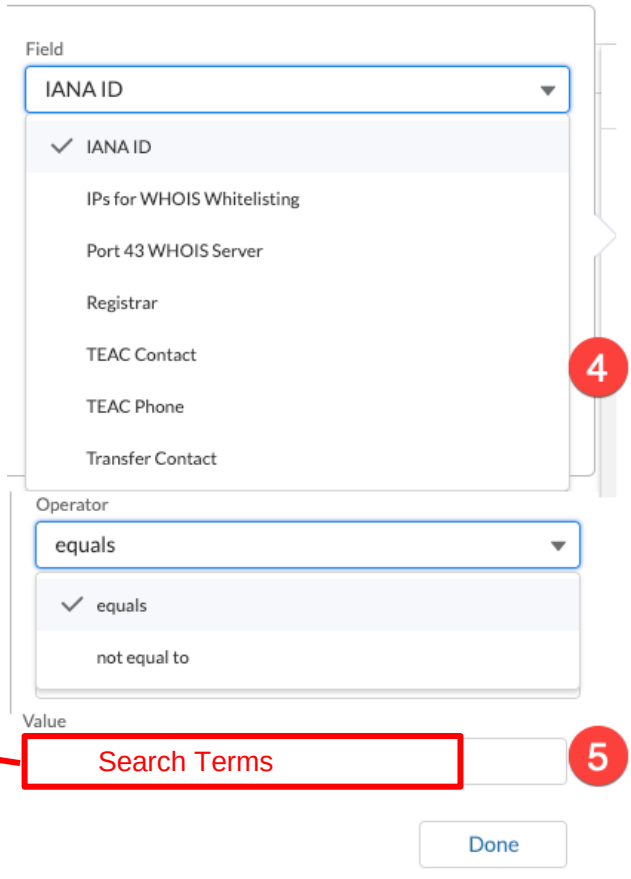
Within a list view, click the funnel icon to filter records based on the download method, request ID, requester login, requester name, or TLD.

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.**



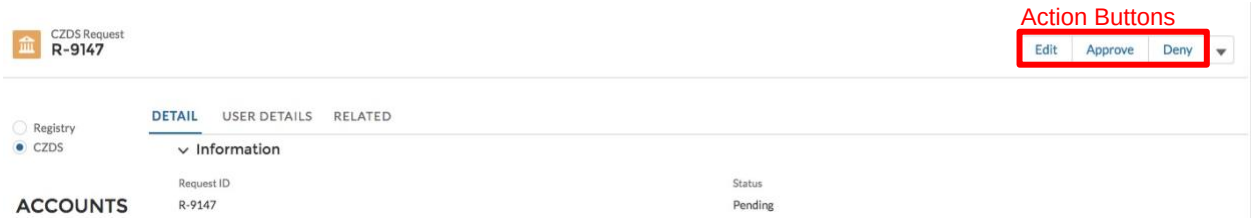
The search terms are not case sensitive, but must match the field values used in the portal. This means you cannot type “CZDS” if you are looking for “CZDS Direct Download.”

Use commas to search for multiple terms: gov, edu, com.

7 Editing Requests

Only pending or approved requests can be edited. Different action buttons will be available depending on the request status.

Request Status	Available actions
Pending	Edit, Approve, and Deny
Approved	Revoke
Approved – Extension Requested	Extend and Deny



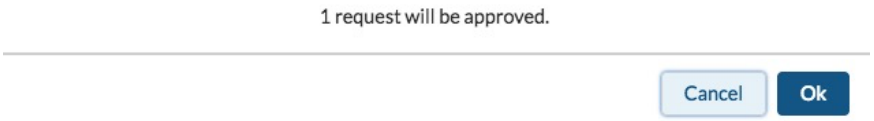
7.1 Editing Individual Requests

7.1.1 Edit

Edit the number of days the request is valid. The TLD sets the default value, but users can modify the number, which must be between 90–4,000 days. Click **Save** when finished.

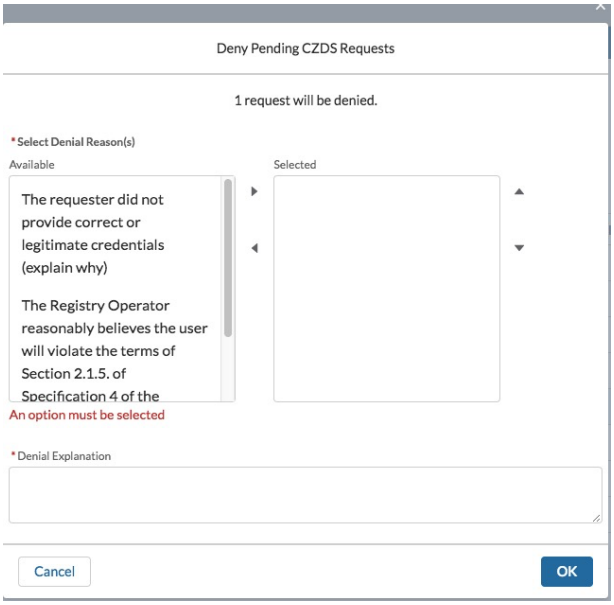
7.1.2 Approve

When viewing a request in **Pending** status, click **Approve** in the upper right corner to authorize a request. On the confirmation screen, click **Ok**.

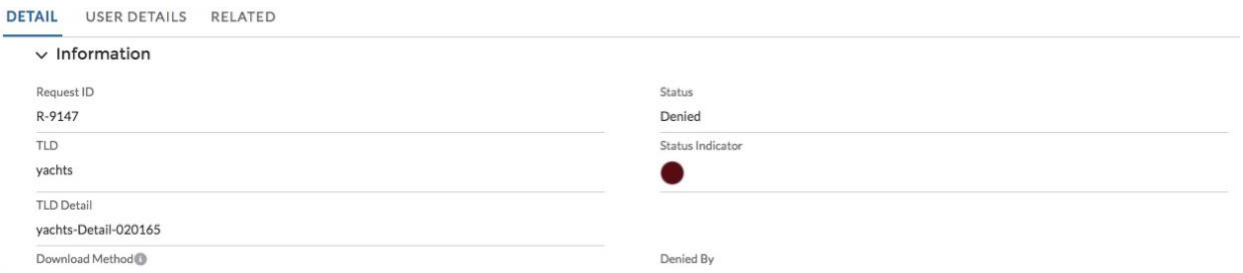


7.1.3 Deny

When viewing a request in **Pending** status, click **Deny** and a separate screen appears to reject the request. Select a Denial Reason(s), type the Denial Explanation, and click **OK**.

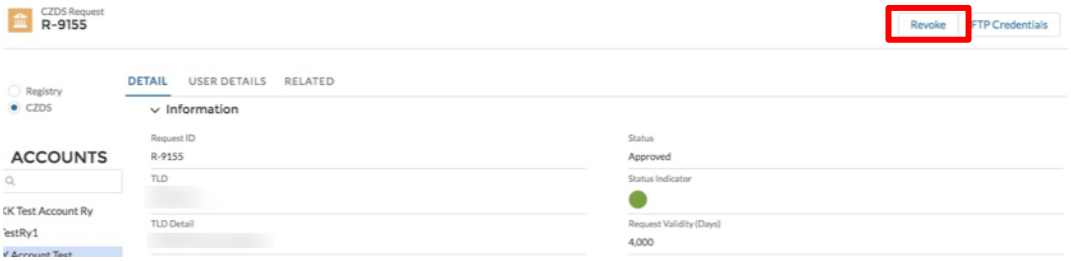


When a request is denied, the status indicator becomes dark red. Notice that the action buttons have disappeared from the upper right corner because the request is no longer editable.

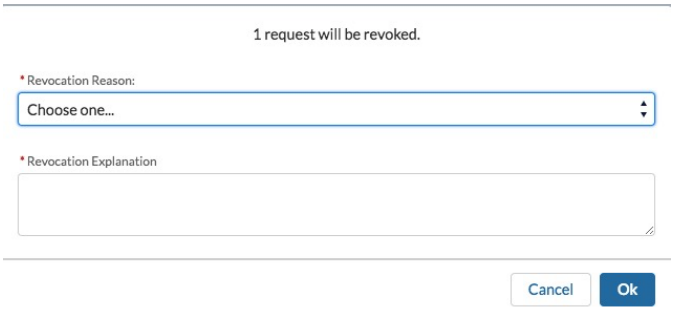


7.1.4 Revoke

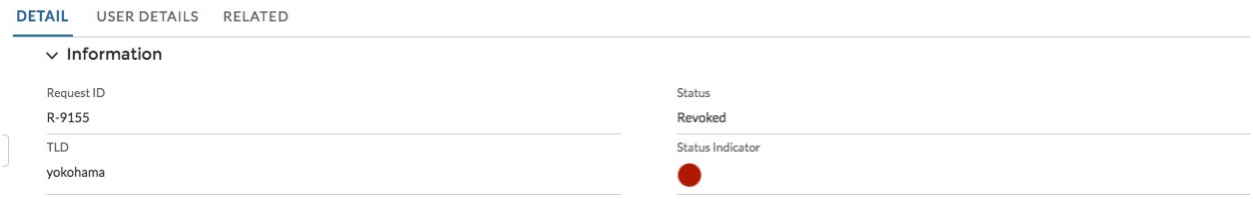
When viewing a request in **Approved** status, click **Revoke** in the upper right corner.



A confirmation screen appears requiring you to select a reason and provide an explanation.

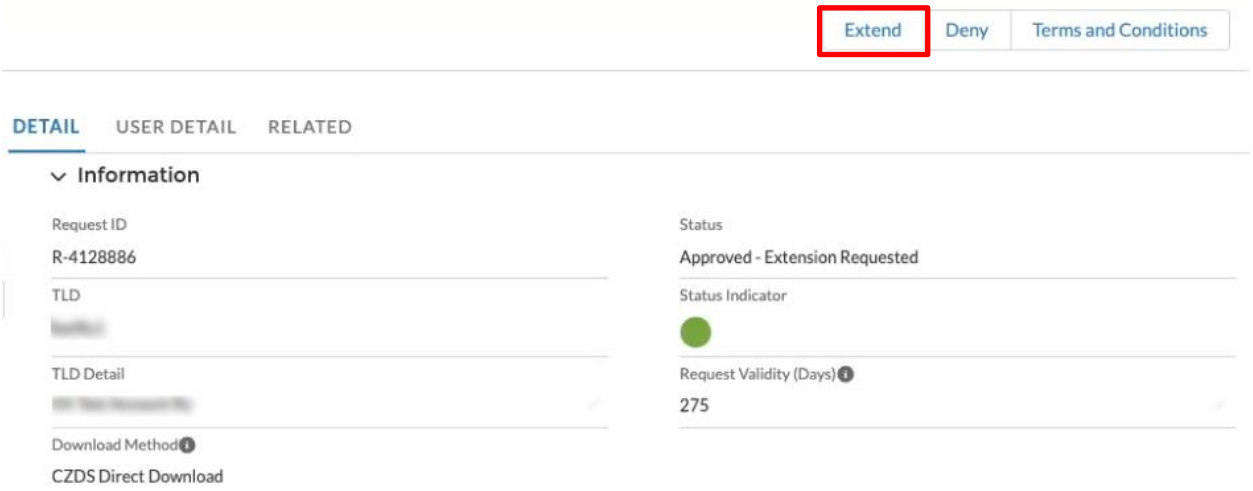


The request is complete when the Status Indicator turns red.



7.1.5 Extend Request Validity

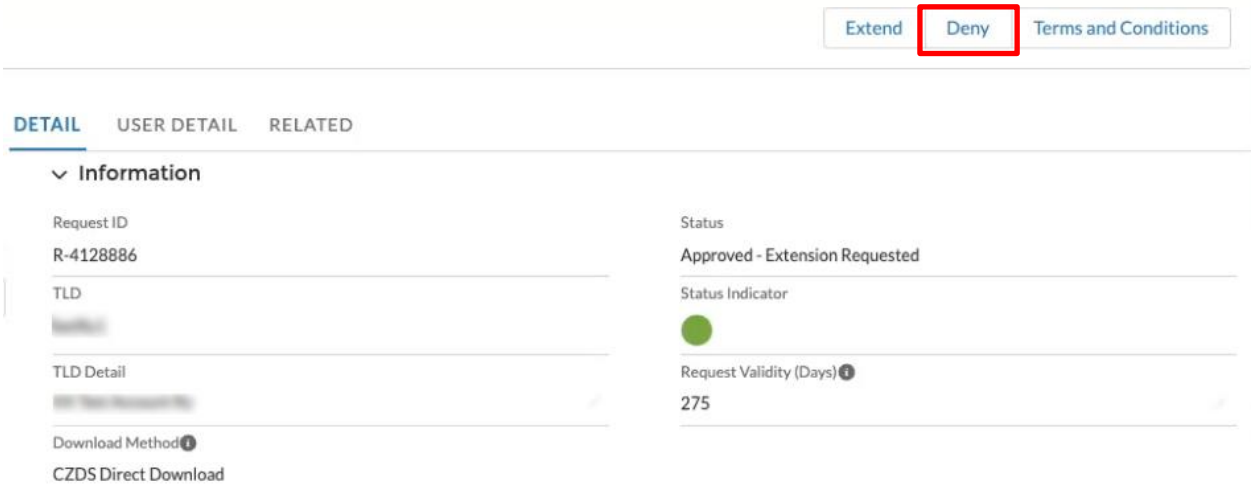
When viewing a request in **Approved - Extension Requested** status, click **Extend** in the upper right corner.



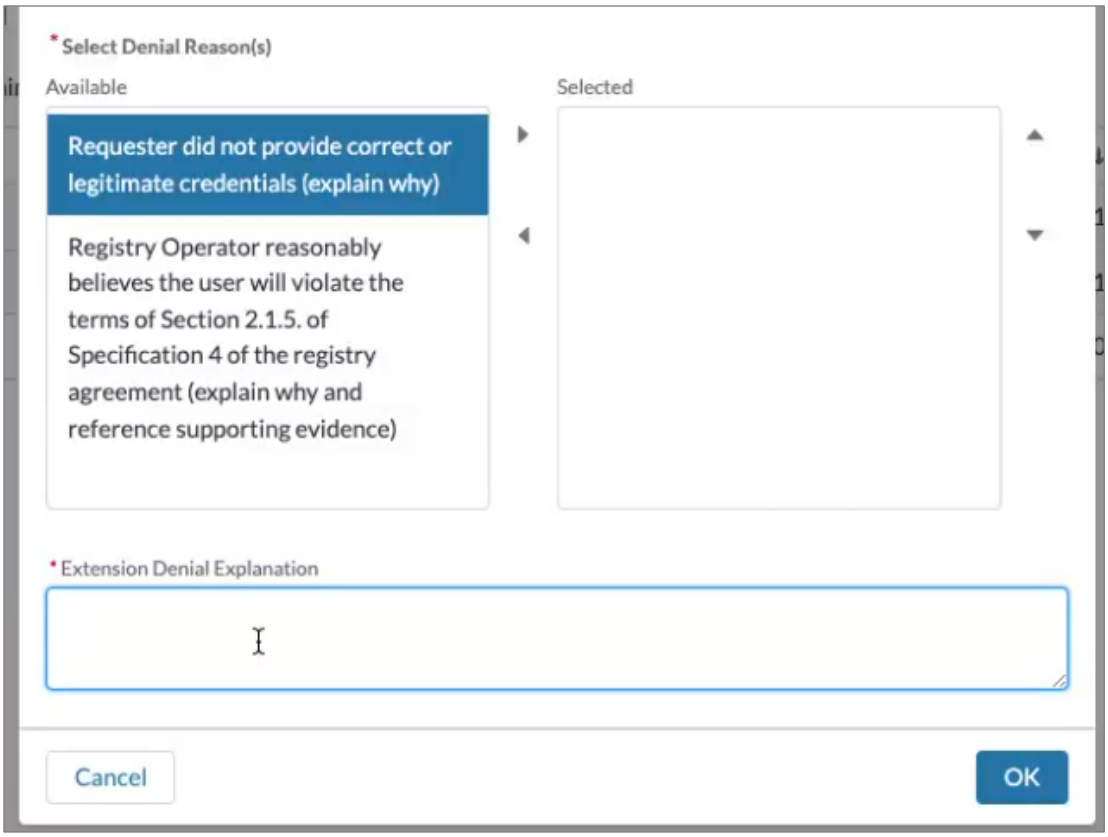
On the confirmation screen, click **OK**. This will extend the current expiration date of the request by adding another term as defined in the request validity days and return it to the **Approved** status.

7.1.6 Deny Extension

When viewing a request in **Approved - Extension Requested** status, click **Deny** in the upper right corner.



A confirmation screen appears requiring you to select a denial reason and to type a Denial Explanation message to share with the requester. To deny the extension request click **OK**.

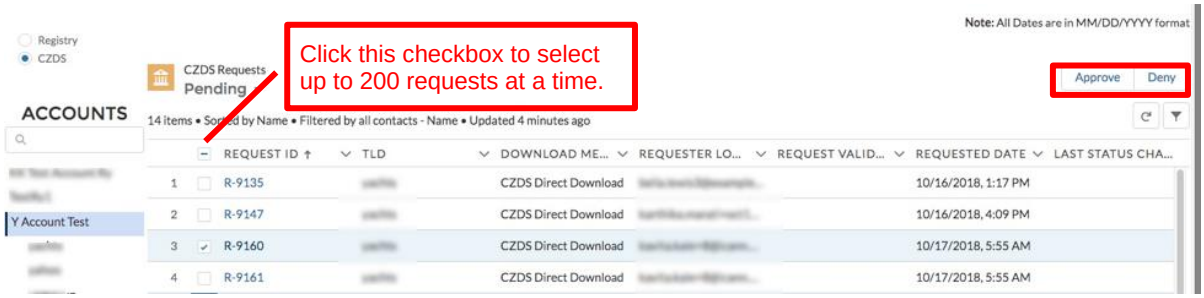


This will return the request to the **Approved** status, without updating the original expiration date.

7.2 Editing Multiple Requests

You can quickly update multiple requests to approve, deny, extend, deny extension, or revoke *when in the **Pending, Approved** or **Approved - Extension Requested** list views*. Notice that when no boxes are checked in the list views, the top right action buttons are inactive.

1. Click the check box to the left of one or multiple records, and the action buttons will be enabled.

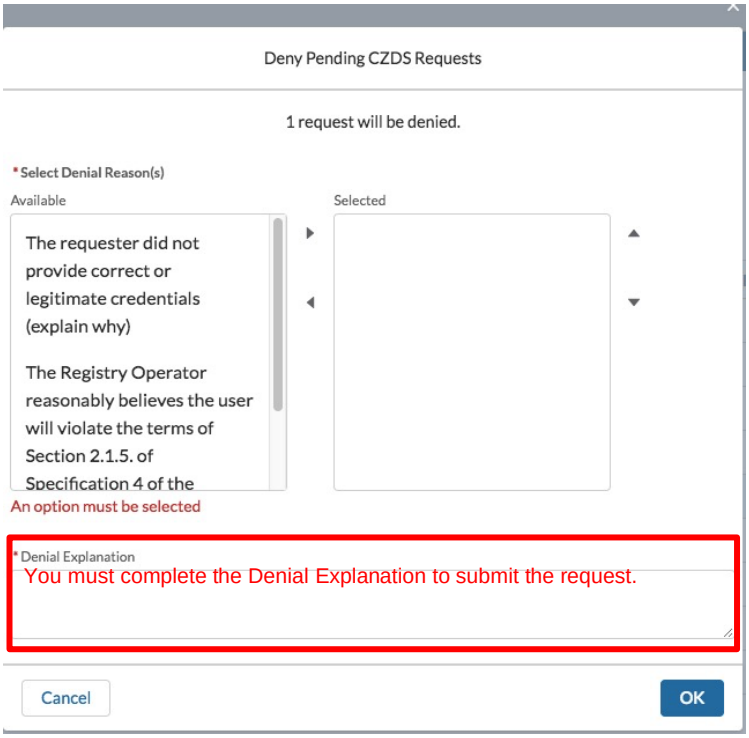


7.2.1 Bulk Approve

In the **Pending** list view, select one or more requests and click **Approve.** A separate screen will require you to confirm approval of the requests. Click **OK** to authorize the selected requests.

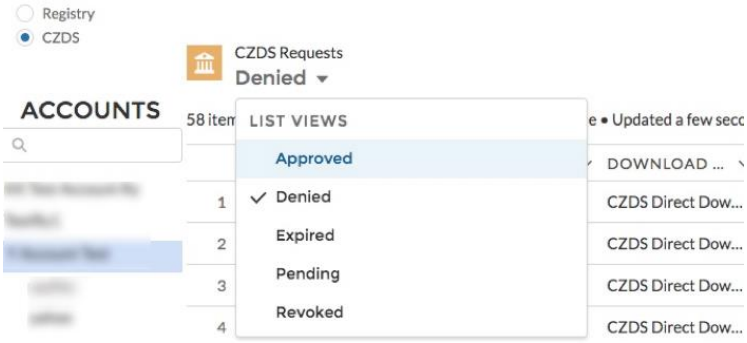
7.2.2 Bulk Deny

1. In the **Pending** list view, click **Deny** and a separate screen prompts you to Select Denial Reason(s) and Denial Explanation.



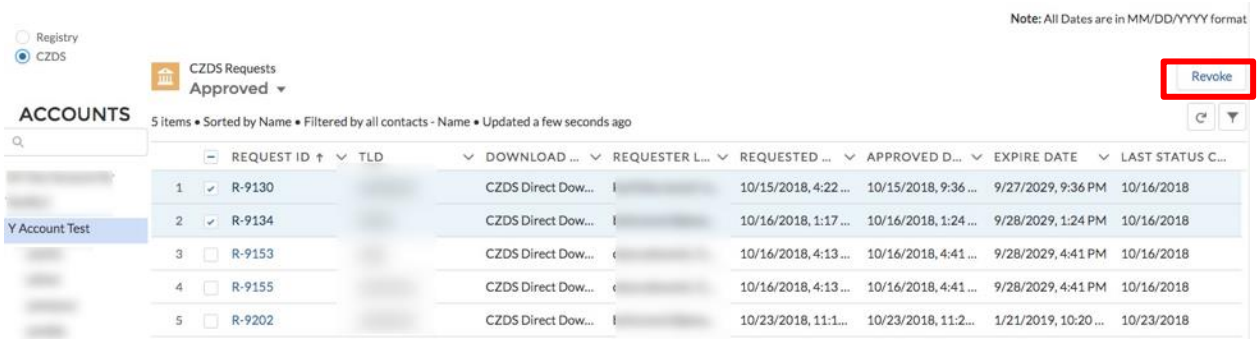
2. When you have completed the required fields, click **OK**.

3. Once you have submitted the request, choose the **Denied** list view to see all requests you have denied.

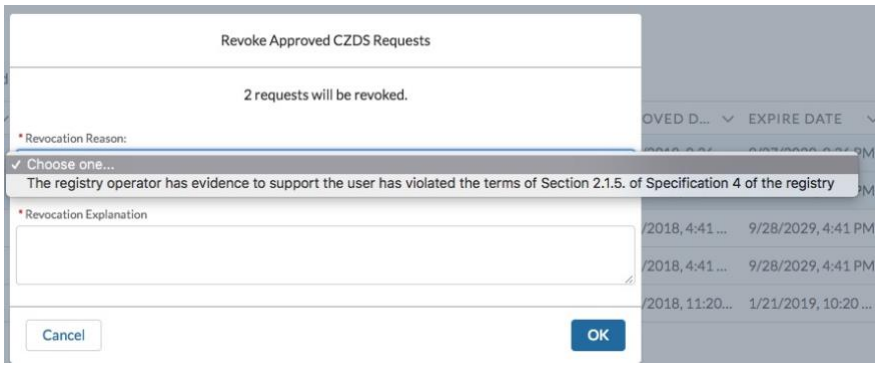


7.2.3 Bulk Revoke

1. In the **Approved** list view, select multiple requests to revoke before their expiration date. Click **Revoke**.



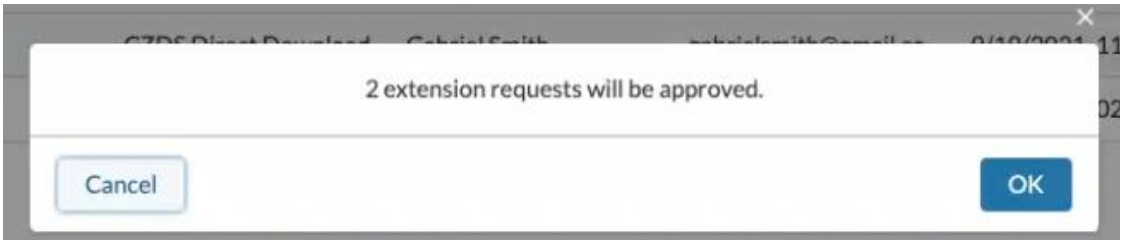
2. Select a revocation reason and provide an explanation to revoke the selected requests.



3. Click **OK**, and your requests will appear in the **Revoked** list view.

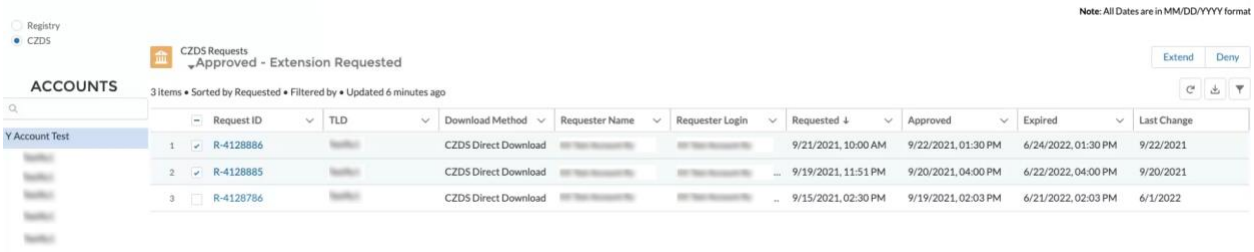
7.2.4 Bulk Extend Validity

In the **Approved - Extension Requested** list view, select one or more requests, and click **Extend**. A separate screen will require you to confirm approval of the extension requests. Click **OK** to extend the expiration date for another term and the selected requests will now appear in the **Approved** list view.

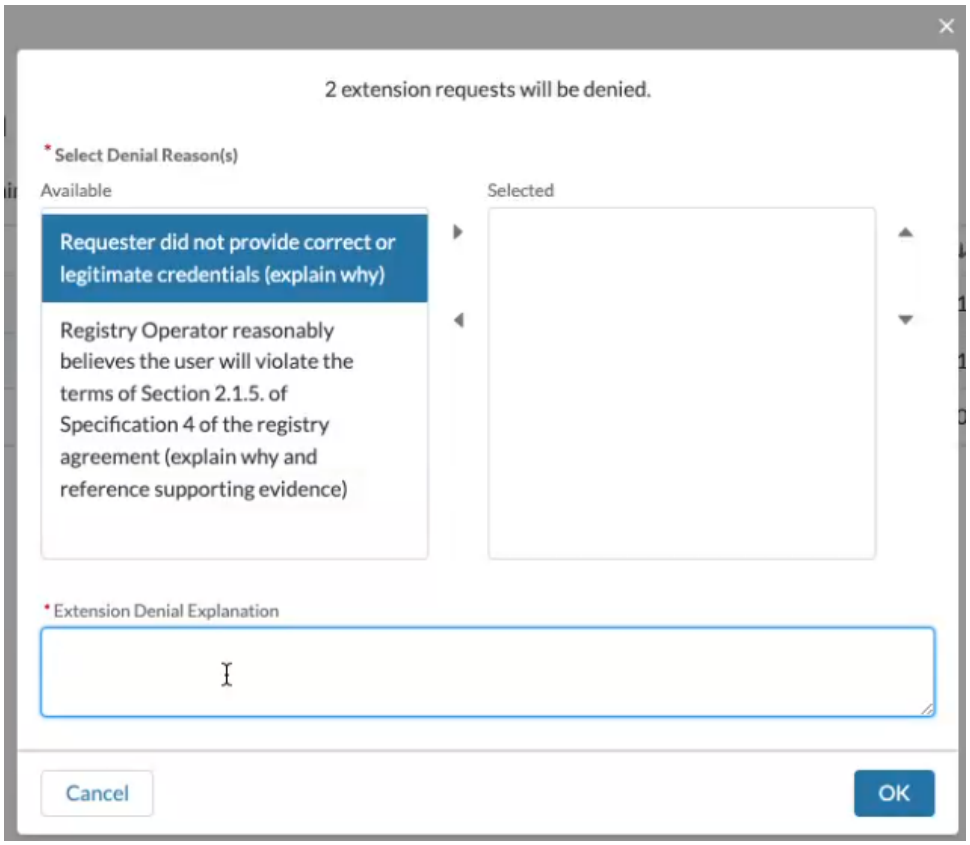


7.2.5 Bulk Deny Extension

1. In the **Approved – Extension Requested** list view, select multiple requests to deny the extension request. Click **Deny**.



2. Select a reason and provide an explanation for rejecting the request extensions.



3. Click **OK**, and the selected requests will now continue to appear in the **Approved** list view without extending the original expiration dates.

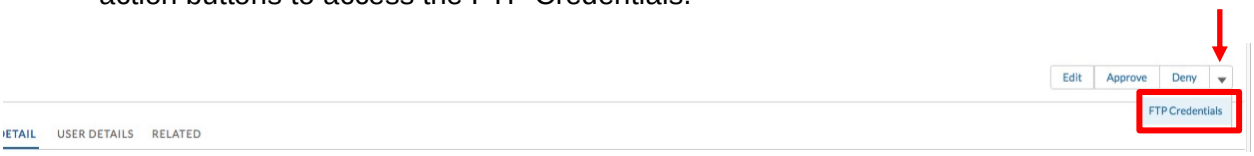
8 Approving FTP Requests for Registry Operator Provided TLDs

There are two methods for registries to provide their zone files to publicly.

The first method is **CZDS Direct Download**, which allows registry operators to review and process all requests in CZDS. Once a request is approved, end users can download zone files from CZDS directly for TLDs that use the CZDS Direct Download method. This method requires no additional credentialing by the registry operators, thus preferred by almost all registry operators.

The second method is **Registry Operator Provided**. This second method also requires the registry operator to review and process all requests in CZDS, but requires the end users to download zone files from a File Transfer Protocol (FTP) server maintained by the registry operator. When using the second method, registry operators must provide access to the end user on their FTP servers and submit the required credentials through CZDS as below.

1. In a pending request (from the **Pending** list view), click on the arrow at the end of the action buttons to access the FTP Credentials.



2. Enter the username and password for the end user to download the file. Click **Submit FTP** and you will be prompted to approve the request.

9 Bulk Update CZDS Settings for TLDs

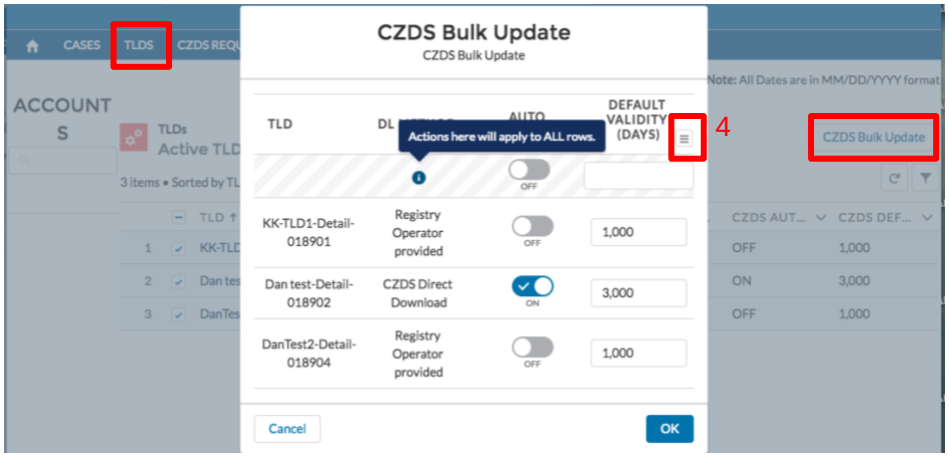
You can update the CZDS settings (Auto Approve and Validity) for multiple TLDs.

Auto Approve: Sets the system to automatically approve all future access requests and extension requests.

Validity: The number of days the request is valid.

1. Click the **TLDs** tab.
2. Under the **Active TLDs** list view, select the TLDs you want to update.
3. Click the **CZDS Bulk Update** button in the upper right corner.

   Note: This button becomes active only when one or more TLDs are selected.



4. To apply the same settings to all TLDs selected in the previous screen, click the menu button .

   Default Validity: In the top row, enter the number of days and the same value will be applied to all selected TLDs.

   Auto Approve: Toggle the switch to the desired position to apply the same setting to all selected TLDs. Please note that enabling the Auto Approve option for a TLD will not affect existing requests that are already in **Pending** status or **Approved - Extension Requested** status.

   If desired, you can also manually enter different settings for individual TLDs.

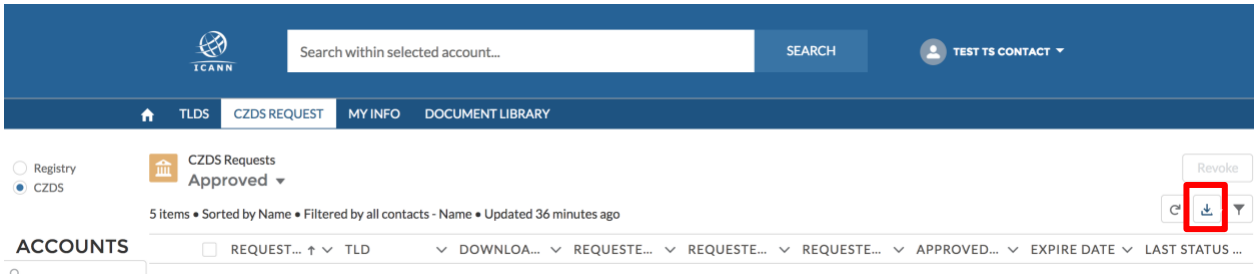
10 CZDS Download Method

CZDS offers two download methods: CZDS Direct Download (default) and Registry Operator provided. This setting cannot be updated within CZDS. To update this setting, please contact ICANN Global Support Center.

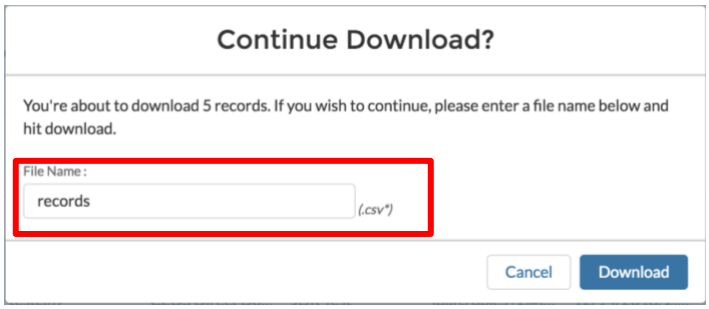
11 Download List View as a CSV file

The download feature allows downloading CZDS requests that are displayed in the list view, which are limited to 200 when 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.

1. From a list view, click the download icon on the right.



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



3. Confirm save location and click **Save**.

12 Helpful Links

ICANN Contractual Compliance team	compliance@icann.org
ICANN Global Support contact email	globalsupport@icann.org
ICANN Naming Services portal User Guide for CZDS	https://www.icann.org/resources/pages/czds-2014-03-03-en
ICANN Naming Services portal User Guide for Registrars	https://www.icann.org/resources/pages/nsp-registrars-2018-03-26-en
ICANN Naming Services portal User Guide for Registries	https://www.icann.org/resources/pages/registry-resources-2017-09-22-en.
NSp Sign In page	https://portal.icann.org
Registrar Contacts Update page	https://www.icann.org/resources/pages/registrar-contact-updates-2015-09-22-en