ICANN CZDS Naming Services portal User Guide

Version 1.0

ICANN Product Team 25 January 2019



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1 Logging into the CZDS Naming Services portal

If you already a Naming Services portal account, skip to <u>Section 2</u> <u>Accessing the CZDS</u> <u>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 <u>no-reply@icann.org</u> 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.

ICANN Naming Services portal Welcome: Activation Require	d	
GS O Global Support Center <no-reply@icann.org> O I I.org Friday, August 24, 2018 at 11:37 AM</no-reply@icann.org>		
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:// /welcome/4EQv1zLt3g5WJoTImm?	1	
rromURI=/home/salesforce/0oanImIjh98doFgSD1t6/46		Note
Upon		I he actual language
activation, you can access the Naming Services portal from this link:		may be slightly
https://force.com/namingservices	2	different from this
Username: @icann.org		example.
Separate Naming Services portal user guides are available for <u>registrars</u> [<u>icann.org]</u> and <u>registries [icann.org]</u> .		
If you need assistance accessing your account, call the ICANN Global Support Center at one of the phone numbers found here licann ord, 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.		

- 1. Click the embedded activation link in the email to set up your password with multi-factor authentication.
- 2. Bookmark <u>http://portal.icann.org/</u> 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:
 - O Google Authenticator
 - O 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 <u>https://portal.icann.org</u>.
- 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 individuals associated with accounts who do not have login credentials.
List View	A list of records within a tab filtered by common record type (e.g., Pending, Expired, Denied).
Subtab	The navigation groups under a main tab or within a case (e.g., Detail, User Detail, Related).
Tab	Used to navigate between objects in the Naming Services portal (e.g., Home, TLDs, My Info, Document Library, CZDS Request).

2 Accessing the CZDS Persona

If you have both Registry and CZDS permissions, select the **CZDS** radio button to access the CZDS functionality.



Note: If you only have CZDS permissions, then you will not see radio buttons since you only have access to one account.

3 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.

	Search Search	h within selected ac	count	SEARCH	3
	★ TLDS CZDS REQUESTS	MY INFO DOC	UMENT LIBRARY		
Pagistry	Tabs				Note: All Dates are in MM/DD/YYYY format
czds	CZDS Requests Pending - List V	view		Click on each column header to	Approve Deny
ACCOUNTS	14 items • Sorted by Name • Filte	red by all contacts - Na	ame • Updated a minute ago	soft your view.	C' 🝸
~	REQUEST ID ↑	✓ TLD	✓ DOWNLOAD ME ✓	REQUESTER LO V REQUEST VALID	. V REQUESTED DATE V LAST STATUS CHA
	1 R-9135	unites.	CZDS Direct Download	tella invisitigesample -	10/16/2018, 1:17 PM
Y Account Test	2 R-9147	parties.	CZDS Direct Download	karthika.nanativact)	10/16/2018, 4:09 PM
	3 R-9160	parties.	CZDS Direct Download	kartulate-tigicare	10/17/2018, 5:55 AM
	4 🗌 R-9161	yaditta	CZDS Direct Download	karlukate-tigicare	10/17/2018, 5:55 AM
	5 R-9178	100700	CZDS Direct Download		
	6 R-9179	units.	CZDS Direct Download		
	7 R-9180	units.	CZDS Direct Download		
	8 R-9181	units.	CZDS Direct Download		
	9 R-9146	unitere	CZDS Direct Download	karthika.marati-acti	10/16/2018, 4:09 PM

3.1 Request Layout Subtabs

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

CZDS Request R-9135	Subtabs		Edit Approve Deny ¥
Reparty CZDS ACCOUNTS	DETAIL USER DETAILS RELATE V Information RequestID Ref135	Related: Information related to the history of the request.	
KK Test Account Ry TestRy1 YAccount Test	TID Devail TID Devail C205 50 vert D R0 Accord Repeater have	etails: Personal information (e.g., ddress, and phone number) e requester that is not stored in ce for security reasons.	antry (Depil
Detail: Info to the reque name, requ reason).	rmation related est (e.g., TLD lest- ID,		

4 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.

î î	TLDS	CZDS REQU	ESTS I	MYINFO	DOCU	MENTLIBRARY	i i						
												Note: All Dates	are in MM/DD/YYYY format
	CZDS	Requests											
ш	Rev	oked 🕶											
25 ite	ms • So	orted by Name •	 Filtered I 	by all cont	tacts - Nam	e • Updated 3 r	minutes ago						C 🚺
		REQ ↑ ∨	TLD	V DO	own ~	REQU ~	REQU ~	APPR ∨	REVO V	REVO V	LAST STA	Filters	→
1		R-1337	-	CZ	ZDS Dir	matter.mc.	9/27/201	9/27/201	9/27/201	The regist	9/27/2018		
2		R-1338	-	CZ	ZDS Dir	-	9/27/201	9/27/201	9/27/201	Request r	9/27/2018	Add Filter	Remove All
3		R-4175	-	CZ	ZDS Dir	jumitest	10/9/201	10/9/201	10/9/201	The regist	10/9/2018		
4		R-4177	-	CZ	ZDS Dir	belts built .	10/9/201	10/9/201	10/9/201	The regist	10/9/2018		
5		R-4182	-	CZ	ZDS Dir	tarthice.	10/9/201	10/9/201	10/9/201	Request r	10/10/201		

1. Click Add Filter, then click inside the New Filter* box.

Cª Cancel Sav Filters → Matching all of these filters		phiose pens		C' 🔽
Filters → Matching all of these filters		C T	Cancel	Save
		<i>→</i>	Matching all of these filt	ters
New Filter*			New Filter*	×
Add Filter Remove All Add Filter Remov	r	Remove All	Add Filter	Remove All

 Select the field you want to filter and the operator. In the Value field, enter the search terms and click Done. You can create multiple filters to drill down your results. The list view automatically refreshes once you click Done.

	Field			Cancel	Save
The search terms are not	Requeste	er Name	•	Cancer	Jave
case sensitive, but must match the field values used	Operator			Matching all of these filters	
in the portal. This means you cannot type "CZDS" if	equals		•	New Filter*	×
you are looking for "CZDS Direct Download."	Value Test User	r1, Test User 2, Test User 3		Add Filter	Remove All
Use commas to search for multiple terms: gov, edu	E		Done		
com.	est User	test.user.01@exa	1/14/2019, 10:10		
	est User	test.user.01@exa	1/14/2019. 10:10		

5 Editing Requests

Only pending or approved requests can be edited. The three action buttons are **Edit**, **Approve**, and **Deny**.

	ft -	TLDS	CZDS REQUESTS	MY INFO	DOCUMENT LIBRARY		
							Action Buttons
CZDS Request R-9147							Edit Approve Deny 🗸
Panista	DET	TAIL	USER DETAILS	RELATED			
 CZDS 		√ Info	rmation				
		Request I	D			Status	
ACCOUNTS		R-9147				Pending	

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.

	Edit R-9147	
Information		
Request ID	Status	
R-9147	Pending 👻	
TLD	Status Indicator	
yachts	•	
*TLD Detail	Request Validity (Days)	
yachts-Detail-020165	× 4,000	
	Number must be between 90–4	4.000

5.1.2 Approve

In the **Pending** list view, click **Approve** in the upper right corner to authorize a request. On the confirmation screen, click **Ok**.

1 request will be approv	ved.	
	Cancel	Ok

5.1.3 Deny

In the **Pending** list view, click **Deny** and a separate screen appears to reject the request. Select a Denial Reason(s), type the Denial Explanation, and click **OK**.

	1 request will be denied.	
Select Denial Reason(s)		
wailable	Selected	
The requester did not provide correct or	•	•
legitimate credentials	4	-
(explain why)		
The Registry Operator reasonably believes the user will violate the terms of Section 2.1.5. of Specification 4 of the		
An option must be selected		
Denial Explanation		

The request has been completed when the status indicator is red. Notice that the action buttons have disappeared from the upper right corner because the request is no longer editable.

VINFORMATION		
Request ID	Status	
R-9147	Denied	
TLD	Status Indicator	
yachts	•	
TLD Detail		
yachts-Detail-020165		
Download Method	Denied By	

5.1.4 Revoke

- •

In the approved record (in the **Approved** list view), click **Revoke** in the upper right corner.

R-9155			Revoke FTP Credentials
Registry	DETAIL USER DETAILS RELATED		
CZDS	 Information 		
	Request ID	Status	
ACCOUNTS	R-9155	Approved	
2	TLD	Status Indicator	
Test Assessed Dec			
K Test Account Ky	TLD Detail	Request Validity (Days)	
istRy1		4,000	
Account Test			

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

1 request w	vill be revoked.
Revocation Reason:	
Choose one	
Revocation Explanation	
	Cancel

The request is complete when the Status Indicator turns red.

DE	TAIL USER DETAILS RELATED	
	✓ Information	
	Request ID	Status
	R-9155	Revoked
	TLD	Status Indicator
	yokohama	•

5.2 Editing Multiple Requests

You can quickly approve, deny, or revoke multiple requests *only in the Pending* or *Approved list views*. Notice that when no boxes are checked in the **Pending** or **Approved** list views, the top right action buttons (**Approve** and **Deny**) are inactive.

	n T	LDS CZDS REQUEST	S MY INFO DOCUME	NT LIBRARY			
0.0.1						Note: All Date	s are in MM/DD/YYYY forma
Registry CZDS	CZDS Requests Pending +						Approve Deny
ACCOUNTS	7 items • Sorted by Name • Filter	ed by all contacts - Name	Updated 3 minutes ago				C 7
	REQUEST ID †	V TLD	V DOWNLOAD M	IET V REQUESTER LOGI V RE	QUEST VALIDI V REQUESTED DATE V LAST STATUS	CHAN Filters	→
the first design of the	1 R-9135	100700	CZDS Direct Dov	vnload	10/16/2018, 1:17 PM		
Concession from	2 🗌 R-9160	10000	CZDS Direct Dov	vnload I	10/17/2018, 5:55 AM	Add Filter	Remove All

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

		_				Note: All Dates are in Mi	M/DD/YYYY form
 Registry CZDS 	CZDS Pend	Requests ding	Click this che select all req	eckbox to uests at once.		Ap	prove Deny
ACCOUNTS	14 items • So	irt d by Name • F	iltered by all contacts - N	ame • Updated 4 minutes ago			C,
Q		REQUESTID	† ∨ TLD	✓ DOWNLOAD ME ✓	REQUESTER LO 🗸	REQUEST VALID V REQUESTED DATE V LAST	STATUS CHA
Of Test Account Ry	1	R-9135	100700	CZDS Direct Download	talls installigenergie -	10/16/2018, 1:17 PM	
Y Account Test	2	R-9147	yathis	CZDS Direct Download	kettikumentimett	10/16/2018, 4:09 PM	
partite	3 🖌	R-9160	unites.	CZDS Direct Download	International Stationary	10/17/2018, 5:55 AM	
pathon.	4	R-9161	unite	CZDS Direct Download	harfulate Mgrann.	10/17/2018, 5:55 AM	

5.2.1 Bulk Approve

In the **Pending** list view, click **Approve** and a separate screen confirms approval of the requests. Click **OK** to authorize the selected requests.

5.2.2 Bulk Deny

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

D	eny Pending CZDS Requ	lests
	1 request will be denied	d.
Select Denial Reason(s)		
Available	Selected	
The requester did not provide correct or		
legitimate credentials (explain why)	4	•
The Registry Operator reasonably believes the user		
will violate the terms of Section 2.1.5. of		
Specification 4 of the An option must be selected		
Denial Explanation		
You must complete th request.	e Denial Explar	nation to submit the
Cancel		OK
Carleer		OK

- 2. When you have completed the required fields, click OK.
- Once you have submitted the request, choose the **Denied** list view to see all requests you have denied.



5.2.3 Bulk Revoke

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

			Searc	ch within sele	cted account		SEARCH	0		
	ń	TLDS	CZDS REQUESTS	MY INFO	DOCUMENT LIBRARY					1
Registry CZDS	5 iter	CZDS App ms • Sor	5 Requests proved + rted by Name • Filter	ed by all conta	ts - Name • Updated a few second	fs ago			Note: All Dates are	in MM/DD/YYYY forma Revoke
Q		-	REQUEST ID †	V TLD	V DOWNLOAD V	REQUESTER L V	REQUESTED V	APPROVED D V	EXPIRE DATE V	LAST STATUS C
	्व	1	R-9130		CZDS Direct Dow	1	10/15/2018, 4:22	10/15/2018, 9:36	9/27/2029, 9:36 PM	10/16/2018
Y Account Test	-	2 4	R-9134		CZDS Direct Dow	1	10/16/2018, 1:17	10/16/2018, 1:24	9/28/2029, 1:24 PM	10/16/2018
	3	3	R-9153		CZDS Direct Dow	¢	10/16/2018, 4:13	10/16/2018, <mark>4</mark> :41	9/28/2029, 4:41 PM	10/16/2018
		4	R-9155		CZDS Direct Dow	¢	10/16/2018, 4:13	10/16/2018, 4:41	9/28/2029, 4:41 PM	10/16/2018
	5	5	R-9202		CZDS Direct Dow	1	10/23/2018, 11:1	10/23/2018, 11:2	1/21/2019, 10:20	10/23/2018

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

Revoke Approved CZDS Requests		
2 requests will be revoked.		
	OVED D V	EXPIRE DATE
* Revocation Reason:	0040.0.04	10 10 0 0000000
The registry operator has evidence to support the user has violated the term * Revocation Explanation	ms of Section 2.1.5. of Specification 4 /2018, 4:41	9/28/2029, 4:41 PM
	/2018, 4:41	9/28/2029, 4:41 PM
Cancel	/2018, 11:20	1/21/2019, 10:20

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

6 Approving FTP Requests for Registry Operator Provided TLDs

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.

			Edit	Approve	D	eny	Ŧ	
				-1	FTP Cr	edentia	ls	
ETAIL	USER DETAILS	RELATED		•				

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.

7 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 CZDS 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.

↑ CASES	TLDS	cz	ZDS REQU		CZDS Bul CZDS Bu	Ik Update			
ACCOUNT S	¢° 3 items	rLDs Acti • Sor	ve TLD	TLD	DL Actions here	AUTO e will apply to ALL row	VALIDITY (DAYS)	4	CZDS Bulk Update
	1	-	TLD † KK-TLC	KK-TLD1-Detail- 018901	Registry Operator provided	OFF	1,000	CZDS AUT	✓ CZDS DEF ✓ 1,000
	2	•	Dan tes DanTes	Dan test-Detail- 018902	CZDS Direct Download	N	3,000	ON OFF	3,000
				DanTest2-Detail- 018904	Registry Operator provided	OFF	1,000		

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.

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

8 CZDS Download Method

CZDS offers two download methods: CZDS Direct Download (default) and Registry Operator provided. To update this setting, contact ICANN Global Support Center.

To change this setting a request must be submitted via ICANN Global Support. Warning: All previously approved end-user access will be revoked, and requesters will lose access to zone files!

CZDS Method

CZDS Direct Download

Test TS

Operating RO

Test TS

Registry Operator SFTP Server ⁽¹⁾ 1.1.1.1.1

9 Download List View as a CSV file

You can download CZDS requests from the list view in increments of 200 as a CSV file. 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.

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

		Searc	ch within sele	cted account		SEARCH	🔔 TEST TS CONTACT 👻	
	🔒 TLDS	CZDS REQUEST	MY INFO	DOCUMENT LIBRARY				
RegistryCZDS	CZDS App	Requests proved -						Revoke
	5 items • Sor	rted by Name • Filter	red by all conta	cts - Name • Updated 36 minutes ago				C' 🗶 🔻
ACCOUNTS		REQUEST ↑ ∨	TLD	✓ DOWNLOA ✓ REQUESTER	V REQUEST	E V REQUESTE	✓ APPROVED ✓ EXPIRE DATE	✓ LAST STATUS

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

Continue Download?		
You're about to download 5 recon hit download. File Name : records	s. If you wish to continue, please enter a file name below and	
	Cancel Download	

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

10 Revision History

Version	Date	Changes
1.0	2019-01-25	Creation of first version.

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