ICANN Naming Services Portal User Guide for Registries

Version 4.4

ICANN Engineering & IT Team
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![ICANN logo]

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1 Introduction: The Naming Services portal

The Naming Services portal (NSp) is the official platform for information exchange between ICANN and its contracted parties (registry operators and registrars). The NSp has multi-factor authentication for increased security. ICANN suggests that all contracted parties use and implement multi-factor authentication in their systems.

The NSp is not only a communication medium but also a platform where contracted parties can submit requests, view various information such as contacts and technical information that was provided to ICANN, and respond to requests from ICANN, among other information exchanges.

Contracted parties can also monitor and reply to contractual compliance cases within the NSp. The portal includes a dashboard which groups each contracted party's compliance cases in three different categories: action type, status, and complaint type (e.g., URS, Data Escrow or SLA Alerts).

Contracted parties are encouraged to use this official platform for unofficial information exchange to ask questions and receive support about various topics from ICANN. By submitting a General Inquiry Case with relevant information, contracted parties ensure that any questions will be answered quickly by ICANN Global Support or directed to relevant experts within ICANN.

For details on how to log in to the Naming Service portal please reference the NSp Quick Start Guide for Registries and Registrars.

If a portal user loses access to the NSp, they can submit a General Inquiry case by sending an email to globalsupport@icann.org from the email address that is in ICANN's records for the portal user.

2 Navigation

2.1 Account Search and Global Search

The NSp contains two search bars. The far left account search panel only searches TLDs within a selected account. This is different from the global search bar at the top of the screen, which searches all cases, files, TLDs, etc., within the selected account.

To use global search:

1. Select an account on the left.

2. Click inside the global search box and specify your search terms.

Global search encompasses TLDs, compliance tickets, and documents.

2.2 Invoicing Preferences

Credentialed users can specify the invoice delivery method (email, print, or both) and whether the invoices should be delivered individually or in one single email (group invoicing).

To change the invoicing preferences (con.):
1. Click Update Account.
2. Check the box under Group invoicing if you would like all invoices for the account delivered in one email.
3. For Invoice Delivery Method: Click the dropdown arrow and choose one of the three options.
The default is Email Only. Click Save.
4. Cross Ownership Interests- This is checked when the Registry has declared cross ownership with other entities
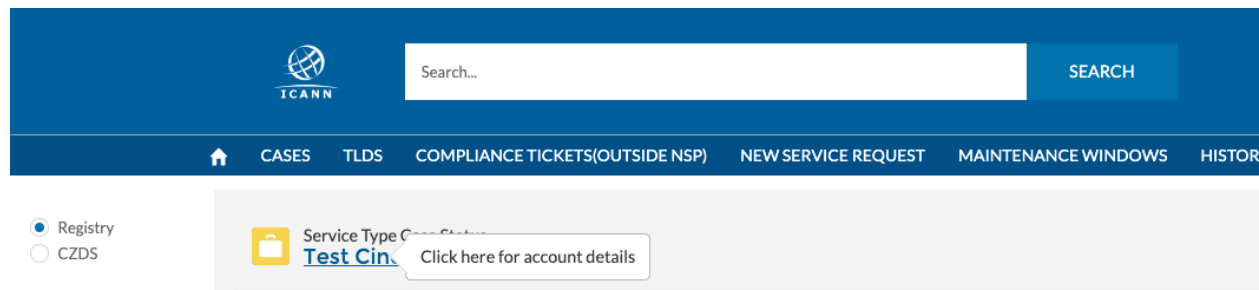
3 The Naming Services portal Tabs

Once logged in to the portal, you will see the tabs described below.
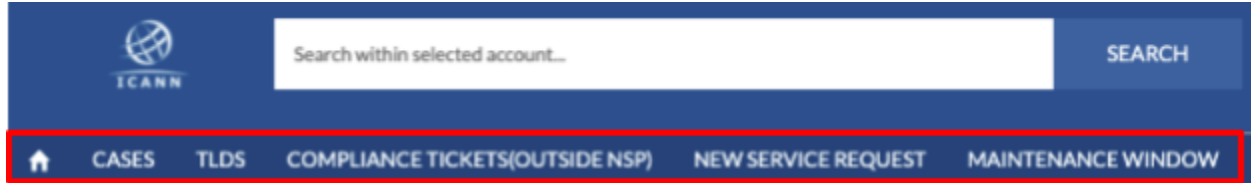
Home icon and 5 tabs

Note: Applicant accounts only have two tabs and the home icon. For more information, see Section 8, Applicant Accounts.

Click on the Account name under the Service Type Requests to view the account summary. There are two subtabs:

- ◉ **Detail** – It has the following fields.

    a. Engagement Manager – ICANN contact for the account
    b. Account Name – Name of the account
    c. Cross-Ownership Interests – If checked, indicates that the account has cross-ownership with other entities.

Click on the Update Account button on the top right to update these fields.

    d. **Invoice Delivery Method** – choose whether your invoices are delivered by email only, print only, or both. The default setting is email only.
    e. **Invoice Grouping** – choose whether multiple invoices are combined into a single file or emailed individually.

- ◉ **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.

Tab	Description
Home	Click to return home at any time.

Cases	View and edit service requests for a given TLD. Cases are the primary means of communication between you and ICANN org. This tab displays all cases related to your account and TLDs.
TLDs	Displays active and pending (going through assignment) TLDs for which you are the credentialed user. It also displays the status of each TLD's service request. To view all cases (service requests and general inquiries) related to a TLD, click **TLDS** > desired TLD > **Related** > **Associated Cases**. This tab is not available on Applicant Accounts.
Compliance Tickets (Outside NSp)	Compliance matters initiated prior to 26 March 2021 will continue to be processed through the legacy system until they are closed.
New Service Request	Submit a general inquiry case or service request for your TLD.
Maintenance Window	Create, edit, and delete maintenance windows for your TLDs.

4 Home/Landing Page and Dashboards

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

The upper dashboard displays the status of your service requests and general inquiry cases. They are grouped by list view, which is a predefined group of records.

The lower dashboard shows the Compliance Cases Dashboard.

Compliance Cases Dashboard

The lower dashboard on your landing screen presents your compliance cases in three different categories: action type, status, and complaint type.

Dashboard	Description
Action Type	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.
Open Cases by Status	Organizes cases based on their compliance status (e.g., first notice, second notice, or breach). For information about compliance case statuses and processes, visit About ICANN 's Contractual Compliance Approach and Processes.
Open Cases by Complaint Type	Displays the total number of cases per type of complaint. The current categories include: Abuse Contact Audit BRDA Bulk ZFA Code of Conduct Disclosure of gTLD Registration Data Generic Registry Monthly Reports PICDRP Registry Data Escrow Registry Fees Reserved Names RR-DRP SLA Alerts URS Zone File Access

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.

5 Cases Tab

The **Cases** tab displays all cases belonging to the account. There are three types of cases:

- **General inquiry** cases (default) are for any general questions, account maintenance, or to report problems. For more information, see Section 6.1, General Inquiry Cases.
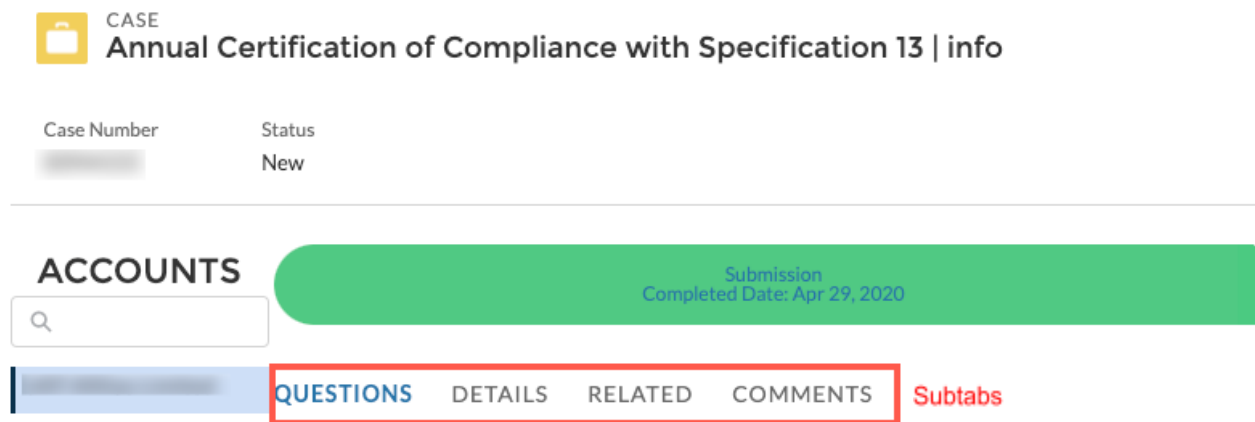
    Note: This is the only option available for applicant accounts. For more information, see Section 8, Applicant Accounts.

- **Service requests** are for more complex processes (e.g., when registry operators must inform or request consent or approval from ICANN, per the rights, obligations, and provisions defined in the Registry Agreement).

- **Compliance** cases are for tracking and responding to complaints made by the community based on ICANN's Contractual Compliance authority. These cases were created after March 2021.

All credentialed users can view the cases on the account. Note that if an account contains more than one credentialed user, then only the case creator receives notifications when a case is updated.

5.1 Cases Subtabs

Subtabs are the navigation groups under a main tab or within a case. The table below defines each subtab.

Subtab	Description
Questions	This subtab only appears in service requests. Questions need to be answered to populate the details of the service request for it to be reviewed and processed. Fields marked with an * (asterisk) are mandatory and must be completed before submitting the request. ICANN org reviews the information once the case is submitted.
Details	Contains the information of the service request (e.g., the case number, who created the case, status, etc.). Although this subtab is available when creating a new service request, the fields are blank and will be populated once the request has been submitted.
Related	Displays related information pertaining to the case, such as associated TLDs, files, any related cases, and all email correspondence.
Comments	Displays all the comments in the service request. This section allows you to provide input on your case(s) and ask questions. You can also post a comment after you have created a service request to request changes and/or upload files.

5.2 List Views

A list view is a predefined group of records. Click the **ListView** dropdown arrow (▼) to filter your cases based on status.

1. Click the **Cases** tab.

2. Click the **ListView** dropdown arrow (▼) and select the list you want to view:
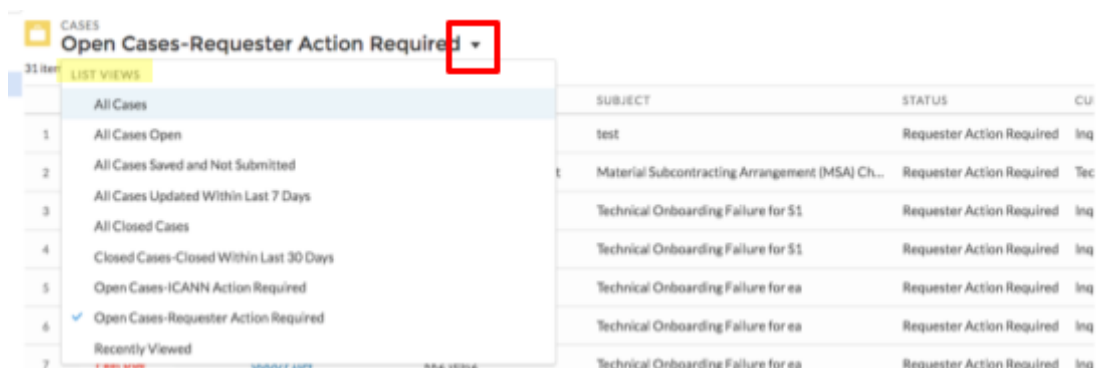
Once in a selected view, click the column header to sort the cases, then click the desired case number to view its details.

5.3 Case Status Descriptions

Cases have assigned statuses, defined below, to let you know how the case is progressing.

Status	Description
New	After you complete all the information and click **Submit**, the case status changes to **New**.
Not Submitted	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 **Save**) and edited. This status does not apply to general inquiry cases.
ICANN – In Progress	ICANN org has taken ownership of the case and is working on it.
Re-Open Requested*	A general inquiry case goes into re-open requested status when a credentialed user adds a comment to a closed case. Users can decide if they want to open a new case or re-open the closed one. * This status does not apply to service requests.
Portal User Action Required	ICANN org is requesting information or is requiring action from you.
Canceled	Either you or ICANN org has canceled the case.
Closed	Case has been resolved and closed.

5.4 Compliance Status Descriptions

Compliance cases have their own statuses, which are separate from case statuses "above". For information of the compliance statuses and process, visit About ICANN 's Contractual Compliance Approach and Processes.

6 TLDS Tab

The TLDS tab lists all the top-level domains (TLDs) under an account and has two list views:

- **Active**: Current status of the TLDs in the account.

- **Pending**: Pending configuration of the TLDs in the account, which is typically only seen during an Assignment or Material Subcontracting Arrangement (MSA) Change.
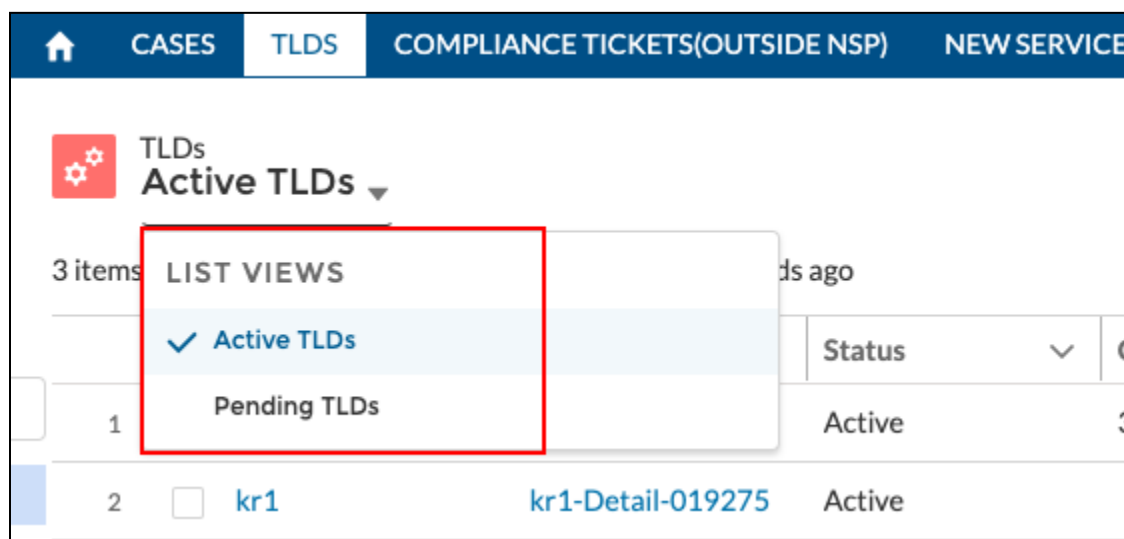
After you have selected your list view, click the desired TLD. The information is grouped into five subtabs: **Detail**, **Related**, **TLD Roles**, **EPP Extensions**, and **Additional WHOIS**.

6.1 Detail Subtab

The **Detail** subtab provides contact and technical information for the TLD. Click the **Edit** action button in the upper right corner to change the information for a delegated TLD. For more information on action buttons, see Section 5.6, Action Buttons.

6.2 Related Subtab

The **Related** subtab contains six separate sections – Files, Sunrise Information, RSTs (Registry Service Testing), Associated Cases,TLS Client Authentication Data and Maintenance Windows – populated with previously submitted information. Click the hyperlinks within each section to view additional details. You cannot modify these details.

Note that certain fields will be empty if an account has undelegated TLDs.

6.3 TLD Roles Subtab

ICANN has defined sets of responsibilities assigned to a contact for each TLD. Some responsibilities require more than one contact; collectively, these contacts are referred to as roles (e.g., 24x7 Emergency Contact, Billing Contact, and Registry Primary Contact). Roles can only be updated with contacts that exist in the account. To add a new contact to your account, see Section 5.3.3, Update TLD Roles.
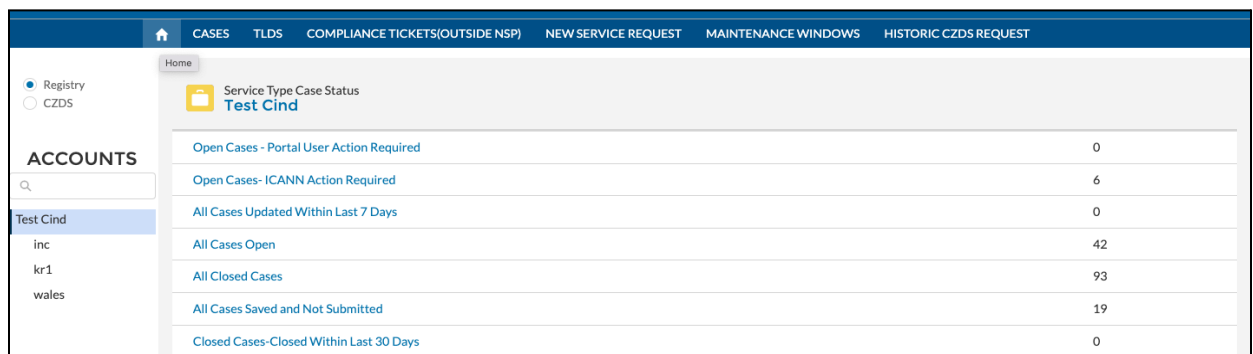
Note that a contact is different from a user. A contact can be connected to a TLD role and/or a user for that account. A user must first be a contact before the ICANN org can assign login credentials. However, a user does not have to be connected to a TLD role to be credentialed.

To add a new user to your account, see section 5 of the quick user guide found on the Naming Services portal resource page for steps to add a credentialed user to your account.

6.3.1   View All Contacts

You can see a list of all contacts, including inactive ones, for an account.

1. Click the **Home** icon.

2. Under **Service Type Case Status**, click the account name.

On the next screen, click **Related** to view all account contacts.

Refer to section 5 of the quick start user guide found on the [Naming Services portal resource page](#) for steps to add a credentialed user to your account.

The registry primary contact can submit a general inquiry case to remove outdated contacts from the account.

6.3.2   Add a New Contact to Your Account or Update Contact Information

Users cannot self-service to create or update contacts.

Create a general inquiry case to add a new contact to your account or update details for an existing contact. In the description section of the request, include the first name, last name, primary phone, email address, and which TLD role the new contact should be associated with. You can also submit a general inquiry case to update details of a contact. Refer to the Criteria for Contacts section for more information.

Note that a contact is different from a user. A contact can either be connected to a TLD role or not. A user must first be a contact before the ICANN org can assign login credentials. However, a user does not have to be connected to a TLD role to be credentialed.

6.3.2.1   Criteria for Contacts

When submitting a general inquiry case to add a new contact or update contact details, provide the following information.

Required	Optional
First Name, Last Name, Address*, City, ZIP/Postal Code, Country, Primary Phone Number and Country Code, Email Address	Mobile Number and Country Code, Position/Title, State/Province/Region

* Only required for Registry Primary, Billing, Legal (Notice) and Public Contacts. These contacts' addresses are displayed in the TLD Detail subtab.

- ◉ At least one of the three emergency contacts should have an individual's name and email address (e.g., jane_doe@icann.org as opposed to it_support@example.com). Distribution group email addresses may also be used.

- ◉ The registry primary contact cannot be the same as the secondary contact or the legal (notices) contact. Each contact must provide different email addresses and phone numbers.

- ◉ Each contact may have a maximum of two phone numbers and up to 15 email addresses.

- ◉ Refer to the next section, Update TLD Roles, for more on how to update roles.

For a full description of all roles, please see the Helpful Links section below for instructions on retrieving roles descriptions from the Document Library in the Naming Service portal.

6.3.3   Update TLD Roles

You can only change roles for existing contacts. To add a new contact to your account, see Section 5.3.2, Add a New Contact to Your Account or Update Contact Information. You may update the roles as desired once a contact has been added. Please refer to the Helpful Links section for details.

1. Under the **TLD Roles** subtab, find the role you want to update.

2. If a name is already in the **Contact** field, click the "x" and type the first few letters of the new contact's name. The field automatically populates with all possibilities.

3.   Using your mouse, select the desired contact. Repeat this process for every role you want to change.

4.   When you are finished, click **Save**.

Although the same contact may be assigned to multiple roles, the following three roles *cannot be edited from the portal*:

- ◉   Legal (Notice) Contact
- ◉   Billing/Financial Primary Contact
- ◉   Registry Primary Contact

To change the contacts in these roles, the credentialed user must submit a general inquiry case from their primary email or from the portal. You do not have to submit a separate request for each change; one case can contain updates for all three roles.

6.4 Additional WHOIS Fields Subtab

Displays any information you have previously provided about additional fields shown in the Registry WHOIS service and allows you to remove existing entries that no longer apply.

You may add new fields to the list of Additional WHOIS fields by creating a new service request type: *Submit Additional WHOIS Fields*. To submit a new service request, see Section 6.2.1, Create a Service Request.

6.5 EPP Extensions Subtab

Displays any information you have previously provided about implemented EPP Extensions and allows you to remove entries that no longer apply.

Create a new service request (select service type: *Submit EPP Extension Information*) to update information about implemented EPP Extensions.

6.6 Action Buttons

Action buttons, to the right of the TLD name on the TLDS tab landing page, allow you to submit new details for the Registry Onboarding Information Request (ONBIR). Note that action buttons – with the exception of TLS Client Authentication – will NOT be available when the ONBIR status is set to **Approved**. The ONBIR process does not affect the TLS Client Authentication action button.
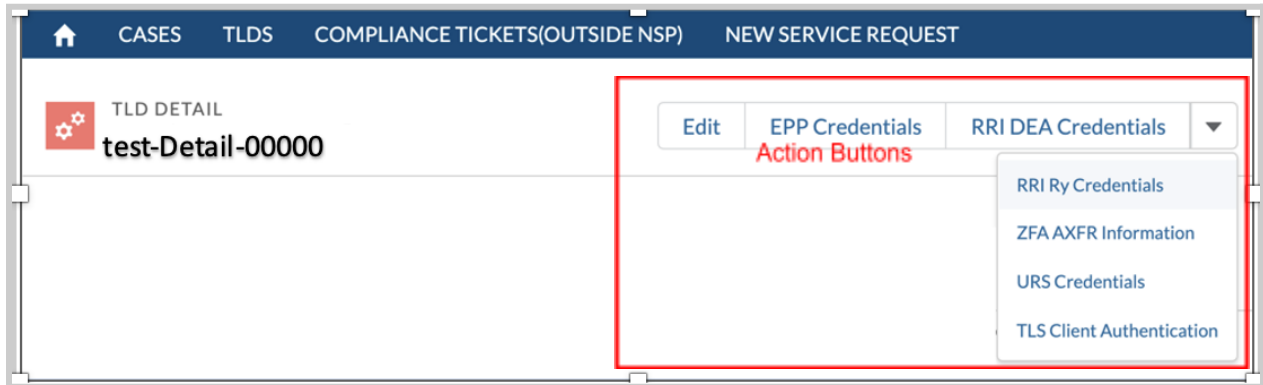
List of action buttons:

- Edit
- EPP Credentials
- RRI DEA Credentials
- RRI Ry Credentials
- ZFA AXFR Information
- URS Credentials
- TLS Client Authentication

Password complexity specifications, if required, are displayed in the popup window when you click the respective action button.

If any of the Registration Reporting Interfaces (RRI) password fields contains an empty value, the existing password remains unchanged for the account, and the rest of the submitted information will be updated.

Refer to the CZDS guide for detailed information.

7 New Service Request Tab

The **New Service Request** tab allows you to open two types of cases: General inquiry and service request. Both types of cases contain the following details:

7.1 General Inquiry Cases

General inquiry cases are for any non-process questions related to your accounts (e.g., I heard this policy was published. What does this mean?). You may also submit a general inquiry case to add a new contact or credentialed user to your account. General inquiry cases are responded to within seven days.

7.1.1   Create a General Inquiry Case

To open and submit a new general inquiry case:

1. In the **New Service Request** tab, select **Registry Services**, and click **Next**.

2. In the top box of the next screen, type **General Inquiry** in the top box and click **Next**. You may also click the dropdown arrow in the bottom box and select **General Inquiry**.

Note: Click **Download Case Request PDF** to view and download the latest copy of this guide.

3. Enter the subject and description, select the relevant TLD(s) (optional), and click **Submit**.

4. Once the inquiry has been submitted, the confirmation screen displays a case number in the upper left corner with a status of **New**.

NEW CASE

CASE CATALOG   SELECT SERVICE TYPE   ENTER CASE DETAILS

GENERAL INQUIRY

*Subject

*Description

Available TLDs   Selected TLDs

testint18
testint19
testint2
testint20
testint21
testint22
testint23

Select All   Clear   Select All   Clear

Cancel   Back   Submit

7.1.2   Update or Provide New Information to a Submitted General Inquiry Case

If you have already submitted a general inquiry case and need to add additional information or modify your inquiry, add a comment in the case to alert ICANN org of the update. To add a comment:

1. Click the **Comments** subtab.

2. Click **Share an update** to expand the box and type your comment. You can also add attachments by clicking the paperclip symbol in the lower left corner of the box.

3. When finished entering your comments and/or uploading your files, click **Share**.
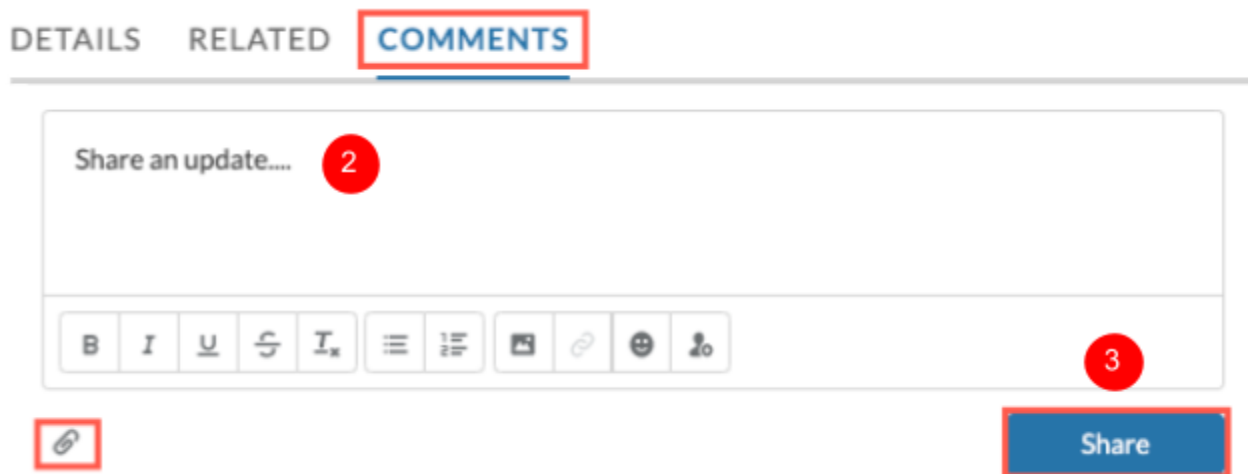
7.1.3   Expedite a General Inquiry Case

The **Expedite Case** button allows you to request a shorter resolution time for a general inquiry case. *This function is not available for service requests*. The response time for expedited cases is less than seven days, but is adjusted at the discretion of ICANN org. A request may also be denied if the case cannot be resolved within the specified turnaround time.

1.   In the **Cases** tab, click the desired case number. Make sure the case type is a general inquiry, not a service request.

2.   On the next screen, click **Expedite Case** in the upper right corner. In the popup window, type your reason for expediting the case and click **Submit**.
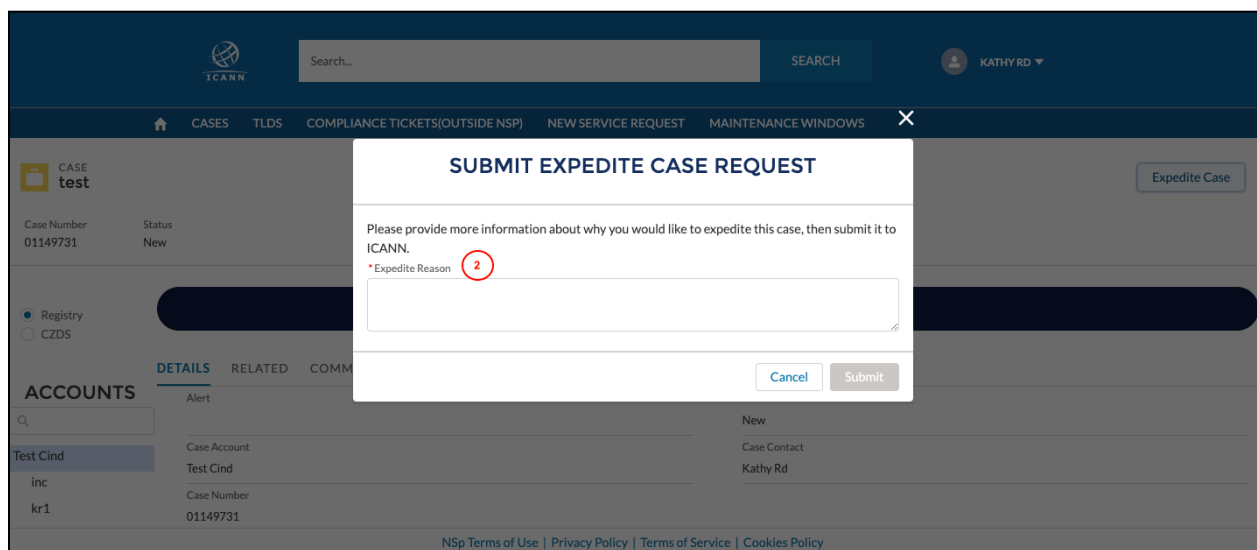
A green **Success** box appears at the top of the confirmation screen once the expedite request has been submitted.

3. Click **Expedite Case** to view the status of your expedited case:

☐ **Requested** (still pending; not yet approved or rejected)
☐ **Approved**
☐ **Rejected**
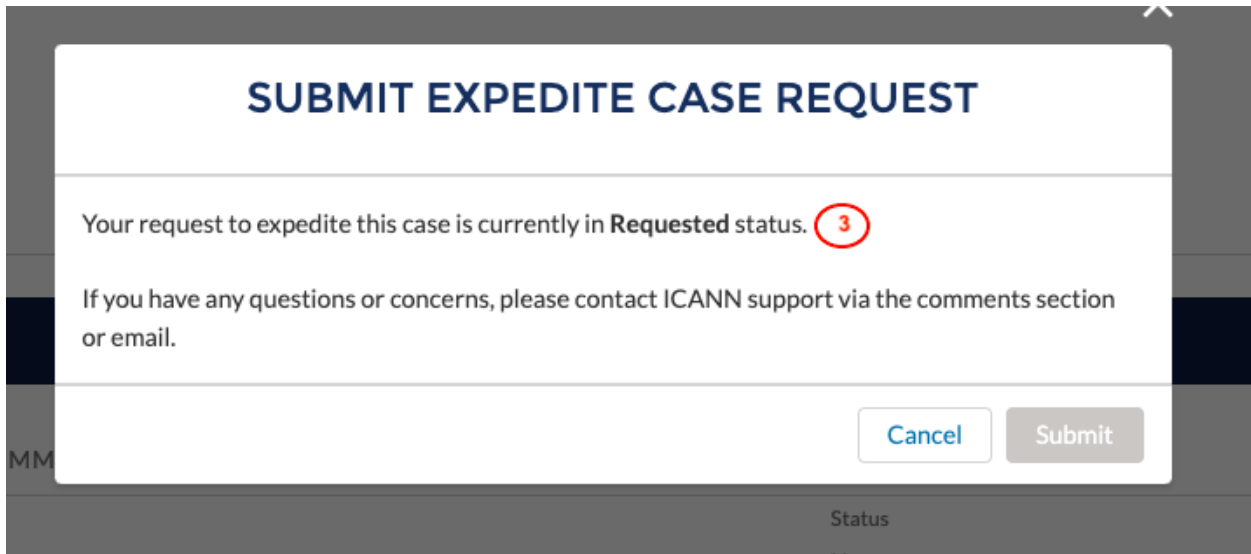
Note: A case can only be expedited once.

7.2 Service Requests

Service requests are for more complex processes (e.g., when registry operators must inform or request consent or approval from ICANN, per the rights, obligations, and provisions defined in the Registry Agreement). Applicants cannot create service requests, but they can create general inquiry cases. A service request contains four subtabs – **Questions**, **Details**, **Related**, and **Comments** – and a progress tracker indicating where the case is in its lifecycle. Hover your mouse over a phase to see the estimated Service Level Target (SLT) and expected start and end date for that phase.

A printer icon in the upper right of the **Questions** subtab allows you to print a hard copy of your case details. This function is not available for general inquiry cases.

7.2.1   Create a Service Request

You must create a new case to submit a service request for your TLD. To create a new case:

1. Click the **New Service Request** tab.

2. Select **Registry Services** and click **Next**.

3. In the top box of the next screen, type the name of the service request and click **Next**.

    If you do not know the name of the service, click the dropdown arrow in the bottom box to view a list of available services.

4. Select one or more TLD(s) (if applicable) from the list and click **Next**.

5. Enter the information in the provided fields and click **Next**.

    Note: Fields marked with an asterisk (*) are required.

6. Click **Save** at any time to save your progress or **Cancel** to leave the case without saving.

    Note: You can save a service request even when all the required fields data have not yet been populated. The saved request has a status of **Not Submitted** and can be found in the **All Cases Saved and Not Submitted** list views. Click the case number to finish entering the information.

7. Click **Submit** when you have provided all the required information and the service request is ready for ICANN org to review.

- All fields marked with a red asterisk ( ) are required. Other fields may become required based on your responses. If a response does not apply, enter "N/A.
- Click the "Save" button to save your work. This will allow you to return to the request at a later time and will not submit the request.
- You may print or save your request as a PDF by clicking the printer icon in the upper right corner. You must click "Save" in order to print the request.
- Click the "Copy Case" button located in the upper right hand corner to create a new case and copy over all answered questions from this current case. Please note, attachment questions and associated attachments will not be copied over.
- Click the "Submit" button to submit your completed request to ICANN org.

Request Details

1. Covered Period

Enter the start date and end date of the period of the prior calendar year for which this certification applies (e.g. submit your certification for covered periods in calendar year 2021 by 20 January 2022).

* Start Date

* End Date

2. Submission of Internal Review

Upload the results of the Registry Operator's internal review.

ATTACHMENT

* Attach File

⬆ Upload Files   Or drop files

Title   File Type   File Size

6 Cancel   Save   Undo Changes   Submit 7

If you have already submitted a service request and need to add additional information or modify your request, use the **Comments** subtab to alert ICANN org of the update. Make sure you are in the case you want to add information. You may have to select a different list view (see Section 9.2, List Views) to find the desired case.

To add a comment:

1. In the **Cases** tab, click the desired case number, then click the **Comments** subtab.

2. Click **Share an update** to expand the box and type your comment. You can also add attachments by clicking the paperclip symbol in the lower left corner of the box.

3. When finished, click **Share**.

7.2.2　Copy a Service Request

The **Copy Case** button duplicates the service request from one TLD to another. *This function is available only for service requests and does not apply to general inquiry cases*.

Note: Duplicating the case does not copy the attachments.

1. In the **Cases** tab, click the desired case number.

2. On the next screen, click **Copy Case** in the upper right corner.

3. In the popup window that appears, select one or more TLDs (depending on the type of service request), and click **Copy**.
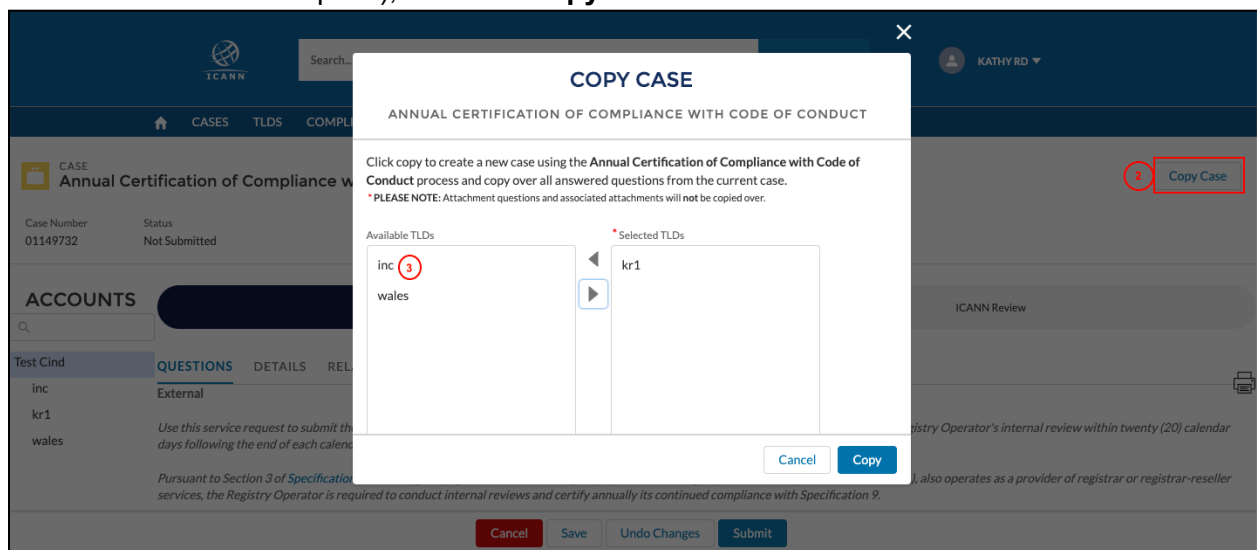
4. Edit the fields (if needed) and click **Submit**.

8 Maintenance Window Tab

In this tab, registries can inform ICANN about the maintenance window for the services that ICANN utilizes. A portal user can create, update, and delete maintenance windows for the TLDs under the accounts they are credentialed.

Note: All maintenance windows are in UTC (Coordinated Universal Time) if the user hasn't changed the settings to correspond to their own time zone.

8.1 List Views

The maintenance window tab contains three list views:

◉ **All** – view all maintenance windows for all TLDs under one account.

◉ **Enabled** – view the enabled maintenance windows for the TLDs under the account.

◉ **Disabled** – view all disabled maintenance windows for TLDs under the account.

8.2 Create a Maintenance Window

To create a new maintenance window:

1. Click the **Maintenance Window** tab.

2. Click **Create Maintenance Window** in the upper right corner.
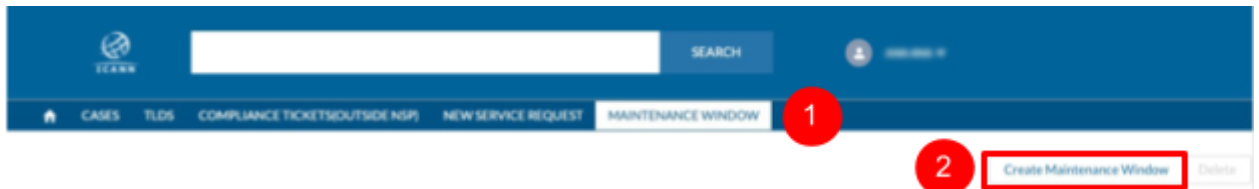
3. Select the TLD(s), service(s), and complete the required fields.

4. Click **Next**.

The start time must be *at least* 24 hours ahead of the current date and time.

Your browser settings determine the time zone.

The **Enabled** box is checked by default.

5. Verify that the information for the maintenance window(s) is correct. Click the box next to the **Maintenance Window Name** header to bulk validate all maintenance windows.

   You may also select individual maintenance windows by checking the box next to each entry. Click **Validate**.

6. If the times overlap with any currently enabled windows for the same TLD and service combination, then the validation will fail. Click the red error icon to view details of the problem.

   Click **Back** to go to the previous window to change any information and repeat the process from Step 5.

   Click **Cancel** to delete all the information. No maintenance windows will be created.

   A confirmation message appears if the validation is successful.

Click **Submit** and the screen returns to the **Maintenance Window Enabled** list view.

8.3 Edit a Maintenance Window

You may only edit ongoing or future maintenance windows; past windows cannot be edited. For ongoing windows, you may only extend or shorten the times of the maintenance.

1. Click the **Maintenance Window** tab and make sure you are in either the **All** or **Enabled** list view.

2. Click the desired entry under the **Maintenance Window Name** column.

3. Click **Edit**. In the popup window, modify the details and click **Save**.
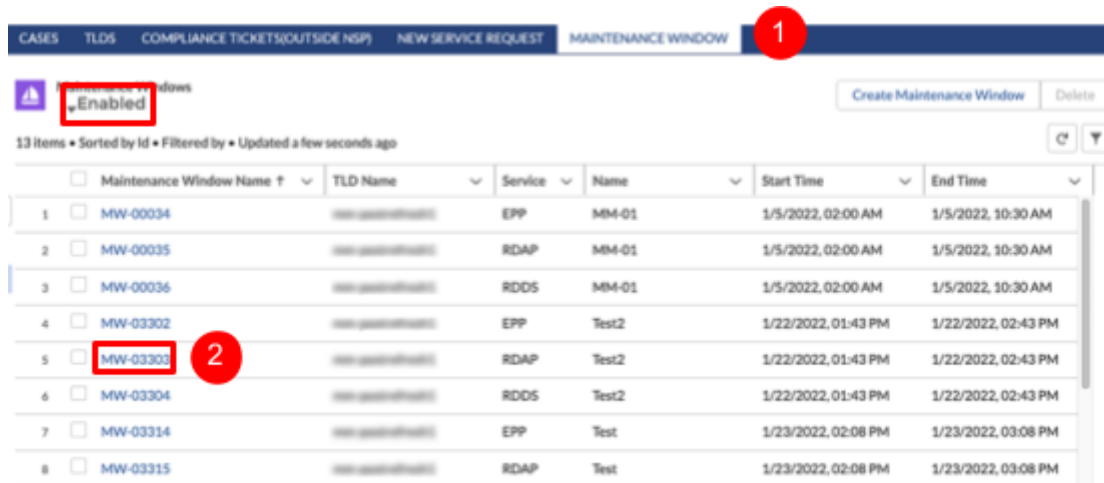
8.4 Delete a Maintenance Window

Only future maintenance windows can be deleted; ongoing and/or past windows cannot be deleted. There are two methods to delete maintenance windows: individual and bulk.

8.4.1 Individual Delete

1. Click the **Maintenance Window** tab and make sure you are in the desired list view.

2. Click the entry you want to delete under the **Maintenance Window Name** column.

3. In the upper right corner, click **Delete**. A message will ask you to confirm your choice.
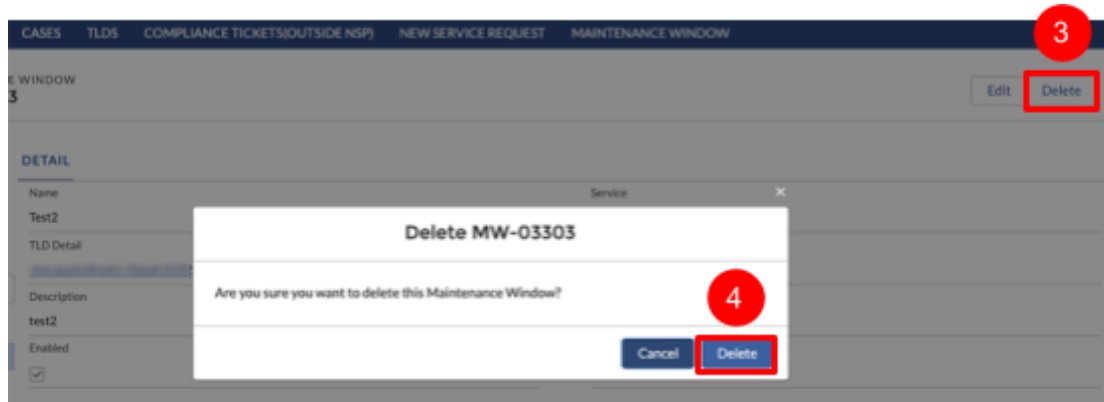
4. Click **Delete** to confirm your choice, or **Cancel** to return to the **Maintenance Window** landing page.

8.4.2   Bulk Delete

1. Click the **Maintenance Window** tab and make sure you are in the desired list view.

2. Check the entries you want to delete. To select all the entries at once, click the box in the header of the **Maintenance Window Name** column.

3. In the upper right corner, click **Delete**.

4. Re-confirm your selections in the validation popup window and click **Validate**.

5. If the checked maintenance windows are ongoing or past, an error message appears. Click the error icon to view the details. Click **Cancel** to return to the **Maintenance Window** landing page and restart the bulk delete process.
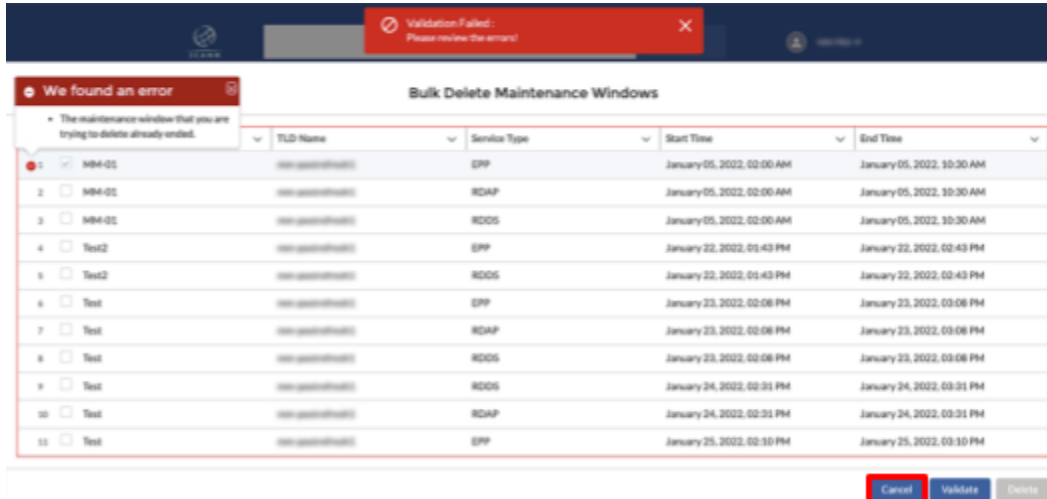
If none of the windows are ongoing or in the past, a confirmation message indicates that the validation was successful. Click **Delete** to complete the process.
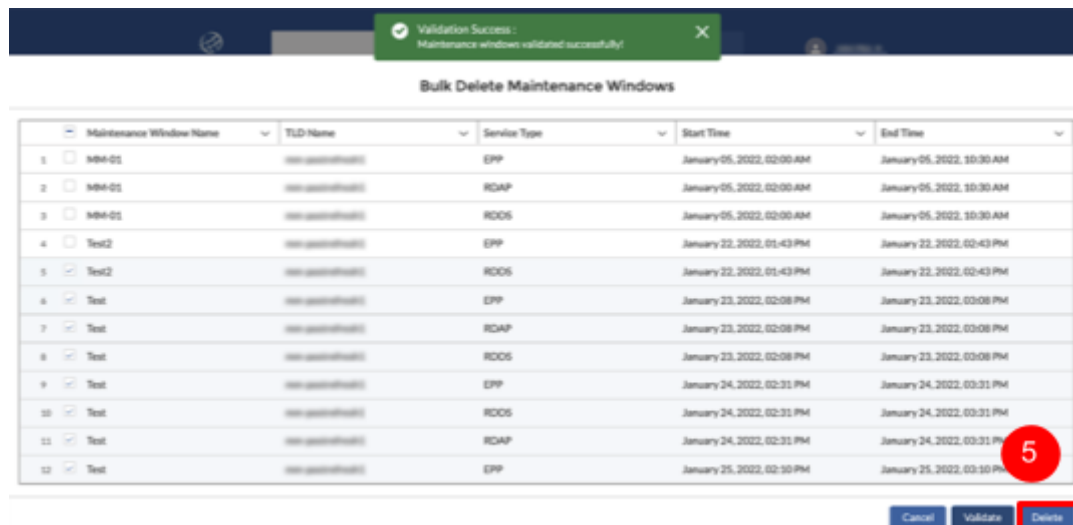
9 Applicant Accounts

TLDs that have not been contracted and are still in the application phase will only have access to the following features:

- Only the **Home** icon and two available tabs: **Cases** and **New Service Request**.

- The application number appends the account name in the **Accounts** column.

- The account name is appended by "-.app", and a separate login is assigned to each pending application. If one company has multiple applications, each one will have its own unique login credentials.

- Applicants can only create general inquiry cases. Service requests are not allowed.

- Applicants cannot update their contact information in the **My Info** section. Create a new general inquiry case (see Section 6.1.1, Create a General Inquiry Case) to change this information.

If an applicant becomes a registry, then ICANN org provides them with new credentials for a registry operator account with full system functionality and the applicant account is retired.

10 Helpful Links

Use the Document Library in the [Naming Services portal](#) to find important documentation, including [description of roles](#), important registry operator resources, and the general operations handbook for registry operators. The documents can be found by selecting **All Registries** in the list views**.**