OpenHRS Operating Manual
July 28, 2008

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OpenHRS Overview

OpenHRS allows you, as an accredited Registrar, to process and manage domain registrations under your own accreditation from a single technology platform. OpenHRS is an extension of the OpenSRS platform, leveraging the existing order-processing and management logic already developed in OpenSRS.

OpenHRS provides a technical solution that allows you to optimize and manage your domain name business operations without significant up-front development costs. It provides Registry inter-operability, Registrant management tools, and flexible order-management processes from a single interface. It significantly reduces the one-time and ongoing technology development overhead required to offer domain name registrations using your own accreditation.

OpenHRS allows you to out-source your technical infrastructure for domain registrations, including (but not limited to) hardware, application development and support, database administration, server co-location, load balancing and fall over, and WHOIS and data escrow.

You can process your registrations as well as administer your domains under management. The Administrator Web Interface (AWI) provides you with Registrar management tools.

What's in this Guide

This operating manual:

- Provides an overview of OpenHRS, and the operational overhead you need to consider.
- Explains the business functions of the commands in the Administrator Web Interface (AWI).
- Discusses the business impact of each feature in the system.

The intended readers of this guide are your Registrar administrators. Should you have any questions about the Administrator Web Interface (AWI) that are not addressed in this guide, please contact us.

Note: This guide addresses the most common features in the OpenHRS system. Since each customer's instance of the OpenHRS system is customized, you may find features described here that are not available to you, and that some of the features available to you are not described here.

Not covered in this guide

This guide does not include any of the information in the existing OpenSRS guides. The following guides apply to both OpenSRS and OpenHRS customers, and are referred to throughout; please review them.

Reseller's Guide to Domain Name Registration and Management – This guide includes information on domain registration and management, and instructions on using the Reseller Web Interface (RWI).

CCS Installation and Setup Guide – The Client Code Suite (CCS) is a cross-platform and extendible package of interfaces that allows your customers to buy and manage the services you provide. The CCS currently enables the provisioning of Domains and Blogware services, and can be used instead of the Reseller Client Library.

OpenSRS API Specification – Outlines the configurations and API commands required to connect to OpenSRS to make domain registration and management available to your customers from your website. The API method of connecting to OpenSRS allows you to create your implementation using the language of your choice. There are two versions of the API Specification: OpenSRS API Specification for Perl, which describes how to install and use the Reseller Client Library (a package of scripts and HTML pages that you can integrate with your website to make the Manage Web Interface available to your customers, allowing them to purchase, renew, transfer, and manage domains), and OpenSRS API Specification for XML, which describes how to connect to the OpenSRS system and submit XML requests using XML over HTTPS.

Note: All OpenSRS documentation is available from
http://opensrs.com/site/resources/documentation

OpenHRS is Different from OpenSRS

Although the OpenHRS system is an extension of the OpenSRS system, there are some differences that are discussed below:

Payment Methods are Limited

Transfers to a New Registrar

No Unmanaged Batch Pool

No Manage Interface

Transaction Fee vs. Registry Costs

Supported TLDs

Payment Methods are Limited

OpenHRS customers cannot remit payments to OpenSRS using an online credit card payment gateway as part of the standard product. OpenHRS customers must pay by wire transfer or cheque, and must carefully monitor their account balance with OpenSRS. The system provides customizable email notification of low account balances.

OpenHRS customers can only remit payments during regular business hours. As a result, should the customers' transactional balance with OpenSRS fall to zero outside of business hours, they will not be able to add funds until the next business day.

Transfers to a New Registrar

If the OpenHRS customer has name registrations with any other Registrar (including Tucows), those domains may only be moved to the OpenHRS' Registrar identity via the transfer process.

Note: A transfer request forces a renewal of the domain. We advise you to develop a clear policy with your clients (Registrants), so they are aware that upon their domain's renewal it is transferred to your Registrar account. Keeping customers informed in advance about your plans maximizes your client retention and minimizes potential confusion around the transfer and renewal process.

No Unmanaged Batch Pool

OpenHRS does not provide an unmanaged batch pool as a standard feature. However, the unmanaged batch pool was originally introduced to the OpenSRS system to offset the demand for batch commands to the capacity required for the 5,000 Resellers accessing the system for regular connections. As the nature of the OpenHRS installation is that the Registrar has a set number of Registry connections under their control, batch pool access is generally not required. For example, the Registrar could choose to query the Registry every day at 2 p.m. to search for dropped names, and this would have no impact on any other system users because the Registrar's own connections would be used.

No Manage Interface

There is no manage interface hosted by OpenSRS for Registrants under your accreditation, such as manage.opensrs.net, which is available for OpenSRS Registrants in the OpenSRS environment. Interfaces for managing domains can be customized for your accreditation using the OpenSRS API and scripts.

Transaction Fee vs. Registry Costs

Transactions with registries are done directly between you and the Registry, and there may be discrepancies between OpenSRS transaction fees and Registry charges at any given time. Because of the differences between Registry reporting periods and OpenSRS transaction recording, these numbers may not always be synchronized, but reconciliation is possible through the monthly statement financial reports provided with OpenHRS.

Supported TLDs

OpenHRS supports all of the TLDs that OpenSRS supports. For a complete list of available TLDs, see the OpenSRS website.

Roles and Features

Access to functionality within the OpenHRS system is controlled by feature. As a Registrar, you are given access to all domain and transfer-related information. Should users with fewer features be required, this can be discussed with your OpenSRS account manager during implementation.

Interfaces

AWI – Administrator Web Interface

Used by the Registrar's administrators to manage the domains and transactions in OpenHRS.

The AWI supports common Registrar tasks, including:

- Manage settings related to default messages, etc.
- Monitor transfers that are being done via your system
- Troubleshoot domains, using the Search Reg System Orders feature
- Manage a domain on behalf of a Registrant
- Monitor and add nameservers

The AWI's main page allows you to manage

- Domains
- Transfers
- Nameservers
- Default Messaging
- Passwords

RWI – Reseller Web Interface

Used to interact with OpenHRS for general account management and for Quickstart processes. For information about this interface, please review the *Reseller's Guide to Domain Name Registration and Management*.

OpenSRS API

Used by Service Providers to provision and manage domains. Please refer to the *OpenSRS API Specification*.

Pricing

Pricing of OpenHRS differs from that of OpenSRS. Registration fees charged by the Registry are handled directly by the Registrar. Each registration may be subject to a transaction fee, payable to OpenSRS. The rate of the transaction fee is determined by your agreement with OpenSRS, and is subject to minimum volumes. Refer to your OpenHRS contract for specific details.

Note:

- Transactions are charged per name-year processed.
- Monthly fees are subject to a minimum volume (see contract).
- Transaction fees are not refunded when a transaction is reversed.
- Credit is not extended within the system; prepayment is required for all fees.

Getting Started

Login Information

As part of your implementation, OpenSRS provides you with a username and password, as well as a web address. This web address is a secure site for your administration of the OpenHRS environment. Please contact your OpenSRS representative for this information.

Note: For security reasons, you should always log-out when you're finished using the Administrator Web Interface (AWI).

Initial Setup and Review

The OpenSRS team configures your environment as your OpenHRS system is implemented. However, you should review the following feature settings upon receiving AWI access, and on a periodic basis thereafter.

- **Setting up Default Messages**, which allows you to customize the content system-generated email messages, and control whether your Resellers have the ability to customize certain elements with the email messages.
- **Manage Restricted Domains**, which allows you to indicate domains for which a transfer request should NOT be executed.

Monitoring Transactions

Given the complex nature of some transactions, you may need to monitor transactions and take corrective action in order for them to complete.

For transfer transactions, monitoring features are provided to help you increase your completed transfer rate. For example, if the system is unable to parse the admin email for a transferring domain, the transfer is marked with an invalid admin contact – this order times out if not corrected. The **View Transfers Needing Valid WHOIS Information** feature allows you to correct a transfer order so that it can proceed. You should review this list and correct orders as required.

To ensure that inappropriate transfer requests are not submitted to the Registry, you can review the transfers prior to submitting them. The **View Transfers Waiting for Registrar Review** feature allows you to submit transfer requests to the Registry.

If a domain is not properly registered, for example due to a time out at the Registry, the domain may only be partially registered. As the Registrar, you may be required to reset the information to ensure a proper registration. The **Reconcile Partially Registered Domains and Reconcile Partially Renewed Domains** pages allow you see which domains are partially registered and complete the registration.

Compliance Requirements

As part of the accreditation process, your organization has agreed to abide by guidelines outlined by ICANN. As part of training, OpenHRS compliance requirements may be discussed generally, but the official authority is always ICANN.

Here are the links to some of ICANN's policies, required for compliance:

For all guidelines related to accreditation and your responsibilities, please visit http://www.icann.org/registrars/ra-agreement-17may01.htm

For domain disputes, please consult the UDRP at
http://www.icann.org/udrp/udrp.htm

If arbitration is required, an ICANN arbitrator must be engaged. See http://www.icann.org/udrp/approved-providers.htm

For policies on transfers, see
http://www.icann.org/transfers

For guidelines on the WHOIS Data Reminder Policy, see
http://www.icann.org/registrars/wdrp.htm

* These links are subject to change.

Managing Domains

Querying a Domain

Querying a domain is an easy method of accessing specific domain information that is held both at the Registry level and within your OpenHRS database. The search returns results for one domain at a time. You must enter the full domain name (i.e. acme.com) — wildcard searching is not supported.

To open the query page from the AWI main page, type a domain name in the **Query a domain** field, then click the **Query a domain** button:
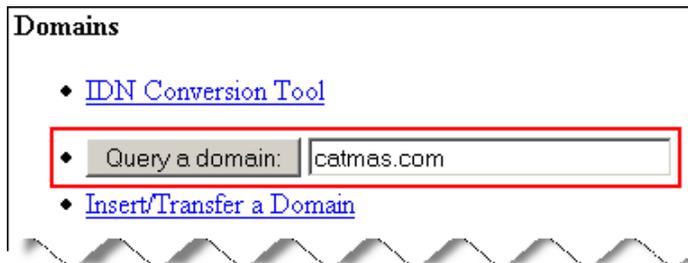
Note: If you don't know the domain name, use the **Search Reg System Orders** function, as it allows wildcard searches. If you can't find the domain based on its name, try a query using the status of the order (to discover whether the order completed, expired, etc.).

Search Results

A query returns the following page with information about the domain and links to additional domain information:

- **Exists:** Indicates whether the domain is listed at the Registry.
- **Points to "Your Name":** Indicates whether the Registry records the domain name as currently sponsored by you.
- **Found in Local DB:** Indicates whether the domain is in your local OpenHRS database.
- **Marked as Registered:** Indicates whether the domain was originally registered in your local OpenHRS database.
- **Internal Status:** What status has been applied to the domain by the Registrar.

If you are the Registrar for the domain, the following information is also displayed:

- **Reseller:** Identifies the domain's Reseller and provides links to that Reseller's profile where you can update the Reseller's settings; the Reseller Web Interface (RWI), logged-in as that Reseller; and the Reseller Notes page where you can add a note or review notes regarding that Reseller's profile.
- **Domain:** Provides links to view, modify, manage, the domain,
- **Transfers:** Enables you to see the domain's transfer history.
- **Orders:** Provides links to view the domain's order history.
- **Whois:** Shows the WHOIS status of the domain.
- **Notes:** Allows you to view any notes about the domain.
- **Registry Requests:** Allows you to search the domain's history of requests submitted to the Registry.

Domain not found

If the domain is not found in your HRS profile, try using the **Search Deleted Domain** link to see if the domain was ever in your HRS account and when it was deleted.

Viewing a Domain

Domain details can be accessed from the results page when querying a domain; see "Querying a Domain".

To a view a domain, from the **Domain** section in the query results page, click **View**.

View domain

The view domain page lists the domain's contact information and nameservers. You can also use the links on this page to manage the domain.

Modifying a Domain

Editable fields for the domain can be accessed from the results page when querying a domain; see "Querying a Domain".

To a modify a domain, from the **Domain** section in the query results page, click **Modify**. To get to the query results page, see "Querying a Domain".

Query Domain		Submit
View RSP		Submit

NOTE: IDN domain can only be queried in punycode.

catmas.com			
Exists	Yes	Reseller (status: active)	example - RWI - Reseller Notes
Points To example	Yes		
Found In Local DB	Yes	Domain	View - Modify - Manage (MWI) - Search Deleted
Marked as Registered	Yes		
Internal Status	Active	Transfers	Search Incoming - Search Outgoing

Modify domain

This allows the Registrar to perform general domain administration, including:

Renew Information – Provides read access to the domain's renewal information, including expiry date, renewal settings, etc.

Renew Domain – Begins the renewal process. Note: All renewal orders should be initiated via the AWI or RWI as a best practice.

Change Domain Ownership – Updates the ownership information for a single domain or for all domains within a single profile

Mark Domain as Registered – Allows for the cleanup of domains that were successfully approved by the Registry, but were not successfully entered into the Registrar database.

Hold when expires – Puts the domain on hold when it expires. This gives the original Registrant time to renew or re-register the domain before someone else can register it.

Bypass 60 days no transfer rule – Allows a domain to be transferred within 60-days of registration or renewal.

Registry Status Updates

- **Active –** Indicates that the domain is operational.
- **Hold –** When the domain is on hold, the name won't resolve because it has been removed from the Registry-maintained zone files. Note that this may take some time to propagate throughout the Internet.
- **Lock –** If the domain is locked, it cannot be transferred and the nameserver information cannot be modified.

Internal Status Updates

- **Active –** Indicates that the domain is operational.
- **Edit-Hold –** If there is a dispute over the domain name, edit-hold prevents the contact information from being modified via the manage interface.

Managing a Domain as the Domain's Registrant

The Manage feature allows Registrars to make changes to domain information without requiring the domain's username and password information. Please refer to the *Reseller's Guide to Domain Name Registration and Management* for more details about the functions available.

To a manage a domain, from the **Domain** section in the query results page, click **Manage (MWI)**. To get to the query results page, see "Querying a Domain".

The Manage Web Interface for the domain opens. From here, you can make changes to the domain.

Viewing Transfer-In History and Transfer-Away Requests

You can query the domain to determine if it was transferred-in, and see if a transfer-away request exists for the domain.

To a view transfer history and requests, from the **Domain** section in the query results page, click either **Search Incoming** or **Search Outgoing**. See "Querying a Domain" to get to the query results page.

The domain's transfer-in history or any transfer-away requests are listed. If the domain was not transferred-in or does not have any transfer-away requests, no records are listed.

Viewing a Domain's Payment History

You can query the domain to see a list of payments.

To a view payment history, from the **Domain** section in the query results page, click **Payment History**. See "Querying a Domain" to get to the query results page.

A list of all orders and related charges for the specified domain is returned, including dates and transaction types.

Viewing and Adding Notes Regarding a Domain

Each time a setting change is made to a domain, for example, locking prohibiting transfers is activated, a note regarding the change is logged. Notes include information about transfers, renewals, and so on, but do not include contact changes or nameserver updates.

You can also create "internal" notes to log changes you've made to the domain.

To view or add notes

1. From the **Domain** section in the query results page, click **Domain/Internal Notes**. See "Querying a Domain" to get to the query results page.

2. Click the **Domain/Internal Notes** link.

A list of all notes regarding the specified domain is returned, including dates and type of activity.

3. To add a note, enter the details in the **Add Internal Note** textbox, then click the **Add new note** button.

Manually Inserting or Transferring a Domain

This feature allows you to manually insert or transfer a domain into your OpenHRS database, but because it bypasses the standard order process flow, this tool should not be used as a regular interface for domain entry.

Important: Do not use this tool to insert domains that are successfully transferred. The OpenHRS system automatically updates your profile with any changes resulting from a transfer.

This tool should be used for compliance/legal reasons. For example, if, as part of a dispute resolution, it were decided that a domain should revert back to its state prior to a transfer, the following would typically occur:

- The Registry would modify its information to reflect you as the Registrar.
- You would then use this function to insert the domain into your database with the correct information.

Note: You should add notes to this active domain, indicating that it was manually inserted and why. Since there is no historical record of a domain order, adding this note may save you time later if you are required to troubleshoot an issue regarding this domain.

Inserting a Domain With a New Profile

1. From the AWI main page, in the **Domains** section, click the **Insert/Transfer a Domain** link. The **Manual Domain Insertion** page opens.

2. Click the **Insert a domain with a new profile** link. The **Insert/Transfer Domain** page opens with fields that you need to complete.

3. Enter the domain information in the fields, and when done, click the **Submit** button.

Creating a Domain Based on an Existing Profile

Creating a domain based on an existing profile allows you to quickly retrieve registrant's information. From this point you can either create a new domain in the same profile, or transfer the existing domain. If you would like the new domain to be based on a separate management profile, simply change the username or password.

1. From the AWI main page, in the **Domains** section, click the **Insert/Transfer a Domain** link. The **Manual Domain Insertion** page opens.

2. Enter the domain upon which you want to base the new domain in the textbox, then press ENTER. You may need to use the **Search Reg System Orders** feature to find the domain that you want to use as a base.
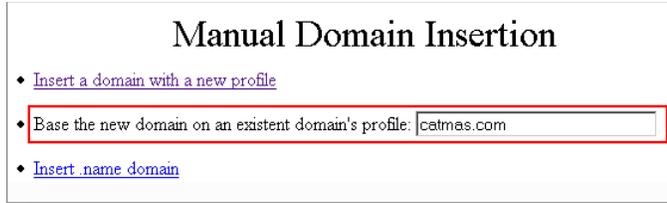
The **Insert/Transfer Domain** page opens, with many of the fields already populated.

3. Make any changes or additions to the form, and when done, click the **Submit** button.

Searching for Domains in Your Profile

The **Search Reg System Orders** option allows you to view all orders within your instance of OpenHRS (except those created using the **Insert/Transfer a Domain** function, as they are all confirmed and only stored from a billing perspective). This feature provides the following benefits:

- Ability to track successful orders for accounting reconciliation
- Allows administrators to review orders that require attention
- Ability to quickly troubleshoot end-user requests
- Displays initial registration values on a domain, to assist in compliance issues

Note: This feature shows the order request as it was originally entered for the domain. To see the domain's current information, use the **Query a Domain** feature.

To search for a domain

1. From the AWI main page, from the **Domains** section, click the **Search Reg System Orders** link. The **Search Reg System Orders** page opens.

2. Use the drop-down lists and textboxes to refine your search. All fields are optional, but more search criteria return more precise results. Search options include:

   Search ID — The Order ID of the transaction.

   Domain — If you are searching for a specific domain, enter it here. Wildcards accepted.

   Registration type — Choose the type of orders to be displayed: All, New, Renewal, Transfer.

   Status — Choose the status of the order: All, Pending, Processed, Completed, Cancelled, Declined, Waiting for Response from Registry.

   Allow Bypassing Transfer Notification — Allows you to search for transfers where the initial confirmation message was not sent to the domain owner to ensure that the transfer was issued immediately. This process DOES NOT comply with ICANN transfer rules unless a paper copy of the confirmation is received.

   Email — The email address of the domain's admin contact. Wildcards accepted.

   Affiliate ID — The unique identifier that you have previously assigned to one of your affiliates, most commonly one of your Resellers. Since the use of an affiliate ID is optional, this field may not be applicable to your search. Wildcards accepted.

   Reseller — The username of the Reseller from whom the domain or service was ordered. Not all HRS customers has Resellers, so this field may not be applicable to your search. Wildcards accepted.

   Order Date — Enter the date prior to which the system should search. This field can be formatted as 'today', 'MM/DD/YYYY' or 'Jun 12, 2000'.

3. When done entering search criteria, click the **Search** button. The **Reg System Orders** page opens with search results.

   From the search results, you can see the information related to the orders themselves. This includes information about the order ID, the domain requested, the type of order, the order status, email, order date and period, etc. This interface shows 50 results per page, and creates pages based on the criteria of the search page.

4. Locate the domain in the **Domain** column. If necessary, use the paging links to scroll through multiple pages of returned domains. For more information on the domain, click the domain name link.

Reg System Orders

1 2 3 4 5 6 7 8 9 10 of 4119 >> >|
Total: 82365

ID	Reseller	Domain	Language	Type	Status	Email	Affiliate ID	^ Order Date	Period
2858951	example	catmas.com		New Domain	Completed	hostmaster@example.com		2006-11-22 12:43:22	2
2858950	example	catmass.com		New Domain	Completed	hostmaster@example.com		2006-11-22 12:43:20	2
2858949	example	catmascat.com		New Domain	Completed	hostmaster@example.com		2006-11-22 12:43:18	2
2858948	example	catmassite.com		New Domain	Completed	hostmaster@example.com		2006-11-22 12:43:16	2

Note: All order notes are stored for historical reasons, and as a result may not reflect the current domain state. The notes can and do contain information regarding errors even after the errors have been corrected.

Searching for Deleted Domains

The Search Deleted function shows records of domains that have been transferred away (and the database entry deleted) or deleted because the domain expired and was not renewed.

Note: In the case of expired domains, the deletion date only reflects the date the domain was deleted from your local database (and when the delete command was sent to the Registry). The Registry may hold the domain for some additional time in a Redemption Grace Period.

To search for deleted domains

1. From the AWI main page, click the **Search Deleted Domains** link in the **Domains** section. The **Search Deleted Domains** page opens.

Search Deleted Domains

Search for a specific Domain Name, or you can do wild card searches on the domain name. (e.g. "happy*" or "*.net")

Domain Name	*.com	All Deleted

Search using any combination of the criteria below.
Replace the "All" in the text boxes with specific data to narrow a search.

Registration Date (Range)	From: M All D All Y All To: M All D All Y All
Renewal/Expiry Date (Range)	From: M Feb D 1 Y 2005 To: M Jul D 31 Y 2006
Contact email	- select type - Email address:
Reseller	

Results to HTML page   Results to File   Reset Values

2. Use the textboxes and drop-down lists to refine your search. The **Domain Name** textbox is required, but does accept wildcards.

3. When done entering search criteria, click the **Results to HTML page** or **Results to File** button. The **Results to HTML page** option opens a new

page in your browser with the search results, and the **Results to File** option allows you to save a .csv file that you can review later and save for your records.

Example of the results in an HTML page:

Search Results (Deletions)
Domains matching the search criteria '*.com' Domains expiring after the date **02/01/2005** before **07/31/2006**

Page 1 2 3 4 5 6 7 8 9 10 >> of 646 [Next]
Number of selected domains: 32292

Reseller	Date Registered	Expiry Date	Domain Name	Deletion Date	Notes	Reason
reseller5000	Apr 4, 2005	Feb 13, 2006	catmas.com	Jun 14, 2005		Transferred
reseller5000	Apr 4, 2005	Jul 6, 2005	catmascat.com	Jun 14, 2005		Transferred
reseller5000	Apr 5, 2005	Jun 14, 2006	catmasblog.com	Jun 15, 2005		Transferred

Deleting a Domain

Occasionally, domains need to be deleted. Reasons for deletion include typos, legal reasons, payment is denied, the domain has expired/transferred, and so on. Should the domain be deleted within five days of its original creation, the Registry issues a refund for the Registry fee. After five days, no refund is granted.

The deletion process allows you to record the reason for deletion. Indicating the reason for deletion is recommended in case there is a dispute later as to why the domain was deleted.

To delete a domain

1. From the AWI main page, click the **Delete Domain** link, located in the **Domains** section. The **Domain deletion** page opens.

Domain deletion

Reseller: example
Reason: Expired
Domains:

catmas.com

Delete from Registry and DB: ☑
Bypass 5 day limit check: ☐
Delete from DB only: ☐

Delete Domains

2. In the **Domains** textbox, enter the domain(s) to be deleted, and choose the reason for the deletion and deletion options.

Reasons include:

- **By Request** — Requested by the Registrant or another party.
- **Expired** — Domain was not renewed.
- **Transferred** — Transferred to another Registrar.
- **Historical** — Data cleanup.
- **Auction** - The domain expired and was bought by a new registrant through the auction service.

Options include:

- **Delete from Registry and DB**
- **Bypass 5-day limit check** — If you choose this option, you are acknowledging that there is no refund for the deletion.
- **Delete from the local database only** — Deletes the domain from the local database only. This option has no impact on the Registry and is used when the domain appears in the Registrar's database but either doesn't exist at the Registry or doesn't point to that Registrar.

3. When done, click the **Delete Domains** button.

Reconciling Partially Registered Domains

If a domain is not properly registered, due to a time out at the Registry for example, the domain may only be partially registered. As the Registrar, you may be required to reset the information to ensure a proper registration.

Symptoms of a partially registered domain include:

- Order is still marked as pending at the Registry, but the domain has been taken, indicated by the WHOIS info pointing to you as the Registrar.
- A query to the Registry database shows you as the Registrar, but the domain is not marked as registered.
- Domain doesn't exist, but the order was placed.
- Querying the domain via the AWI shows **Domain exists/points to Registrar** but **Marked as Registered** indicates **No**.

To purge or activate a partially reconciled domain

1. From the **Domains** section of the AWI main page, click **Reconcile Partially Registered Domains**. The **Domain Reconciliation** page opens, listing any unreconciled domains.

2. From the **Action** list, click the checkbox beside the domain that you want to activate or purge. Only one of the actions is available, depending on the status of the domain:

   - **Activate** — The domain is fully registered, but the order remains in the pending state.
   - **Purge** — If the domain exists at another Registrar or hasn't been registered at all, and if the Registrant hasn't paid for it, the domain can be purged.

Domain Reconciliation

Count: 3
Page 1 of 1

Domain	Action
catmas.com	☑ Purge

Domain exists: Yes
    Created:
    Domain owned by HRS-Registrar: No
    Reseller paid for domain: No	

catmas2.com	☐ Activate

Domain exists: Yes
    Created:
    Domain owned by HRS-Registrar: Yes
    Reseller paid for domain: No	

catmascat.com	☑ Activate

Domain exists: Yes
    Created:
    Domain owned by HRS-Registrar: Yes
    Reseller paid for domain: No	

Fix Domains

1. When done, click the **Fix Domains** button.

Reconciling Partially Renewed Domains

Reconciling is required for domains where a renewal request was submitted, but no indication of success or failure is received. This situation can occur when a registry connection fails during a renewal request.

To view and process any incomplete renewal requests

1. From the **Domains** section of the AWI main page, click **Reconcile Partially Renewed Domains**. The **Domain Renewal Reconciliation** page opens, listing any unreconciled domains.

2. Locate the domain that you want to reconcile, then click that domain's checkbox in the **Action** column.

3. Click the **Fix Renewal** button.

Processing Blocked .CA Orders

Checking for Blocked .CA Orders

A .CA domain is not registered automatically if a "blocker" exists for the requested name, or the name is a "municipal". Registration requests for "blocker" or "municipal" .CA domain names are moved to a pending queue, and must be processed manually.

Blocker - a conflicting name is already registered to someone else, and permission is required from the owner of the conflicting domain before registration of the requested domain can be completed. For example, if hellodolly.ca is requested but hellodolly.on.ca is already owned by someone else, the owner of hellodolly.on.ca needs to approve the registration of hellodolly.ca before it can be registered. The current owner is free to allow or refuse the new registration.

Municipal - the requested name is reserved as a "municipal" name. "Municipal" is the term that CIRA uses for a municipality name, such as the name of a Canadian province or city. If the applicant ordering a municipal is anything other than the municipality, the order is cancelled.

Checking for pending .CA domains

1. To see your list of pending .CA applications, click the **View Blocked Orders for .ca domain** link in the OpenHRS main page. The **Blocked Orders** page opens.

2. From the **Blocked Orders** page, review the list of domains in the **Domain** column. Any domains that are blocked because of a municipal restriction has "municipal" below the domain name, and any that are blocked because a domain with a conflicting name already exists have "blocker" below the domain name.

OpenHRS registrars should monitor their queue of pending .CA registration applications each day, and attempt to process the registration or cancel it.

Processing Municipal .CA Orders

Registration requests for .CA domains that are the same name as a Canadian city or town are designated as a "municipal" and can only be registered by that city or town. Registration requests for municipal names are automatically queued, and you must manually verify and process those requests.

The .CA domain application includes a **Legal Type** field; for a municipal .CA domain name, the legal type must be "Government or government entity in Canada". If the legal type is any other value, you can cancel the .CA order.

Checking the legal type

1. To see your list of pending .CA applications, click the **View Blocked Orders for .ca domain** link in the OpenHRS main page. The **Blocked Orders** page opens.

2. From the **Blocked Orders** page, review the list of domains in the **Domain** column. Any domains that were blocked because of a municipal restriction have "municipal" below the domain name.

3. To determine if the request was blocked due to an invalid Legal Type, click the date in the **Order Time** column. The **Domain Information** page opens.

Domain Information	
Domain Name: vancouver.ca	Status: Waiting For Registry Response
Profile: New profile CIRA: 1147813	
Registration Period: 1 Year	
Affiliate ID:	
Special Information	
Is this domain a registered trade-mark? No	
Language Preference: English	
Registrant name: Joel Masont	
Registrant description: info news and events	
Legal Type: Permanent Resident of Canada	
View Order Notes(2)	

4. Check the **Legal Type** to determine if the applicant is eligible to register a municipal domain. If the Legal Type is "Government or government entity in Canada", the applicant is eligible to register that domain and you can process the order; if the Legal Type is any other

value, the applicant is not eligible and you should cancel the order and inform the applicant. See "Cancelling the order" below.

Cancelling the order

After following steps 1 -4 of "Checking the legal type" above, cancel orders for municipal domains where the **Legal Type** is a value other than "Government or government entity in Canada".

1. Click the back button in your browser to return to the **Blocked Orders** page.

2. To process or cancel the order, click the name in the **Domain** column. The **Municipality restricted domain 'domainname.ca'** page opens.
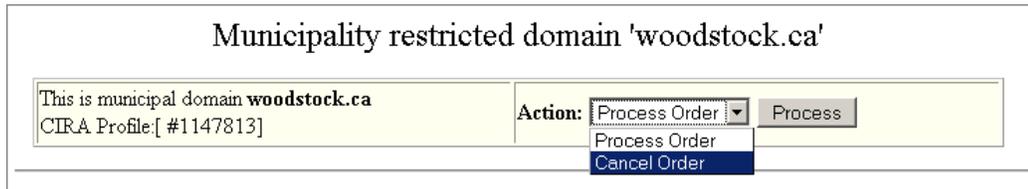
3. From the **Action** drop-down list, choose **Cancel Order**, then click the **Process** button.

Processing the order

After following steps 1 -4 of "Checking the Legal Type" above, process orders that meet the criteria for a municipal .CA domain name by completing the following manual tasks:

- Contact the applicant and instruct them to complete an official CIRA application form and fax it back to you. See "Sample email to send to .CA municipal domain name applicants".
- You must then verify the application against the online order form, and if they match, fax the application to CIRA (CIRA's fax # 1-800-285-0517).
- After faxing the completed form to CIRA, email compliance@cira.ca notifying them that you've faxed an application form for a municipal .CA domain name.
- Process the online order (see below).

To process the online order: from the **Blocked Orders** page in the OpenHRS interface, click the name in the **Domain** column. The **Municipality restricted domain 'domainname.ca'** page opens. From the **Action** drop-down list, choose **Process Order**, then click the **Process** button.

Processing Blocker .CA Orders

A blocker exists when a .CA registration is requested, but a conflicting name is already registered to someone else. Permission is required from the owner of the conflicting domain before registration of the requested domain can be completed. For example, if hellodolly.ca is requested but hellodolly.on.ca is already owned by someone else, the owner of hellodolly.on.ca needs to approve the registration of hellodolly.ca before it can be registered. The owner or hellodolly.on.ca is free to allow or refuse the new registration.

Blocker .CA domain registration requests must be processed manually. In order to complete the registration, you (the Registrar) need to contact the owner of the conflicting domain, and request their permission to register the domain requested by your customer.

Contacting the owner of the blocker domain and requesting permission to register the requested domain

1. To see your list of pending .CA applications, click the **View Blocked Orders for .ca domain** link in the OpenHRS main page. The **Blocked Orders** page opens.

2. From the **Blocked Orders** page, locate the requested .CA domain in the **Domain** column. Any domain requests where a blocker exists have "blocker" below the domain name.

3. To identify the blocker domain and its owner's email address, click the domain name in the **Domain** column.

The **Blocking domains for domain 'domain.ca'** page opens.

The blocker domain is shown in the **Domain** column, and the email address of the blocker domain's admin contact is listed in the **Admin Email** column.

In the above example, the registration request is for "catmas.ca" and the blocker domain is "catmas.on.ca". The admin contact of "catmas.on.ca" (in this example felix@catmas.on.ca) must approve the registration of catmas.ca in order for the registration to be processed.

4. Create a new email message and address it to the blocker domain's admin contact. In the above example, the email recipient is "felix@catmas.on.ca". This email message is sent to the blocker's admin contact, requesting permission to register the requested .CA domain.

5. In the subject line of the email message, enter the name of the blocker domain and the requested domain, in the format "blocker.ca / requested.ca", for example: "catmas.on.ca / catmas.ca".

6. Compose the message, requesting permission to register the requested .CA domain. Be sure to include the response required. See the "Sample Blocker Email Message".

7. Send the email message.

8. Repeat if there are multiple blocker domains, sending an email message to each blocker's admin contact. Make sure the subject line refers to the appropriate blocker domain.

9. In the **Blocking domains for domain 'domain.ca'** page, in the **Notes** field, enter a note indicating that you sent an email message to the blocker's admin contact requesting permission to register the requested domain, and include the date the message was sent.

10. From the **Action** menu, choose **Save Order**, then click the **Process** button.

Processing or cancelling the order

Once the blocker's admin contact has replied to your email, you can process or cancel the order, depending on their response. If the blocker's admin contact does not reply with 14 days, you should cancel the order.

Processing the order in OpenHRS sends the registration request to CIRA, who then send the owner of the blocker domain an email message with a link to a web page where they can approve the registration of the requested .CA domain. Once approved, CIRA completes the registration.

1. To locate the order in your list of pending .CA applications, click the **View Blocked Orders for .ca domain** link in the OpenHRS main page. The **Blocked Orders** page opens; the blocked domain that you want is listed in the **Domain** column.

2. Click the domain name in the **Domain** column. The **Blocking domains for domain 'domain.ca'** page opens.

3. Process or cancel the order:
   If the owner of the blocker domain approved the registration: choose **Approved** from the **Status** drop-down list, and choose **Process Order** from the **Action** drop-down list.
   If the owner declined the registration or did not reply within 14 days: choose **Denied** from the **Status** drop-down list, and choose **Cancel Order** from the **Action** drop-down list.

Blocking domains for domain 'catmas.ca'

Total: 1

Domain	Owner Org Name	Admin Email	Tech Email	Registrar	Status
catmas.on.ca	Cat Blogs	felix@catmas.on.ca	felix@catmas.on.ca	Tucows.com Co.	Approved ▼

Notes:

Action: Process Order ▼
Get Blockers
Save Order
Process Order
Cancel Order

Proces...   Reset Value

4. Click the **Process** button.

Reviewing and Processing Transfers

Transfers Overview

The transfer section of the AWI allows you to see all outstanding transfers in the system, and execute administrator-related functions. To understand the specific transfer work-flow for each TLD, please review the *OpenSRS Domain Transfers Guide* and the *Reseller's Guide to Domain Name Registration and Management*.

Note: In order to have your customers' domains under your own Registrar name when you become an OpenHRS customer, you must have them transferred into your account. Normally a domain is renewed for one year as part of the transfer process, so, as a best practice, most Registrars do the transfer to their system upon renewal of the domain; this way the user is not expected to renew before necessary. Keeping your customers informed in advance of how this process works streamlines their transfers upon renewal.

Processing Restricted Transfers Waiting for Registrar Review

If you have valuable domain names in your Registrar profile and would like to protect those names from being transferred, you can add those domains to a restricted-from-transfers list. Adding names to that list can be done using the AWI.

If a transfer is requested on a restricted domain, the transfer request is moved to the AWI for processing instead of being sent to the domain's admin contact for verification. From the AWI, you can either cancel or allow pending transfers on restricted domains.

This feature is rarely used since Registrars began locking domain names, but is worth keeping in the interface in case you take on a high-profile client with a name that you want to restrict from transfers. In the case of a legitimate high-profile transfer-IN, the order must be manually processed.

To view and process pending transfer requests for transfer-restricted domains

1. From the AWI main page, in the **Transfers** section, click the **View Restricted Transfers Waiting for <registrar> Review** link. The **Pending Restricted Transfers** page opens, listing any pending requests for transfers of domains on your restricted list.

Pending Restricted Transfers

Order Date	Domain	Reseller	Type	Org Name	Action	
10:58 am May 8, 2006	catmas.com	reseller5000	REG2REG	Whois: New: Company Ltd	☐ Process	☑ Cancel
Process Orders						

2. From the **Action**, select either the **Process** or **Cancel** checkbox, depending on if you want to approve or cancel the transfer request.

3. Click the **Process Orders** button.

The request is then released to the domain's admin contact to approve or decline, according to the standard transfer process.

Cancelling Transfers Pending Registry Approval

Normally, transfers-in succeed or time-out after seven days. However, if you are certain that a transfer won't succeed (i.e. the losing Registrar sends notification that they have stopped the transfer), you can cancel the pending transfer with the Registry and resubmit the order.

Note: If it turns out the transfer wasn't actually cancelled by the losing Registrar, the Registry may "AUTO-ACK" the transfer and point it towards your Registrar tag. When this happens, you need to manually insert the domain into the HRS database by using the **Insert or Transfer a Domain** option.

To cancel transfers that you know will not complete

1. From the AWI main page, in the **Transfers** section, click the **Cancel Transfer Pending Registry Approval** link. The **Cancel Pending Registry Transfer Request** page opens.

2. In the **Domains** textbox, enter any domains pending transfer that you want to cancel. You can enter multiple domains, one per line. To determine which transfers are pending, follow the steps in "Viewing Transfers Waiting for Registry Approval".

3. When done listing domain transfers to cancel, click the **Submit** button.

Viewing Transfers Pending Valid WHOIS Information

When a transfer request is submitted, the first step is to confirm the transfer request with the domain's admin contact. If the system is unable to parse the admin email address for confirmation, the transfer is marked with an invalid admin contact and is moved to pending.

The AWI allows you to view a list of all the transfers that were not successful and track down the source of the error.

To view transfers that are pending due to missing or invalid WHOIS information

1. From the AWI main page, in the **Transfers** section, click the **View Transfers Needing Valid Whois Information** link. The **Pending for valid admin contact Transfers** page opens, listing domains for which a transfer request could not be processed due to missing admin contact information.

Pending for valid admin contact Transfers

Order Date	Domain	Reseller	Type	Org Name	Action	
6:01 am Dec 8, 2006	catmas.com	reseller5000	REG2REG	Whois: Gabriel Horne New: Gabriel Horne	☐ Process	☐ Cancel
6:01 am Dec 8, 2006	catmasco.com	reseller5000	REG2REG	Whois: Gabriel Horne New: Gabriel Horne	☐ Process	☐ Cancel
6:01 am Dec 8, 2006	catsmas.com	reseller5000	REG2REG	Whois: Gabriel Horne New: Gabriel Horne	☐ Process	☐ Cancel
5:59 am Dec 8, 2006	catmascats.com	reseller5000	REG2REG	Whois: Gabriel Horne New: Gabriel Horne	☐ Process	☐ Cancel

2. Do one of the following:

   - To process or cancel the transfer request, click the **Process** or **Cancel** checkbox in the **Action** column, then click the **Process Orders** button at the bottom of the page.

   - To review and add information about the transfer request and the domain's contact info, click the domain name. The **Transfer status** page for that domain opens.

Transfer status for catmas.com

Reseller Username: reseller5000
Status: Pending Owner Approval
Are contact changes required?: Yes
Owner Request Date: N/A
Owner Confirmation Date: N/A
Owner Confirm IP: N/A
Owner Confirm Phone: N/A
Registry Request Date: N/A
Request Unique ID: N/A

View Whois From Losing Registrar
Grab Whois Again From Losing Registrar
View Transfer Notes (0)
Resubmit transfer request.

WHOIS Information

Registrant Name: Gabriel Horne
Transfer Authorization Email: ghorne@mycatmas.co
Losing Registrar: Skylles

WHOIS:
```
Domain Name: catmas.COM
Registrar: Skylles
Whois Server: whois.skylles.com
Referral URL: http://www.sSkylles.com
Name Server: NS5.EASYSPACE.COM
Name Server: NS4.EASYSPACE.COM
Status: ACTIVE
EPP Status: ok
Updated Date: 08-Dec-2006
```

Internal Note:

External Note:

Approve Transfer

SUBMIT   RESET VALUES

3. From the **Transfer status** page, the following actions are available:

View WHOIS Information From Losing Registrar – Prior to the transfer being completed, the user can view the WHOIS info stored about the incoming transfer if contact is required. If the WHOIS info was not available, this link is not visible.

Grab WHOIS Again from Losing Again – Should the WHOIS information not be available when the parse was originally attempted, the user can grab the WHOIS info again in an attempt to collect the admin contact email.

View Transfer Notes – Displays any notes that have been stored regarding this transfer order.

Resubmit transfer request

4. To update the transfer request with the correct admin email address, enter the email address is the **Transfer Authorization Email** field. In most cases, transfers are pending due to the admin contact email address being missing or invalid.

5. Use the **WHOIS**, **Internal Note**, and **External Note** fields to make any changes to the WHOIS data, and add any notes to the transfer request.

6. When done updating domain details to complete the transfer, click the **Submit** button.

Manually Submitting Transfers to Accelerate Submission to the Registry

Transfer requests are submitted to the Registry asynchronously. Throughout the day, transfer requests can be found listed in the AWI before they have been sent to the Registry for processing. You can view the list of transfers awaiting Registry submission, and manually process or cancel any of those transfer requests.

Note: No action is required unless you want to manually process the transfer request to speed up its submission the Registry.

To review and process any pending transfers

1. From the AWI main page, in the **Transfers** section, click the **View Transfers Waiting for <Registrar> Review** link. The **Pending Transfers** page opens, listing any domains pending transfer.

Pending Transfers

Order Date	Domain	Reseller	Type	Org Name	Action
3:55 am Jun 27, 2006	catmas.org	reseller5000	REG2REG	Whois: New: Property Loans Ltd	☐ Process ☐ Cancel
			Process Orders		

2. Locate the domain name pending transfer, and from the **Action** column, select either the **Process** or **Cancel** checkbox.

3. Repeat for other domains pending transfer, then click the **Process Orders** button.

Viewing Transfers Waiting for Registry Approval

Once a transfer has been approved by the admin contact and the gaining Registrar, the transfer request is submitted to the Registry for completion. The Registry may contact the admin contact to confirm the transfer. During the period when the transfer request is waiting for Registry approval, it is possible to view any notes about the transfer.

To review and process any pending transfers

1. From the AWI main page, in the **Transfers** section, click the **View Transfers Waiting for Registry Approval** link. The **Pending Registry Approval Transfers** page opens, listing domains waiting Registry completion.

2. From the **Domain** column, locate then click the domain that you want to check. The **Transfer status for <domain name>** page opens, listing status notes for the transfer, and the domain's contact information.

Transfer status for catmas.com

Reseller Username: reseller5000
Status: Pending Registry Approval
Are contact changes required?: Yes
Owner Request Date: N/A
Owner Confirmation Date: N/A
Owner Confirm IP: N/A
Owner Confirm Phone: N/A
Registry Request Date: N/A
Request Unique ID: N/A

View Transfer Notes (0)

Owner Contact Information	
First Name	George
Malle	Malle

Searching for Transfers-Away

A transfer request is normally initiated by the gaining Registrar. When a transfer order is submitted for a domain in your profile, the OpenHRS system automatically sends a confirmation email to the domain's admin contact to verify the transfer. If the admin contact fails to respond within five days (either to approve or decline the transfer), the Registry automatically completes the transfer.

A record of completed, cancelled, pending, and expired transfers-away is available for .COM, .NET, .INFO, .ORG, .BIZ, .NAME, .MOBI, and .US domains.

To search for transferred-away domains

1. From the AWI main page, in the **Transfers** section, click the **Manage Transfers Away** link. The **Transfers Away** page opens, where you can enter search criteria to search for transferred domains.

2. Enter your search criteria. All fields are optional, but more search criteria return more precise results.

3. Click the **Search** button when done specifying search criteria. The page reloads, listing any transfers matching your search criteria.

4. To see more information about the transferred domain, click the domain's name in the **Domain** column.

Changing the IPS Tag for Multiple .UK Domains

.UK transfers-away are handled differently than most other TLDs in that the current Registrar (the IPS tag holder) makes the request to move the domain to a new tag holder. The new tag must be obtained from the domain owner.

If transferring several domains to new tag holders, the **UK Domain Tag Transfer Away** feature changes the tag for multiple domains at once. Any number of domains may be entered (one per line), for each new IPS tag.

Once submitted to Nominet, domain tag changes are usually completed in a few hours. Once completed, the domain is removed from the HRS account.

To specify new IPS tags when transferring away .UK domains

1. From the AWI main page, in the **Transfers** section, click the **UK Domain Tag Transfer Away** link. The **Change Domain Tags** page opens.

2. Enter the new IPS tag in the **New Domain Tag** field. IPS tags must be in uppercase.

3. Enter the domains to assign to that new tag in the **List domains textbox**, one domain per line.

4. Repeat for additional IPS tags. To add more than three IPS tags, click the **Add more Domain Tags** button.

5. When done adding IPS tags and the domains to transfer to those tags, click the **Submit** button.

Viewing the List of all IPS Tag Holders (.UK Registrars)

IPS tags are used to validate all domain tag change requests, including the transfer of .UK domains; tag transfers are only accepted for tag holders on this list. If necessary, tags can also be manually added or removed.

To see the list of all IPS tag holders

1. From the AWI main page, in the **Transfers** section, click the **List of valid Domain Tags** link. The **List of valid Domain Tags** page opens.

   To add a tag to the list: in the **Add new Domain Tags** box, enter the tag to add, one per line, then click the **Process** button.

   To remove a tag from the list: click the **Remove** checkbox in the **Action** column beside the tag's name, then click the **Remove** button at the bottom of the page.

2. Use the paging buttons to search for a specific tag holder.

Placing a Transfer Restriction on a Domain

OpenHRS allow you to create a "restricted domains" list. This list defines domain names for which OpenHRS does not automatically email a domain's admin contact to approve a transfer request that you have received. Transfer requests for any domain on this list must be reviewed and approved by the Registrar prior to execution. There may be a number of domains that you know should NOT be transferred. For example, Microsoft.com probably isn't going to be transferred, but someone may try to see if they can do it.

Note: Your OpenHRS database ships with no domains on the restricted domains list. It is up to you to populate the restricted domains list as part of getting started.

To place a transfer restriction on a domain, from the AWI main page, in the **Transfers** section, click the **Manage Restricted Domains** link. The **Restricted Domain** page opens.

To add a domain to your restricted list: enter the domain name in the **Add Domain** field, then press ENTER.

To remove a domain from your restricted list: click the Remove checkbox beside the domain name in the Action column, then click the Save Changes button at the bottom of the page.

To view the domains on your restricted list: use the paging buttons at the top of the page.

Manually Approving or Preventing Transfers-Away

Unless a domain owner refuses a transfer request, the transfer is automatically processed after five days and the domain is moved to the new Registrar.

However, if there are business reasons for the transfer to be approved or rejected, you can use the **Affect Losing Transfers** feature to approve or reject it. This feature is often used as a compliance tool, where two Registrars are cooperating to restore the correct state to a domain that has been fraudulently transferred. Outside of compliance reasons, regular end-user messaging is used instead of manually approving or rejecting a transfer-away.

To approve or prevent a transfer-away

1. From the AWI main page, in the **Transfers** section, click the **Affect Losing Transfers** link. The **Affect Losing Transfers** page opens.

2. In the **Domains** textbox, enter the domains for which you want to approve or stop a transfer-away.

Affect Losing Transfers			
Domains (one per line)	catmas.com catsmas.com		
Approve	○		
Reject	⦿	Reason	Domain Locked ▾

Court Order
Domain Locked
Evidence of Fraud
Initial 60 Days after registration or transfer
No Payment
Objection by Transfer Contact
Resonable Identity Dispute
UDRP Action

NOTE: Rejection Reason selected will app
Email to attempting gaining registrar and the e

Submit

3. Choose either the **Approve** or **Reject** option. If rejecting the transfer, choose the reason from the **Reason** drop-down list. Reasons include:
Court Order - A court order has determined that the domain may not be transferred away.
Domain Locked - The domain is locked against transfers.
Evidence of Fraud - The transfer-away request appears to be fraudulent.
Initial 60 days after registration or transfer - Domains may not be transferred for 60 days after registration or transfer.

Objection by Transfer Contact - The domain owner does not approve the transfer of their domain.
Reasonable Identity Dispute - Identity of domain owner who approved the transfer is in question.
UDRP Action - Universal Dispute Resolution Policy action pending.

4. Click the **Submit** button when done.

Searching Transfers

Searching transfers allows you to view all transfer orders within your environment, except those created using the **Insert or Transfer a Domain** function. This feature allows you to:

- Track incoming transfers for accounting reconciliation.
- Review transfers in any of the various states that require attention.
- Quickly troubleshoot end user requests.
- Access the domain's previous WHOIS data, for compliance purposes.

To search transfers

1. From the AWI main page, in the **Transfers** section, click the **Search Transfers** link. The **Advanced Admin Search** page opens.

2. Use the fields to define your search criteria. One of **Domain**, **Reseller Username**, or date range is required. Search options are:

   - **Domain** – If you are searching for transfer information for a specific domain, enter the domain name in this field. Wildcards are accepted.
   - **Type** – The type of transfer order to search for: All, Registrar to Registrar (Reg to Reg), Reseller to Reseller (Rsp to Rsp).
   - **Status** – The status of the transfer order: All, Waiting for Owner Approval, Waiting for Admin Approval, Waiting for Registry Approval, Completed, Cancelled.
   - **Restricted** – Indicates whether the transfer is for a restricted name.
   - **Allow Bypassing Transfer Notification** –
   - **Reseller Username** – The username of the gaining Reseller. This may not apply to all HRS users since not all have Resellers.
   - **Order Date is after** – Provides a targeted date range for the search, *e.g.* 30/1/2006.
   - **Order Date is before** – Provides a targeted date range for the search, *e.g.* 30/1/2006.
   - **Number of results to display** – Determines the number of results to be returned per page.

3. When done specifying search criteria, click the **Submit Search** button. The **Transfer Search** page opens, where you can see information about each transfer's order status, domain, or Reseller.

Searching for a Transfer Submitted in a Batch Request

If a transfer has been entered as part of a bulk transfer order, you may choose to search for all transfers that were part of the same order. This feature allows you to quickly view, troubleshoot and adjust any transfers received as part of a transfer batch that need your attention.

To search batch transfers

1. From the AWI main page, in the **Transfers** section, click the **Search Batch Transfers** link. The **Search For Batch Transfer By Order ID** page opens.

2. Use the fields to define your search criteria. The **Order_ID** field is required; all other fields are optional, but more search criteria return more precise search results.

The search results allow you to see the list of bulk transfers that meet the criteria, and provide links to details on the domains that were transferred. Each domain is marked with the current status of the transfer, and various actions are available when each specific domain is accessed.

Viewing Expired UK Orphans

OpenHRS enables you to view any .UK domains that have been orphaned. Orphaned .UK domains are domains that are assigned to your .UK registrar tag but have do not have a Reseller. Domains in this state cannot be managed or renewed. Any domain in this list can be assigned to a Reseller using the Transfer a Domain function in the RWI.

To view orphaned .UK domains

From the AWI main page, in the **Transfers** section, click the **Expired UK Orphans** link. The **Expired UK Orphans** page opens, listing any .UK domains that do not have a Reseller assigned to them.

Nameservers

Although the manage interface tools allow the Registrant and Registrar to modify nameserver information for a domain, the ability to find all domains using a particular nameserver is not a feature provided in the manage interface functionality.

Occasionally, the Registrant or tech contact for a domain requests a list of all domains that have been registered with a certain nameserver. This is usually required when a nameserver is being deactivated and is being replaced with a new nameserver.

The **Query a Nameserver** tool can quickly provide that information and email it to the interested party.

Note: This list only contains domains that have your organization listed as the Registrar. Should your end user have additional domains with other Registrars, those domains are not listed (even if they use the same nameserver). The specific Registry may also have a link on their website that users can query for a full picture of all domains registered at that Registry with that nameserver (regardless of Registrar).

Query a Nameserver

The results of a nameserver query are:

- Language encoding of the nameserver (UTF-8 is standard)
- IP address at the Registry
- Number of domains that use this nameserver (locally, within your database)

After performing a nameserver query, the following actions are available:

- **Email** – Sends the list of nameservers to the specified email address
- **Host Name** – Updates a nameserver at the Registry and for all local domains that are using it. This tool cannot be used for updates in registries that treat nameserver information as part of the domain record (i.e. Nominet). Where the nameservers are stored as separate objects, it is only possible to rename a nameserver if you are the sponsoring Registrar for both names.
- **Encoding Type** – Displays the nameserver's encoding type
- **IP Address** – Displays the nameserver's IP address and allows you to update it, if desired. Updates can also be done using the Manage Web Interface.
- **Delete Nameserver** – Removes the nameserver from the specified Registry's database. This action cannot be performed if there are any domains associated to the nameserver in question, either in the local database or at the Registry.

Note: The manage interface should be used if mass changes are required.

Create a Foreign Nameserver

Generally, nameservers are created at the Registry that sponsors them (for example, ns1.server.com is created at the .com Registry). However, the nameserver is then only known at that particular Registry. Should a user require that a different TLD be used for a nameserver at that same Registry (for example, ns1.server.biz at the .com Registry), it can be created using this tool.

Note: You can only create nameservers at registries with which you are enabled.

The following functions are available:

- **Create a Foreign TLD Nameserver** – Allows you to add up to 25 foreign nameservers to a specific Registry.
- **Add Nameserver to All Foreign Registries** – Allows you to add one nameserver to all registries.

Configuring Messages

Default messages within the OpenHRS system provide Registrants with notifications related to their domains. These messages are populated with domain and user-specific information each time an event occurs. Some of the most common messages can be enabled or disabled via the RWI. Your administrators can also modify these messages to make them more specific to your business, but it is not advisable to make changes to the variable tags, as it can break the inherent functionality of the message.

Viewing the Default Messages List

This section allows you to edit the various messages that are sent to Resellers and end users when specific events occur. From this screen, you can edit the following types of information:

- Email display from
- Email display reply-to
- Email address reply-to

You can also add your own customized paragraphs, if desired, and preview the message.

Viewing the Templates Message List

This section provides additional messages that you can customize and preview.

Domain redemption Messaging

- Domain redemption request to OpenSRS/HRS staff
- Domain redemption Notification, to RSP

Domain Renewal Messaging

- Daily renewal reminder, to RSP
- Renewal Confirmation, To End User
- .UK Renewal Confirmation, To End User
- Manual Renewal Reminder, to End User

WHOIS Privacy Messaging

- End User WHOIS Privacy order confirmation request
- End User Bulk WHOIS Privacy order confirmation request
- Whois Privacy bulk purchase confirmation results to EU
- Whois Privacy bulk purchase results to RSP
- WHOIS Privacy contact instructions, To "Interested Party"
- WHOIS Privacy forwarded message
- Domains Whois Privacy Modification Report to EU
- WHOIS Privacy service disabled message to EU
- WHOIS Privacy service suspended message to EU
- WHOIS Privacy service expired message to EU

- WHOIS Privacy service expiring notification message to EU
- WHOIS Privacy service pending 10 days message to EU
- WHOIS Privacy service pending 10 days message to RSP

Transfers FOA Storage

- Transfer AWAY REG2REG FOA Stored
- Transfer IN REG2REG FOA Stored

Transfers IN Messaging

- Initial Authorization for Registrar Transfer (General TLDs)
- Initial Authorization for BATCH Registrar Transfer (General TLDs)
- Initial Authorization for Registrar Transfer (Country Code TLDs)
- Initial Authorization for RSP to RSP Transfer (ALL TLDs)
- Initial Authorization for BATCH RSP to RSP Transfer (ALL TLDs)
- Transfer Notification Courtesy Message to Admin Contact

Transfers AWAY Messaging

- Confirmation of Registrar Transfer Request (General TLDs)
- Confirmation of Registrar Transfer Request (Country Code TLDs)
- Transfer AWAY Declined by Losing Registrar to EU
- Transfer AWAY Declined by Losing Registrar to Attempting Gaining Registrar

Bulk Changes Messaging

- Bulk Change Search Results to RSP
- Bulk Change Results to RSP
- Bulk Change Cancellation to RSP
- Bulk Change Termination to RSP

RSP Account Notifications

- Payment email invoice/receipt, to RSP
- Account balance is below reseller threshold, to RSP
- Account balance is below than half of reseller threshold, to RSP
- Domain Refund Notification, to RSP
- Autorenew enabled, to RSP
- Autorenew disabled, to RSP
- Autorenew enabled for all domains in profile, to RSP
- Autorenew disabled for all domains in profile, to RSP
- Message to Reseller when ACH Service is enabled
- Message to reseller when ACH request is rejected
- Message to reseller when ACH request is returned
- Message to reseller when ACH payment cannot be processed [Min.Acc.Bal.]
- Message to reseller when ACH payment cannot be processed [Max 3 day ACH]
- Message to reseller when ACH minimum account balance threshold is reached

- Message to reseller when automated ACH request is processed
- Message to reseller when online ACH request is processed
  Contact Management Messaging
- Domains Contact Modification Report to EU
  .CA Messaging
- .CA registrant transfer notification to RSP
- .CA new registrant confirmation letter
  .DE Messaging
- .DE nameservers for transfer notification, to RSP
- .DE nameservers for transfer notification, to end user
  .UK Messaging
- Confirmation of Domain Tag change away, to EU
- Confirmation of Domain Tag change away, to RSP
- Failure of Domain Tag change away
- RSP Email for Reseller Interface failures
- RSP Email for Manage Interface failures
- EU Email for Manage Interface failures
  XPack Messaging
- New Domain Registration (XPack) submitted
- Update Domain Info (XPack) Request Submitted
- Domain Transfer (XPack) submitted
- Domain Renewal (XPack) submitted
- Revoke Domain Info (XPack) Request Submitted
- Transaction (XPack) cancelled, to RSP
- Transaction (XPack) completed, to RSP
  Domain Admin Messaging
- Email domain auth-code to customer
- Email domain password to customer
  EU WDRP Domain Messaging
- WHOIS Data Reminder Policy
  Credit Server Messaging
- Credit server batch processing failure notification
- Credit server batch processing partial success notification
- Credit server batch processing success notification

IDN Conversion Tool

The IDN conversion tool is used for international domain names or nameservers, which have their own "encoded" format. The tool converts non-English domain names into any of the following formats:

- Native Characters
- Row-based ASCII Compatible Encoding (RACE)
- Punycode

Note: To use this tool, please ensure your browser has the Unicode (UTF-8) encoding enabled.

Domains that have been encoded with Punycode always start with "xn--" at the beginning of the domain, and this is what tells browsers (and other interfaces) to convert the domain into character sets like Big 5 Chinese, Korean and others.

The OpenSRS hosted IDN conversion tool is located at
http://precow.tucows.com/cgi-bin/IDN/index.cgi

Contact Verisign to obtain a copy of the tool to make available from your website.

Changing Your AWI Password

It is a good practice to periodically change your login password for the AWI. Passwords must be at least eight characters long, and contain at least one uppercase letter and one non-letter character.

To change your AWI password

1. From the AWI main page, from the **Admin Maintenance** section, click the **Change AWI Password** link.

2. Use the fields to enter your existing and new password, then click the **Change Password** button.

FAQ

What happens when a domain expires?

Domain Expiry Process

This expiry process applies to the .COM, .NET, .ORG, .INFO, .NAME, and .BIZ TLDs. The expiry and redemption process differs for country code TLDs.

Day	Status	Redeemable	Domain still working?	WHOIS status
1	**Autorenew Grace Period** One day after expiry, the Registry automatically renews expired domains and charges the Registrar. If the domain is cancelled within 40 days, the Registry refunds the Registrar.	Yes	The domain continues to resolve	One of: - OK - clienttransferprohibited - clientupdateprohibited - clientdeleteprohibited
41	**Redemption Period** The domain can still be restored for an additional fee plus the renewal fee. The redemption fee varies depending on the Registry.	Yes	The domain continues to resolve	One of: - redemptionperiod - pendingdeleterestorable
71	**Pending Delete** During this five-day period, action can not be taken to recover the domain.	No	The domain no longer resolves	pendingdelete
76	**Domain Released**	No	The domain no longer resolves	no status, domain not found

Day	Status	Redeemable	Domain still working?	WHOIS status
	Domain becomes available for anyone to register again.			

How do I redeem an expired domain?

Expired gTLD domains can be redeemed up to 69 days after the domain expired. Redemption of an expired domain must be done at the Registry, using the Registry's tools. Contact the Registry and follow their redemption process.

Once you've redeemed the domain with the Registry, you need to restore the domain in the HRS system.

Note: The following TLDs can be automatically redeemed by using either the Redeem Domain link in the RWI or the Redeem Restorable Domains link in the AWI; you do not need to contact the registry:

- .COM/.NET
- .ORG
- .TV
- .INFO
- .MOBI
- .ASIA
- .BR
- .CA
- .EU
- .IN
- .IT
- .ME
- .NL
- .XXX

Warning: Before using this feature, contact your Account Manager or System Engineer to ensure redemption processes correctly. Before you can redeem a domain, OpenSRS must activate your HRS account for domain redemption, and all profile information, required at setup, must be provided. If complete profile information is not provided, redemptions are not automated.

Once the domains have been redeemed with the registry, you can use the AWI to reinstate the domains within HRS.

To restore an expired-deleted domain in HRS

1. From the HRS main page, click **Search Deleted Domains**.

2. In the **Search Deleted Domains** page, specify your search criteria. The domain name is required; however, wildcards are accepted.

3. Click the **Results to HTML page** button. The **Search Results** page opens.

4. In the **Search Results** page, click the domain name that you want to restore. The details page for that domain opens.

5. Click the **Restore Deleted Domain into DB** link.
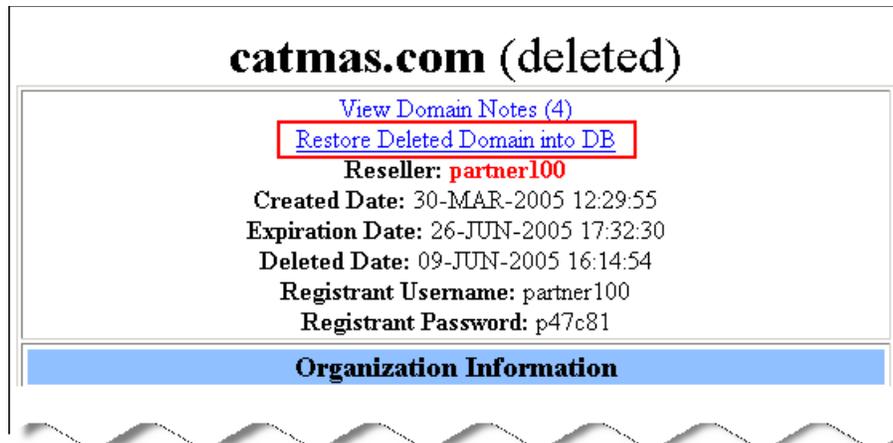
How do I check for pending orders for .CA domains?

A .CA domain is not registered automatically if a "blocker" exists for the requested name, or the name is a "municipal". Registration requests for "blocker" or "municipal" .CA domain names are moved to a pending queue, and must be processed manually.

Blocker - a conflicting name is already registered to someone else, and permission is required from the owner of the conflicting domain before registration of the requested domain can be completed. For example, if hellodolly.ca is requested but hellodolly.on.ca is already owned by someone else, the owner of hellodolly.on.ca needs to approve the registration of hellodolly.ca before it can be registered. The current owner is free to allow or refuse the new registration.

Municipal - the requested name is reserved as a "municipal". "Municipal" is the term that CIRA uses for a municipality name, such as the name of a Canadian province or city. If the applicant ordering a municipal is anything other than the municipality, the order is cancelled.

Checking for pending .CA domains

1. To see your list of pending .CA applications, click the **View Blocked Orders for .ca domain** link in the OpenHRS main page. The **Blocked Orders** page opens.

Blocked Orders

Status: [All ▼] Domain: [   ] Reseller: [   ] [Search]

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Reseller	Order Time	Domain	Status
reseller5000	30-AUG-2006 02:47:59	oasis.ca blocker	pending
reseller5000	16-OCT-2006 21:04:28	woodstock.ca municipal	pending

2. From the **Blocked Orders** page, review the list of domains in the **Domain** column. Any domains that were blocked on account of a municipal restriction have "municipal" below the domain name, and any that were blocked because a domain with a conflicting name already exists have "blocker" below the domain name.

OpenHRS registrars should monitor their queue of pending .CA registration applications each day, and attempt to process the registration or cancel it.

For more information on how to process pending orders, see "Processing Municipal .CA Orders" and "Processing Blocker .CA Orders".

Revisions and Updates

July 28, 2008

- Rebranded guide, changing 'Tucows' to 'OpenSRS'.

July 6, 2007

- Removed reference to IPS tag updates by Nominet.

December 18, 2006

- Revised version of this document published. Several screen captures and detailed procedures have been added.

November 27, 2006

- Revised draft version of this document published. Added section "Processing Blocked .CA Orders" and added content to several topics. Content additions still underway.

September 5, 2006

- Revised draft version of this document published. Content additions still underway.

June 2006

- Re-release of this document.