

FO TECH SOLUTIONS LLC

RUNBOOK AND HANDOVER

Acme Freight Brokerage ♦ EDI 214 automation and TMS migration, phase one

Version 1.0 ♦ Handed over at phase one close

Prepared for: Operations Director and dispatch team ♦ Prepared by: FO Tech Solutions, lead engineer

SAMPLE DELIVERABLE ♦ SYNTHETIC DATA, REAL FORMAT

Acme Freight Brokerage is a made-up company; the hosts, accounts, and people are invented. The document is the one every engagement ends with: what was built, where it lives, how to run it, and what to do when it breaks, written so Acme can run it without us.

WHAT THIS COVERS

The 214 automation that applies carrier status updates to loads in the new TMS, the review queue for the three carriers on non-standard codes, and the accounts, monitoring, and documents Acme now owns. If a dispatcher can follow the "when something breaks" section at 6am without calling anyone, this document has done its job.

SYSTEM OVERVIEW

COMPONENT	WHAT IT DOES	WHERE IT RUNS
SFTP inbound folder	Carriers drop EDI 214 files here, about 400 a day	Acme's SFTP server, /edi/inbound/214
edi-214-apply	Polls the folder every 2 minutes, parses each file, applies the status to the load in the new TMS by API, moves the file to processed/ or review/	Acme's Azure subscription, Function App acme-edi-prod

Review queue	Files from the three non-standard carriers, and any file that fails to parse, wait here for a dispatcher	New TMS, work queue "EDI review"
Code map	Translates each non-standard carrier's status codes to standard ones once a dispatcher has confirmed the mapping	Table edi_status_code_map in the Function App's database
Alerting	Emails dispatch when the queue exceeds 20 files or no file has been processed in 60 minutes during business hours	Azure Monitor, action group acme-edi-dispatch

ACCOUNTS AND ACCESS

Everything below is in Acme's name. FO Tech's access was revoked at handover, per the checklist at the end.

ACCOUNT	OWNER AT ACME	USED FOR	WHERE THE CREDENTIAL LIVES
Azure subscription	Operations Director	Function App, database, monitoring	Acme's password manager, folder "EDI"
New TMS API user svc-edi-214	Dispatch lead	The automation's writes to loads	Azure Key Vault acme-edi-kv , secret tms-api-key
SFTP service account edi-reader	IT contact	Reading the inbound folder	Key Vault, secret sftp-key
Source repository	Operations Director	The automation's code and this runbook	Acme's GitHub organisation, acme/edi-214-apply

ROUTINE OPERATIONS

Every business day (dispatch, 5 minutes)

- Open the "EDI review" queue. Work each file: confirm the load, pick the standard status, apply. A file the queue has seen before from the same carrier with the same code will offer the previous answer.
- If the same code from the same carrier has been mapped the same way three times, add it to the code map (section below) so it stops arriving in the queue.

Weekly (dispatch lead, 10 minutes)

- Check the count in [processed/](#) for the week against the carrier count in the TMS. A carrier with zero files for a week has usually changed its SFTP path. Call them.

Monthly (IT contact, 15 minutes)

- Archive [processed/](#) files older than 90 days to cold storage. The script is [scripts/archive.ps1](#) in the repository, and it prints what it will move before moving it.
- Check the Key Vault for secrets expiring in the next 60 days. The TMS API key is set to expire yearly.

ADDING A STATUS CODE TO THE MAP

1. In the Function App's database, insert a row in `edi_status_code_map`: carrier SCAC, their code, the standard code, your initials, today's date.
2. Nothing needs to restart. The next file from that carrier with that code applies automatically.
3. The row is logged. If a mapping turns out wrong, delete the row and the code returns to the queue.

WHEN SOMETHING BREAKS

WHAT YOU SEE	WHAT IT USUALLY IS	WHAT TO DO
Alert: "No 214 processed in 60 minutes"	SFTP unreachable, or the Function App stopped	1. Check the SFTP server is up. 2. In Azure, open <code>acme-edi-prod</code> and check its state is Running; if Stopped, press Start. 3. If both look fine, check the last error in the Function App's Logs tab and match it to the table below.
Alert: "Review queue over 20 files"	A standard-code carrier changed its format, or a new carrier started sending	Open the queue. If most files are from one carrier, that carrier's format changed; work the queue and email the carrier's EDI contact (list in the TMS, carrier record, "EDI contact" field).
Log: <code>401 Unauthorized</code> from the TMS API	The API key expired or was rotated	Generate a new key in the TMS admin (Settings, API users, <code>svc-edi-214</code>). Put it in Key Vault as <code>tms-api-key</code> . The app picks it up within 5 minutes.
Log: <code>429 Too Many Requests</code>	A carrier sent a backlog at once	Nothing. The app backs off and retries. It clears at about 500 files an hour.
A load shows the wrong status	A wrong code mapping, or a carrier sent a wrong file	Open the load's status history; each event names the file it came from. Fix the status by hand. If the mapping was wrong, delete that row in the code map.
Anything else		The Function App's Logs tab shows the last 24 hours. Copy the error line into the support email below.

KNOWN LIMITATIONS

- Four quarantined 214 events from the migration reference loads that never existed. They sit under load `QUARANTINE-214` for Acme to discard.
- The app processes one file at a time per carrier to keep status order correct. A carrier sending 2,000 files at once takes about four hours to clear.
- Outbound EDI (204, 210) is the TMS vendor's connector and is not covered here.

WHERE EVERYTHING IS

ITEM	LOCATION
Source code, deployment script, this runbook	<code>acme/edi-214-apply</code> in Acme's GitHub; <code>docs/runbook.md</code> is this document

Carrier mapping table and merge log (from the migration)	New TMS database, tables <code>carrier_merge_log</code> and <code>carrier_mapping_signed</code>
Reconciliation report and cutover checklist, signed	Acme SharePoint, "TMS migration" library
Equipment code mapping agreed in week 2	Repository, <code>docs/equipment-codes.md</code>

SUPPORT AFTER HANDOVER

The automation is Acme's. Questions go to contact@fotechsolutions.net and get a reply within one business day. Further work on it is scoped in writing like any other work.

HANDOVER CHECKLIST

ITEM	DONE
Two-hour walkthrough of the queue and this runbook with dispatch (recorded, link in SharePoint)	Yes
All secrets rotated after handover and stored in Acme's Key Vault	Yes
FO Tech accounts removed from Azure, the TMS, SFTP, and GitHub	Yes
Repository transferred to Acme's GitHub organisation	Yes
Alerts confirmed to reach the dispatch inbox (test alert sent and received)	Yes