# Device Ordering Policy

## 1. Purpose & Scope

This policy outlines the guidelines and procedures for requesting IT hardware within the organization. It applies to all employees, managers, and IT administrators involved in the device ordering process.

## 2. Roles & Responsibilities

Employees: Submit device requests and provide justification when required.  
Managers: Review and provide input for out-of-catalog requests.  
IT Admin: Review escalated requests and make final decisions.  
IT Asset Management (ITAM): Maintain catalog and ensure compliance with policy.

## 3. Process Overview

1. Employee submits a device request via the Copilot Studio agent.  
2. If the device is outside the catalog, justification is required and manager input is requested.  
3. The request is evaluated by an AI approval step referencing this policy.  
4. If rejected by AI, the request is escalated to IT Admin.  
5. Final decision and rationale are returned to the employee.

## 4. Policy Clauses (P-1 to P-20)

* P-1 Standard Laptop: Surface Laptop 7 (16 GB / 512 GB) eligible for FTE, refresh ≥36 months.
* P-2 Monitors: One 27" monitor standard; second monitor requires manager input citing role need.
* P-3 Desktop: Surface Studio 2+ allowed for design roles only.
* P-4 Spend controls: Any request with extended total cost >$2,000 requires director approval.
* P-5 Out-of-catalog: Must include business impact, security/accessibility rationale, and duration of need.
* P-6 Accessories: Max 2 accessories per request unless justified.
* P-7 Tablets: Surface Pro 11 allowed for field roles only.
* P-8 Refurbished preference: Prefer certified refurb when functionally equivalent.
* P-9 OS Standard: Windows 11 required unless exception approved.
* P-10 Shipping: Default to office address unless WFH approved.
* P-11 Second monitor: Requires manager input and role justification.
* P-12 Quantity cap: Max 1 primary device per employee.
* P-13 Cost center: Must be provided for budget tracking.
* P-14 Sustainability: Devices must meet energy efficiency standards.
* P-15 Security: Devices must support company security baseline.
* P-16 SLA: Requests must be processed within 3 business days.
* P-17 Asset tracking: All devices must be tagged and logged.
* P-18 Refresh cycle: Minimum 36 months between replacements.
* P-19 Eligibility: Device options vary by job family.
* P-20 Exceptions: Must be documented and approved by IT Admin.

## 5. Information the Agent Must Collect

The agent must collect the following information before triggering the approval flow:  
- Device Requested (type/model)  
- Requester Email  
- Justification (mandatory if out-of-catalog)

## 6. Approval Logic (Reference for Flow)

Requests within the standard catalog are auto-approved unless policy constraints are triggered.  
Out-of-catalog requests require:  
- Justification aligned with P-5  
- Manager input  
- AI approval referencing relevant clauses  
If AI rejects, escalate to IT Admin for final decision.

## 7. Definitions

Standard Catalog: List of approved devices maintained by ITAM.  
Out-of-Catalog: Devices not listed in the standard catalog.  
Justification: Business reason for requesting a non-standard device.  
Request ID: Unique identifier for tracking device requests.

## 8. Governance

This policy is maintained by the IT Asset Management team. Updates are reviewed quarterly.  
For questions or exceptions, contact ITAM at itam@company.com.