

Creating a Change Request from a Configuration Item (CI) in ServiceNow

This guide walks you through the process of creating a change request from a Configuration Item (CI) in ServiceNow. You will learn how to navigate the ServiceNow interface, search for the appropriate CI, customize your list view, and either associate CIs with an existing change request or create a new one.

Prerequisites

- Access to ServiceNow with permissions to view and manage Configuration Items and Change Requests.
- Familiarity with the UNIX Servers list and Change Request forms in your organization's ServiceNow instance.

Step 1: Access the change requests list

Open ServiceNow and navigate to the Change Requests page. This page displays a list of existing change requests with columns such as Number, Short Description, Type, State, Planned Start Date, Planned End Date, Requested By, and Assigned To.

Example entries include:

- CHG0040007: Please reboot ApplicationServerPeopleSoft (Emergency, New)
- CHG0040006: Add network switch to cabinet (Standard, Scheduled)

The left sidebar contains navigation options such as Create New, Open, Closed, Standard Change, and Change Advisory Board.

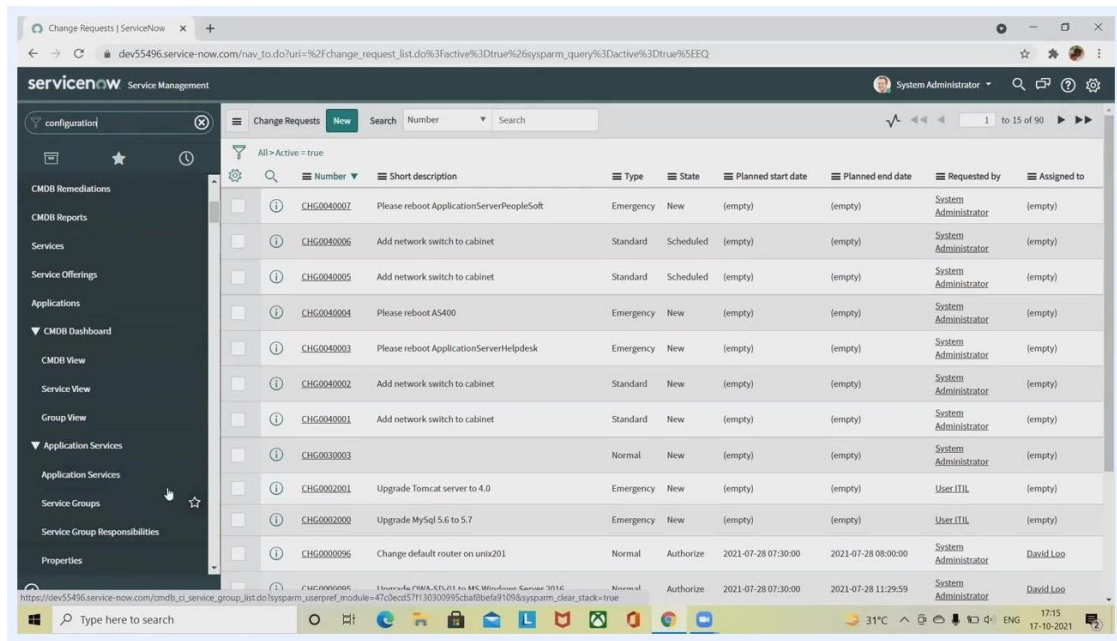
The screenshot displays the ServiceNow Change Management interface. On the left is a navigation sidebar with options like 'Change', 'Create New', 'Open', 'Closed', 'All', 'Overview', 'Standard Change', 'Standard Change Catalog', 'My Proposals', 'Open Proposals', 'All Templates', 'Change Advisory Board', 'CAB Workbench', and 'All CAB Requests'. The main area shows a table of change requests with columns for Number, Short description, Type, State, Planned start date, Planned end date, Requested by, and Assigned to. The table lists several requests, including reboots, network switch additions, and server upgrades. A yellow banner with the text 'Raigurukul.com' and 'Learn & Lead' is overlaid on the bottom of the table.

	Number	Short description	Type	State	Planned start date	Planned end date	Requested by	Assigned to
☐	CHG0040007	Please reboot ApplicationServerPeopleSoft	Emergency	New	(empty)	(empty)	System Administrator	(empty)
☐	CHG0040006	Add network switch to cabinet	Standard	Scheduled	(empty)	(empty)	System Administrator	(empty)
☐	CHG0040005	Add network switch to cabinet	Standard	Scheduled	(empty)	(empty)	System Administrator	(empty)
☐	CHG0040004	Please reboot AS400	Emergency	New	(empty)	(empty)	System Administrator	(empty)
☐	CHG0040003	Please reboot ApplicationServerHelpdesk	Emergency	New	(empty)	(empty)	System Administrator	(empty)
☐	CHG0040002	Add network switch to cabinet	Standard	New	(empty)	(empty)	System Administrator	(empty)
☐	CHG0040001	Add network switch to cabinet	Standard	New	(empty)	(empty)	System Administrator	(empty)
☐	CHG0030003		Normal	New	(empty)	(empty)	System Administrator	(empty)
☐	CHG0002001	Upgrade Tomcat server to 4.0	Emergency	New	(empty)	(empty)	User.ITIL	(empty)
☐	CHG0002000	Upgrade MySQL 5.6 to 5.7	Emergency	New	(empty)	(empty)	User.ITIL	(empty)
☐	CHG0001015	C. vnc-d. nup os rro umb 01	Normal	Authorize	2021-07-28 07:30:00	2021-07-28 08:00:00	System Administrator	David Loo
☐	016		Normal	Authorize	2021-07-28 07:30:00	2021-07-28 11:29:59	System Administrator	David Loo

ServiceNow Change Requests list with navigation sidebar and multiple change requests displayed

Step 2: Navigate to configuration items

In the left sidebar, use the search bar and type "conf" or "configuration" to filter the menu. Locate and expand the Servers section under the filtered results.



Sidebar search for 'configuration' with expanded menu showing Servers, Application Servers, and related options

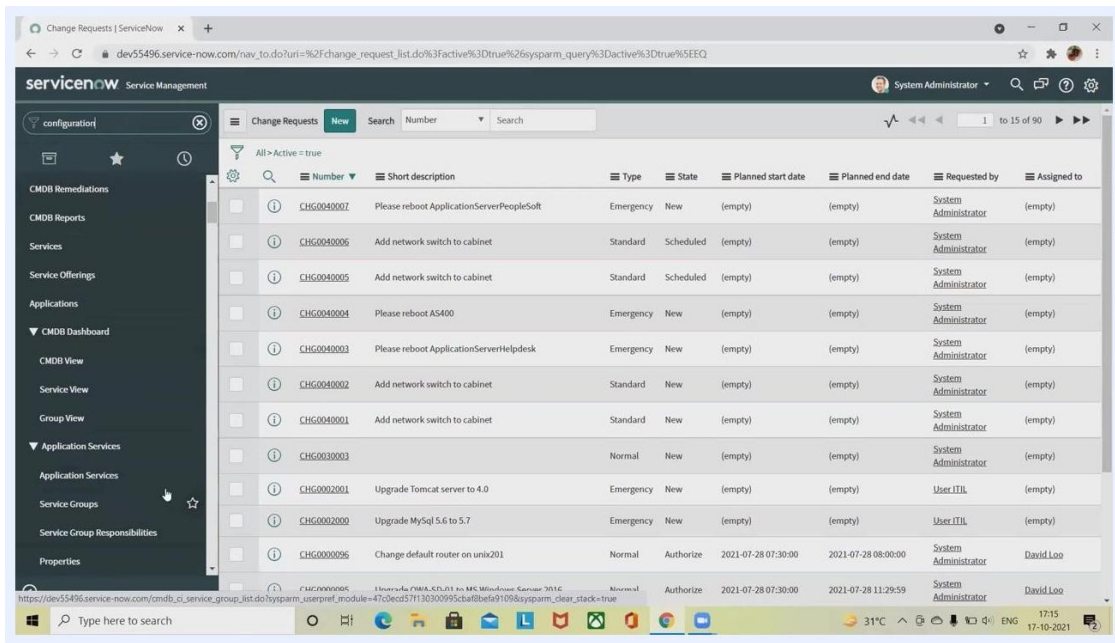
Step 3: Select UNIX servers

Under the Servers section, click Unix to view the list of UNIX servers. The main panel updates to display a list of UNIX servers with columns for Name, Operating System, Description, OS Version, and Class.

Example server entries:

- dbaix900nyc (AIX, 5L, UNIX Server)

- lawson_app_100 (Solaris, 10, UNIX Server)



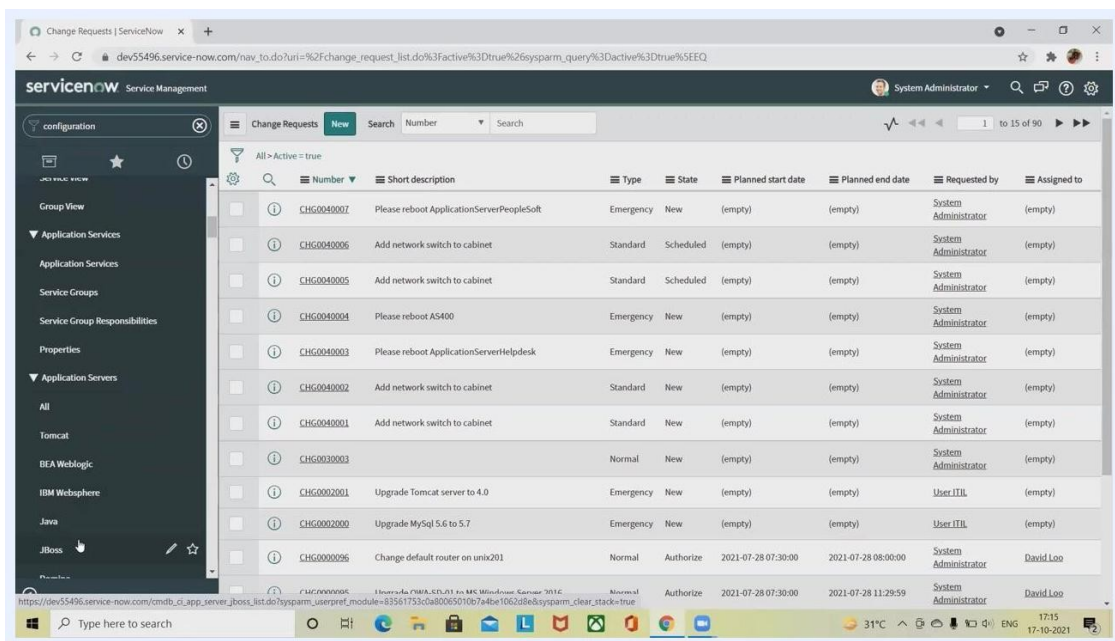
The screenshot shows the ServiceNow Change Requests interface. The left sidebar contains navigation links for Configuration, CMDB Remediations, CMDB Reports, Services, Service Offerings, Applications, CMDB Dashboard, CMDB View, Service View, Group View, Application Services, Application Services, Service Groups, Service Group Responsibilities, and Properties. The main table displays a list of change requests with columns: Number, Short description, Type, State, Planned start date, Planned end date, Requested by, and Assigned to. The table shows 15 records, with the first 10 visible. The first 10 records are for UNIX servers, and the last 5 are for other applications.

Number	Short description	Type	State	Planned start date	Planned end date	Requested by	Assigned to
CHG0040007	Please reboot ApplicationServerPeopleSoft	Emergency	New	(empty)	(empty)	System Administrator	(empty)
CHG0040006	Add network switch to cabinet	Standard	Scheduled	(empty)	(empty)	System Administrator	(empty)
CHG0040005	Add network switch to cabinet	Standard	Scheduled	(empty)	(empty)	System Administrator	(empty)
CHG0040004	Please reboot AS400	Emergency	New	(empty)	(empty)	System Administrator	(empty)
CHG0040003	Please reboot ApplicationServerHelpdesk	Emergency	New	(empty)	(empty)	System Administrator	(empty)
CHG0040002	Add network switch to cabinet	Standard	New	(empty)	(empty)	System Administrator	(empty)
CHG0040001	Add network switch to cabinet	Standard	New	(empty)	(empty)	System Administrator	(empty)
CHG0030003	Upgrade Tomcat server to 4.0	Normal	New	(empty)	(empty)	System Administrator	(empty)
CHG0002001	Upgrade MySQL 5.6 to 5.7	Emergency	New	(empty)	(empty)	User.ITIL	(empty)
CHG0002000	Upgrade MySQL 5.6 to 5.7	Emergency	New	(empty)	(empty)	User.ITIL	(empty)
CHG0000096	Change default router on unix201	Normal	Authorize	2021-07-28 07:30:00	2021-07-28 08:00:00	System Administrator	David Loo
CHG0000095	Change default router on unix201	Normal	Authorize	2021-07-28 07:30:00	2021-07-28 11:29:59	System Administrator	David Loo

UNIX Servers list with columns for Name, Operating System, Description, OS Version, and Class

Step 4: Select one or more CIs

In the UNIX Servers list, select one or more CIs by checking the boxes next to their names. For example, select "dbaix900nyc" and "dbaix901nyc."



The screenshot shows the same ServiceNow Change Requests interface as the previous one, but with checkboxes marked next to the first two rows (CHG0040007 and CHG0040006). The left sidebar is also visible, showing the same navigation links as before.

Number	Short description	Type	State	Planned start date	Planned end date	Requested by	Assigned to
☒ CHG0040007	Please reboot ApplicationServerPeopleSoft	Emergency	New	(empty)	(empty)	System Administrator	(empty)
☒ CHG0040006	Add network switch to cabinet	Standard	Scheduled	(empty)	(empty)	System Administrator	(empty)
☐ CHG0040005	Add network switch to cabinet	Standard	Scheduled	(empty)	(empty)	System Administrator	(empty)
☐ CHG0040004	Please reboot AS400	Emergency	New	(empty)	(empty)	System Administrator	(empty)
☐ CHG0040003	Please reboot ApplicationServerHelpdesk	Emergency	New	(empty)	(empty)	System Administrator	(empty)
☐ CHG0040002	Add network switch to cabinet	Standard	New	(empty)	(empty)	System Administrator	(empty)
☐ CHG0040001	Add network switch to cabinet	Standard	New	(empty)	(empty)	System Administrator	(empty)
☐ CHG0030003	Upgrade Tomcat server to 4.0	Normal	New	(empty)	(empty)	System Administrator	(empty)
☐ CHG0002001	Upgrade MySQL 5.6 to 5.7	Emergency	New	(empty)	(empty)	User.ITIL	(empty)
☐ CHG0002000	Upgrade MySQL 5.6 to 5.7	Emergency	New	(empty)	(empty)	User.ITIL	(empty)
☐ CHG0000096	Change default router on unix201	Normal	Authorize	2021-07-28 07:30:00	2021-07-28 08:00:00	System Administrator	David Loo
☐ CHG0000095	Change default router on unix201	Normal	Authorize	2021-07-28 07:30:00	2021-07-28 11:29:59	System Administrator	David Loo

Two UNIX servers selected in the list, with checkboxes marked

Step 5: Customize list columns (optional)

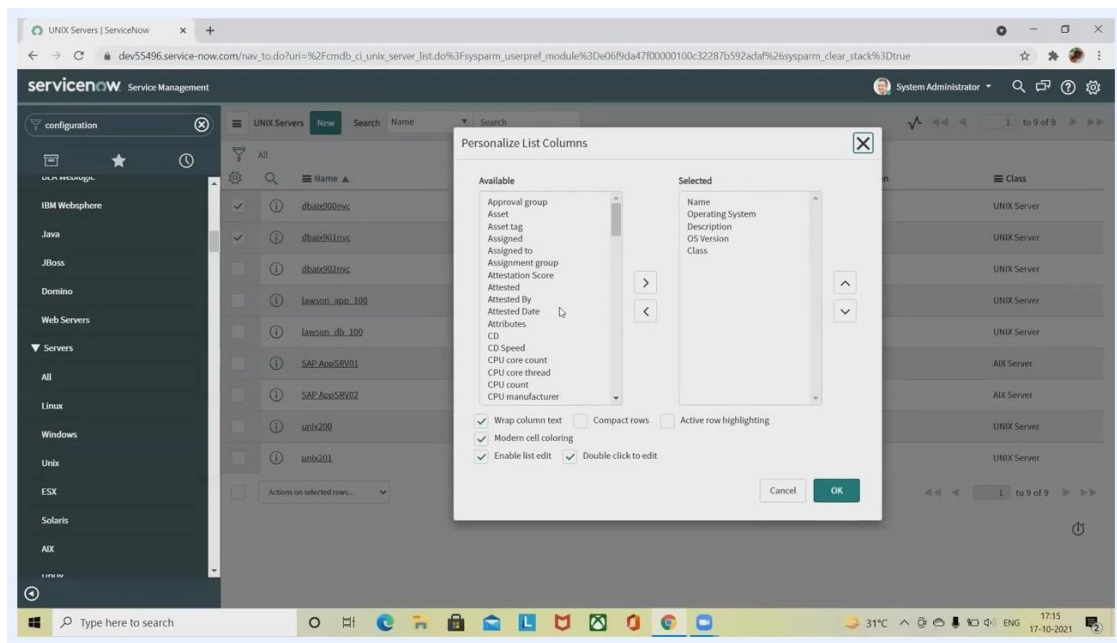
To personalize the columns displayed in the UNIX Servers list, click the gear icon (Personalize List). In the Personalize List Columns dialog, move fields between Available and Selected as needed.

Default selected columns are Name, Operating System, Description, OS Version, and Class. Additional options include Approval group, Asset, Assigned to, CPU details, and more.

You can also enable options such as:

- Wrap column text
- Compact rows
- Active row highlighting
- Modern cell coloring
- Enable list edit
- Double click to edit

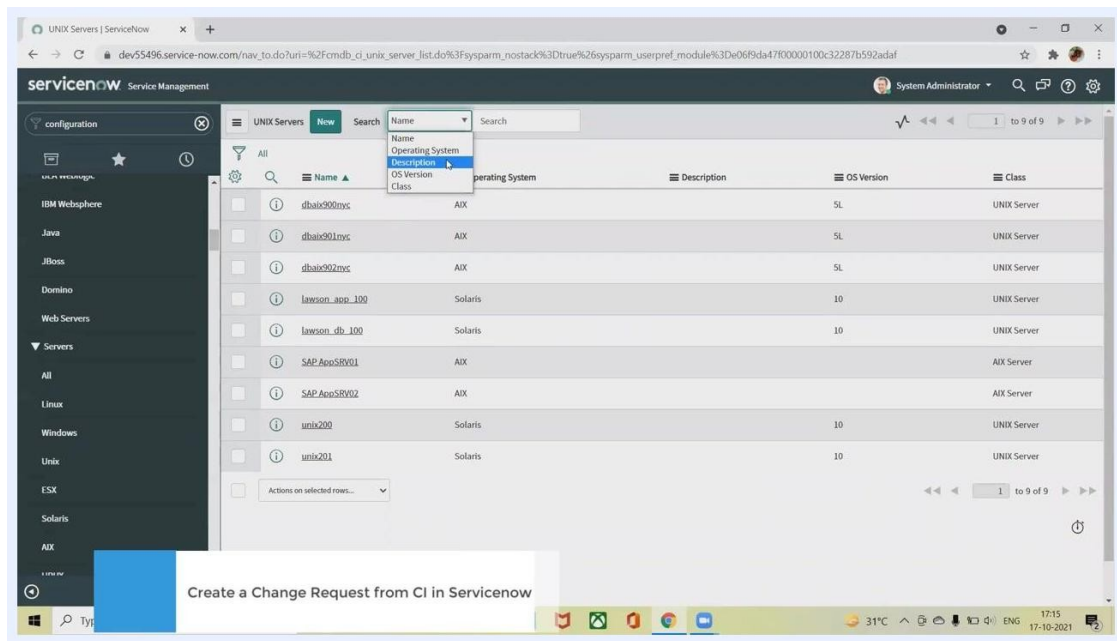
Click OK to apply your changes.



Personalize List Columns dialog with available and selected fields, and customization options

Step 6: Search and filter CIs

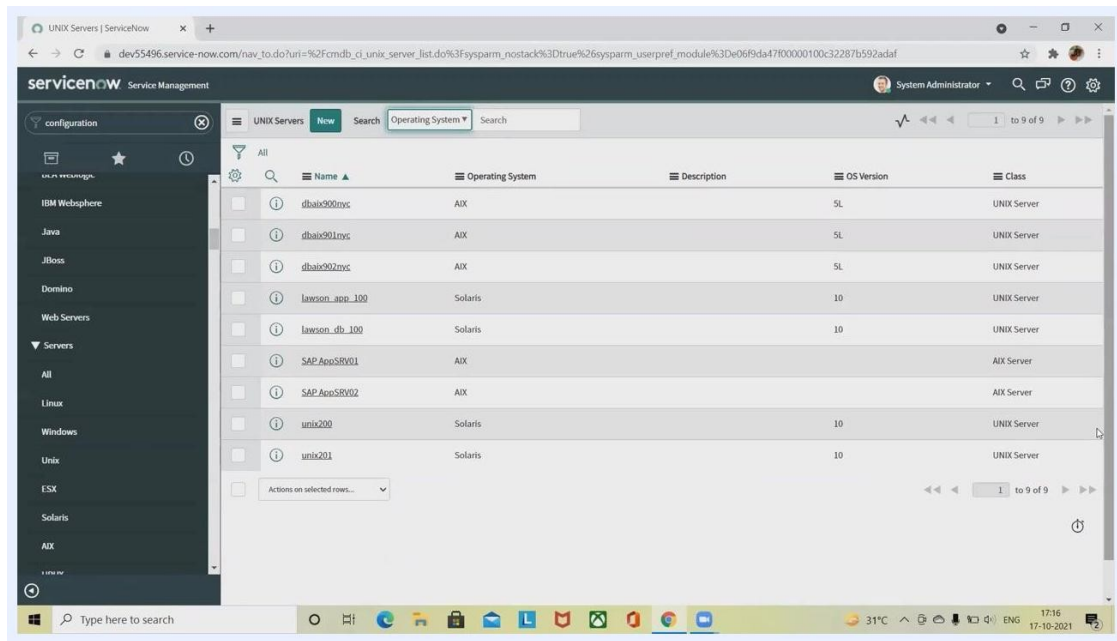
Use the search bar above the UNIX Servers list to filter by Name, Operating System, Description, OS Version, or Class. Select the desired filter from the dropdown and enter your search term.



Search bar with dropdown filter options for Name, Operating System, Description, OS Version, and Class

Step 7: Create a new UNIX server CI (if needed)

If the CI you need does not exist, click the New button at the top of the UNIX Servers list.

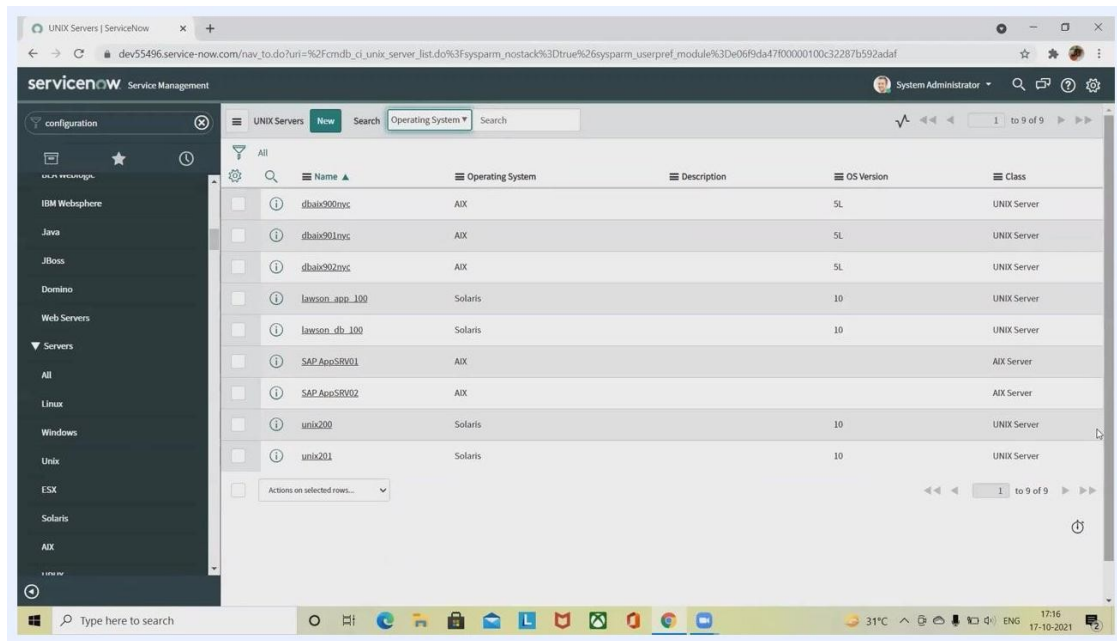


UNIX Servers list with 'New' button highlighted, showing server entries and search/filter options

A new record form appears. In the Name field, enter the name of your new UNIX server or the name associated with your team's request. Fill in additional details as required:

- Asset tag
- Manufacturer
- Asset
- Company
- Serial number
- Model ID
- Assigned to
- Configuration section: Model number, Operating System, OS Version, OS Service Pack, Disk space (GB), Description, RAM (MB), CPU speed (MHz), CPU count, CPU manufacturer, CPU type

Click Submit to save the new UNIX server CI.



New UNIX Server record form with fields for Name, Asset tag, Manufacturer, Company, Serial number, Model ID, Assigned to, and configuration details

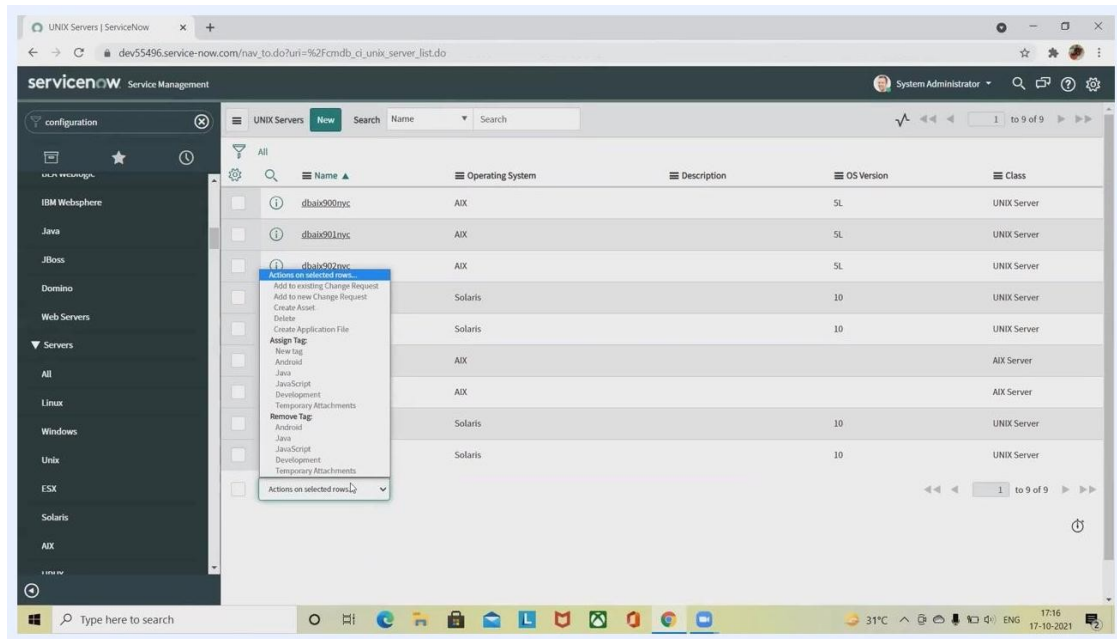
Step 8: Choose an action for selected CIs

In the UNIX Servers list, select one or more CIs by checking the boxes next to their names. At the bottom of the list, open the Actions on selected rows... dropdown menu.

Available actions include:

- Add to existing Change Request
- Add to new Change Request
- Create Asset
- Delete
- Create Application File
- Assign Tag (New tag, Android, Java, JavaScript, Development, Temporary Attachments)
- Remove Tag (Android, Java, JavaScript, Development, Temporary Attachments)

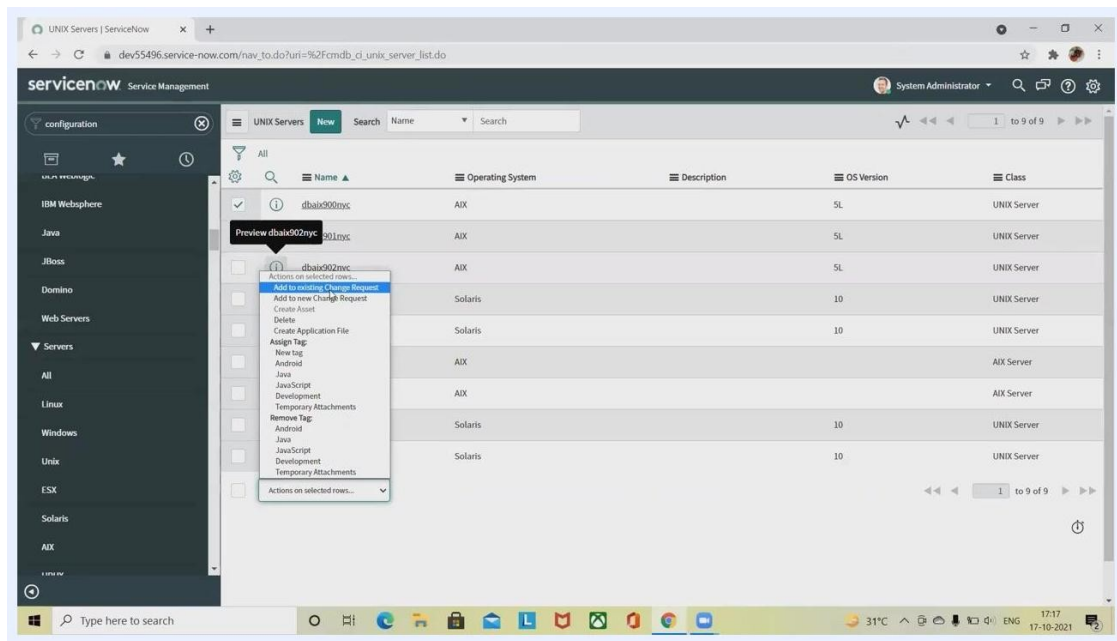
Select the action you require. To associate the CIs with an existing change request, choose Add to existing Change Request.



Actions on selected rows dropdown menu with options for adding to change requests, creating assets, assigning/removing tags, and more

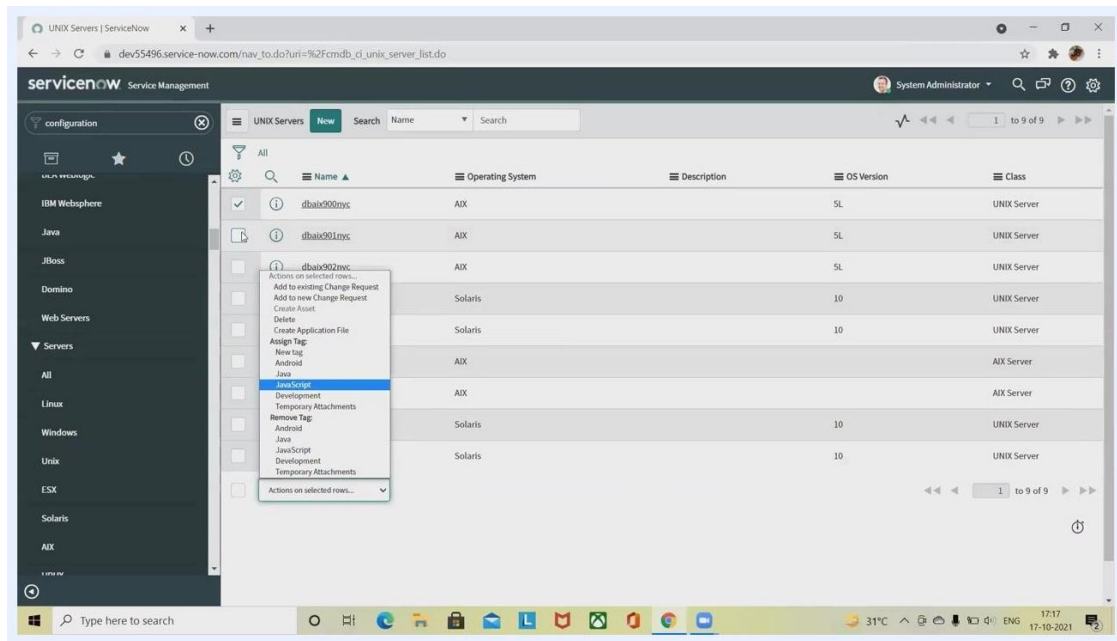
Step 9: Add selected CIs to an existing change request

If you are unable to select the option, ensure you have selected multiple items in the list. After selecting the desired CIs, choose Add to existing Change Request from the dropdown.

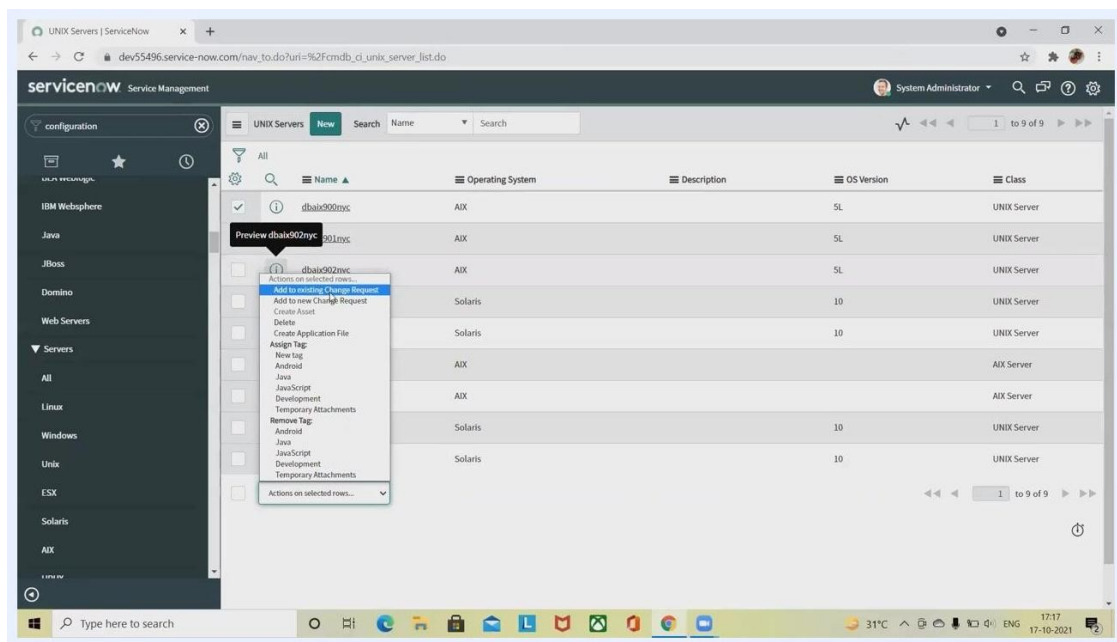


Multiple UNIX servers selected and 'Add to existing Change Request' highlighted in the actions dropdown

A dialog box titled Choose a Change Request appears. In the Change Request field, enter the number or search for the change request you want to associate with the selected CIs. Click the search icon to look up available change requests.



Choose a Change Request dialog with a field to enter or search for a change request number
A new window displays the list of change requests matching your search criteria.
If no records are found, adjust your search term.

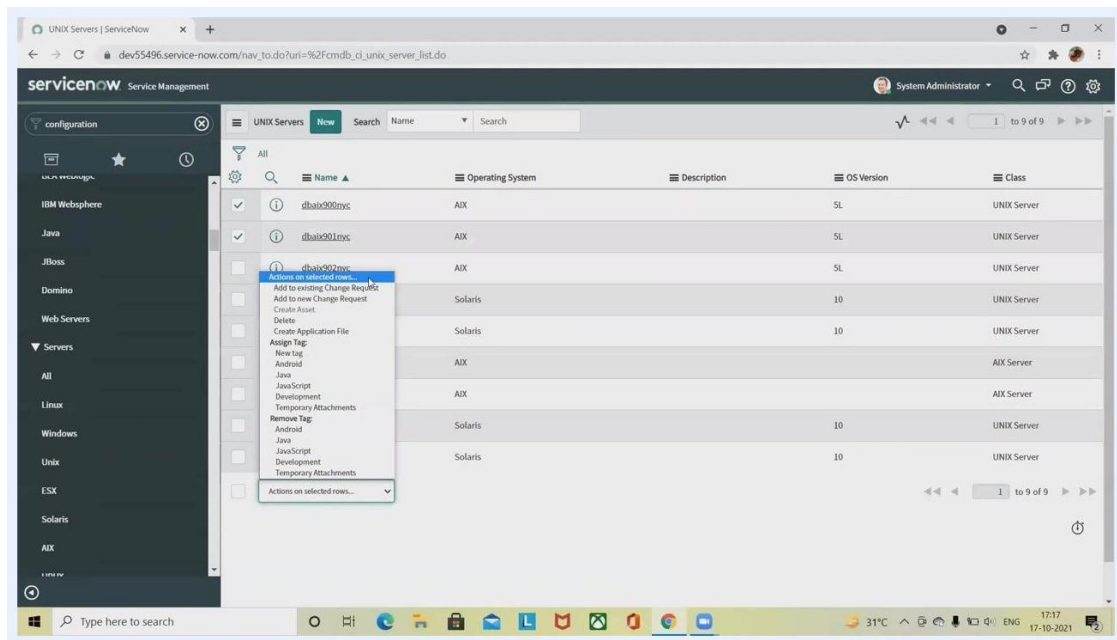


Change Requests search window showing no records found for the entered number

Once you find the appropriate change request, select it and click OK to associate the selected UNIX server CIs with the change request.

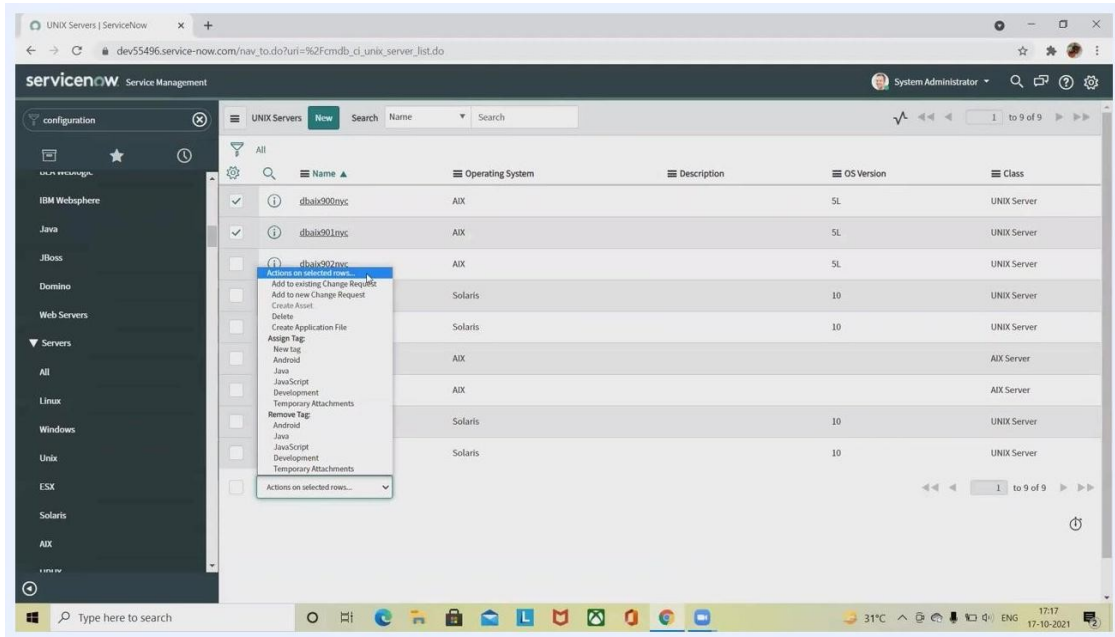
Step 10: Search for and associate a change request

In the Choose a Change Request dialog, use the Search tab to locate an existing change request. In the Number section, enter the change request number (for example, "123" or "CR") to search for a specific request. If no records are found, try different search terms or verify the number.



Choose a Change Request dialog open, with the Change Requests search window showing "No records to display" and search options for Number or Short description

You can change the search filter from Number to Short description if needed, using the dropdown next to the search box.

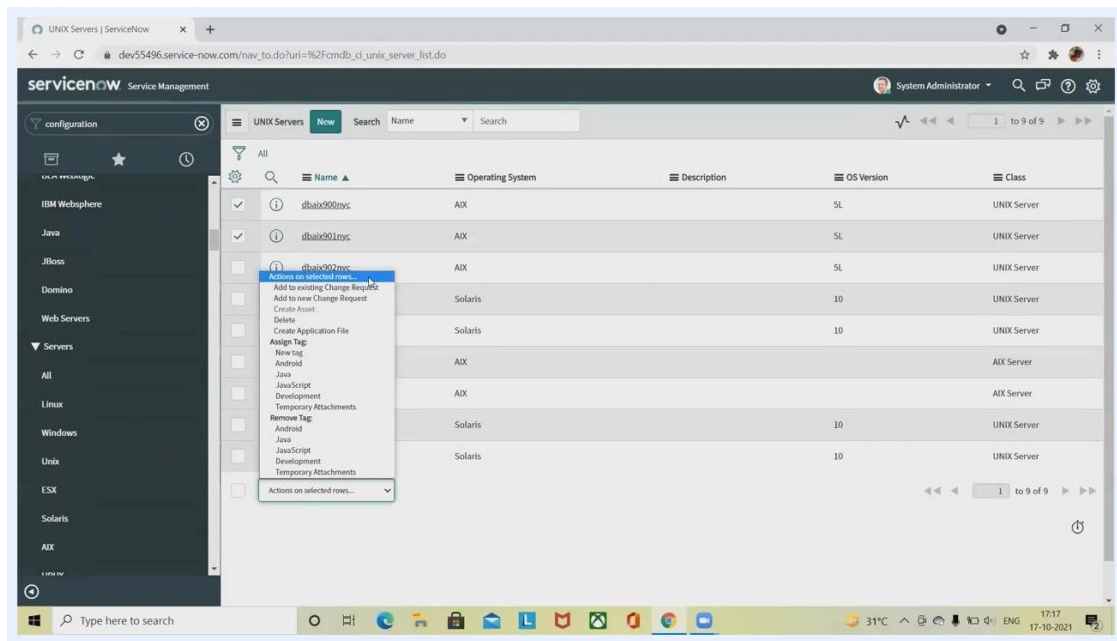


Change Requests search window with filter dropdown expanded, showing options for Number and Short description

If the change request exists, select it and click OK to associate the selected UNIX server CIs with the change request. If the change request does not exist, you cannot proceed with associating the CIs to an existing request.

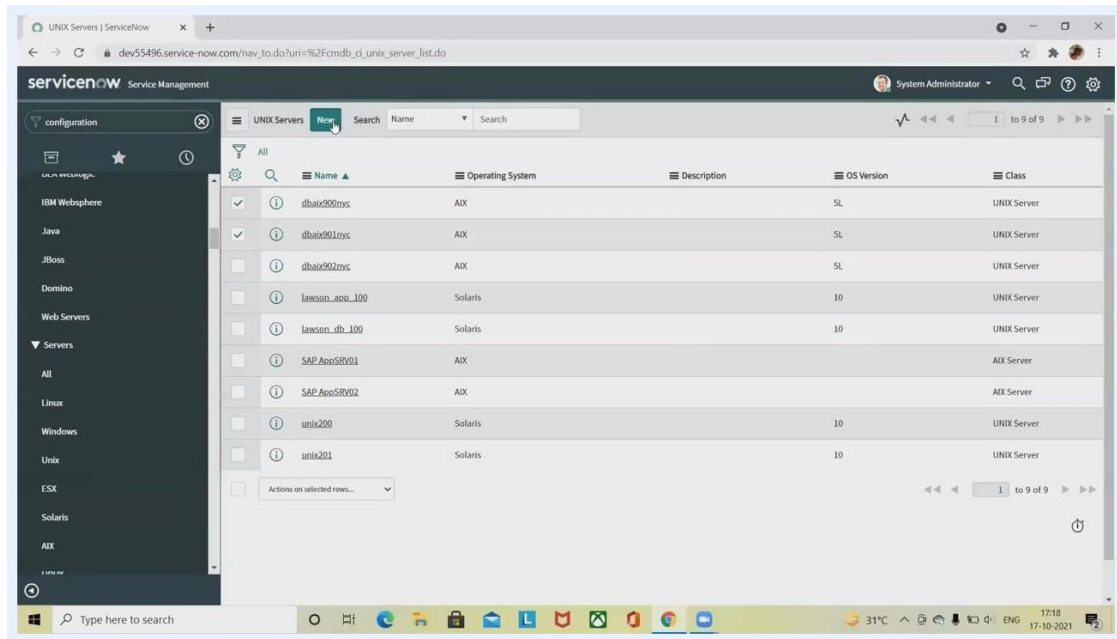
Step 11: Create a new change request from selected CIs

If you want to create a new change request, first select the desired UNIX server CIs from the list. Open the Actions on selected rows... dropdown and select Add to new Change Request.



UNIX Servers list with multiple items selected and the Actions on selected rows dropdown open, highlighting "Add to new Change Request"

Click the New button at the top of the UNIX Servers list to start creating a new UNIX server CI if needed.

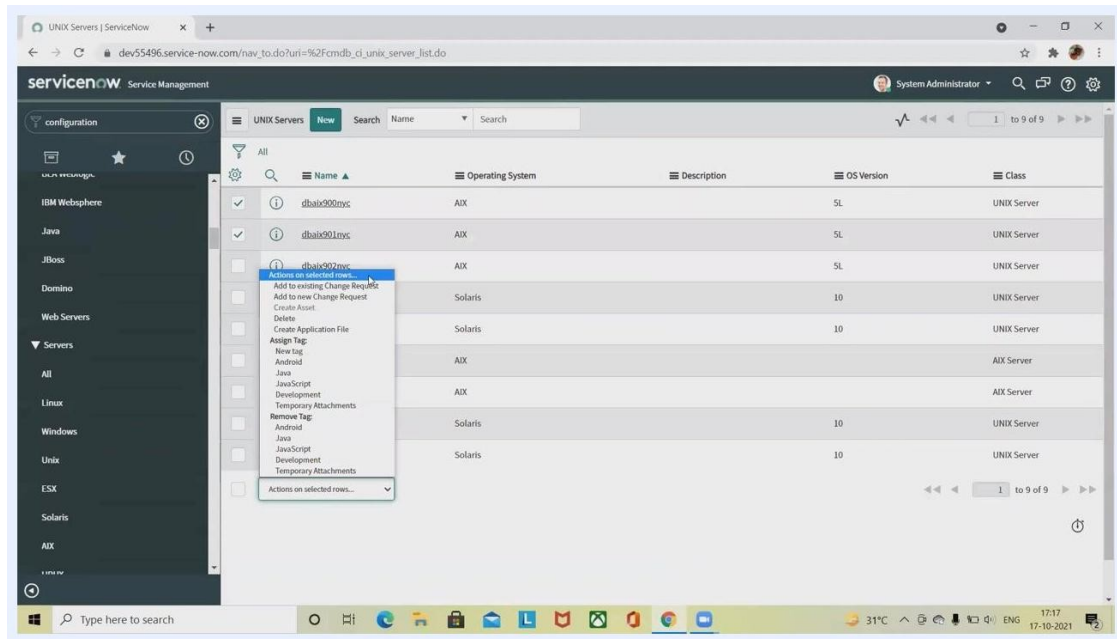


UNIX Servers list with the 'New' button highlighted, ready to create a new UNIX server CI

Fill in all required fields in the new record form:

- Name
- Asset tag
- Manufacturer
- Asset
- Company
- Serial number
- Model ID
- Assigned to
- Configuration section: Model number, Operating System, OS Version, OS Service Pack, Disk space (GB), Description, RAM (MB), CPU speed (MHz), CPU count, CPU manufacturer, CPU type

Ensure all mandatory fields are completed, then click Submit to create the new UNIX server CI or change request.



New UNIX Server record form with all required fields and configuration details visible, ready for data entry

Step 12: Complete the change request details

When creating a new change request, a detailed form appears. Enter or verify the following details:

- Number (auto-generated, e.g., "CHG0030004")
- Requested by (e.g., "System Administrator")
- Category (e.g., "Other")
- Service
- Configuration item
- Priority (e.g., "4 - Low")
- Risk (e.g., "Moderate")
- Impact (e.g., "3 - Low")
- Type (e.g., "Normal")
- State (e.g., "New")
- Assignment group, Assigned to (if applicable)
- Short description and Description

Use the tabs to provide additional information:

- Planning: Enter planned start and end dates, CAB required, CAB date, etc.
- Schedule
- Conflicts
- Notes
- Closure Information

Complete all required sections as per your organization's process.

Change Request form with fields for Number, Requested by, Category, Service, Configuration item, Priority, Risk, Impact, and tabs for Planning, Schedule, Conflicts, Notes, and Closure Information

Click Submit to save and create the change request. Your selected UNIX server CIs will now be associated with the new change request.

The screenshot shows the ServiceNow 'Create Change Request' form. The left sidebar contains a navigation menu with categories like 'Configuration', 'Web Servers', and 'Servers'. The main form area is titled 'Change Request New record' and includes fields for 'Priority' (set to 4 - Low), 'Risk' (Moderate), and 'Impact' (3 - Low). Below these are 'Short description' and 'Description' text areas. The 'Planning' tab is active, displaying a message: 'Planned start date and Planned end date are the requested change window'. It contains fields for 'Planned start date', 'Planned end date', 'Actual start date', and 'Actual end date'. There is also a 'CAB required' checkbox, a 'CAB date' field, a 'CAB delegate' dropdown, and a 'CAB recommendation' text area. A 'Submit' button is at the bottom left of the form. The bottom of the screen shows a Windows taskbar with various application icons and a system tray displaying the date and time (17:19, 17-10-2021).

Change Request form showing Planning tab with fields for planned start/end date, CAB required, and other closure information

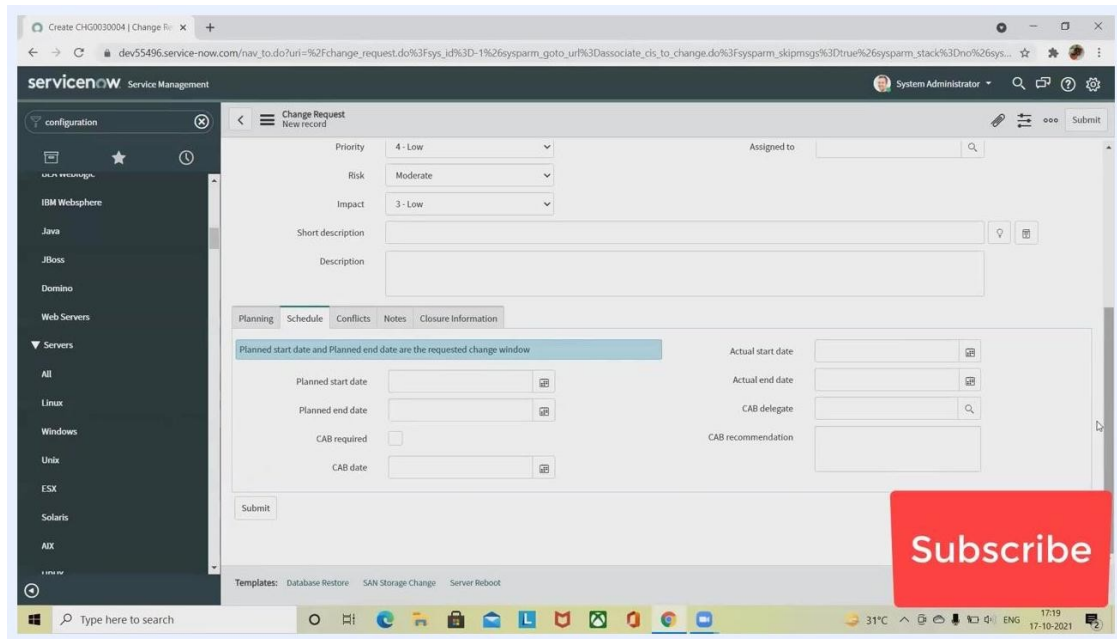
Step 13: Finalize and submit the change request

Review all entered details in the Change Request form to ensure accuracy and completeness. Navigate through the tabs (Planning, Schedule, Conflicts, Notes, Closure Information) to verify all required information is provided.

In the Schedule tab, confirm or enter the following fields as needed:

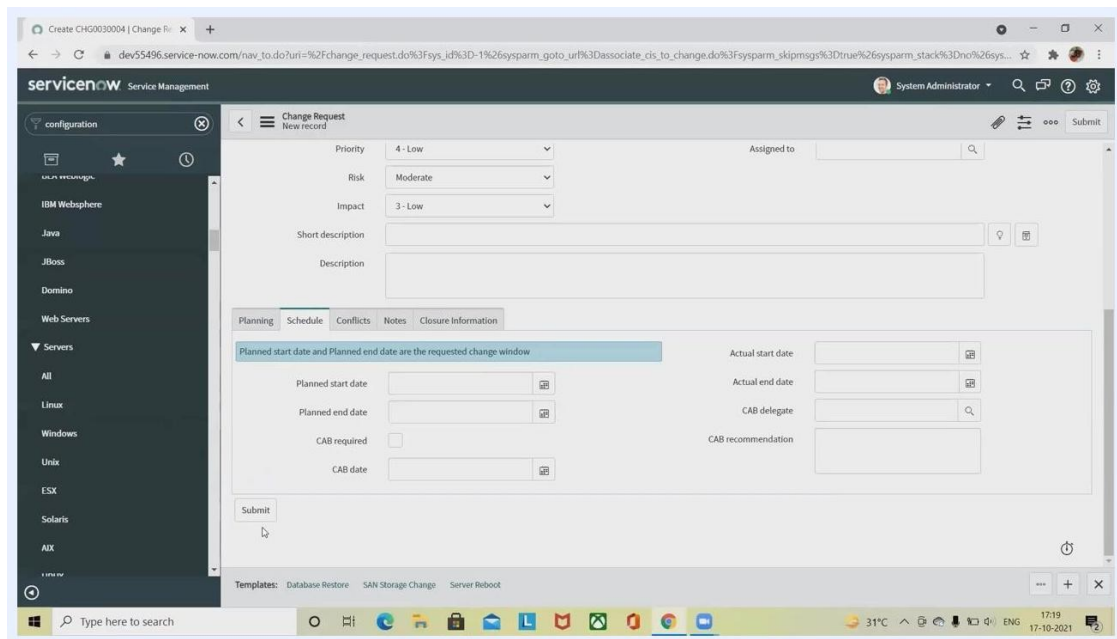
- Planned start date and Planned end date
- CAB required (check if a Change Advisory Board review is needed)
- CAB date (if applicable)
- Actual start date and Actual end date (if available)
- CAB delegate and CAB recommendation (if applicable)

Once all information is complete, click the Submit button at the bottom of the form to save and create the change request.



ServiceNow Change Request form open on the Schedule tab, with fields for planned/actual dates, CAB required, and Submit button visible. "Subscribe" overlay in the lower right corner.

After submission, the change request is created successfully, and your selected UNIX server CIs are associated with it.



ServiceNow Change Request form with Schedule tab open, "Subscribe" overlay in the lower right corner, desktop environment visible.

Summary

By following these steps, you can efficiently locate and select configuration items (CIs) in ServiceNow, customize your view, and either associate existing CIs with a change request or create a new one. This ensures accurate tracking and management of changes within your IT environment, with all required details captured for effective change management.

What's next

For more tutorials and updates on ServiceNow workflows, consider subscribing to the relevant resource channel and enabling notifications to stay informed of new instructional content.