

Quick Connect Workflow

- Quick Connect Workflow, on page 1
- Prerequisites for Using the Quick Connect Workflow, on page 2
- Restrictions for Quick Connect Workflow, on page 2
- Information About Quick Connect, on page 3
- Access the Quick Connect Workflow, on page 5

Quick Connect Workflow

Table 1: Feature History

Feature Name	Release Information	Description
Quick Connect Workflow for Onboarding Cisco IOS XE Catalyst SD-WAN Devices	Cisco IOS XE Catalyst SD-WAN Release 17.6.1a Cisco vManage Release 20.6.1	This feature provides an alternative, guided method in Cisco SD-WAN Manager to onboard supported WAN edge devices into the Cisco Catalyst SD-WAN overlay network. As part of the Quick Connect workflow, basic day-0 configuration profiles are created, which apply to all Cisco Catalyst SD-WAN Device (IOS XE) devices, irrespective of the device model and device family. This workflow adds edge devices to the WAN transport and establishes data plane and control plane connections. This feature is supported on Cisco IOS XE Catalyst SD-WAN devices only.

Feature Name	Release Information	Description
Specify a Region and Subregion When Deploying a Device	Cisco IOS XE Catalyst SD-WAN Release 17.13.1a Cisco Catalyst SD-WAN Control Components Release 20.13.1	You can specify both a region and a subregion when deploying a device.

Prerequisites for Using the Quick Connect Workflow

- The organization name should be configured.
- Certificate authorization for the Cisco SD-WAN Validator and the Cisco SD-WAN Controller should be configured.
- The controllers (Cisco SD-WAN Manager, Cisco SD-WAN Validator, and Cisco SD-WAN Controller) should be installed and configured.

Note If you haven't configured these, the Quick Connect workflow directs you to the **Administration** > **Settings** window in Cisco SD-WAN Manager to complete the prerequisite configuration.

Restrictions for Quick Connect Workflow

WAN settings

The Quick Connect workflow is limited to configuring WAN settings (VPN 0). To be able to complete the Cisco Catalyst SD-WAN overlay bring up process, you also need to configure service-side VPN templates.

For detailed information about configuring network interfaces, see Configure Network Interfaces.

Platform support

The Quick Connect workflow is supported for Cisco Catalyst SD-WAN Device (IOS XE) devices only.

Single in-progress workflow

You can have only one in-progress workflow at any given point.

Maximum number of devices for the Quick Connect workflow

The Quick Connect workflow supports creating day-0 configurations for a maximum of 500 devices at a time, with these exceptions:

- Cisco Catalyst SD-WAN Manager Release 20.14.1 and 20.16.x: Maximum 25 devices at a time
- Cisco Catalyst SD-WAN Manager Release 20.15.1: Maximum of 25 devices at a time. Later releases of 20.15.x support 500.

If you have more than the maximum number of devices, run the workflow more than once.

Information About Quick Connect

Overview of the Quick Connect workflow

The Quick Connect workflow in Cisco SD-WAN Manager creates a basic day-0 configuration profile, which is applicable to all Cisco IOS XE SD-WAN devices, irrespective of the device family and model. This workflow establishes control plane and data plane access in your WAN.

The behavior of the Quick Connect workflow depends on how you upload devices to Cisco SD-WAN Manager. You can upload your devices in one of the following ways, either as part of the Quick Connect workflow or independently.

- Using the auto sync option, where your Smart Account is synced with Cisco SD-WAN Manager. This option requires Cisco SD-WAN Manager to be able to connect with the Cisco Plug n Play (PnP) portal
- Using the manual upload method, where you download the authorized serial number file of devices from the Cisco PnP portal and upload it to Cisco SD-WAN Manager

IP addresses for onboarded devices

The Quick Connect workflow assigns IP addresses to newly onboarded devices like this:

- It assigns addresses from the system IP pool if
  - you have defined a system IP pool (see Create a system IP pool), and
  - system IP selection is set to Auto in the Quick Connect workflow.
- Otherwise, it uses IP addresses that you enter manually in one of the steps of the workflow.

Upload devices using Auto Sync

From Cisco Catalyst SD-WAN Manager Release 20.18.2, tenants in a single-tenant environment must register the Plug-and-Play service using Smart Account or Virtual Account credentials. When you authenticate the Plug-and-Play service, the devices added to the Cisco PnP portal are auto-synced to Cisco SD-WAN Manager.

The auto sync method of uploading your devices to Cisco SD-WAN Manager can be used for both, deployments that include cloud controllers and deployments that include on-premises controllers, provided that Cisco SD-WAN Manager is able to connect with the Plug n Play (PnP) portal.

How the Auto Sync option works with Cisco PnP, SD-WAN Manager 20.18.1 and earlier

After the Cisco team has configured and deployed the Cisco SD-WAN Controllers, an email, which includes the Cisco SD-WAN Manager information associated with the order is sent. To add devices to the overlay network in such a case, follow these steps:

1. Log in to Cisco SD-WAN Manager using the default credentials (admin/admin).
2. To transfer device information from Cisco PnP portal to Cisco SD-WAN Manager, sync your Smart Account or Virtual account in Cisco SD-WAN Manager. You need Cisco credentials of the Virtual Account

administrator role for this step. For more information about uploading the WAN Edge router serial numbers, see Upload WAN Edge Router Serial Numbers from Cisco Smart Account.

Note Every time you add new devices to the PnP portal, you need to resync Cisco SD-WAN Manager with the Smart Account or the Virtual Account for the new devices to appear in Cisco SD-WAN Manager.

After the device information is transferred to Cisco SD-WAN Manager, you can configure Cisco SD-WAN Manager overlay.

Note For more information about the Cisco PnP portal and its role in onboarding devices for Cisco SD-WAN Manager, see the following reference documentation:

- Cisco Plug and Play Support Guide for Cisco SD-WAN Products
- Plug n Play Onboarding Workflow

How the Auto Sync Option Works with ZTP

If your supported WAN edge devices are registered with Cisco Zero Touch Provisioning (ZTP), the device onboarding is automated and concludes with the devices being authenticated by the Cisco SD-WAN Validator.

With ZTP, after a device is unboxed, connect its WAN port to the network, ensuring that the IP settings from DHCP are configured. This includes configuring the IP address, mask, gateway, and DNS. The device then looks for the ZTP server, which is aware of the Cisco PnP portal inventory. The ZTP server then authenticates the device and redirects it to the Cisco SD-WAN Validator for further authentication.

Note For more information about configuring the vEdge routers to join the overlay network automatically, see Prepare Routers for ZTP.

How Devices Onboarded Using the Auto Sync Option Appear

If you upload devices to Cisco SD-WAN Manager using one of the auto sync options (through Cisco ZTP or Cisco PnP), at the end of the Quick Connect workflow, your devices appear in the Cisco SD-WAN Manager dashboard, accessible from **Monitor** > **Overview**.

Cisco vManage Release 20.6.x and earlier: If you upload devices to Cisco SD-WAN Manager using one of the auto sync options (through Cisco ZTP or Cisco PnP), at the end of the Quick Connect workflow, your devices appear in the Cisco SD-WAN Manager dashboard, accessible from **Dashboard** > **Main Dashboard**.

Upload devices manually

You can choose to upload your devices to Cisco SD-WAN Manager manually, if:

- You don't want to use the auto sync option, which requires you to sync your Smart Account with Cisco SD-WAN Manager

- Your Cisco SD-WAN Manager instance is unable to connect with the Cisco PnP portal

How Manual Upload of Devices Works

Follow this procedure to manually upload your devices to Cisco SD-WAN Manager.

1. Download the authorized serial number file or the provisioning file from the Cisco PnP portal. This file is available in the PnP portal under **Controllers** > **Provisioning File**



Note Starting from Cisco IOS XE Catalyst SD-WAN Release 17.13.1a, the **Controllers** tab is renamed as the **Control Components** tab to stay consistent with Cisco Catalyst SD-WAN rebranding.

2. Transfer the device information to Cisco SD-WAN Manager by manually uploading the authorized serial number file to Cisco SD-WAN Manager. For more information about manually uploading the WAN Edge router serial numbers, see Upload WAN Edge Router Authorized Serial Number File.

Quick Connect Behavior with Manual Upload of Devices

If you upload your devices to Cisco SD-WAN Manager using the manual method, they do not appear in the Cisco SD-WAN Manager dashboard until you deploy them using the CLI bootsrap configuration that the Quick Connect workflow generates.

The bootstrap method helps you onboard a factory-shipped WAN Edge device with the configuration needed to securely deploy it to join the Cisco Catalyst SD-WAN network.



Note For the complete procedure to deploy Cisco Catalyst SD-WAN Device (IOS XE)s using the CLI bootstrap configuration, see On-Site Bootstrap Process for Cisco SD-WAN Devices.

Smart Account and Virtual Account credentials

Change credentials to use for logging in to the Smart Account or Virtual Account:

When you begin the Quick Connect workflow, one of the first steps is to synchronize your device inventory. This requires logging in to the Smart Account or Virtual Account that you are using to manage the Cisco licenses used in the network. These accounts support multiple sets of credentials for different users. You can change the credentials that you use to log in to the Smart Account or Virtual Account using the **Switch account** control.

Access the Quick Connect Workflow

1. From the Cisco SD-WAN Manager menu, choose **Workflows**.
2. **Start a new Quick Connect workflow:** Under the **Library** area, choose **Quick Connect**.

   OR

   Resume an in-progress Quick Connect workflow: Under the **In-progress** area, click **Quick Connect**.

Note If you upload devices to Cisco SD-WAN Manager the manual upload method, you need to complete the additional step of deploying them using the CLI bootstrap configuration that the Quick Connect workflow generates. For more information about generating a bootstrap configuration file that loads to a device, see On-Site Bootstrap Process for Cisco SD-WAN Devices.

Note

- From Cisco Catalyst SD-WAN Manager Release 20.18.2, the **Add and Review Device Configuration** step in the Quick Connect workflow uses the Site Name instead of the Site ID in the Site column. When exporting or importing CSV files, specify the Site Name instead of Site ID, in the Site column.
- From Cisco Catalyst SD-WAN Manager Release 20.18.2, a **Skip configuration** button has been added to the Quick Connect Workflow. This enhancement allows users to directly onboard a device without needing to enter information such as **Hostname**, **System-IP**, or **Site Name**.