TAKE CONTROL OF
SHORTCUTS

AUTOMATION ON THE GO
For iOS and iPadOS

by ROSEMARY ORCHARD
$11.99

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Welcome to *Take Control of Shortcuts*, version 1.0, published in December 2019 by alt concepts inc. This book was written by Rosemary Orchard and edited by Joe Kissell.

This book gives you all the information you need to get started with Shortcuts. After reviewing core concepts, the book shows you how to build shortcuts, and explains exactly what to do to achieve specific results you can use immediately.

If you want to share this ebook with a friend, we ask that you do so as you would with a physical book: “lend” it for a quick look, but ask your friend to buy a copy for careful reading or reference. Discounted classroom and user group copies are available.

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**Updates and More**

You can access extras related to this ebook on the web (use the link in *Ebook Extras*, near the end; it’s available only to purchasers). On the ebook’s Take Control Extras page, you can:

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- Read the ebook’s blog. You may find new tips or information, as well as a link to an author interview.

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Introduction

Shortcuts is an app built into iOS and iPadOS that allows you to create automations, or programs, without actual code—connecting apps on your device to each other and beyond.

Shortcuts allows you to run a shortcut—a series of actions that can communicate with one another and pass data to each other as well as deliver it to you. This allows you to do anything from change to a different camera app every time you open the camera, to creating complex templates for documents and expanding them with data on the fly.

In this book, I teach you the core understanding you need, so you can build shortcuts by yourself. I also walk you through plenty of sample shortcuts, which help you understand the application of the core concepts as well as being intrinsically useful. These include Meeting Time (to create a meeting notes template and automatically turn on Do Not Disturb), a shortcut to control the noise cancelling mode of AirPods Pro, and even one to add the currently playing song to a special playlist.

As well as learning how to build shortcuts, you will also learn how to use them with web services, and discover apps with excellent automation support which can improve your workflows.

Even if you are already familiar with Shortcuts, or programming in general, there are lots of tips and tricks throughout the book to help you improve your understanding and techniques.

This book teaches you more than how to use Shortcuts—it also shows you examples of ways automation can make your life easier without adding complexity or difficulty to the tasks you do.
If you’re new to Shortcuts, it’s best to read the book in order. If you have already used Shortcuts or know how to program, you may want to jump ahead in this book and then come back to the beginning later to fill in any gaps you think you have.

**Get to know Shortcuts and important concepts:**

- Get a quick overview of Shortcuts as you Explore the User Interface.
- Find out how to Run Shortcuts.

**Learn the fundamentals:**

- Learn how to Build Shortcuts.
- And of course you will want to know how to Install and Sync Shortcuts too.

**Build shortcuts:**

- See some Productivity Shortcuts.
- Have fun with the Media Shortcuts.
- Geek out your residence with Home Shortcuts.
- Or find a few other curiosities in Other Shortcuts.
- And finally, expand your Shortcuts experience with Complementary Apps.

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Explore the User Interface

Before we start building shortcuts, let’s explore the user interface. First, find the Shortcuts app on your iPhone or iPad and tap its icon. Then we can explore the various areas of the app, and everything in them.

The Shortcuts Tabs

There are three tabs in Shortcuts, which you can switch among by tapping the icons at the bottom of the screen (Figure 1). First is My Shortcuts, which I, and others, sometimes refer to by its former name, the Shortcuts Library. The next tab is Automation, where you can configure shortcuts to run automatically. The final tab is Gallery, where you can download and install prebuilt shortcuts as well as create one-action shortcuts suggested by your apps.

Figure 1: The three panes in Shortcuts.
In My Shortcuts is a tile representing each of your shortcuts (once you have added some; until then, you’ll see just a Create Shortcut tile). In the top-left corner of each shortcut is its icon, and at the bottom is the shortcut’s name and the number of actions in it (Figure 2). Tap the icon to run the shortcut, or tap the More icon in the top-right corner to edit and inspect it. (If you touch and hold the tile, you can rename the shortcut, share it, or open Details—the edit and inspection mode.)

Figure 2: A shortcut button in My Shortcuts.

The Shortcuts Editor

The editor interface in Shortcuts (Figure 3) has two main sections, the actions list and the shortcuts editor. On the iPad, the action list displays on the left and the shortcuts editor on the right. On the iPhone, the main view is the editor, and the action list is at the bottom—drag the search area upward to view it.
Run Shortcuts

There are lots of ways to run shortcuts, and I would be remiss if I didn’t tell you how to do so! You can run shortcuts manually or automatically (with per-device or HomeKit triggers, as I explain later).

Run Shortcuts Directly in the App

One way to run shortcuts is directly inside the Shortcuts app. There are two ways of doing this. From My Shortcuts, the primary tab in Shortcuts (Figure 6), you can tap any individual shortcut and it runs. This hides the inner workings of the shortcut as much as possible during the execution. It also means you see dialogs where you can select something or input data, and you see the results of your shortcut—if it is programmed to show them to you!

Figure 6: The My Shortcuts tab.

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Inside the shortcuts editor (refer back to Figure 3), found by creating a new shortcut or editing one (tap the More icon in the top-right corner of a shortcut tile), you also have a Play button to let you run the shortcut. (If you have a keyboard attached, you can also press ⌘-R to run the shortcut.)

## Run Shortcuts in the Today Widget

The Today View appears when you swipe right on the Home screen and, on an iPad, can optionally be set to stay on the left side of the Home screen. It contains a customizable list of widgets, one of which belongs to Shortcuts (Figure 7). All new shortcuts appear there by default, though you can remove any shortcut from the widget if you like. You can run any shortcut here by tapping it.

![The Shortcuts widget, with the expanded view.](image)

**Figure 7:** The Shortcuts widget, with the expanded view.
Build Shortcuts

Building shortcuts is not unlike creating a project with Lego—there is a series of actions (blocks) and we need to put them together in a way that fits (aligning the bumps), as well as creating the end goal we want (the model). This chapter outlines the key concepts you need to understand to be able to do this. Don’t feel that you need to read and understand everything here before you can build a Shortcut; you can jump ahead at any time and come back later to “fill in the gaps” as you see fit!

Before you do any of these steps, go to the My Shortcuts tab in Shortcuts and tap the plus icon in the top-right corner or tap Create Shortcut. On an iPad, the *action pane* (list of actions you can add to your shortcut) appears on the left, and on the right is the shortcuts editor. On an iPhone, the main view is the shortcuts editor and there is a search bar at the bottom which when tapped reveals the action pane.

One-Step Shortcuts

Many of the shortcuts demonstrated in this book are of the longer and more complex variety, to really give you a feel of how to combine the different actions to achieve powerful results. That said, the most powerful automation is one you can create and use. Inside the Gallery, the section Shortcuts from Your Apps has a whole host of one-action shortcuts you can create with just the tap of a button. Explore these and look at combining them. You don’t need to worry about Input & Output for something as simple as “Play playlist” and “Set HomeKit Scene.” Here are a few ideas for one action shortcuts you can create right now:

- **Play Playlist:** Use this to play your favorite playlist with just one tap.
- **Toggle Alarm:** Make sure your 7 A.M. alarm is on.

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• **Show Directions:** Just one tap to get directions home? Yes!

• **Set Playback Destination:** Send the music playing on your device to a HomePod quickly.

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**Actions**

An action in Shortcuts is a block; it can accept input and provide output (but doesn’t have to), and it should do *something*. Tap the icon in the top-left corner of the action (Figure 18), or tap the Info icon in the action list. A popover appears that *should* tell you what the action does (though the explanations for some are not the best).

![Figure 18: The details of the Set Volume action.](image)

To add an action to a shortcut, find it in the action pane (either by using the search field or by navigating through the available categories), and then tap it. When you do so, the action appears at the end of your shortcut. If you want to add it to a specific place, you can drag it to that position—either from the end of the shortcut or from the action list. Any input the action requires is shown as light blue bubbles (see Figure 19). Many actions have optional extra information, which is shown when you tap Show More and then provides fields for further information you can enter.
Install and Sync Shortcuts

Before we dive further into the world of shortcut creation, we should look at how to cheat and let someone else do all the hard work—after all, that’s another step on the rung of the automation ladder.

Install Shortcuts from iCloud Links

Throughout this book, and on the internet in general, there are links to shortcuts you can download and install. Anyone can make and share these shortcuts. However, unlike in the App Store there is no vetting process, so you have to judge for yourself whether something is safe.

Before you can install shortcuts from links, you must enable “Untrusted Shortcuts” in Settings > Shortcuts, and type in your device passcode to confirm your choice. If the option isn’t there, install a shortcut from the gallery (one that shouldn’t interrupt your life too much is the “Word of the Day”) and run it a few times, then try again. Once the setting is turned on, you can install shortcuts from iCloud links and share them in the same way.

Actions from Apps vs. Shortcuts in the Gallery

Inside the gallery tab there are two kinds of shortcuts, “Real Shortcuts” and single action shortcuts created by apps you use. There are two differences: firstly shortcuts in the gallery are made by Apple as demonstration shortcuts, secondly actions from apps contain one action in a shortcut.

Evaluate Actions

Before you install a shortcut, you should evaluate it to see what it does and what it is trying to access. Each shortcut needs your permission to access apps and URLs, but before you get that far you can see what is in a shortcut when you first click the link to install it (Figure 41).
Figure 41: The install shortcut screen.

On this screen you can see all the actions in the shortcut, exactly what it does, and which apps it accesses. There are two buttons at the bottom of the view, below a disclaimer from Apple. Our gut instinct is usually not to tap the big red button, but in this case that’s exactly what we need to do to install the shortcut. To back out and avoid installing the shortcut, tap the second button (or tap Cancel at the top).
Productivity Shortcuts

Automation with the goal of being productive is extremely logical, and this section is dedicated to making and explaining shortcuts with exactly that purpose. There is a download link for each shortcut provided at the end of its section, but I also explain how to build each one manually yourself.

**Tip:** I highly recommend you build the shortcut as you read, as this lets you see how everything works and connects together. Find the action with the Search box or look for it in one of the groups, and tap it to add it to your Shortcut.

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**Share PDF**

This shortcut takes anything you give it, makes a PDF with it, and shows you the sharing options for a PDF. Here’s what we need to do to build the shortcut:

1. Add the **Make PDF** action.
   
   You don’t have to do anything to this action, just add it to your shortcut. As the name says, it makes a PDF.

2. Add the **Share** action.
   
   When you add this action, it should automatically say “Share PDF”, and if you tap **PDF**, you can tap Reveal Action to see that the PDF comes from the Make PDF action.

   **Tip:** The Reveal Action doesn’t always look like it has done something—you have to really look at your screen to see that *one action has more shadow than the others*—that action is the source of your magic variable!

3. Tap the More ⋮ icon and toggle on Show in Share Sheet. Then tap Done.

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4. Tap Next in the top-right corner, set the name (“Share PDF”), and optionally tap the icon to change its color or glyph. Then tap Done.

That’s it! You just built a really useful shortcut in four steps! Let’s test it. Go to Safari and open a webpage (such as TakeControlBooks.com). Tap the share icon, and scroll down in the list of actions until you find Share PDF—tap it. The shortcut makes a PDF of the webpage and opens another share menu to let you share it.

**Install the Shortcut**

Tap the link below to install the shortcut on an iPhone or an iPad. When you do, Safari opens briefly and then Shortcuts opens and asks you to review the shortcut and install it. If you get an error message, go back and read the section on Share Your Shortcuts.

**Install Share PDF shortcut:** [https://alt.cc/shsp](https://alt.cc/shsp)

**Meeting Time and Notes**

Usually as we walk into a meeting (whether that be a meeting room or clicking on a link to join a teleconference) there are plenty of things running through our heads—everything from “Is Bob’s cat back from the vet?” to “I need to check who is on holiday in two weeks and see if it affects our deadlines.” This leaves precious little space for the small but important things like creating a new meeting note and making sure Do Not Disturb is enabled. This shortcut is designed to help us tackle the little things with just a tap.

This shortcut gives you a list of events from your calendar today, asks you to choose from them, and turns on Do Not Disturb until the end of the event. Then it formats the data from your event into a usable format and creates a note with it. Finally, it searches for that note and opens it.

Here are instructions to build this shortcut:

1. Add a **Find Calendar Events** action.
Media Shortcuts

Shortcuts can do a lot with media, which includes music, images, and more. Here are a few examples of what you can do with the media-related actions.

Convert and Share Image

By default, photos we take on our devices are in HEIC format—and they’re extremely large. If we want to share them, some of our apps convert them automatically for us and even resize them. For consistent results, though, we can use a shortcut:

1. Right after creating the Shortcut, tap the More icon, and enable Show in Share Sheet. Change Share Sheet Types and Deselect All before you select Images.

2. Add an If action and delete the Otherwise section.

   The first part of this is set to Shortcut Input, and we need to change Condition to has any value.

3. After the If but before End If, add a Select Photos action.

   This runs only if you don’t use your shortcut from the Activity View (so if you don’t share an image to it). It outputs either what you shared to the shortcut, or what you just selected.

4. After the End If statement, add a Convert Image action.

   This should automatically update to Convert If Result to JPEG. Tap Show More and slide down the Quality to an appropriate level (see Figure 51). Preserve Metadata tells Shortcuts whether it should keep data like the location attached to the image.
5. Add a Share action.
   This is automatically changed to Converted Image.

6. Tap Next, give the shortcut a name and icon, and tap Done.

**Install Convert & Share Image shortcut:** [https://alt.cc/shci](https://alt.cc/shci)

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**Play Audio**

I use this shortcut with two automations: when I connect to CarPlay, and when I connect to bluetooth devices (my AirPods). With just a few taps, I can tell my device to play music or a podcast.

Here’s how to build this shortcut:

1. Add a **Choose from Menu** action.
   Change “One” and “Two” to Music and Podcast and add a third option Cancel.

2. Under the Music option, add a **Get Current Song** action.

3. Under “Get current song,” add an **If** action and delete the Otherwise.
   Make sure your If uses Current Song as the input and set the condition to does not have any value.
Home Shortcuts

This selection of shortcuts is for use with the home automation triggers. If you previously created any home automations in the Home app, they appear in the automation tab in Shortcuts, and are available in the Home app. This area has a limited number of actions, which means that you are unlikely to do something to upset anyone you share a home with, but also that you need to be creative to achieve all the results we want.

**Note:** There are download links for the shortcuts in this section, but they are just for reference, not for use. Unfortunately, you cannot run a shortcut as part of a home automation, nor import one to it—you will have to recreate all of these yourself.

---

**Make a Button a Toggle**

It astounds me that I cannot make a button a simple replacement for a light switch directly in the Home app. The good news is that Shortcuts is perfectly equipped to handle this! For this to work you need a physical HomeKit button, such as a Logitech Pop (or you can make a Shortcut to toggle your light).

To create this shortcut:

1. Open the **Home** app—not Shortcuts.
   
   A button must be configured in the Home app. I don’t know why and it seems like a strange limitation, but if you try to do it in Shortcuts, you get an error that it must be done in “Settings” (which translates to the Home app).

2. Find a button or switch and touch and hold to open the settings.

3. Tap **Add** next to one of the actions.

4. Scroll to the bottom and tap **Convert to Shortcut**.
5. Delete the **Set Scenes and Accessories** action.

6. Add an **If** action.

   Tap the Input and then tap Select a Home Accessory (**Figure 54**). If you have multiple homes, choose one, and then select the light you want to toggle. Tap Done.

   Tap the Name bubble that is now in your If and choose **Is On**.

![Figure 54: Check the status of a home accessory with an If action.](image)

7. Under the If, add a **Control Home** action (where Home is the name of your HomeKit Home).

   Tap Scenes and Accessories and scroll down to find your light, tap Next, and then touch and hold the light tile to change the settings. We want the light to turn off here.

8. Just beneath Otherwise, add a **Control Home** action.

   Tap Scenes and Accessories and scroll down to find your light again. This time we want the light to turn on so set the brightness (and color) appropriately.

9. Tap Next, and tap Done.

**Install Toggle Button shortcut:** [https://alt.cc/shbt](https://alt.cc/shbt)

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Other Shortcuts

These shortcuts don’t fall into the category of productivity, media, or Home shortcuts, but that doesn’t make them any less useful!

Share Your Shortcuts in Bulk

If you want to share all your shortcuts, or just some of them, all at once, I have a shortcut to do just that. Here’s how you make it:

1. Add a **Get My Shortcuts** action.

2. Add a **Choose from List** action.
   
   This should automatically set the List to **My Shortcuts** from step one. Open Show More and toggle Select Multiple on.

3. Add **Get Link to File**.
   
   This becomes Get link to **Chosen Item**.

4. Add **Repeat with Each**.
   
   The Repeat action is automatically set to use the **Link to File** magic variable.

5. Right under Repeat with each item in **Link to File**, add **Get Item from List**.
   
   Tap **First Item** and change it to **[Item at Index] [Repeat Index]**, then tap the **Repeat Item** after from, clear it, and use the magic variable **Chosen Item** (from step 2).

6. Below Get **[Item At Index] [Repeat Index]** from **Chosen Shortcut(s)**, Add a **Text** action.
   
   Set the text as follows (see **Figure 56**):
   
   - **[Item from List](Repeat Item)**
7. After Repeat with Each, add a **Combine Text** action.

   This automatically selects the **Repeat Results** and combines them with **New Lines**.

8. Add a **Share** action.

9. Tap Next, give the shortcut a name and icon, and tap Done.

**Install Share Your Shortcuts in Bulk shortcut**: [https://alt.cc/shsb](https://alt.cc/shsb)

---

**Log Expense**

I don’t know about you, but I struggle to stay on top of my expenses—especially on work trips. Thankfully I can make my life much easier with shortcuts. Here are instructions to build this:

1. Add an **Ask for Input** action.

   Set the Question to **Date** and tap Show More so you can change the Input Type to **Date and Time**. This defaults to the current date and time when you run the Shortcut, which should make life easier.

2. Add an **Ask for Input** action.

   Set the Question to **Amount**, and under Show More, change the Input Type to **Number**. This adds a 0 you can’t delete, but when you run the shortcut and start to type a number, it disappears.

3. Add another **Ask for Input** action.

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Work with REST APIs

Thankfully for us, most developers have quickly caught onto the power that is Shortcuts. But there are some web services for which developers haven’t (yet) added Shortcuts support, there is no app, or that enable you to do more by working directly with the service through its REST API. An API (Application Programming Interface) is a way we can talk to (web) applications and get information or send them commands, and a REST (Representational state transfer) API is a common, standardized format for web services. This means that with the right skills and actions, we can enhance Shortcuts ourselves.

An Introduction to API Calls with Shortcuts

We talk to these APIs primarily using one action, Get Contents of URL. This action does let us get the content of a regular webpage, but it also allows us to make requests with specific parameters (options we send to the server), authentication tokens (also known as API keys) to prove who we are, and different kinds of requests.

Make the Request

In there are five kinds of calls you will can make to a URL for an API request:

- **GET:** This kind of request is used to look things up.

- **POST:** This request can create new items, or replace content in them—if you use this for updates, then in many cases it will delete any data you do not send to the API again. (For example, if you get data that has a title, and content, and an author, but only send author back, then the title and content will be deleted.)

- **PUT:** Use this to update a resource and send all the fields.
• **PATCH:** You can use this to update an item without sending all the data again.

• **DELETE:** As the name implies, this deletes something—you must specify what will be deleted for this to work.

Not every API uses these actions in the same way (whether or not it is correct to do so), so the answer to “Which HTTP method do I use?” is unfortunately “Read the documentation.” To make this easier, I’ve chosen three different APIs below and will walk you through each one.

**Use Authentication**

Lots of APIs need you to verify who you are. In some cases this is because the provider wants to charge you, or because you want to access data which is not available to everyone. There are two common methods to do this:

• **Specify an API key in the URL:** For example, the URL `https://api.darksky.net/forecast/[key]/[latitude],[longitude]` calls the Dark Sky API for the weather forecast, gives it your key, and then provides the longitude and latitude of a the location you want the weather forecast for.

• **Send an Authorization Header:** See Figure 58. Some keys must be specified as *Bearer [key]* or *Basic [key]*; this is dependent on the type of authorization used, and should be clearly detailed in any REST API documentation.
Complementary Apps

Thankfully for us, Shortcuts is popular—this means there are several apps out there that give us more actions, and those in turn let us automate more things. I’ve listed these apps in order from “easiest to use” to “most complex.”

**Toolbox Pro**

*Toolbox Pro* exists to add actions to Shortcuts. With it you can set and retrieve global variables—to use in more than one shortcut, check if your device is on charge, find emoji, and more. If you can’t find an action in Shortcuts that you think ought to exist, there is a good chance this app has it. You don’t need to configure anything, or write a script to use this app—just install it, look at the samples, then open Shortcuts and use the actions!

For example, if you want to check whether audio is playing, you can use the Toolbox Pro action *Is Audio Playing* (see **Figure 61**).

**Figure 61:** Hand playback to your HomePod if audio is playing.
You can also Get Connection Status, an action that tells you whether you are connected to the internet.

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**Pushcut**

Similar to automations, Pushcut sends notifications to let you run shortcuts. Alone, this doesn’t sound impressive, but combined with other services and the unique triggers, it is very powerful. For example, you can extend the Meeting Time & Notes to send you a notification at the scheduled end of the meeting—and when you open that notification, it can run a shortcut to send the notes to the attendees.

Pushcut also integrates with Zapier and Integromat. These are web services which integrate with a lot of other web applications and allow you to hook them to one another. With these connections you can set up web-based triggers, and in the app itself you can create location-based triggers. So for example, when a record changes in Airtable, Zapier can tell Pushcut to send you a notification, and you can use this to run a shortcut—perhaps to provide more input, or to send a customized email.

Another trick you can perform with Pushcut is using a shortcut to schedule a notification. When I clock in at work in the morning (which I do with Shortcuts!), I tell Pushcut to send me a notification to clock out in eight hours. When this notification arrives I tap it, and Shortcuts opens and runs my Clock Out shortcut for me.

You can also trigger Pushcut in the same way as an API—with Get Contents of URL (see Work with REST APIs for more details on how this works). This lets you trigger it a part of a Home automation (so when you arrive home, Pushcut notifies you instead of Shortcuts). You can use this approach to give yourself a menu of HomeKit scenes to choose from instead of the lights always doing the same thing.

Create a notification in the Pushcut app and copy the URL. In your shortcut (any kind), add a get contents of URL action, and paste in the link from Pushcut. Now when the shortcut runs it will send a call to the
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About the Author

Rosemary Orchard is the cohost of Automators, an automation-themed podcast on Relay FM with David Sparks, and Nested Folders, an independent productivity podcast with Scotty Jackson. She also writes for MacStories and The Sweet Setup, as well as produces videos for ScreenCasts ONLINE.

When she isn’t writing, she’s busy eating chocolate and planning world domination with Shortcuts.

Shameless Plug

You can find my website at RosemaryOrchard.com, and lots of automation resources at Automation Orchard. I also wrote another book called Build Your OmniFocus Workflow.
About the Publisher

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