Quick Start Guide

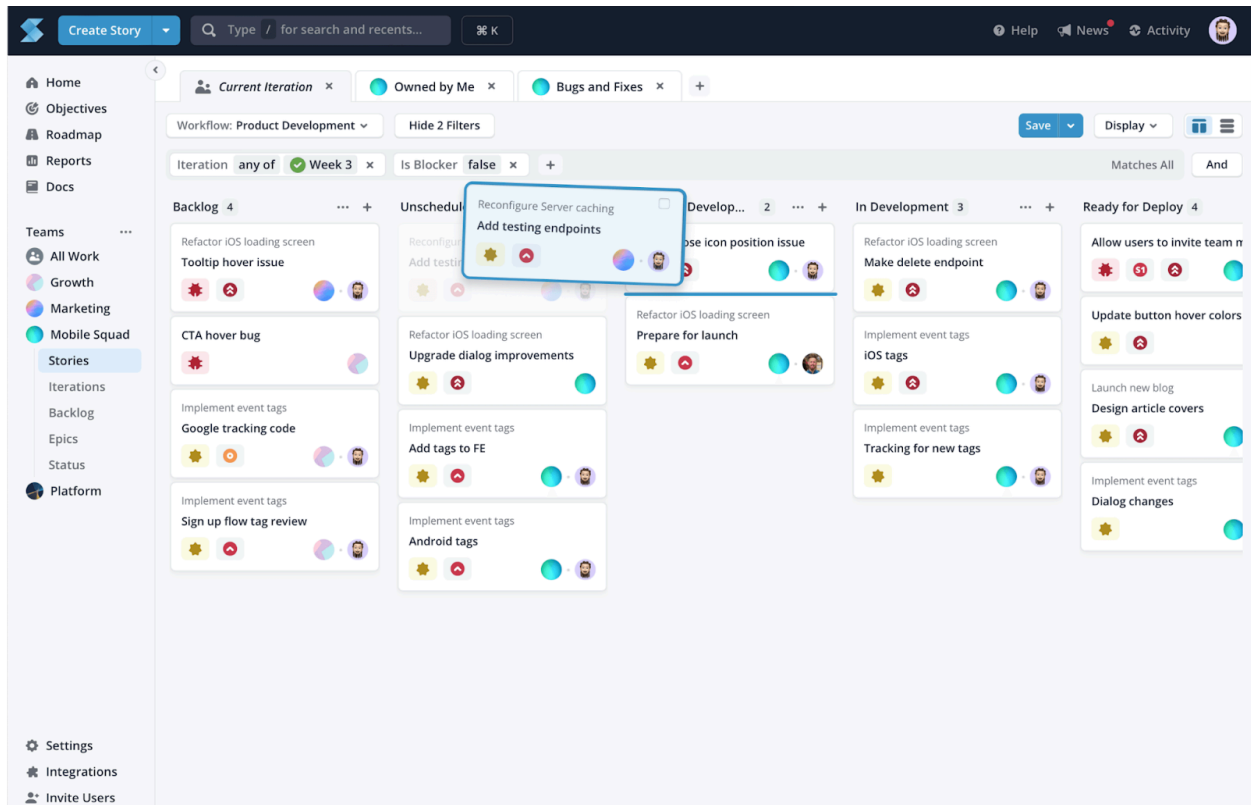Get an overview of Shortcut and see how to get started

Categories ⌄
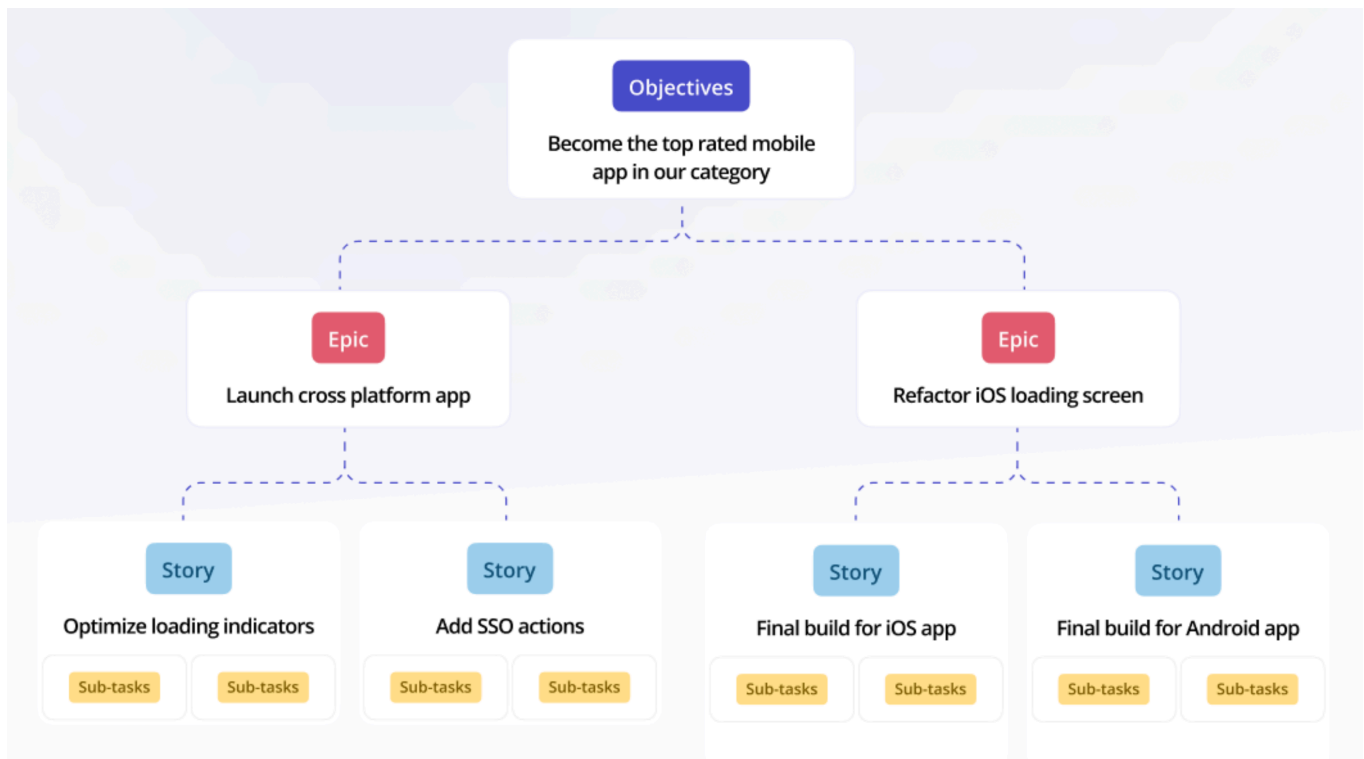
Quick Start Guide

Hello 👋 ! We're so glad you're here!

As the name suggests this guide is meant to give you a quick overview of what Shortcut is. If you'd like a deeper understanding of Shortcut, such as how to run team stand-ups or how to create templates for work you do again and again - we have a more in-depth guide for that! Or, if you and your team would like a personalized Shortcut walkthrough (read: *not* a sales call), book time with our Team - we're here to help!

Start here and see why Shortcut is the project management tool your team will actually enjoy using. Let's get into it!
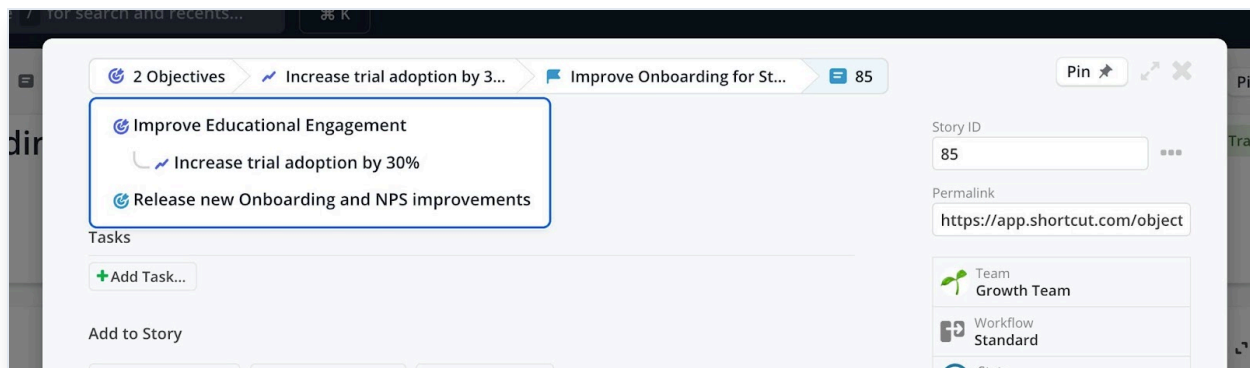
The Basics

Shortcut is designed for product development teams who care about making progress. It unites issue tracking, sprints, roadmaps and goals into a single experience to help teams - from startup to scale - build and ship products. Shortcut's hierarchy is simple:

- **Stories** represent a shippable scope of customer value. They capture the problem that needs solving, and specify requirements and acceptance criteria. Stories often have multiple implementation steps that can be captured with Sub-tasks.
- **Sub-tasks** capture the implementation steps of Stories. They move through your team's workflow and stay connected to GitHub.
- **Epics** are collections of Stories that represent larger projects. Epics are great for cross-functional squads to manage work. For example, the go-to-market plans for a feature launch might involve Stories from product, engineering, marketing and CX.
- **Objectives** connect teams, the projects they own, and individual work to strategic company goals. Objectives are made up of Epics and the associated Key Results let you see progress as work is completed.

💡 Look for the Breadcrumbs on Story and Epics detail pages to let you drill down into how those pieces of work connect back to the strategy, helping align teams focus with the work that matters most.
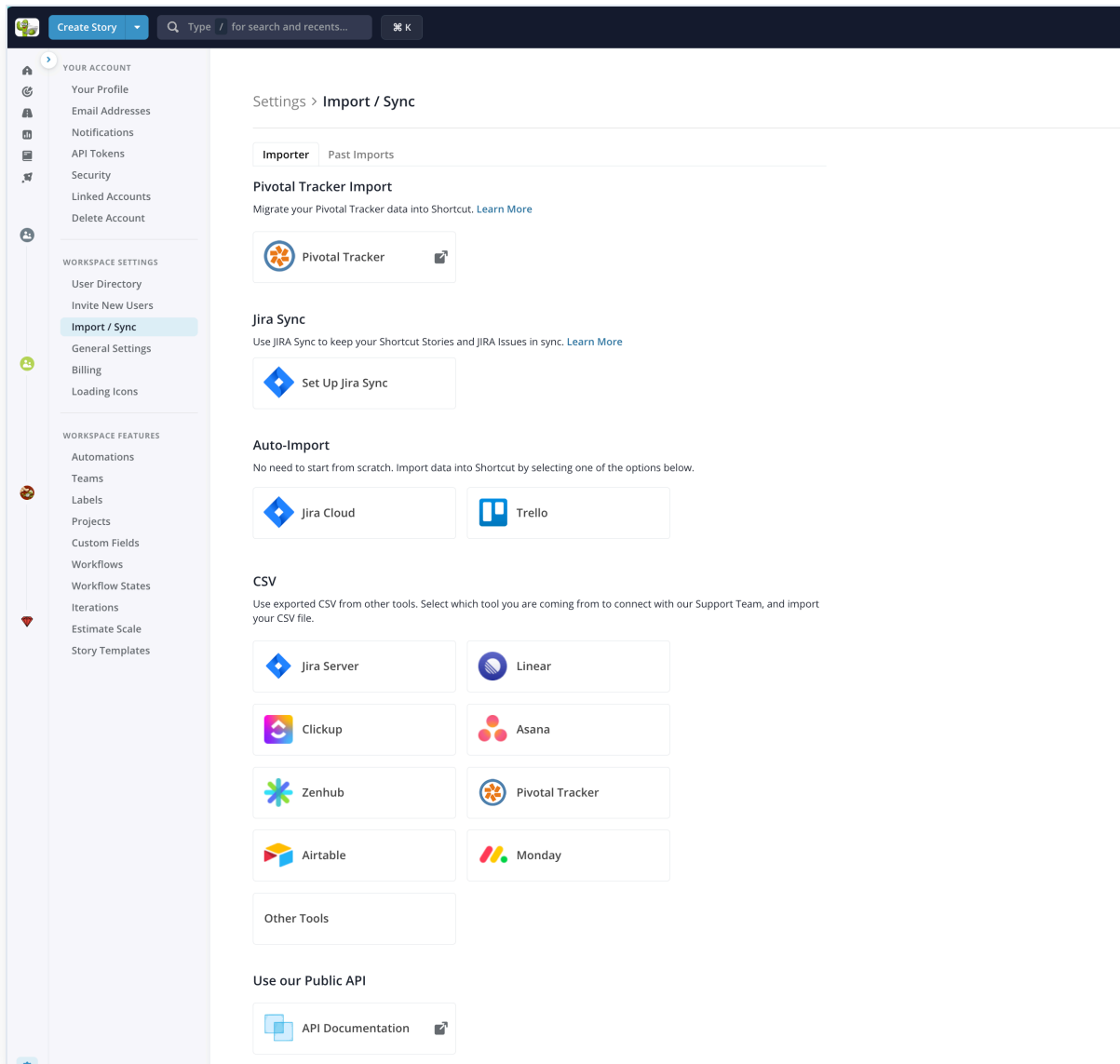

Read more about the Shortcut hierarchy and our product development philosophy in The Shortcut Way.

Getting Set-up

Importing your data brings your progress, history and insights directly into Shortcut, so you can pick up right where you left off. We offer importers to help you move from other project management tools quickly and effortlessly. *You can do this anytime - now or later!*

Shortcut Integrates with Tools to Help Improve Your Team's Workflow

Connect GitHub, GitLab, or BitBucket

Connect Your Team's Slack Workspace

See the full list of integrations.

💡 Use ⌘K (cmd/ctrl + k) to access keyboard shortcuts to fly around Shortcut with only your keyboard.

Managing Work

The best thing about Shortcut is that it can help you get stuff done faster and keeps all of your work organized so you and your team can see what's happening, who's doing it and when it will be done.

Start by creating a Story

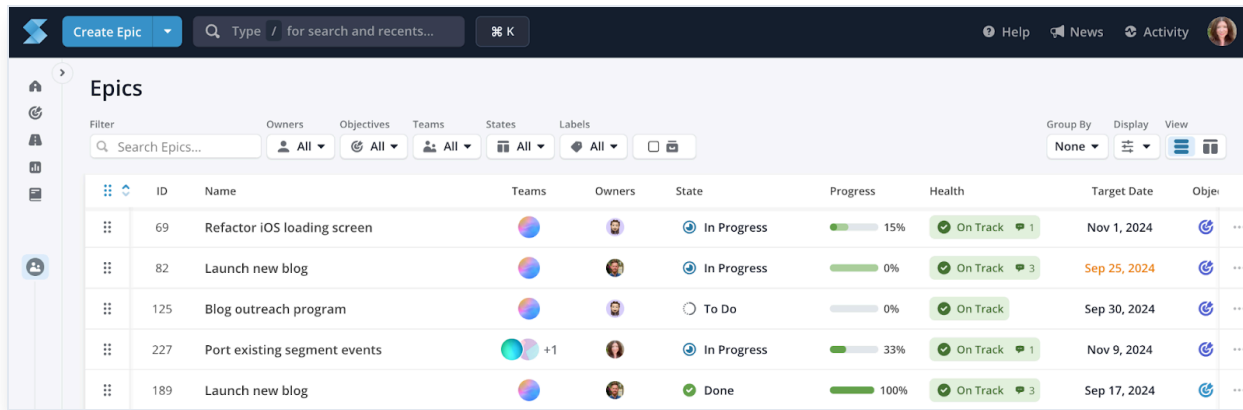Add in a title, description, and connect related documents and tasks. Once created, if you connected GitHub (or your preferred VCS), you can automatically link commits, pull and merge requests, and more, to your Story - saving you time and keeping things in sync.

💡 If your team uses Sprints, you can use the "Iteration" field to assign this Story to an upcoming Sprint.

When you're done, click *Create* and see your Story on the Kanban board. As progress is made on this story, it will move from left to right as it goes through each workflow state until it's done.

Add Stories to an Epic

Epics are collections of Stories and are meant to organize work for features or releases. As an example, if your team is working on an updated mobile UI for your application, all of the Stories that you created for this project will sit inside of an Epic. As Stories are completed, you'll see progress made on the Epic until the feature is ready for delivery.

Go to your Epic page and add the Story you just created to a new Epic. You can create additional Stories right on the page to group the related work together.

See your team's focus with Roadmaps

The Roadmap makes planning, visualizing and communicating work across your organization even easier. It's organized by teams and structured via Epics, making it a flexible way for teams to clearly communicate what they're going to build, and when, to keep the broader team aligned.

Add your Epics to the Roadmap to explore the options: you can rearrange the order and customize what's shown to keep your Roadmap view focused.

Add a Health Status with contextual comment to indicate if work is On Track, Off Track or At Risk. You can also export your Roadmap view to share it with your team.
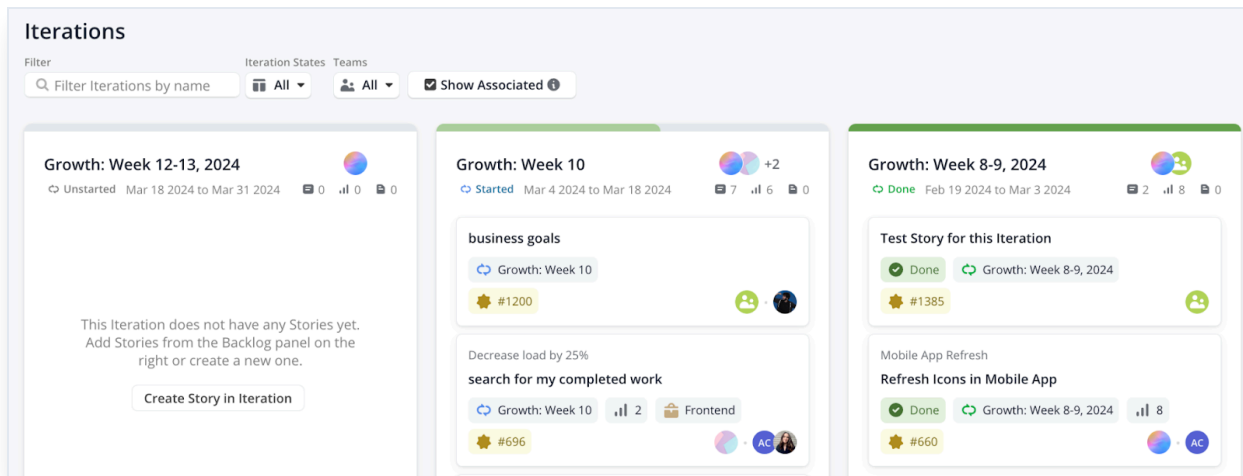
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💡 Even if an Epic is not assigned to the team, the Epic can still be added to the that group to help craft cross-collaborative team roadmaps.
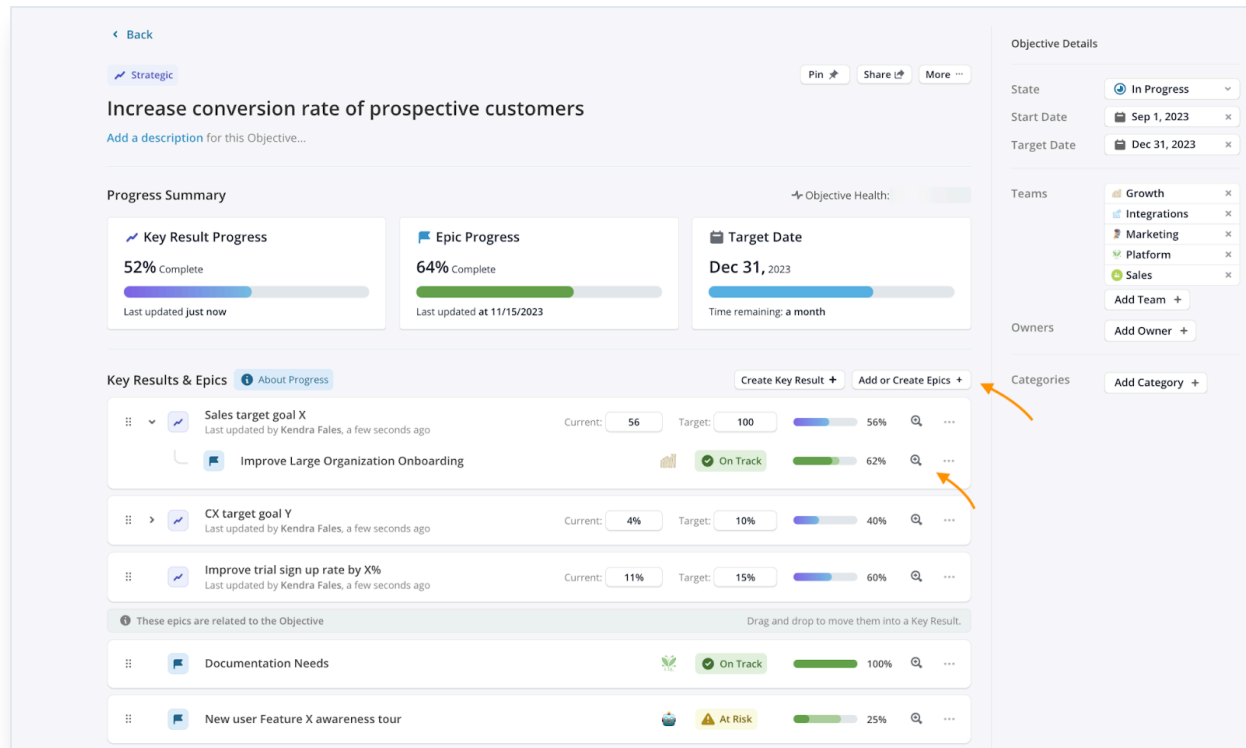
Plan your Sprints with Iterations

Iterations (similar to Sprints) are defined periods of time where we aim to deliver a set of Stories. At Shortcut, we work in two week iterations. Your Iteration page displays what Stories you're working on during the Iteration and provides valuable, at-a-glance versions of your Burndown and Cumulative Flow reports so you can quickly understand how work is progressing, identify bottlenecks in the process, and understand if you'll meet your commitments.

Focus on the big picture with Objectives

Objectives let you see progress towards your top-level strategic goals in the same place as where the product development work is happening. As Stories roll up into Epics, Epics roll up into Objectives and are the key components that drive the business forward. You can add Key Results to track the metrics that matter most.

Work with your Team

Shortcut was made for teams, and it shines when it comes to collaboration, so [invite](#) a few people to try it out with you!

The best way to see the value of Shortcut is to build something *real* together. Pick something your team's working on and create an Epic, add a few Stories, put it on a Roadmap. See it move across workflows and be delivered to your happy customers! Yay, progress! 👏

We'll be ready to answer any questions your team has as they get started. [Contact our team](#) or check out the Help menu to ask questions, find keyboard shortcuts and access our demo workspace.

> 💡 **Now that you're team is in Shortcut, keep up with the latest activity:** Check out the activity feed to see everything that's happening across your org, including comments on your Stories or those that you follow, and mentions directed at you.

Want to chat with other Shortcut users? [Join the Shortcut Slack community](#)

Like what you see and are ready to get started? [Sign up for Shortcut](#)

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Shortcut

We're here to help. And to make the best Product + Engineering tool. But mostly to help.

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