

NodeBB Notes

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General thoughts / notes on use

General Impression

NodeBB is a flexible forum software. It appears to be geared more toward a paying audience, although code is open-source on github and available to non-paying users. The framework is set to be very modular, with a core database but with most of the content supplied via plugins. This allows for a great deal of power/flexibility, but can also create complications. There site is set to be very user-friendly with many user-definable options (although there are still many customizable controls for admins). However, it is much more user-friendly than admin-friendly (especially code-level system admins.)

Its plugin system is really what sets it apart. Otherwise, the use is generally the same as other forums.

Pros:

- Site can easily be configured not to rely on email - easy to allow users to create an account and start in very quickly
- There is a great deal of user customization available
- The permissions can be set at the user-level for each category
- No (sane) limit on number of sub-topic levels
- The plugin framework allows for a great deal of (theoretical) power and flexibility

Cons:

- There are relatively few innate features - it relies on plugins to create the environment
- The plugin framework can be a system-administrator's nightmare, especially when updates to the system core occur.
 - Version differences can break things easily.

- No innate (or easily found!) support for GitHub integration
- Documentation is not always up-to date, and there are few innate instructions or explanations in the gui for admins to use.
- Community has been largely unresponsive toward questions/problems (at least for us).
- Backups are all on the code-end (no gui controls) and complicated.

Platform/Language

- Node.js
- MongoDB
- Redis

Key Features

Plugins

- NodeBB is really built around plugins. If there is something you want the software to do that it currently doesn't, always check the plugins! Many functions that one might consider basic for a forum are written in plugins in NodeBB (and your particular install pack might or might not have them!).

Community

- Main site: <https://nodebb.org/>
- Forum: <https://community.nodebb.org/>

Installation & System Admin Notes

Installation

- We installed/tested version: **NodeBB 1.4.3**

Please see the NodeBB Installation document for details on our installation.

NodeBB “Crash Course” Instruction Manual

For Everyone

Getting Started

Getting an Account

The first thing you will need to do is get an account. Note that the amount of content available without logging in and the exact ways allowed to set up an account can be changed by administrators. (Note to Admins: these settings are changed in the Admin → General → Navigation, as well in individual Categories: Admin → Manage → Categories → (Category) → Privileges)

To create a new account, instead of “Log In”, go to “register”, and enter in your information. Depending on the settings either your account will become active right away, or you will have to wait for an email and/or administrator approval.

Home Page

The default home page shows the categories and some brief statistics and snippets from each of them. Depending on settings you might or might not have to log in to interact with them. Note that the home page can be changed (even by user, if the admins configure/allow it. [Admins, this is done via Admin → General → Home Page]).

Top right: user menu options

If you are NOT logged in:

There are two options: **Login** or **Register**. (Three, if search is installed).

To Register, you will need to have a valid email address. You will also choose a username and a password. Depending on settings, there may be a wait for your account to be validated.

If you are logged in:

There should be a user icon at the farthest right; this is your profile. Clicking on this brings up your “profile menu”, with the following choices (those marked with * are admin only):

- Your **username** - brings you to your user page (which shows your latest posts and stats by default).
- 4 Status options (click on one to set): **online**, **away**, **do not disturb**, **invisible**
- **Edit Profile** - brings you to the edit profile page. Go here to:
 - Change your icon
 - Change your username (if allowed)

- Change your email (if allowed)
- Change your password (if allowed)
- Set information about yourself
- **Settings** - allows you to change your *personal* settings. There are a LOT of options here.
- **Flagged Posts***
- **IP Blacklist***
- **Logout**

There are also the following to the left of the “profile menu”:

- **chat bubble** - brings up your chats
- **bell** - brings up notifications
- **Magnifying glass** (if installed) - brings up simple search window

Top left: navigation menu

(Note: this menu can be completely reconfigured/customized by an admin at **Admin** → **General** → **Navigation**). The following are the default list:

- Category - lists posts by category
- Unread** - list post by unread
- Recent** - lists posts by reverse-chronological order
- Tags** - lists tags (or posts by tag??)
- Popular** - lists most popular posts (need to investigate more how this works)
- Users** - lists users (only admin can see flagged/banned users)
- Groups - lists groups and shows membership
- Admin* - brings you to admin screen (that does not share this menu)
- Search - brings up search tool (many options!)

Categories

To edit or make Categories, go into **admin** → **manage** → **categories**. From there, you can edit existing categories (by clicking “edit” beside the category of choice). **Make sure to save any changes by clicking on the save icon (lower right)!** (Note: html tags do not work in the description!)

Every topic belongs to **one** category. (If you have cross-category information, tags can be used.)
 [Note: while theoretically possible to make it possible to post to multiple categories, it is not innately supported and would - at minimum - require a unique plugin to be written]

There are 4 default categories (Marc, let me know if you change this in initial setup)

- Announcements
- General Discussion
- Comments and Feedback
- Blogs - category for blog posts by individual members

Note on naming: As far as tables on topics are concerned, only the category or subcategory name is listed. (i.e., a topic under “OpenWIS Project / Releases” will simply be listed in the category “Releases”.) Also note that categories can share names. Be aware of this, especially while naming subcategories (I suggest naming them as “Parent - SubCategory”).

Making (and Editing) Categories

As an Admin, go into **admin** → **manage** → **categories** , and click on the blue “+” button at lower left. You can either manually set or copy settings from an existing category when you create (or edit) a category.

You can set the category display order by drag and drop in Admin → Manage → Categories.

You can set the following Category Settings:

- Name / Description
- Parent category (categories can be nested)
- “Banner” image and size
- Background / text color
- Custom Class
- Number of recent replies (default=1)
- External link
- Tag whitelist

You can also set each of the following privileges by **group** and/or by individual. The privileges are as follows (by type):

- Viewing
 - Find Category
 - Access Category
 - Access Topics
- Posting
 - Create Topics
 - Reply to Topics
 - Edit posts
 - Delete posts
 - Delete Topics
 - Upload images
 - Upload files
- Moderation
 - Purge
 - Moderate

(Note: to add groups, go to **Admin** → **Manage** → **Groups**, and click the “+” button.)

To Edit an existing Category go to: **Admin** → **Manage** → **Categories** → **Edit**

Topics

Under each topic, you can choose to **Watch** (default; will show unread posts and alert you of new posts), **Not Watch** (will show unread, but will not alert) or **Ignore** (will neither show unread nor alert). (Note that Ignoring a category will Ignore all Topics in it.) You can also choose to sort by number of posts, oldest, or newest first.

The following Topics are automatically created at install:

- Welcome to NodeBB (General) - an example topic ; short description of NodeBB

New Topics

To start a topic, click on the category you would like to post under. Then, you can click the “New Topic” button to the left. Then, simply give your topic a title and write your post in the box that pops up. (You can also choose to post the new Topic under a different category, if you have changed your mind, by using the dropdown on the right.)

Topic Admin Tools

Admins have the following topic tools:

- Mark unread for all
- Pin Topic (keeps visibility high)
- Lock Topic
- Move Topic (change category)
- Fork Topic (must select Topic to fork...I'm not getting this to work :()
- Move All (change All Topic categories)
- Delete Topic

Tags

To add tags to a Topic, when you create the topic, list any tags you would like to add to that topic into the tag box at the bottom of the posting box (by default, all tags must be 3-15 characters long). Type in each word you would like to use as a tag, separated by comma (“,”). (**Note: You can only use number and letters, plus “.” and “-”. No Spaces.**)

To view tags, you can go to Tags in the navigation menu. There will be a list of tags. Click on a tag to see a list of topics which have used that tag.

Posts

To post, either start a new Topic or reply to an existing one. To reply to a topic, hit the “reply” button for a direct reply. To reply as a new topic, hit the dropdown arrow that is directly next to the reply button. Replying as a new topic creates a new topic.

Either starting a new topic or replying will bring up the “posting box”.

There are some tools under the post title, most of which are self-explanatory. (Note: Zen Mode = full screen).

Existing posts have the following options for interaction (at the lower right):

- Reply (will create a reply post mentioning the author)
- Quote (will create a reply post quoting the post)
- Upvote/downvote (see below)
- Edit (author/admin only)
- Delete (author/admin only)
- Move (admin only)
- Bookmark
- Flag post (might not be available to all users; you cannot flag your own posts, even as admin)

Images

To add images to a post, either upload the image (cloud icon) or insert a url where the image is hosted (picture). Both options will provide the following code in the message box:

![alt text](img url). If the upload option is used, the img url will be automatically filled in with the new file’s url (And the alt text will be auto-filled with the file name).

Mentioning / Getting a user’s attention

To mention a person (like on Twitter), just write @username in the post / Topic you are writing!

Also, if you hit the “reply” text on the bottom right of the post, your reply will automatically contain a mention toward the author.

Upvoting / Downvoting (Reputation)

At the bottom right of an existing post, there is an up arrow and a down arrow. Clicking on the up arrow “upvotes” the post, and increases the author’s “reputation”. Clicking on the down arrow “downvotes” the post and lowers the author’s “reputation” (note: you cannot up/down vote your own posts).

Reputation can be used as criteria for granting certain privileges (such as allowing downvotes, and flagging posts, among other things). Site administrators can choose to allow only upvoting, or to turn off the reputation system altogether. (To make these changes, go to Admin → Settings → Reputation.)

For Admins

Configuration Views and Options

Admin control panel at: *URL/admin* (but there does not seem to be any easy way to navigate to there using default options, unless admin is included in the navigation menu)

General

- Dashboard
 - shows statistics
 - One interesting breakdown: registered vs unregistered user activity
 - Shows where active users are
- Homepage - allow and set where homepages go for users
- Navigation - customize navigation menu options:
 - Icon (image; huge number to choose from)
 - Route (url path)
 - Tooltip (text shown as hover over pointer)
 - Text (for navigation icon)
 - Text class [optional] (bootstrap CSS for text)
 - ID [optional]
 - Properties (turn on/off):
 - Admin Only
 - Global Moderator / Admin Only
 - Logged-in only
 - Open in new window
 - Which plugins to load (like search)
- **Languages**
- **Sounds** (incoming/outgoing messages, notifications)
- Social - share posts with Facebook, Twitter, or Google+

Manage

- Categories
 - Disable
 - See Analytics
 - Edit
 - Category Settings - colors, links, etc
 - Privileges (Permissions)
 - (Note: You can copy the settings across categories!)
- Tags
 - Create/delete tags
- Users

- New User - just fill out name, email, password!
- Download csv w/ info
- Edit users (select on list)
 - make/remove admin
 - Validate email
 - Send validation email (disabled at our setup)
 - Send password reset email
 - Ban/Unban user
 - Reset lockout
 - Reset flags
 - Delete user
 - Delete user AND content
- Show Users by:
 - Latest Users
 - Not Validated
 - No Posts
 - Top Posters
 - Most Reputation
 - Inactive
 - Most Flagged
 - Banned
- The following User statistics are shown:
 - Uid (number in order of creation)
 - Username
 - Email
 - Post count
 - Reputation
 - Flags
 - When joined
 - When last online (based on sign-in time, I believe)
 - Banned
- Registration queue (need to go to **Settings -> User -> User Registration** to set this up)
- Groups
 - Set the name, description, title given to members
 - Set the color, icon, and visibility of badge
 - Make private (req group OWNER approval)
 - Disable join requests
 - Hide group (must add members manually)
 - Manually add user to group (search for user name)
 - View member list
 - Owners have star next to name and can do the following:
 - Add/revoke ownership
 - Remove members (“kick”)

- Flags
- IP Blacklist

Settings

- Site Settings
 - - set Titles, description, keywords, etc
 - Site logo - upload, set url it goes to, etc
 - Favicon
 - Homescreen/touch icon
 - Turn on outgoing links warning
- Reputation
 - Disable/enable Reputation system
 - Disable/enable downvoting
 - Set min Reputation to down vote
 - Set min Rep to flag posts
- Email
 - Email settings - set site email/name
 - Gmail routing - (for high-security gmail issues)
 - Edit email template - (shows code)
 - Email testing - send test emails
 - Email subscriptions
 - Disable subscriber emails
 - Set time to send emails (24-hr according to server clock)
- User
 - Authentication
 - Enable local login (on by default)
 - Require email confirmation
 - Set min wait time to send another conf email
 - Set login using username, email, or either
 - Account Settings
 - Disable/allow user name changes
 - Disable/allow email changes
 - Disable/allow password changes
 - Disable/allow account deletion
 - Make user info private
 - Themes
 - Prevent users from choosing custom skin
 - Account Protection
 - Login attempts allowed / hour
 - Account lockout duration
 - Force password reset after X days (0=off, presumably)
 - Session Time

- Days, Seconds (only 1 used)
 - I'm not sure what exactly this does
 - User Registration
 - Set registration type (this is explained on page)
 - Max invitations per user (only if "invite only" is registration setting)
 - Min/Max username length
 - Min password
 - Max "about me" length
 - Set Terms of Use (blank=disabled)
 - User search
 - Number of results
 - Default user settings
 - What info to show
 - Whether to auto-subscribe to digest email
 - Settings for digest email
- Groups
 - Set groups private (req owner approval)
 - Allow/disable group creation by users (vs. admins)
 - Max group name length
 - upload/list default group cover images
- Guests
 - Allow guests to set (temp) username
 - Allow guests to search content without login
 - Allow guests to search members without login
- File Uploads
 - Allow uploads of regular files
 - Make uploaded files private
 - Resize image (set max size)
 - Max file size
 - Allow thumbnails
 - Set allowed file extensions (none listed allows all)
 - Allow profile images
 - Convert to png
 - Set profile image size/file size
 - keep/delete old versions
 - Set list of default cover images
- Posts
 - Default topic/post sorting
 - Posting restrictions
 - Set timing and size restrictions on posts, titles, topics, etc.
 - Set how long a topic has no new post before considered old (and warning new posters)
 - Timestamp - when to show relative date vs absolute (0=always absolute)

- Teaser - show first, last (or first if no replies), last or “no replies”
- Unread Settings - track time/number for unread messages
- Signature Settings - allow signature, links, images, set length
- Composer settings
 - Show “help” tab
 - Allow plugins to add to “help”
- **Turn on/off IP Tracking**
- Chat
 - Disable/enable chat
 - disable/enable chat editing and deletion
 - Max length of message
 - Max users in chat rooms
 - Set time between chat messages
- Pagination
 - Set pages or infinite scrolling
 - Posts / topics per page
 - Initial number of topics to load
- Tags
 - Min / max number tags per topic
 - Min / max length
 - Make tags list private
 - Max number of related topics to display (if pulled by Theme)
 - Note: Tag management is done at: Admin → Manage → Tags
- Notifications
 - Welcome notification - set text and link
- Cookies
 - EU consent on/off
 - Set notice text, link to policy text, etc
 - Set session cookie domain
 - Revoke all sessions (will log you out!)
- Webcrawler
 - Set custom robots.txt
 - disable/enable RSS feeds
 - disable/enable sitemap.xml
 - Set number of topics to display in sitemap
 - Clear sitemap cache
 - View sitemap
- Sockets
 - Max reconnection attempts
 - Reconnection delay
- Advanced
 - Turn on Maintenance Mode - allow only admins to access site properly
 - Headers

- Set ALLOW-FROM for iFrame
 - “Powered by” header
 - Set Access-Control-Allow-Origin (set to null or empty to deny access to all sites)
 - Access-Control-Allow-Methods
 - Access-Control-Allow-Headers
- Traffic Management - disallow access during high-traffic situations (and control the settings)

Appearance

- Themes (3 available by default) - Note: must restart to take effect
 - Lavender - magazine-like style with block/columns
 - Persona - similar to Discourse, more traditional forums (default)
 - Vanilla - lists topics w/ series of block-icons
- Skins - changes color/font options
- Custom HTML & CSS
 - Set custom CSS and headers (incl. Javascript)
 - Enable custom CSS

Extend

- Plugins
 - List of downloaded plugins, and status
 - Also lists by active, inactive, out-of-date
 - Search for new plugins
 - LOTS of suggestions!
 - Change order of active plugins
- Widgets
 - Looks to be able to build and include widgets on website? (Usable externally??) - NEED TO INVESTIGATE MORE (I know so little about widgets!)
- Rewards
 - Set so that certain events trigger others
 - Triggers: Reputation, Post Count, Last Logged in Time
 - Events: Add to Group, Send Message, Add to Reputation
 - Set number of times each reward is attainable
 - Could theoretically be both positive and negative, as designed

Plugins

- Composer (default) - set route for composer
- Persona Theme - theme settings
 - hide/show subcategories (in cat. view)
 - hide/show last post in cat. View
 - Enable quick reply

- Markdown - set markdown conversion rules
- Emoji Extended
 - Global Settings
 - Installed Sets
 - Get Plugins
 - Install Plugins → Goes to Plugins: Installed
- DB Search

Advanced

- Database - shows stats on database and raw info
- Events - shows events
- Logs - shows logs (can also clear/reload)
- Errors
 - 404 (not found) error graph and paths where problems occurred
 - 503 (service unavailable) graph (and presumably, paths, once any occur)
 - Can export and clear error logs
- Cache - shows current cache settings and button to update cache (saves settings changed)

Adding Users

You can create new users by going into **Admin** → **Manage** → **Users** and clicking on “New User”. (This is also the area to manually validate accounts or ban users.) Alternately, someone can register at the login location. (Settings for what users can and cannot use to log in are set in **Admin** → **Settings** → **User** and **Admin** → **Settings** → **Guests**.)

To check if the user has been added, look at the User navigation or **Admin** → **Manage** → **Users**.

New user restrictions

- Time between posts - X seconds must elapse between posts. [default = 120] (Set in **Admin** → **Settings** → **Post**)
 - This restriction is lifted when user has X reputation [default = 3] (also set in above path)

Resetting Passwords

A user can reset their password by going to **user icon** → **Edit Profile** → **change password**.

For an Admin to reset a user’s password: **Admin** → **Manage** → **Users** → (click on user’s **checkbox**) → **Edit** → **Send Password Reset Email**

Note: I can't find a way for Admin to reset password without sending an email. So if your email server is broken, you're in trouble here should a user forget their password. You can always delete their account and have them re-create it, though. Do this via: **Admin** → **Manage** → **Users** → **(click on user's checkbox)** → **Edit** → **Delete User**. (DO NOT to click "Delete User(s) and Content!")

Backing Up Data

In NodeBB, there are no gui-controlled ways to create or restore backups. The databases must be backed up using "traditional" methods by the system admin at the code/installation level.

There is a thread discussing methods to do this here:

<https://community.nodebb.org/topic/9670/how-to-take-a-backup>

Plugins

To add in plugins via NodeBB's gui, go to **Admin** → **Plugins** → **Install Plugins**. From there, you can search for new plugins, change the order of existing plugins, and uninstall current plugins. (This can also be accomplished by going to **Admin** → **Extend** → **Plugins**.)

Another thing systems admins should keep in mind is that there is always the possibility of version conflicts between your main NodeBB install and its plugins, so keep an eye on how things run after adding any new plugins!