# NocoBase AI Business App Builder by Optick

## Customer Instructions for AWS Marketplace Users

*Ubuntu 24.04 | Docker Compose | PostgreSQL | Nginx | Public IP Onboarding*

**Important first login summary**

Connect to your instance using your Amazon private key and the **ubuntu** user.
Open NocoBase in a browser at http://YOUR_PUBLIC_IP/.
The administrator password is generated on first boot and is shown in /home/ubuntu/FIRST_LOGIN.txt.
If the web page does not appear immediately, wait one minute and refresh.

## 1. Product Overview

NocoBase AI Business App Builder by Optick provides a ready to launch private, self hosted NocoBase platform for building no code and AI assisted business applications on AWS.

Use this AMI to build internal tools, CRM systems, dashboards, approval workflows, project trackers, admin panels, and database driven business apps without starting from a blank server.

The AMI includes Docker Compose, PostgreSQL, Nginx reverse proxy, first boot credential generation, backup and restore helpers, AI setup guidance, and a public help page.

## 2. Recommended AWS Launch Settings

| Setting | Recommendation |
|---|---|
| Operating system | Ubuntu 24.04 |
| Recommended starting instance | t3.medium for testing or light use |
| Better default instance | t3.large for small teams and better performance |
| Production oriented instances | m6i.large, m7i.large, m6i.xlarge, or m7i.xlarge depending on workload |
| Root volume | 40 GB gp3 minimum. Use 60 GB or larger for production data, attachments, and backups. |
| Default OS user | ubuntu |

## 3. Security Group Requirements

Open only the ports required for normal customer access. PostgreSQL and the internal NocoBase container port should not be exposed directly to the internet.

| Port | Purpose | Recommended Source |
|---|---|---|
| TCP 22 | SSH administration using the ubuntu user and Amazon private key | Your trusted IP address whenever possible |
| TCP 80 | NocoBase web application and public help page through Nginx | 0.0.0.0/0 |
| TCP 13000 | Internal NocoBase container listener behind Nginx | Do not open publicly |
| TCP 5432 | PostgreSQL database inside Docker network | Do not open publicly |

**Security note**

Use port 80 for web access and port 22 for SSH only.
Do not expose internal NocoBase port 13000 or PostgreSQL port 5432 publicly. Restrict SSH to your trusted IP address whenever possible.

## 4. First Login After Launch

After the EC2 instance launches, wait about one minute for first boot initialization to generate credentials and start the Docker stack.

1. Open an SSH session to the instance using your Amazon private key and the ubuntu user.

```
ssh -i /path/to/your-key.pem ubuntu@YOUR_PUBLIC_IP
```

2. Read the first login file.

```
cat /home/ubuntu/FIRST_LOGIN.txt
```

3. Find the application URL and generated administrator password in that file.
4. Open the displayed URL in your browser.

```
http://YOUR_PUBLIC_IP/
```

5. Log in using the generated credentials shown in FIRST_LOGIN.txt.

| Field | Value |
|---|---|
| Email | admin@optick.local |
| Password | Generated on first boot and shown in /home/ubuntu/FIRST_LOGIN.txt |

**After first login**

Change the administrator password inside NocoBase after your first successful login.

If the browser shows a loading page or connection issue immediately after launch, wait one minute and refresh the page.

## 5. Application URLs

| URL | Purpose |
|---|---|
| http://YOUR_PUBLIC_IP/ | Main NocoBase application |
| http://YOUR_PUBLIC_IP/optick-help.html | Public help page with quick onboarding notes |

The public help page does not display passwords. Administrator credentials are available only inside the server first login file.

## 6. Useful Server Commands

The following helper commands are installed for easier administration. Commands that the customer may run are highlighted in red throughout this document.

```
optick-nocobase-url
```

*Show the current public URL.*

```
optick-nocobase-status
```

*Check NocoBase, Docker, Nginx, PostgreSQL, disk usage, and image record.*

```
optick-nocobase-logs
```

*View recent NocoBase, PostgreSQL, and Nginx logs.*

```
optick-nocobase-restart
```
*Restart the NocoBase Docker Compose stack.*

```
optick-nocobase-backup
```
*Create a NocoBase backup.*

```
optick-nocobase-list-backups
```
*List local NocoBase backups.*

```
optick-nocobase-restore /opt/optick-nocobase/backups/BACKUP_DIRECTORY
```
*Restore from a backup directory.*

```
optick-nocobase-ai-setup
```
*Show AI setup guidance.*

## 7. Backup and Restore

The backup helper creates a local backup containing the PostgreSQL database dump, NocoBase storage files, runtime configuration snapshot, image record, and Docker Compose file.

### Create a backup

```
optick-nocobase-backup
```

### List backups

```
optick-nocobase-list-backups
```

### Restore from backup

Replace BACKUP_DIRECTORY with the backup directory shown by optick-nocobase-list-backups.

```
optick-nocobase-restore /opt/optick-nocobase/backups/BACKUP_DIRECTORY
```

**Backup recommendation**

Create a backup before major configuration changes, plugin changes, data imports, or upgrades.
For production use, copy important backups to durable storage outside the instance.

## 8. AI Employee Setup

NocoBase includes AI Employee capabilities, but AI features require the customer to configure their own LLM provider and API key inside the NocoBase web interface.

Basic setup path inside NocoBase: System Settings > AI Employees > LLM Service.

1. Log in to NocoBase as the administrator.
2. Go to System Settings.
3. Open AI Employees.
4. Open LLM Service.

5. Click Add New.
6. Select the provider and enter the provider API key.
7. Enable recommended models or manually enter model IDs.
8. Save the service and open the AI Employee chat entry.

```
optick-nocobase-ai-setup
```

*View the AI setup notes from the server command line.*

**API key handling**

Do not paste provider API keys into Linux shell history unless you intentionally choose to manage them outside the NocoBase UI.

The recommended path is to enter provider keys inside the NocoBase administrative interface.

## 9. Common Administration Tasks

### Check status

```
optick-nocobase-status
```

### Restart NocoBase

```
optick-nocobase-restart
```

### View logs

```
optick-nocobase-logs
```

### Open application directory

```
cd /opt/optick-nocobase
```

## 10. Troubleshooting

| Issue | Recommended Action |
|---|---|
| Browser page does not appear immediately | Wait one minute and refresh. Then run optick-nocobase-status over SSH. |
| Forgot the initial generated password | Read /home/ubuntu/FIRST_LOGIN.txt over SSH. |
| Need the application URL | Run optick-nocobase-url. |
| Need service health details | Run optick-nocobase-status. |
| NocoBase appears stuck after configuration changes | Run optick-nocobase-logs, then optick-nocobase-restart if needed. |
| Need to restore previous data | Run optick-nocobase-list-backups, then optick-nocobase-restore with the chosen backup directory. |
| AI Employee features are not responding | Confirm that an LLM provider, API key, and model are configured inside System Settings > AI Employees > LLM Service. |

## 11. File Locations

| Path | Purpose |
|---|---|
| /opt/optick-nocobase | Application directory and Docker Compose files |
| /home/ubuntu/FIRST_LOGIN.txt | First login instructions and generated admin password |
| /home/ubuntu/AI_SETUP.txt | AI setup notes |
| /var/www/optick-nocobase/optick-help.html | Public help page |
| /usr/local/bin/optick-nocobase-* | Helper commands |
| /usr/local/sbin/optick-nocobase-firstboot | First boot automation script |

## 12. Learning Resources

NocoBase Website: https://www.nocobase.com/

NocoBase Documentation: https://docs.nocobase.com/

NocoBase Docker Installation: https://docs.nocobase.com/get-started/installation/docker

NocoBase AI Employees Quick Start: https://docs.nocobase.com/ai-employees/quick-start