About the Guide

This guide was developed by rOpenSci and The Carpentries to help break down barriers for our community members interested in adopting Mastodon as a social media platform. It offers tips to help get started and is not meant to be a comprehensive overview of the platform or the fediverse. Therefore, it includes other trusted resources where you can learn more. We welcome feedback on this guide by emailing info@ropensci.org or community@carpentries.org.

Why Mastodon?

A large number of individuals and organisations engaged in science, education, and open-source software have moved to Mastodon as an alternative to X (formerly known as Twitter)[1]. Similar to X, Mastodon is a microblogging platform with posts from users that include text, hashtags, links and attachments. However, they also have differences that may initially seem confusing. These differences include:

- **Terminology.** A post is a *toot*. When sharing another user's toot, instead of retweeting, you *boost* it. Instead of liking a toot, you *favourite* it.
- **Decentralised.** Mastodon consists of several independent servers (or *instances*) built around topics, regions, and areas of interest. These instances communicate with each other (they are *federated*) and allow their users to interact as if they were on a single social network (the *fediverse*).
- **No User Tracking.** There are no ads, no monetization, and no algorithms to decide which posts will appear in your feed.
- **Choose from Multiple Apps.** There are several apps available for using the platform on a mobile phone or browser. (*refer to External Tools section*)
- **Higher Character Limits.** Toots can have more than 240 characters. The limit is different in each instance, but many of them allow 500-character posts. Links are always counted as 20 characters no matter their length.
- **Ability to Edit Posts.** You can easily edit your own toots after they are published. If you favourited or boosted someone else's toot that was later edited, you will receive a notification, at which time you can unfavourite or unboost the edited post if you decide to do so. (*refer to Etiquette section*)
- **No Quote Feature.**[2] This feature, available on X, is not available on Mastodon. This was a deliberate design element to avoid the feature being used to harass another user.

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[1] Valero, M.V. 2023. Thousands of scientists are cutting back on Twitter, seeding angst and uncertainty. Nature 620, 482-484. doi: https://doi.org/10.1038/d41586-023-02554-0

[2] Mastodon is in active development with new features being considered (view roadmap). Not all instances will implement all new features.

- **User Handle Display.** A user handle on Mastodon is more like an email address. You need to specify the user *and* the instance, for example @thecarpentries (user) + @hachyderm.io (instance) is ***@thecarpentries@hachyderm.io*** or @rOpenSci (user) + @hachyderm.io (instance) is ***@rOpenSci@hachyderm.io***.

Choosing your instance

Choosing an instance can be one of the biggest hurdles to joining Mastodon (there are so many to choose from!), but it does not need to be. We have provided a few considerations to help with your decision, and you can always switch instances once you have joined one. Be aware that instances may decline new accounts for a short period of time if there is a large migration of new users.

Considerations

- **Limit the number of instances you need to search through.** Thinking about the topics you are going to toot about and what you would like to read about are two ways to narrow down the number of options. For example, you can find a list of instances, by region or topic, including those supporting academia.
- **Identify which instances already host members of your community.** For example, rOpenSci and The Carpentries can be currently found on the hachyderm instance, which is focused on professionals and organisations in the technology industry.
- **Know the moderation policies for the instances you are considering.** These policies might impact what you and members of your community can post (e.g., which language you choose for your toot). All instances include an About Us page where you can check their policies.
- **Know the longevity of the instance.** Users need to be sure their instance is not going to disappear overnight. Even though you can change from one instance to another when you decide to do so for whatever reason, it is nonetheless a good idea to choose one that is already established and/or has a plan if they decide to no longer maintain their instance.

Creating and configuring your account

- **Create your account.** Once an instance has been identified, it is time to sign up. There are three possibilities, depending on the instance you choose:
  - Open signups: register a username, email address, and password then begin using your account.
  - Invites: some instances require invite links to the registration form to be shared.
  - Approval: after registering your account, it must be approved by a moderator before you can begin using it.
- **Complete your profile.** This will help other users find and follow you. All instances let you set a profile name, picture, banner image and short text or bio about yourself. Mastodon also has a special section for labelled website links or any other info you want to highlight about yourself. You can edit all of this information, clicking on the "edit profile" button from your profile page.
- **Verify your account.** There are several methods to validate your identity. Once a link is verified, a checkmark is displayed and the link displays in green.

Finding and Building Your Community

Because Mastodon does not track its users, it can make it more difficult to find accounts you want to follow or for others to find you. Here are some tips that will help you build your community. Unlike most social media platforms, Mastodon does not use algorithms to serve its users content of interest.

- **Introduce yourself.** Use the hashtag *#Introduction* and provide some background about who you are, your interests or your work, and what kind of content you will be sharing through the account. You can also pin this introduction toot so users can easily find important information to determine if they want to follow you.
- **Use relevant hashtags.** The easiest way to find content and accounts of interest is through the use of hashtags. An advanced view allows you to add a feed that includes all the hashtags of interest you want to follow. This is also how people can better find you as you include relevant hashtags in your toots. [More information can be found in fedi.tips](). Options to help you get started: *#AcademicMastodon, #DataScience, #FollowFriday, #FOSS, #OpenData, #OpenEducation, #OpenScience, #OpenSource, #Python, #R, #RSEng, #rStats, #rStatsES* (*refer to Etiquette section*).
- **Follow who is being followed by trusted accounts.** You can find additional accounts to follow by identifying who is being followed by accounts you already trust and by who is following them.
- **Identify and register with public opt-in lists.** You may want to identify curated lists to make it easier to identify accounts you may like to follow or that you may wish to be added to so others can easily find you. Example: [Find Academics on Mastodon](), [Academics on Mastodon]().
- **Follow social groups of interest.** You can find accounts with similar interests that are connected via groups. The best place to find [a list of groups is currently Guppe](). [Additional information can be found in the feditips blog post]().

Communicating with others

Visibility of Posts

Mastodon is unique in how it displays the toots in your feed. Not all instances are connected with each other, which can lead to confusion when reading a thread of replies to a toot. There may be a situation where your feed includes a reply from someone you follow but not the original toot which is from an instance not connected to your instance.

Most instances display toots in three different ways: *Home*, *Local* or *Federated*.
- *Home*: timeline with all the toots of the people you follow in chronological order.
- *Local:* displays all the public toots made by users on your instance.
- **Federated:** displays all public toots that your instance can access.

When writing your toot, the world icon found below the text window allows you to select who can view it.
- *Public* (default): visible for all.
- *Quiet public*: visible for all, but opted-out of discovery features.
- *Followers*: visible for your followers only.

- *Specific People*: visible only for users mentioned in your toot. This is useful for sending direct messages to one individual or multiple individuals. However, these messages are not end-to-end encrypted so not recommended for messages that can be sent privately by other means.

Etiquette

- **Content warnings.** Content warnings limit other users from having to see content they may not want to see. This not only includes content that may be offensive but also any topic that may distress another user (e.g., politics). Click the "Add content warning" button below the window where you write your toots to add text for the warning.
- **Alt text.** Users should always add alt text to images attached to their toots. Alt text supports the accessibility of your toot and is highly encouraged in Mastodon. Once an image is attached, you will find an edit button on the image to write your alt text. Be descriptive to clearly convey what is in the image so that it is accessible to individuals with visual disabilities.
- **Use CamelCase for hashtags.** This is another way to ensure your post is accessible by allowing users to distinguish between words within your hashtags.
- **Editing a toot.** If you edit a toot, add a short description of the change you made to the end of the post. This way, anyone alerted to the edit who favourited or boosted your original toot can easily determine if they want to remove either from the edited version.
- **Visibility of threads.** When posting a thread, make the first toot "public" and the following toots "unlisted" so only users who click on the first toot will be fed the full response chain.
- **Posting from other platforms.** Limit linking to toots from X. Many people on the Mastodon platform are there because they decided to leave X.

External Tools

- [**Bridgy fed**](). Allows content from Mastodon and Bluesky to be shared across platforms.
- **Clients.** Allows users to utilise preferred platforms on desktop or mobile devices. [Tooot]() app allows you to manage several accounts.

Resources and Acknowledgement

There are many great resources out there to help get started with Mastodon. Two we used to inform this guide include:
- Navarro, D. 2022. Everything I Know about Mastodon. November 3, 2022. https://blog.djnavarro.net/posts/2022-11-03_what-i-know-about-mastodon.
- [Fedi.tips]()

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- @marcelcosta@bcn.fedi.cat
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We also want to acknowledge the inspiration we received from a similar resource: Center for Scientific Collaboration and Community Engagement (CSCCE). 2020. Slack quick start guide. Woodley and Pratt doi: 10.5281/zenodo.3763729.

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