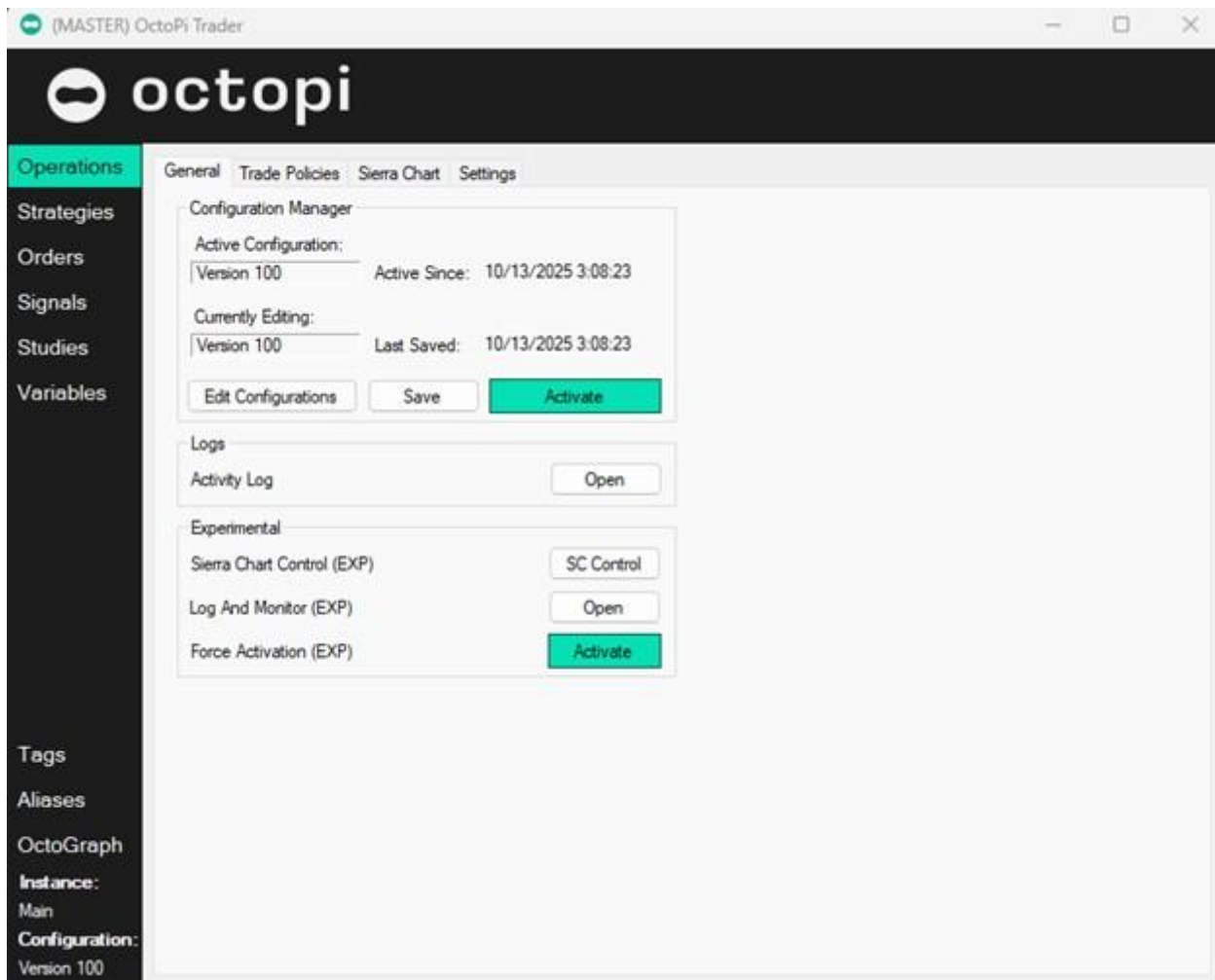


Operations

Main Interface "Operations" tab

- [Operations](#)
- [Operations Experimental](#)
- [Log and Monitor](#)
- [Trade Policies](#)
- [Sierra Chart](#)
- [Settings](#)

Operations



Edit Configurations Opens separate config management interface. Buttons are self-explanatory, but I will list some of the usage to help with purpose behind this:

- Sharing configurations between Sierra instances, computers, and users.
- Keeping backups of configurations in alternate locations to preserve work and provide historical ability to reference different config sets.

Activate Saves and Compiles any configuration changes to both local config file and Sierra Chart Octopi Trader study for execution. You must do this any time you make changes.

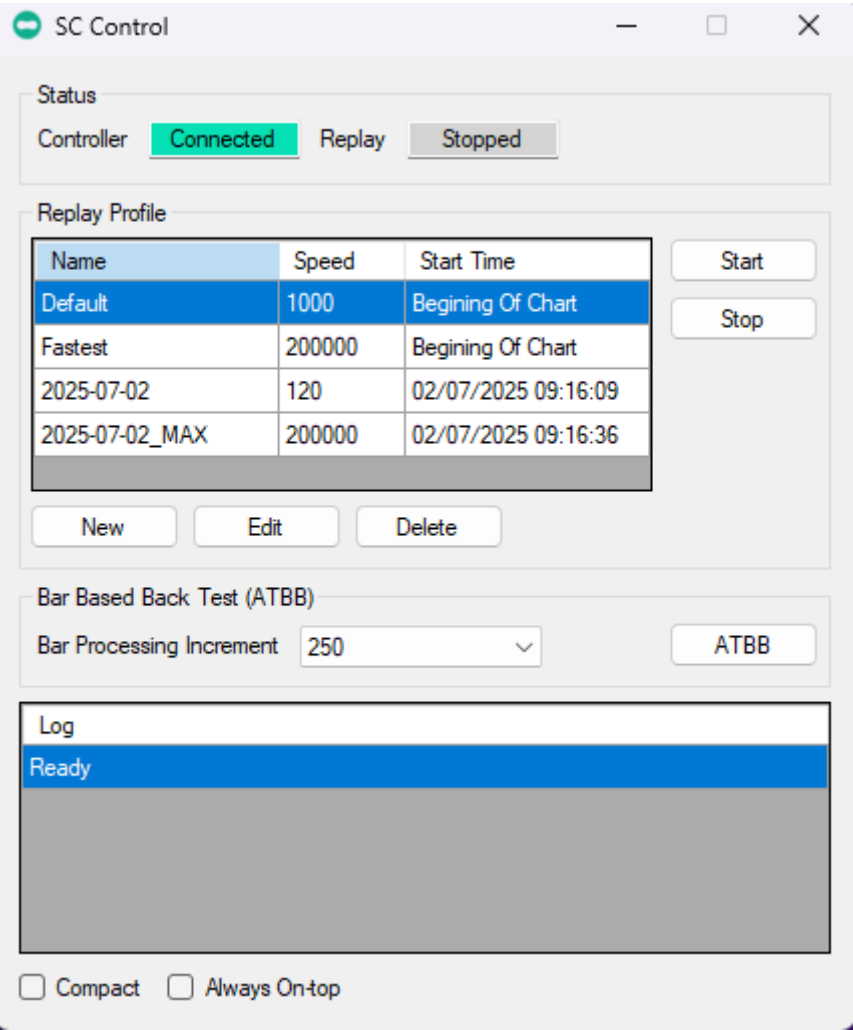
Save is useful to save progress that may or may not be able to be Activated. This will save your config, even if it has errors and does not activate, allowing you to work out the errors and not lose progress before Activation.

Activity Log Open opens Octopi action log that is designed to help you identify the exact sequence of events that took place during trade execution. This is a notepad file we keep inside of the SC directory to help with tracking and troubleshooting.

Operations Experimental

SC Control allows users to control Sierra Chart replays by creating and saving custom replay profiles. Requires setup.

SC Control setup: Inside SC, go to Global Settings -> Sierra Chart Server Settings -> UDP Port -> set value to 6420. Next, go to Studies -> Add Custom Study -> Octopi Controller -> Make sure it's added as the top-most study on the list. If set up correctly, SC Control window will display Controller status "Connected" and Replay status like below:



SC Control Usage:

- Create New replay profile with appropriate settings (self-explanatory, mirrors SC settings)

Edit Replay Profile

Name:

Charts To Replay:

Replay Mode:

Replay Speed:

Processing Step In Seconds:

Start Date-Time:

☐ Start Date-Time (From the beginning of the chart)

☐ Skip Empty Periods

☐ Clear Existing Simulation Trades

☐ Pause On Warnings

☐ Pause On Errors

- Match “Start Replay Paused” checkbox within SC Replay window
- **DO NOT** use SC Replay panel parallel to controller Start/Stop/Pause buttons!
 - Only exception is you can change replay speed on SC mid-way through replay
- Controller will do the following fully automatically:
 - Rewind chart to desired date/time (specific, or start of chart)
 - Clear SIM (if configured)
 - Enable Octopi study
 - Begin replay
 - Stop Replay & Disable Octopi Study

Log and Monitor

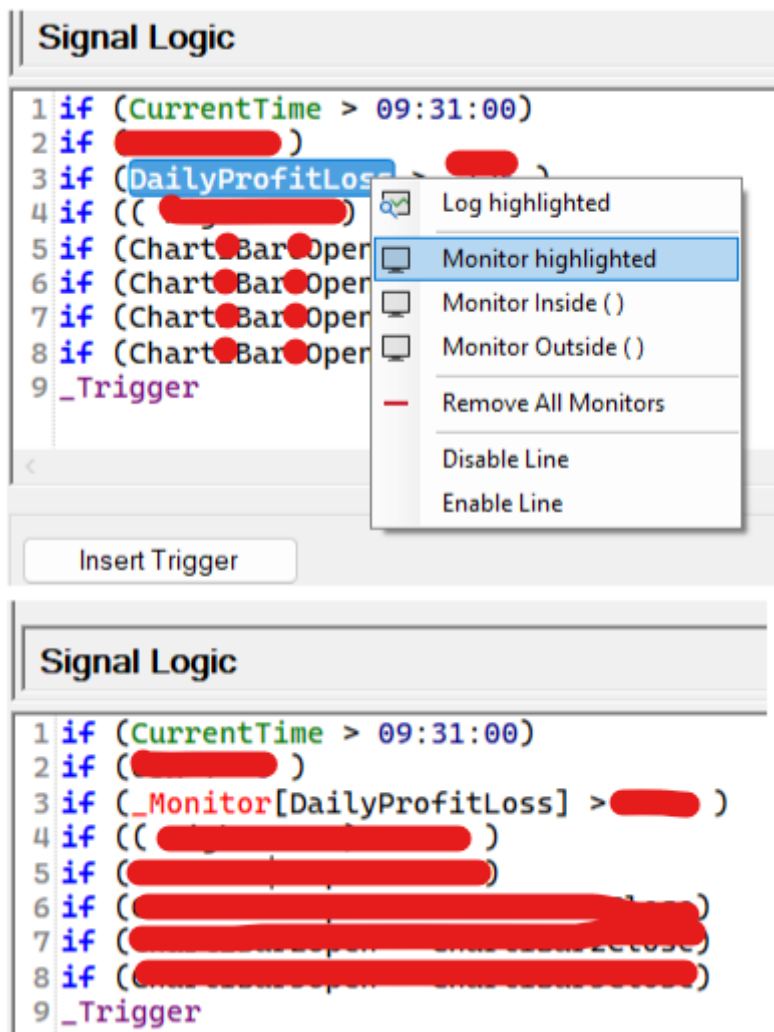
Log and Monitor allows live (or near-live when replay speed is too fast) asynchronous OP status logging and monitoring for both automatic internal status messages as well as user-configured values, studies, and custom conditions.

Activity Log tab mirrors information we put into the Activity Log file mentioned above, but this is done without interrupting SC replay process for maximum performance.

Signal/Studies Monitor is for tracking user-configured monitoring. Examples below, more on this later (and probably in a video)

Examples of user-configured monitors inside “Signals” via Highlight -> Right Click Menu:

Example 1 monitors a SC study subgraph value:



Example 2 monitors a condition inside the bracket (0 and 1 for true and false)

Signal Logic

```

1 if (CurrentTime > 09:31:00)
2 if ( )
3 if (_Monitor[DailyProfitLoss] > -125 )
4 if ( )
5 if ( )
6 if ( )
7 if ( )
8 if ( )
9 _Trigger

```

Insert Trigger

- Log highlighted
- Monitor highlighted
- Monitor Inside ()
- Monitor Outside ()
- Remove All Monitors
- Disable Line
- Enable Line

```

7 if ( )
8 if (_Monitor[ChartBarOpen > ChartBarClose])
9 _Trigger

```

Resulting monitor looks like this:

Log And Monitor (Experimental)

Activity Log

Signal/Studies Monitor

Time	NQ_3B_Long	DailyProfitLoss	NQ_3B_Long	ChartBarOpen > ChartBarClose
0	0		0	
13:47:40	0.00		0	
11:39:04	-103.75		0	
09:31:01	0.00		0	
10:50:00	0.00		0.00	
10:55:00	0.00		1.00	
10:55:39	30.75		1.00	
10:58:04	20.50		1.00	
11:00:01	40.75		1.00	
11:00:03	71.50		1.00	
11:00:07	29.25		1.00	
11:01:02	20.50		1.00	
11:04:29	-1.00		1.00	
11:05:18	-0.50		1.00	

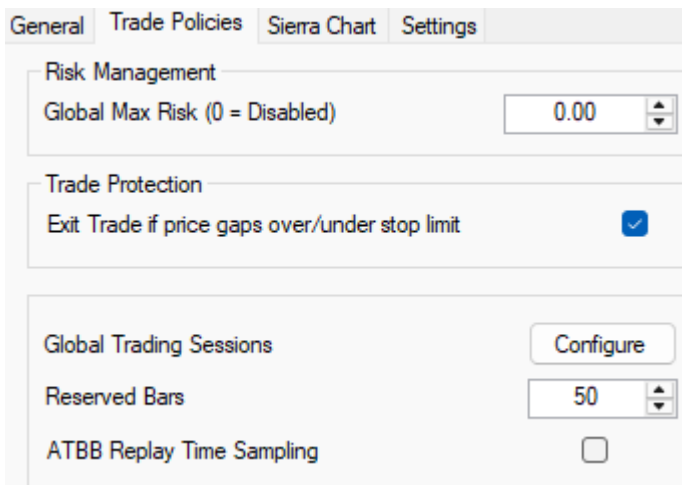
Auto Scroll

☒ Always On-top
 ☐ Monitor Precision

2

Clear

Trade Policies



General Trade Policies Sierra Chart Settings

Risk Management

Global Max Risk (0 = Disabled) 0.00

Trade Protection

Exit Trade if price gaps over/under stop limit ☒

Global Trading Sessions Configure

Reserved Bars 50

ATBB Replay Time Sampling ☐

Global Max Risk sets maximum global (across all strategies within the same configuration) risk in POINTS. Risk is calculated based on each strategy's order sum of STOP order points.

Example: Two strategies entering at the same time, each with order of two contracts configured with 10 points stops will result in 40 points of risk. Limiting Global Risk to 30 points will do one of two things: prevent Strategy 2 from entering at the same time as Strategy 1, OR trim Strategy 2 order to only one contract out of two (See Order Trimming within Strategies).

Trade Protection is a Live-trading feature that detects gaps outside of defined order brackets and queues order for market exit. We recommend using this when you go LIVE.

Global Trading Sessions allows configuring global order execution times, as well as cancel/flatten actions for each. See example below to trade from 8AM to 11AM and Cancel any pending orders at 11, then resume trading at 1PM through 3PM canceling and flattening all positions at 3PM:

Trading sessions

Trading Window

Start

End

13:00

15:00

☐ Flatten position
☒ Cancel pending orders

Add

Remove

Start Time	End Time	Flatten position	Cancel pending orders
08:00	11:00	☐	☒
13:00	15:00	☐	☒

OR

☐ Trade 24 Hours

OK

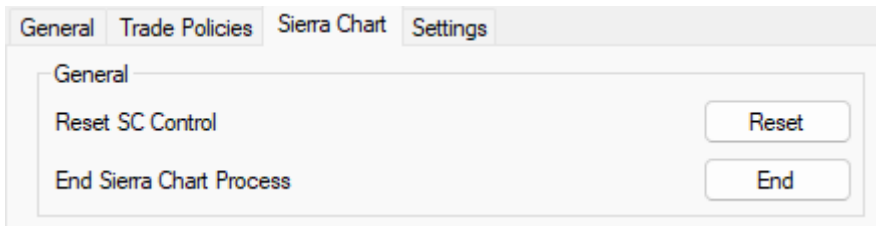
Cancel

We recommend setting this to **Trade 24 Hours** and limiting Strategy execution window as well as creating planned exit signals. This is a secondary layer tool by design but can be used as primary if you must.

Reserved Bars sets a minimum number of bars for SC to replay from the start of the chart to allow for necessary studies to “come of age” before being used for Signal calculations. Example: If your signal is to wait for SMA 50 to cross SMA200, you should set this value to a minimum of 200. For 200 bars OP will not do anything, then will begin execution.

ATBB Replay Time Sampling allows Auto Trading Bar Based Replay (ATBB button in Sierra Chart)

Sierra Chart

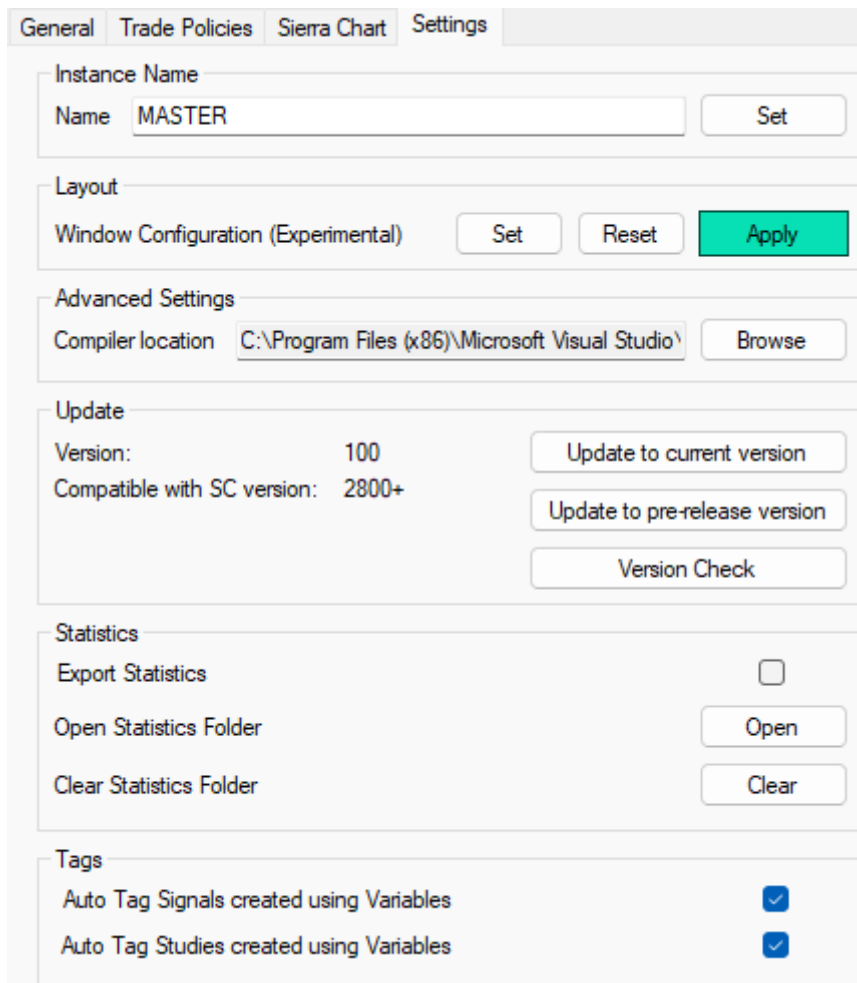


Helper buttons to resolve issues.

One **Resets** Sierra Chart Controller study

Other finds and **Ends** Process for affected stuck Sierra Chart process without having to go through Task Manager and looking for specific instances.

Settings



General Trade Policies Sierra Chart **Settings**

Instance Name
Name

Layout
Window Configuration (Experimental)

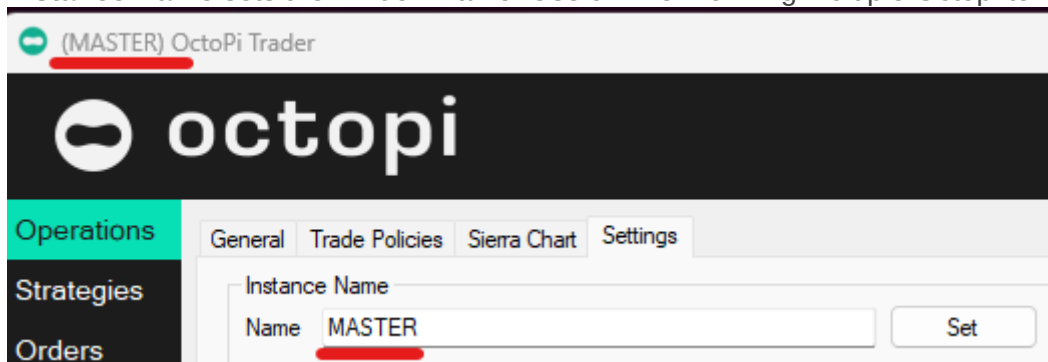
Advanced Settings
Compiler location

Update
Version: 100
Compatible with SC version: 2800+

Statistics
Export Statistics ☐
Open Statistics Folder
Clear Statistics Folder

Tags
Auto Tag Signals created using Variables ☒
Auto Tag Studies created using Variables ☒

Instance Name sets the window name. Useful when running multiple Octopi to keep organized.



Layout lets you Set and Apply (Open and re-place to Set Locations) all of the Octopi Windows you work with such as Controller, Monitor, and Main window.

Compiler location setting for advanced users that keep your compilers elsewhere.

Update Current and Pre-release - only go to Pre-Release if you've been instructed to or if you are adventurous. We don't support Pre-Release versions for anybody other than the users we are working with to test these. If you upgrade and run into issues it's on you!

Statistics exports data for QuantAnalyzer to use. See post about it here:

<https://discord.com/channels/1207787953116553279/1312635388489105418/1355999901846212892>

Tags This setting is to automatically tag Signals and Studies that get created in the process of making Persistent Variables. Helps you identify what you've created inside of Signals or elsewhere vs Signals created for the purpose of setting/resetting/etc of Variables. Keep this on, or don't - your call.