



LOCAL PLATFORM

Quant Research On-Premise

Securely deploy quantitative strategies on-premise with proprietary datasets.

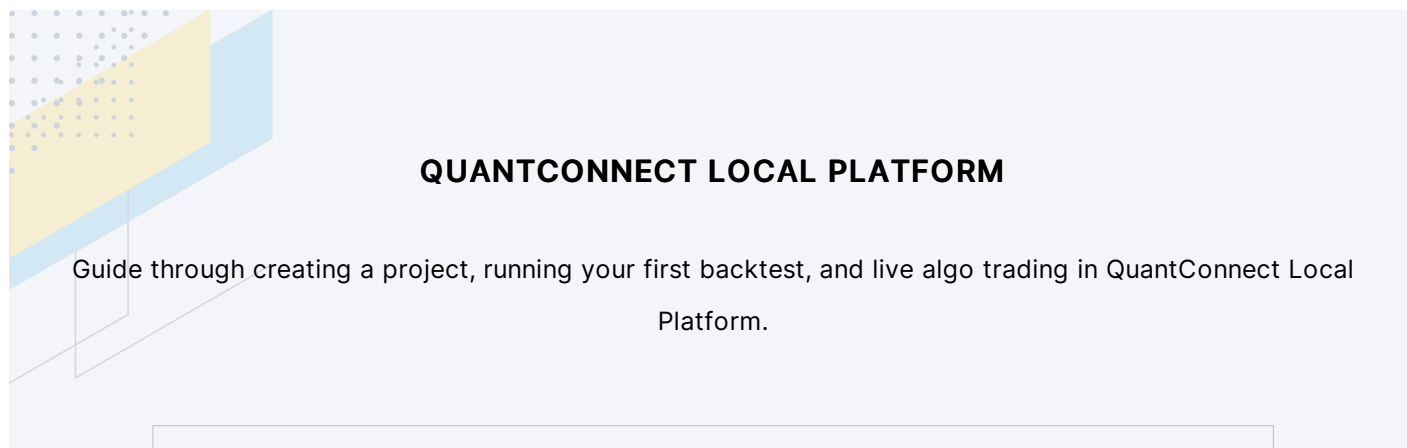
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1 Key Concepts

Key Concepts > Getting Started

1.1 Getting Started



The Local Platform enables you to seamlessly develop quant strategies on-premise and in QuantConnect Cloud, getting the best of both environments. With Local Platform, you can harness your local version control, autocomplete, and coding tools with the full power of a scalable cloud at your finger tips. We intend to keep complete feature parity with our cloud environment, allowing you to harness cloud or local datasets to power on-premise quantitative research.

We encourage a hybrid “cloud + local” workflow, so you can use right tool for each stage of your development process. With the Local Platform, you can create, debug, and run projects on premise while using your own on-site tools. With the Cloud Platform you can deploy backtests at scale and harness our massive data library at low cost.

Follow these steps to create a new trading algorithm and backtest it in QuantConnect Cloud:

1. [Install Local Platform](#) .

2. Open Visual Studio Code.

3. In the Initialization Checklist panel, click **Login to QuantConnect** .

4. In the Visual Studio Code window, click **Open** .

5. On the Code Extension Login page, click **Grant Access** .

6. In VS Code, in the Select Workspace panel, click **Pull Organization Workspace** .

7. In the Pull QuantConnect Organization Workspace window, click the cloud workspace ([organization](#)) that you want to pull.

8. In the Pull QuantConnect Organization Workspace window, create a directory to serve as the organization workspace and then click **Select** .

If you are running Docker on Windows using the legacy Hyper-V backend instead of the new WSL 2 backend, you need to enable file sharing for your temporary directories and for your organization workspace. To do so, open your Docker settings, go to **Resources > File Sharing** and add **C: / Users / / AppData / Local / Temp** and your organization workspace path to the list. Click **Apply & Restart** after making the required changes.

9. In the Open Project panel, click **Create Project** .

10. Enter the project name and then press **Enter** .

Congratulations! You just created your first local project.

11. In the top-right corner of VS Code, click **Build** and then click **Backtest** .

The backtest results page displays your algorithm's performance over the backtest period.

1.2 Features

Introduction

There are 5 tiers of organizations and each tier has its own set of features on Local Platform. To accommodate the growth of your trading skills and business, you can [adjust the tier of your organization](#) at any time.

Hybrid Workflow

The Local Platform lets you run backtests, deploy research notebooks, and deploy live algorithms on your local machine and in QuantConnect Cloud. This gives you the best of both worlds where you can utilize your local hardware or our scalable cloud compute systems.

Version Control

The Local Platform syncs your local and cloud project files. If you pull your cloud projects to your local machine, you can use your own version control systems to track project changes.

Self-Sovereign Security

The Local Platform offers you the ability to take ownership of your project security. On the Institution tier, you can create local projects without pushing them to QuantConnect Cloud.

Custom LEAN Images

The latest master branch on the LEAN GitHub repository is the default engine branch that runs backtests, research notebooks, and live trading algorithms. The latest version of LEAN is generally the safest as it includes all bug fixes. Trading Firm or Institution tier users concerned for stability can elect to use older or custom versions of LEAN.

On-Premise Compute

The Local Platform enables you to run backtests, deploy research notebooks, and deploy live algorithms on your local hardware.

Offline Access

Trading Firm and Institution organizations can run backtests and research notebooks on Local Platform without an internet connection for up to 24 hours.

Coding

The following table shows the coding features of each organization tier:

Feature	Organization Tier			
	Quant Researcher	Team	Trading Firm	Institution
Offline Access Edit projects without an internet connection for up to 24 hours			✓	✓
Anonymous Projects Create and edit local projects without syncing to QuantConnect Cloud				✓

Backtesting

The following table shows the backtesting features of each organization tier:

Feature	Organization Tier			
	Quant Researcher	Team	Trading Firm	Institution
Concurrent Cloud Backtests Quota The maximum number of backtests your organization can run at the same time in QuantConnect Cloud	2	10	Unlimited	Unlimited
Offline Access Backtest algorithms without an internet connection for up to 24 hours			✓	✓

Optimization

The following table shows the parameter optimization features of each organization tier:

Feature	Organization Tier				
	Quant Researcher	Team	Trading Firm	Institution	
Concurrent Cloud Optimizations Quota The maximum number of optimizations your organization can run at the same time in QuantConnect Cloud	2	10	Unlimited	Unlimited	
Offline Access Optimize parameters without an internet connection for up to 24 hours			✓	✓	

Live Trading

The following table shows the parameter optimization features of each organization tier:

Feature	Organization Tier				
	Quant Researcher	Team	Trading Firm	Institution	
Concurrent Cloud Algorithms Quota The maximum number of live algorithms your organization can run at the same time in QuantConnect Cloud	2	10	Unlimited	Unlimited	

1.3 Deployment Targets

Introduction





The deployment target setting allows you to switch modes from local to cloud platforms, choosing where you run your algorithm. Local Platform targets are denoted with blue icons and Cloud Platform targets are denoted with gold icons.

Local

The Local Platform deployment target is your local machine. Follow these steps to set the deployment target of a project to Local Platform:

1. [Create a project](#) or [open an existing one](#) .
2. In the Project panel, click the **Deployment Target** field and then click **Local Platform** from the drop-down menu.

After you set the deployment target to Local Platform, the following icons are blue:

Icon	Name
	Build
	Backtest
	Debug
	Backtest Results






Cloud

The Cloud Platform deployment target is a collection of servers that the QuantConnect team manages. It's the same deployment target you use if you create projects, spin up research nodes, and deploy algorithms on the QuantConnect website. For more information about QuantConnect Cloud, including our infrastructure and usage quotas, see [Cloud Platform](#) .

Follow these steps to set the deployment target Cloud Platform:

1. [Create a project](#) or [open an existing one](#) .
2. In the Project panel, click the **Deployment Target** field and then click **Cloud** from the drop-down menu.

After you set the deployment target to Cloud Platform, the following icons are gold:

Icon	Name
	Build
	Backtest
	Optimize
	Live Trading
	Backtest Results

2 Installation

It takes 10 minutes to install Local Platform and about 1 hour to download the latest LEAN image. The Local Platform requires Docker. When you launch Local Platform, we scan for Docker and prompt you to install it to continue. We run all algorithms in a Docker container to avoid installing any dependencies on your computer.

Install on Windows

Install on macOS

Install on Linux

See Also

[LEAN CLI](#)

2.1 Install on Windows

Introduction

It takes 10 minutes to install Local Platform and about 1 hour to download the latest LEAN image. The Local Platform requires Docker. When you launch Local Platform, we scan for Docker and prompt you to install it to continue. We run all algorithms in a Docker container to avoid installing any dependencies on your computer.

Requirements

Windows systems must meet the following minimum requirements to run Local Platform:

- A 64-bit processor
- 4 GB RAM or more
- Windows 10, version 1903 or higher (released May 2019)
- Hardware virtualization enabled in the BIOS
- 20 GB hard drive or more

You need an internet connection for things like downloading updates, collaborating with team members, and syncing your projects with QuantConnect Cloud. Trading Firm and Institution organizations can run local backtests and research notebooks without an internet connection for up to 24 hours.

Install Docker

If you run the LEAN engine locally with QuantConnect Local Platform, LEAN executes in a Docker container. These Docker containers contain a minimal Linux-based operating system, the LEAN engine, and all the packages available to you on QuantConnect.com. It is therefore required to install Docker if you plan on using QuantConnect Local Platform to run the LEAN engine locally.

Follow these steps to install Docker:

1. Follow the [Install Docker Desktop on Windows](#) tutorial in the Docker documentation.

As you install docker, enable WSL 2 features.

2. Restart your computer.
3. If Docker prompts you that the WSL 2 installation is incomplete, follow the instructions in the dialog shown by Docker to finish the WSL 2 installation.
4. Open PowerShell with administrator privileges and run:

```
$ wsl --update
```

By default, Docker doesn't automatically start when your computer starts. So, when you run the LEAN engine with QuantConnect Local Platform for the first time after starting your computer, you must manually start Docker. To

automatically start Docker, open the Docker Desktop application, click **Settings > General** , and then enable the **Start Docker Desktop when you log in** check box.

Install Local Platform

Follow these steps to install Local Platform:

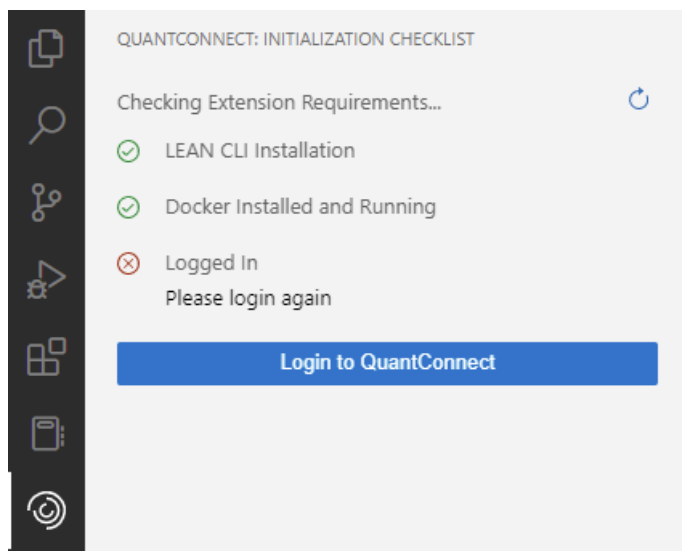
1. [Install Docker](#) .
2. Open a terminal and download the latest LEAN image.

```
$ docker pull quantconnect/lean
```

It takes about an hour to download the image. While it's downloading, continue to the next step. When you use Local Platform, it automatically pulls the latest LEAN image if your current version is more than a week old.

3. [Install Visual Studio Code](#) .
4. [Install Local Platform](#) .

If you open Visual Studio Code and it asks you to log in to QuantConnect, you successfully installed Local Platform.



Next Steps

Log in to your [account](#) and then set up your first [organization workspace](#) .

Troubleshooting

The following sections explain how to solve some issues you may encounter while installing Local Platform.

Docker with WSL 2 Features

When you download Docker Desktop, you need to select the **Enable WSL 2 Features** check box. After you install Docker and restart your computer, if Docker prompts you that the WSL 2 installation is incomplete, follow the instructions in the dialog shown by Docker to finish the WSL 2 installation.

Docker Not Found

If you have Docker installed but the Local Platform can't detect it, update your [Executable Path: Docker](#) setting to be the path to your Docker executable.

LEAN CLI Account Synchronization

Local Platform and the LEAN CLI share your login credentials. If you log in to your account on Local Platform or the LEAN CLI, you log into that account for both Local Platform and the LEAN CLI.

Further Support

For further support with installing Local Platform, [contact us](#) .

2.2 Install on macOS

Introduction

It takes 10 minutes to install Local Platform and about 1 hour to download the latest LEAN image. The Local Platform requires Docker. When you launch Local Platform, we scan for Docker and prompt you to install it to continue. We run all algorithms in a Docker container to avoid installing any dependencies on your computer.

Requirements

Mac systems must meet the following minimum requirements to run Local Platform:

- Mac hardware from 2010 or newer with an Intel processor
- macOS 10.14 or newer (Mojave, Catalina, or Big Sur)
- 4 GB RAM or more
- 20 GB hard drive or more

You need an internet connection for things like downloading updates, collaborating with team members, and syncing your projects with QuantConnect Cloud. Trading Firm and Institution organizations can run local backtests and research notebooks without an internet connection for up to 24 hours.

Install Docker

If you run the LEAN engine locally with QuantConnect Local Platform, LEAN executes in a Docker container. These Docker containers contain a minimal Linux-based operating system, the LEAN engine, and all the packages available to you on QuantConnect.com. It is therefore required to install Docker if you plan on using QuantConnect Local Platform to run the LEAN engine locally.

To install Docker, see [Install Docker Desktop on Mac](#) in the Docker documentation.

Install Local Platform

Follow these steps to install Local Platform:

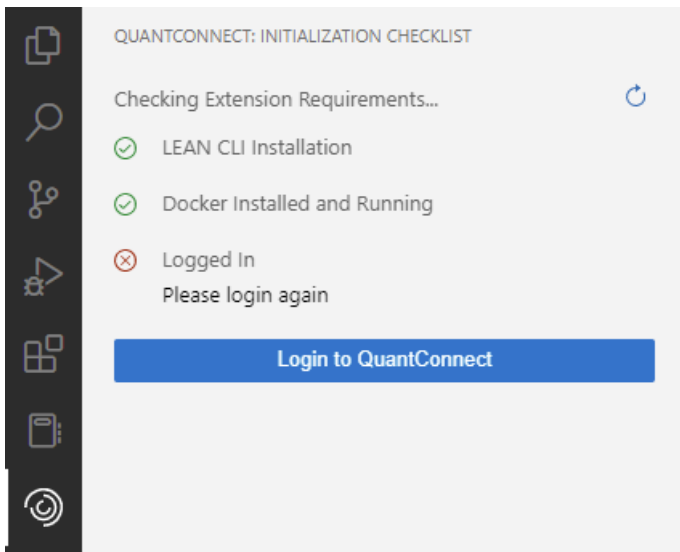
1. [Install Docker](#) .
2. Open a terminal and download the latest LEAN image.

```
$ docker pull quantconnect/lean
```

It takes about an hour to download the image. While it's downloading, continue to the next step. When you use Local Platform, it automatically pulls the latest LEAN image if your current version is more than a week old.

3. [Install Visual Studio Code](#) .
4. [Install Local Platform](#) .

If you open Visual Studio Code and it asks you to log in to QuantConnect, you successfully installed Local Platform.



Next Steps

Log in to your [account](#) and then set up your first [organization workspace](#) .

Troubleshooting

The following sections explain how to solve some issues you may encounter while installing Local Platform.

Docker Not Found

If you have Docker installed but the Local Platform can't detect it, update your [Executable Path: Docker setting](#) to be the path to your Docker executable.

LEAN CLI Account Synchronization

Local Platform and the LEAN CLI share your login credentials. If you log in to your account on Local Platform or the LEAN CLI, you log into that account for both Local Platform and the LEAN CLI.

Further Support

For further support with installing Local Platform, [contact us](#) .

2.3 Install on Linux

Introduction

It takes 10 minutes to install Local Platform and about 1 hour to download the latest LEAN image. The Local Platform requires Docker. When you launch Local Platform, we scan for Docker and prompt you to install it to continue. We run all algorithms in a Docker container to avoid installing any dependencies on your computer.

Requirements

Linux systems must meet the following minimum requirements to run Local Platform:

- 4 GB RAM or more
- 20 GB hard drive or more

You need an internet connection for things like downloading updates, collaborating with team members, and syncing your projects with QuantConnect Cloud. Trading Firm and Institution organizations can run local backtests and research notebooks without an internet connection for up to 24 hours.

Install Docker

If you run the LEAN engine locally with QuantConnect Local Platform, LEAN executes in a Docker container. These Docker containers contain a minimal Linux-based operating system, the LEAN engine, and all the packages available to you on QuantConnect.com. It is therefore required to install Docker if you plan on using QuantConnect Local Platform to run the LEAN engine locally.

To install, see [Install Docker Desktop on Linux](#) in the Docker documentation.

Install Local Platform

Follow these steps to install Local Platform:

1. [Install Docker](#) .
2. Open a terminal and download the latest LEAN image.

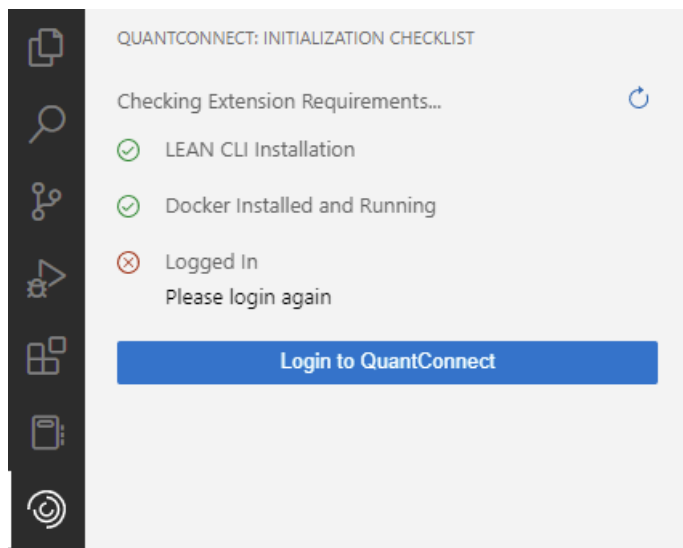
```
$ docker pull quantconnect/lean
```

It takes about an hour to download the image. While it's downloading, continue to the next step. When you use Local Platform, it automatically pulls the latest LEAN image if your current version is more than a week old.

3. [Install Visual Studio Code](#) .
4. [Install Local Platform](#) .

If you open Visual Studio Code and it asks you to log in to QuantConnect, you successfully installed Local

Platform.



Next Steps

Log in to your [account](#) and then set up your first [organization workspace](#) .

Troubleshooting

The following sections explain how to solve some issues you may encounter while installing Local Platform.

Docker Not Found

If you have Docker installed but the Local Platform can't detect it, update your [Executable Path: Docker setting](#) to be the path to your Docker executable.

LEAN CLI Account Synchronization

Local Platform and the LEAN CLI share your login credentials. If you log in to your account on Local Platform or the LEAN CLI, you log into that account for both Local Platform and the LEAN CLI.

Further Support

For further support with installing Local Platform, [contact us](#) .

3 Development Environment

Development Environment > Authentication


3.1 Authentication

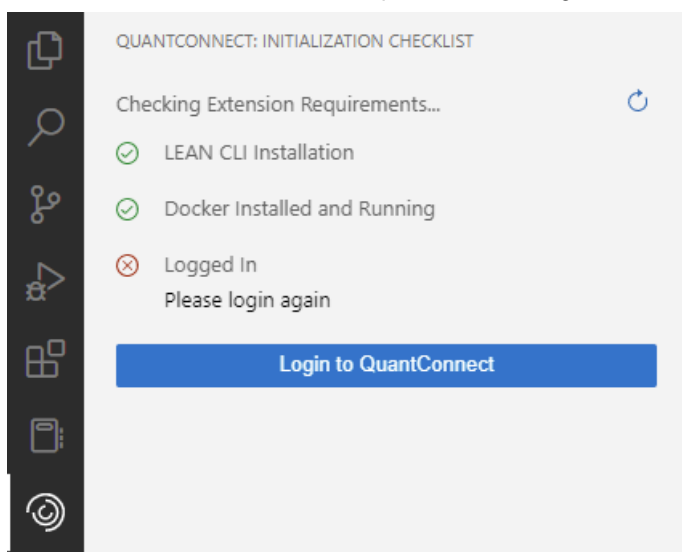
Introduction

To use Local Platform, you need to grant it access to your QuantConnect account.

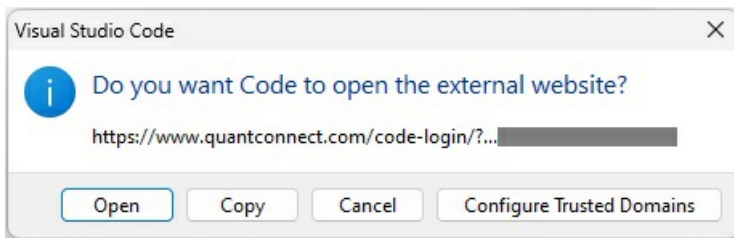
Log In

Follow these steps to log in to Local Platform:

1. Log in to the Algorithm Lab.
 2. Start Docker Desktop.
 3. Open Visual Studio Code.
 4. In the left navigation menu, click the  **QuantConnect** icon.
 5. The Project panel checks the following requirements on your local machine. If any of the checks fail, see the related documentation.
- [LEAN CLI is installed](#) .
 - [Docker is installed and running](#) .
 - You are logged in to QuantConnect.
- In the Initialization Checklist panel, click **Login to QuantConnect** .



- In the Visual Studio Code window, click **Open** .

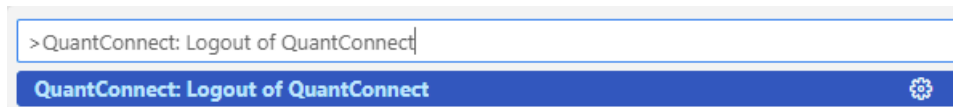


- On the Code Extension Login page, click **Grant Access** .

Log Out

Follow these steps to log out of Local Platform:

1. Open Visual Studio Code.
2. Press **F1** .
3. Enter **QuantConnect: Logout of QuantConnect** and then press **Enter** .



Troubleshooting

Local Platform and the LEAN CLI share your login credentials. If you log in to your account on Local Platform or the LEAN CLI, you log into that account for both Local Platform and the LEAN CLI.

3.2 Organization Workspaces

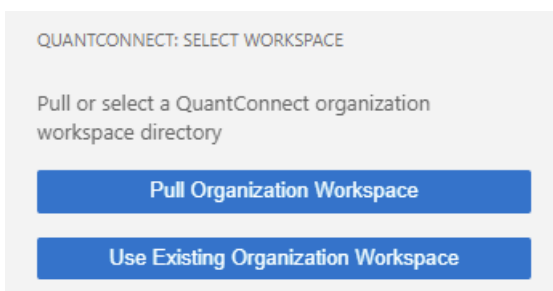
Introduction

An organization workspace is a directory that contains a **data** directory, a Lean configuration file, and all your project files from one of your organizations. You can have a separate organization workspace directory for each organization you're a member of on QuantConnect. These directories need a **data** directory and a Lean configuration file in order to run the LEAN engine on your local machine.

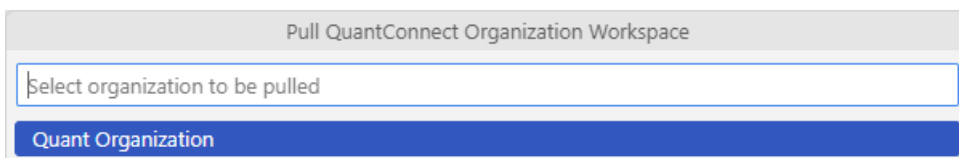
Pull Cloud Organization Workspaces

Follow these steps to pull one of your [cloud organization workspaces](#) and set it as your local organization workspace:

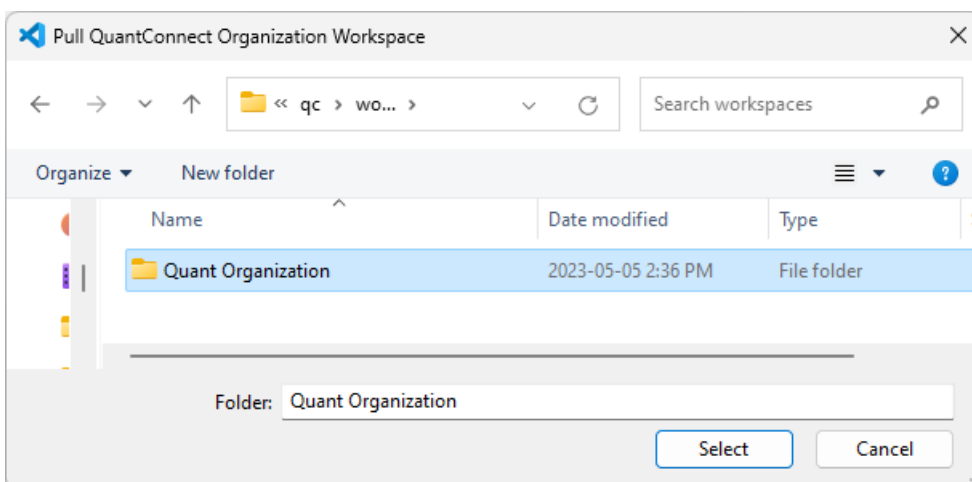
1. [Log in to Local Platform](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Select Workspace panel, click **Pull Organization Workspace** .



4. In the Pull QuantConnect Organization Workspace window, click the cloud workspace ([organization](#)) that you want to pull.



5. In the Pull QuantConnect Organization Workspace window, create a directory to serve as the organization workspace and then click **Select** .




It takes a few minutes to create a new organization workspace directory and populate it with the [the initial file](#)

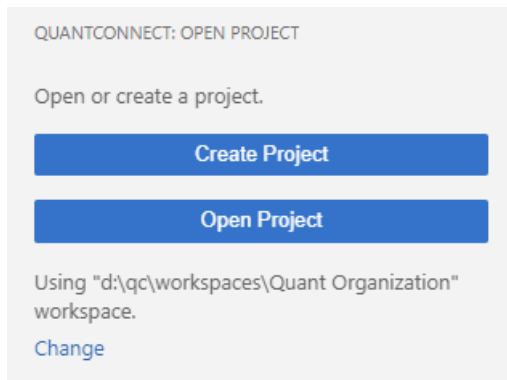
[structure](#) . After the organization workspace is populated with the initial file structure, it pulls [your cloud project files](#) .

If you are running Docker on Windows using the legacy Hyper-V backend instead of the new WSL 2 backend, you need to enable file sharing for your temporary directories and for your organization workspace. To do so, open your Docker settings, go to **Resources > File Sharing** and add **C: / Users / <username> / AppData / Local / Temp** and your organization workspace path to the list. Click **Apply & Restart** after making the required changes.

Change Organization Workspaces

Follow these steps to change organization workspaces:

1. [Log in to Local Platform](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. If a project is already open, [close it](#) .
4. In the Open Project panel, click **Change** .



5. [Pull a cloud workspace](#) .

Directory Structure

The organization workspace directory initially has following structure:

```
.
├── data/
│   ├── alternative/
│   ├── crypto/
│   ├── equity/
│   ├── ...
│   ├── market-hours/
│   ├── option/
│   ├── symbol-properties/
│   └── readme.md
└── lean.json
```

These files contain the following content:

File/Directory	Description
data /	This directory contains the local data that LEAN uses to run locally. This directory is comes with sample data from the QuantConnect/Lean repository . As you download additional data from the dataset market, it's stored in this directory. Each organization workspace has its own data directory because each organization has its own data licenses.
lean.json	This file contains the Lean configuration that is used when running the LEAN engine locally. The configuration is stored as JSON with support for both single-line and multiline comments. The Lean configuration file is based on the Launcher/config.json file from the Lean repository. When you create a new organization workspace, the latest version of this file is downloaded and stored on your local drive.

As you add [projects](#) , the project files are added to your organization workspace directory. If you create and use [shared libraries](#) in your projects, the library files are added to a **Library** directory in your organization workspace.

3.3 Configuration

Introduction

The Local Platform is configured by extension settings in VS Code and by the LEAN Engine settings. Change these settings at any time to suit your needs.

Extension Settings

Follow these steps to view the settings of the Local Platform extension:

1. Open VS Code.
2. In the top navigation bar, click **File > Preferences > Settings** .
3. On the Settings page, in the left navigation menu, click **Extensions > QuantConnect** .

The following table describes each setting:

Name	Description
Executable Path: Docker	A path to the Docker installation you want to use.
Executable Path: Lean	A path to the LEAN CLI executable you want to use.
Lean: Init	A path to the current organization workspace.
Sync: Local And Cloud Projects	Yes to synchronize cloud and local projects. Otherwise, No . No is only available for Institution organizations.
User: Preferred Language	The programming language to use when creating new projects. Py for Python or C# for C#.

LEAN Settings

The Lean configuration contains settings for locally running the LEAN engine. This configuration is created in the **lean.json** file when you pull or create an [organization workspace](#) . The configuration is stored as JSON, with support for both single-line and multiline comments.

The Lean configuration file is based on the [Launcher / config.json](#) file from the Lean GitHub repository. When you pull or create an organization workspace, the latest version of this file is downloaded and stored in your organization workspace. Before the file is stored, some properties are automatically removed because the Local Platform automatically sets them.

The Local Platform can update most of the values of the **lean.json** file. The following table shows the configuration settings that you need to manually adjust in the **lean.json** file if you want to change their values:

Name	Description	Default
show-missing-data-logs	Log missing data files. This is useful for debugging.	true
maximum-warmup-history-days-lock-provider	The maximum number of days of data the history provider will provide during warm-up in live trading. The history provider expects older data to be on disk.	5
maximum-data-points-per-chart-series	The maximum number of data points you can add to a chart series in backtests.	4000

3.4 Autocomplete

Introduction

Intellisense is a GUI tool in your code files that shows auto-completion options and presents the members that are accessible from the current object. The tool works by searching for the statement that you're typing, given the context. You can use Intellisense to auto-complete method names and object attributes. When you use it, a pop-up displays in the IDE with the following information:

- Member type
- Member description
- The parameters that the method accepts (if the member is a method)

Use Intellisense to speed up your algorithm development. It works with all of the default class members in Lean, but it doesn't currently support class names or user-defined objects.

Install Python Stubs

Before you use autocomplete, you may need to run the following command in a terminal to get the latest Python stubs:

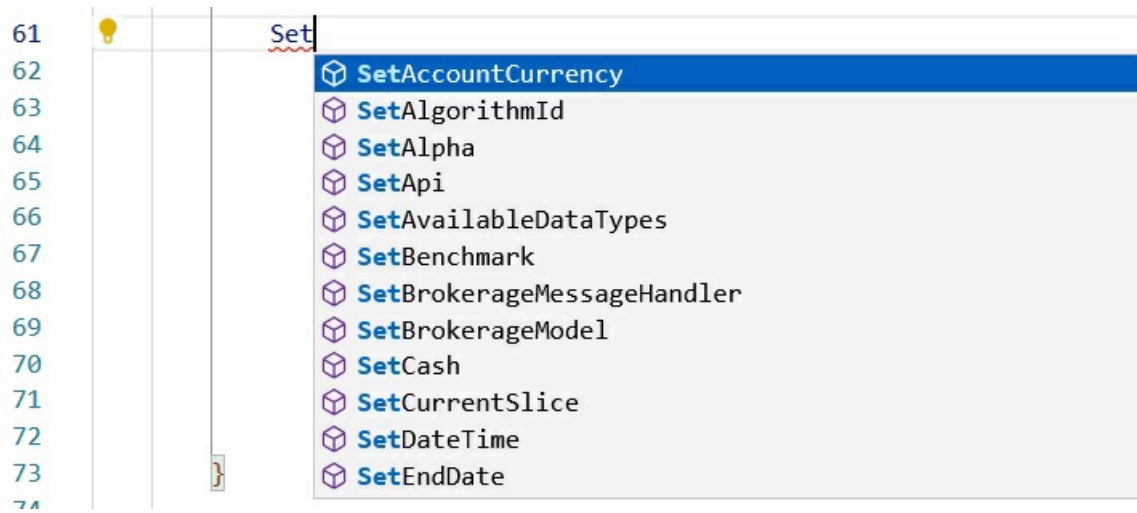
```
$ pip install --upgrade quantconnect-stubs
```

Use Autocomplete

Follow these steps to use autocomplete:

1. [Open a project](#) .
2. Type the first few characters of a variable, function, class, or class member that you want to autocomplete (for example, `Set` or `SimpleMovingAverage.Upda`).
3. Press **CTRL+Space** .

If there are class members that match the characters you provided, a list of class members displays.



4. Select the class member that you want to autocomplete.

The rest of the class member name is automatically written in the code file.

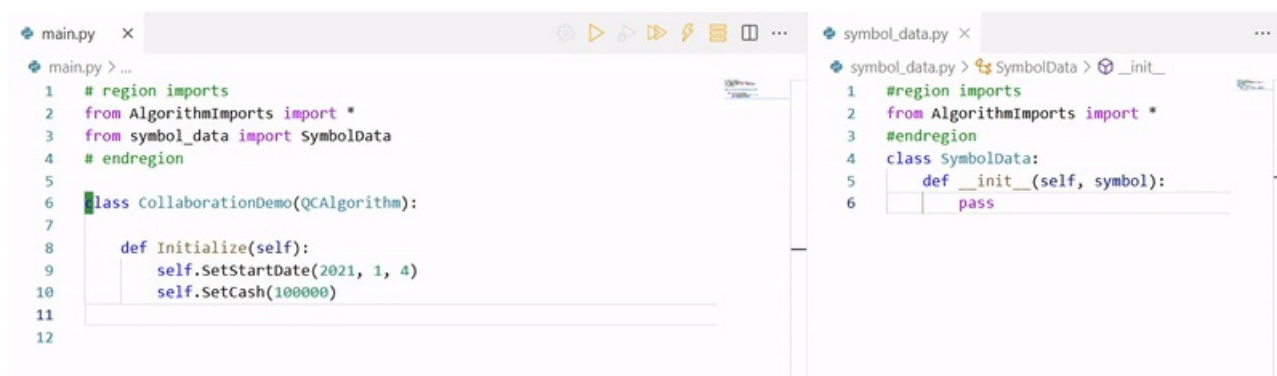
3.5 Collaboration

Introduction

Project collaboration is a real-time coding experience with other members of your team. Collaborating can speed up your development time. By working with other members in an organization, members within the organization can specialize in different parts of the project. On Local Platform, you can collaborate with your remote team members.

Video Demo


When there are multiple people working on the same project, the cursor of each member is visible in the IDE and all file changes occur in real-time for everyone. The following video demonstrates the collaboration feature:



Add Team Members

You need to own the project to add team members to it.

Follow these steps to add team members to a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Collaborate section of the Project panel, click **Add Collaborator** .
4. Click the **Select User...** field and then click a member from the drop-down menu.
5. If you want to give the member live control of the project, select the **Live Control** check box.
6. Click **Add User** .

The member you add receives an email with a link to the project.

If the project has a [shared library](#) , the collaborator can access the project, but not the library. To grant them access to the library, add them as a collaborator to the library project.

Collaborator Quotas

The number of members you can add to a project depends on your [organization's tier](#) . The following table shows the number of collaborators each tier can have per project:

Tier	Collaborators per Project
Free	Unsupported
Quant Researcher	Unsupported
Team	10
Trading Firm	Unlimited
Institution	Unlimited

Toggle Live Control

You need to have added a member to the project to toggle their live control of the project.

Follow these steps to enable and disable live control for a team member:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Collaborate section of the Project panel, click the profile image of the team member.
4. Click the **Live Control** check box.
5. Click **Save Changes** .

Remove Team Members

Follow these steps to remove a team member from a project you own:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Collaborate section of the Project panel, click the profile image of the team member.
4. Click **Remove User** .

To remove yourself as a collaborator from a project you don't own, [delete the project](#) .


3.6 LEAN Engine Versions

Introduction

The latest master branch on the LEAN GitHub repository is the default engine branch that runs backtests, research notebooks, and live trading algorithms. The latest version of LEAN is generally the safest as it includes all bug fixes. Trading Firm or Institution tier users concerned for stability can elect to use older or custom versions of LEAN.

Change Branches

Follow these steps to change the LEAN engine branch that runs your backtests and live trading algorithms:

1. [Open a project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, click the **LEAN Engine** field and then click a branch from the drop-down menu.
4. (Optional) Click **About Version** to display the branch description.
5. If you want to always use the master branch, select the **Always use Master Branch** check box.
6. Click **Select** .

Changing the Lean engine branch only affects the current project. If you [create a new project](#) , the new project will use the master branch by default.

Custom Branches

To create and use custom versions of LEAN, see [Custom Docker Images](#) .

3.7 Synchronization

Introduction

Unless you are working on an anonymous project, Local Platform automatically syncs your local project files with QuantConnect Cloud. Every time you save a file, Local Platform saves the changes in your local project and in the cloud version of the project.

Anonymous Projects

Anonymous projects are projects that are on your local machine and not synced with QuantConnect Cloud. These types of projects are only available for members in Institution organizations. Anonymous projects provide organizations the opportunity to take ownership of their projects security.

Supported File Types

When you save your local projects and push them to QuantConnect Cloud, it only pushes the Python, C#, and notebook files in your project. Projects can contain many other file types like **json** , **csv** , and **html** , but Local Platform only pushes your **py** , **cs** , and **ipynb** files.


3.8 Resource Management

Introduction

The Resources panel shows all of the backtest, research, and live trading nodes that Local Platform can use or is already using.


▼ RESOURCES

⚙ BACKTEST NODES

Node	In Use By	
backtest 1	Local	 Derek Melchin
backtest 2	Local	-
backtest 3	Local	-
backtest 4	Local	-
backtest 5	Local	-
backtest 6	Local	-
backtest 7	Local	-
backtest 8	Local	-
backtest 9	Local	-
backtest 10	Local	-

The **In Use By** column displays the owner and name of the project using the node.

View Resources

To view the Resources panel, [open a project](#) and then, in the left navigation menu, click the  **QuantConnect** icon. The Resources panel is at the bottom of the Project panel.

Stop Nodes

To stop a node, open the Resources panel and then click the **stop** button next to the node.

3.9 Packages and Libraries


Introduction

Libraries (or packages) are third-party software that you can use in your projects. You can use many of the available open-source libraries to complement the classes and methods that you create. Libraries reduce your development time because it's faster to use a pre-built, open-source library than to write the functionality. Libraries can be used in backtesting, research, and live trading. The environments support various libraries for machine learning, plotting, and data processing. As members often request new libraries, we frequently add new libraries to the underlying docker image that runs the Lean engine.

This feature is primarily for Python algorithms as not all Python libraries are compatible with each other. We've bundled together different sets of libraries into distinct environments. To use the libraries of an environment, set the environment in your project and add the relevant `using` statement of a library at the top of your file.

Set Environment

Follow these steps to set the library environment:

1. [Open a project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, click the **Python Foundation** field and then select an environment from the drop-down menu.

Default Environment

The default environment supports the following libraries:

#	Name	Version
	Accord	3.6.0
	Accord.Fuzzy	3.6.0
	Accord.MachineLearning	3.6.0
	Accord.Math	3.6.0
	Accord.Statistics	3.6.0
	CloneExtensions	1.3.0
	Common.Logging	3.4.1
	Common.Logging.Core	3.4.1
	CsvHelper	19.0.0
	Deedle	2.1.0
	DotNetZip	1.16.0
	DynamicInterop	0.9.1
	fasterflect	3.0.0
	FSharp.Core	4.5.2
	MathNet.Numerics	4.15.0
	McMaster.Extensions.CommandLineUtils	2.6.0
	Microsoft.IO.RecyclableMemoryStream	2.3.1
	Microsoft.NET.Test.Sdk	16.9.4
	Microsoft.TestPlatform.ObjectModel	16.9.4
	Moq	4.16.1
	NetMQ	4.0.1.6
	Newtonsoft.Json	13.0.2
	NodaTime	3.0.5
	NUnit	3.13.3
	NUnit3TestAdapter	4.2.1
	protobuf-net	3.1.33
	QLNet	1.12.0
	QuantConnect.pythonnet	2.0.18
	RestSharp	106.12.0
	SharpZipLib	1.3.3
	System.ComponentModel.Composition	6.0.0

Pomegranate Environment

The Pomegranate environment supports the following libraries:

Request New Libraries

To request a new library, [contact us](#) . We will add the library to the queue for review and deployment. Since the libraries run on our servers, we need to ensure they are secure and won't cause harm. The process of adding new libraries takes 2-4 weeks to complete. View the list of libraries currently under review on the [Issues list of the Lean GitHub repository](#) .

3.10 Working With VS Code

Introduction

The VS Code Integrated Development Environment (IDE) lets you work on research notebooks and develop algorithms for backtesting and live trading. When you [open a project](#), the IDE automatically displays. You can access your trading algorithms from anywhere in the world with just an internet connection and a browser.

Supported Languages

The Lean engine supports C# and Python. Python is less verbose, has more third-party libraries, and is more popular among the QuantConnect community than C#. C# is faster than Python and it's easier to contribute to Lean if you have features written in C# modules. Python is also the native language for the research notebooks, so it's easier to use in the Research Environment.

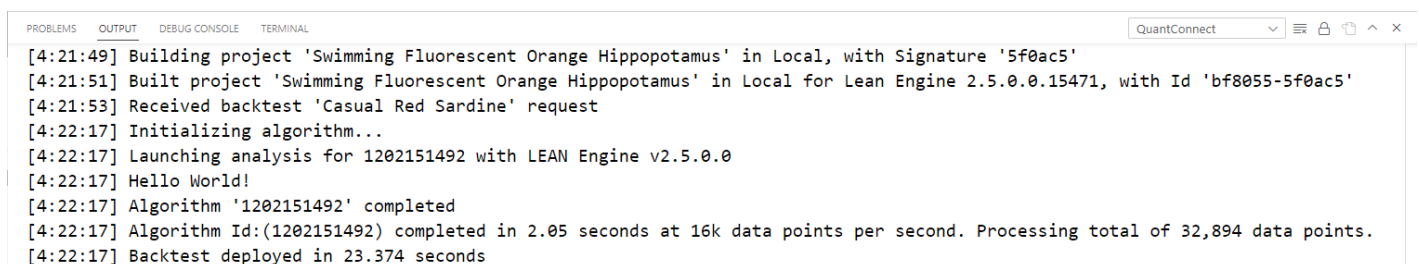
The programming language that you have set on your account determines how autocomplete and IntelliSense are verified and determines the types of files that are included in your new projects. If you have Python set as your programming language, new projects will have .py files. If you have C# set as your programming language, new projects will have .cs files.

Change Languages

To change the default programming language for your new projects, adjust the **User: Preferred Language extension setting**.

Terminal

The terminal panel at the bottom of the IDE shows API messages, errors, and the logs from your algorithms.



```

[4:21:49] Building project 'Swimming Fluorescent Orange Hippopotamus' in Local, with Signature '5f0ac5'
[4:21:51] Built project 'Swimming Fluorescent Orange Hippopotamus' in Local for Lean Engine 2.5.0.0.15471, with Id 'bf8055-5f0ac5'
[4:21:53] Received backtest 'Casual Red Sardine' request
[4:22:17] Initializing algorithm...
[4:22:17] Launching analysis for 1202151492 with LEAN Engine v2.5.0.0
[4:22:17] Hello World!
[4:22:17] Algorithm '1202151492' completed
[4:22:17] Algorithm Id:(1202151492) completed in 2.05 seconds at 16k data points per second. Processing total of 32,894 data points.
[4:22:17] Backtest deployed in 23.374 seconds
  
```

The **Problems** tab of the panel highlights the coding errors in your algorithms.



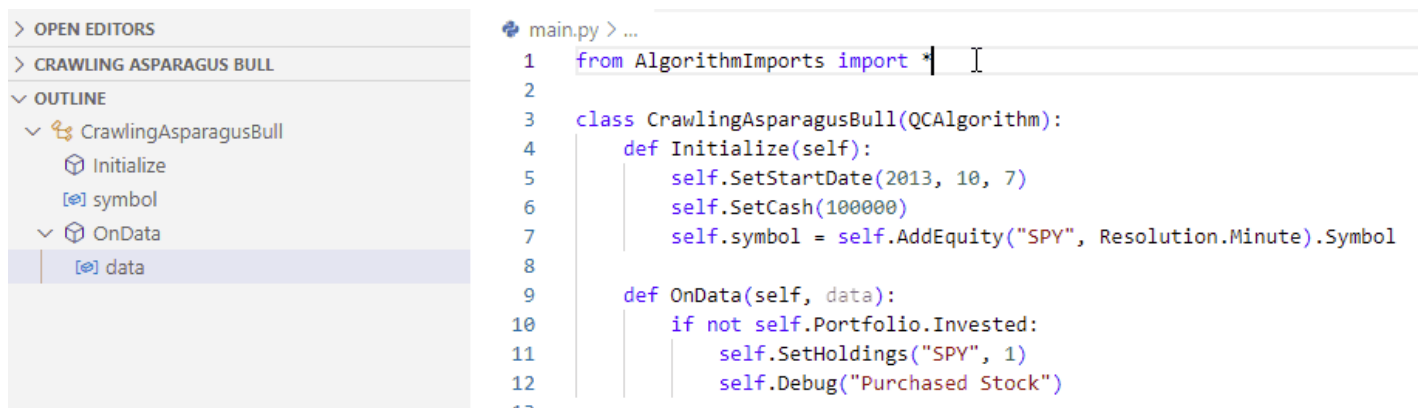
```

Main.cs
  Syntax error, "(" expected [Upgraded Tan Frog] csharp(CS1003) [Ln 59, Col 16]
  The name 'no' does not exist in the current context [Upgraded Tan Frog] csharp(CS0103) [Ln 59, Col 16]
  ) expected [Upgraded Tan Frog] csharp(CS1026) [Ln 59, Col 18]
  Invalid expression term ']' [Upgraded Tan Frog] csharp(CS1525) [Ln 59, Col 18]
  ; expected [Upgraded Tan Frog] csharp(CS1002) [Ln 59, Col 18]
  
```

Navigate the File Outline

The **Outline** section in the Explorer panel is an easy way to navigate your files. The section shows the name of classes, members, and functions defined throughout the file. Click one of the names to jump your cursor to the

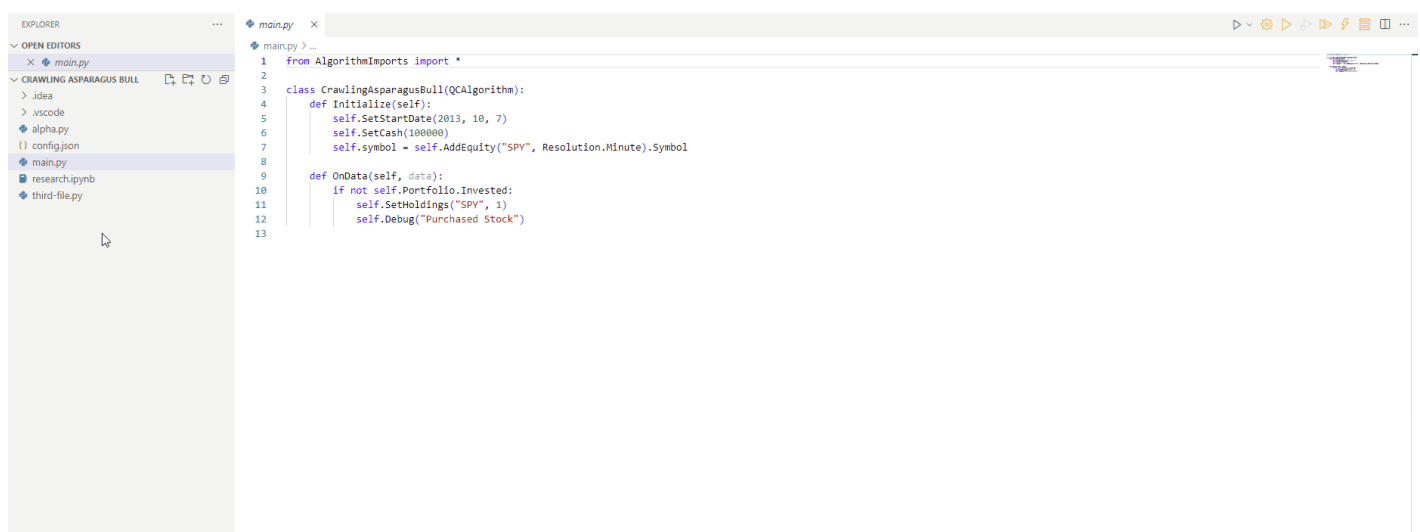
respective definition in the file. To view the **Outline** , [open a project](#) and then, in the left navigation menu, click the  **Explorer** icon.



Split the Editor

The editor can split horizontally and vertically to display multiple files at once. Follow these steps to split the editor:

1. [Open a project](#) .
2. In the left navigation bar, click the  **Explorer** icon.
3. In the **QC (Workspace)** section, drag and drop the files you want to open.



Show and Hide Code Blocks

The editor can hide and show code blocks to make navigating files easier. To hide and show code blocks, [open a project](#) and then click the **arrow** icon next to a line number.

```
1  class MyAlgorithm(QCAAlgorithm):
2      def Initialize(self):
3          self.SetStartDate(2021, 1, 1)
4          self.SetCash(100000)
5          self.AddEquity("SPY")
6
```

Keyboard Shortcuts

Keyboard shortcuts are combinations of keys that you can issue to manipulate the IDE. They can speed up your

workflow because they remove the need for you to reach for your mouse.

Follow these steps to view the keyboard shortcuts of your account:

1. [Open a project](#) .
2. Press **F1** .
3. Enter "Preferences: Open Keyboard Shortcuts".
4. Click **Preferences: Open Keyboard Shortcuts** .

To set a key binding for a command, click the **pencil** icon in the left column of the keyboard shortcuts table, enter the key combination, and then press **Enter** .

4 Projects

Projects > Getting Started

4.1 Getting Started

Introduction


Projects contain files to run backtests, launch research notebooks, perform parameter optimizations, and deploy live trading strategies. You need to create projects in order to create strategies and share your work with other members. Projects enable you to generate institutional-grade reports on the performance of your backtests. You can create your projects from scratch or you can utilize pre-built libraries and third-party packages to expedite your development process.

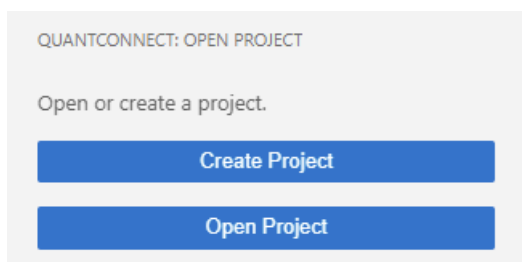
View All Projects

To view all your projects, open the [organization workspace](#) directory on your local machine.

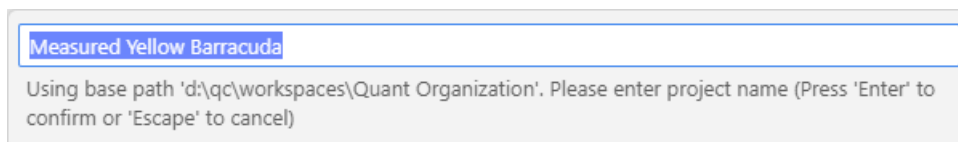
Create Projects

Follow these steps to create a project on Local Platform:

1. [Log in to Local Platform](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. If a project is already open, [close it](#) .
4. In the Open Project panel, click **Create Project** .




5. Enter the project name and then press **Enter** .



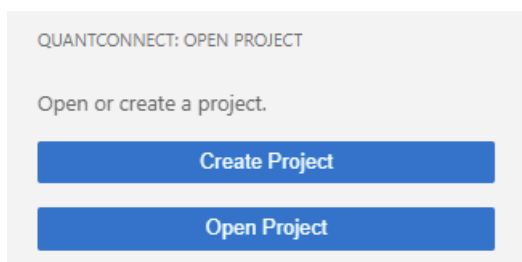
The new project directory is added to your [organization workspace](#) directory and the project opens.

Open Projects

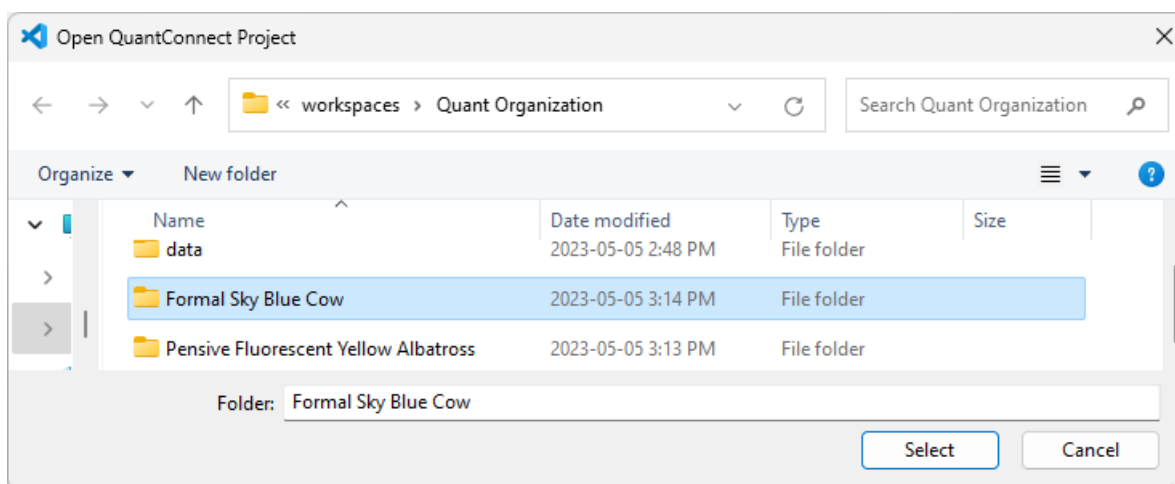
Follow these steps to open a project on Local Platform:

1. [Log in to Local Platform](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.

3. If a project is already open, [close it](#) .
4. In the Project panel, click **Open Project** .




5. In the Open QuantConnect Project window, click a project in your organization workspace and then click **Select** .



6. If an **I Trust the Authors** button appears, click it.

Close Projects

Follow these steps to close a project:


1. In the left navigation menu, click the  **QuantConnect** icon.
2. In the Project panel, click **Close** .



Clone Projects

Clone a project to create a new copy of the project and save it within the same organization. When you clone a project, the project files are duplicated but the backtest results are not retained. Cloning enables you to test small changes in your projects before merging the changes back into the original project.

Follow these steps to clone a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, click **Clone** .

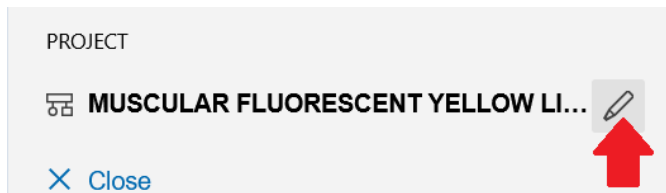


The cloned version of the project opens in a new VS Code window.

Rename Projects

Follow these steps to rename a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, hover over the project name and then click the **pencil** icon that appears.



4. In the **Name** field, enter the new project name and then click **Save Changes** .

The project name must only contain - , _ , letters, numbers, and spaces. The project name can't start with a space or be any of the following reserved names: CON, PRN, AUX, NUL, COM1, COM2, COM3, COM4, COM5, COM6, COM7, COM8, COM9, LPT1, LPT2, LPT3, LPT4, LPT5, LPT6, LPT7, LPT8, or LPT9.

Create Project Directories

Set the name of a project to **directoryName / projectName** to create a project directory.

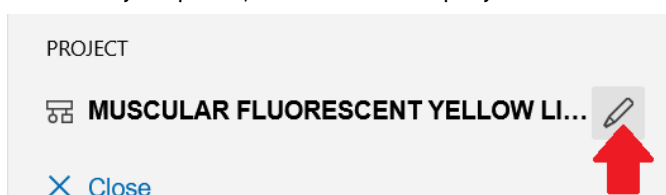
Set Descriptions

You can give a project a description to provide a high-level overview of the project and its functionality.

Descriptions make it easier to return to old projects and understand what is going on at a high level without having to look at the code. The project description is also displayed at the top of backtest reports, which you can create after your backtest completes.

Follow these steps to set the project description:

1. [Open the project](#) .
2. In the Project panel, hover over the project name and then click the **pencil** icon that appears.




3. In the **Description** field, enter the new project description and then click **Save Changes** .

Edit Parameters

Algorithm parameters are hard-coded values for variables in your project that are set outside of the code files. Add parameters to your projects to remove hard-coded values from your code files and to perform parameter optimizations. You can add parameters, set default parameter values, and remove parameters from your projects.

Add Parameters

Follow these steps to add an algorithm parameter to a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, click **Add New Parameter** .
4. Enter the parameter name.


The parameter name must be unique in the project.

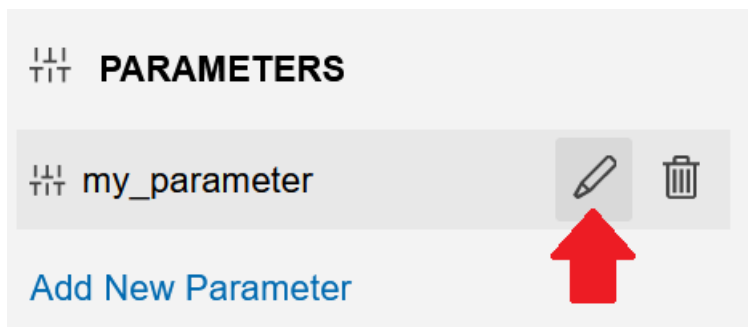
5. Enter the default value.
6. Click **Create Parameter** .

To get the parameter values into your algorithm, see [Get Parameters](#) .

Set Default Parameter Values

Follow these steps to set the default value of an algorithm parameter in a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, hover over the algorithm parameter and then click the **pencil** icon that appears.




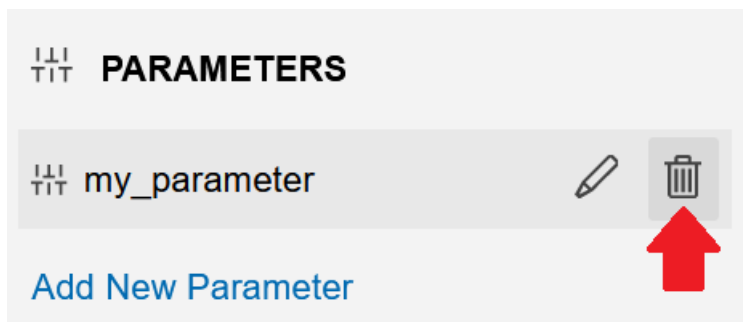
4. Enter a default value for the parameter and then click **Save** .

The Project panel displays the default parameter value next to the parameter name.

Delete Parameters

Follow these steps to delete an algorithm parameter in a project:


1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, hover over the algorithm parameter and then click the **trash can** icon that appears.



4. Remove the `GetParameter` calls that were associated with the parameter from your code files.

Delete Projects

Follow these steps to delete a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, click **Delete** .



4.2 Files

Introduction

The files in your projects enable you to implement trading algorithms, perform research, and store important information. Python projects start with a **main.py** and a **research.ipynb** file. C# projects start with a **Main.cs** and a **Research.ipynb** file. Use the **main.py** or **Main.cs** file to implement trading algorithms and use the **ipynb** file to access the Research Environment.

Supported File Types

Local Platform supports **.py** , **.cs** , and **.ipynb** files in your projects.

Code Files

The **.py** / **.cs** files are code files. These are the files where you implement your trading algorithm. When you backtest the project or deploy the project to live trading, the LEAN engine executes the algorithm you define in these code files.

Notebook Files

The **.ipynb** files are notebook files. These are the files you open when you want to access the [Research Environment](#) to perform quantitative research. When you save notebook files, it saves the input cells but not the output cells.


Configuration Files

Projects also contain configuration files, which are **.json** files, but they aren't displayed in the Explorer panel. These files contain information like the project description, parameters, and shared libraries. For more information about project configuration files, see [Configuration](#) .

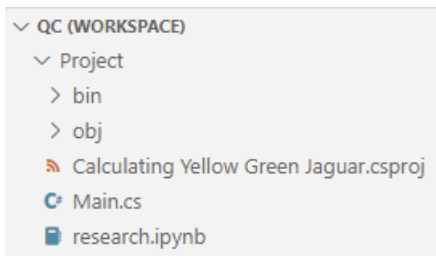
Result Files

When you run a backtest, optimize some parameters, or deploy a strategy to live trading on your local machine, the results are saved as physical files in the project directory. Local Platform doesn't push these result files to QuantConnect Cloud.

View Files



To view the files in a project, [open the project](#) and then, in the left navigation bar, click the  **Explorer** icon.

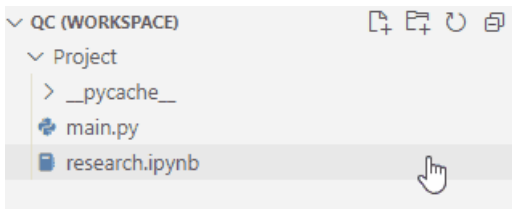
The **QC (Workspace)** section of the Explorer panel shows the files in the project.



Add Files

Follow these steps to add a file to a project:



1. [Open the project](#) .
2. In the left navigation menu, click the  **Explorer** icon.
3. In the Explorer panel, expand the **QC (Workspace)** section.
4. Click the  **New File** icon.
5. Enter a file name and extension.
6. Press **Enter** .

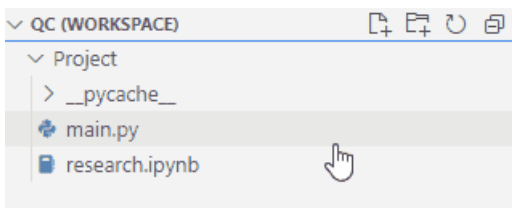


Add Directories

You can organize the code and notebook files in your project into directories to make navigating them easier. For example, if you have multiple [Alpha models](#) in your strategy, you can create an **alphas** directory in your project to hold a file for each Alpha model.


Follow these steps to add a directory to a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **Explorer** icon.
3. In the Explorer panel, expand the **QC (Workspace)** section.
4. Click the  **New Directory** icon.
5. Enter a directory name and then press **Enter** .



Open Files

Follow these steps to open a file in a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **Explorer** icon.

3. In the Explorer panel, click the file you want to open.


Close Files

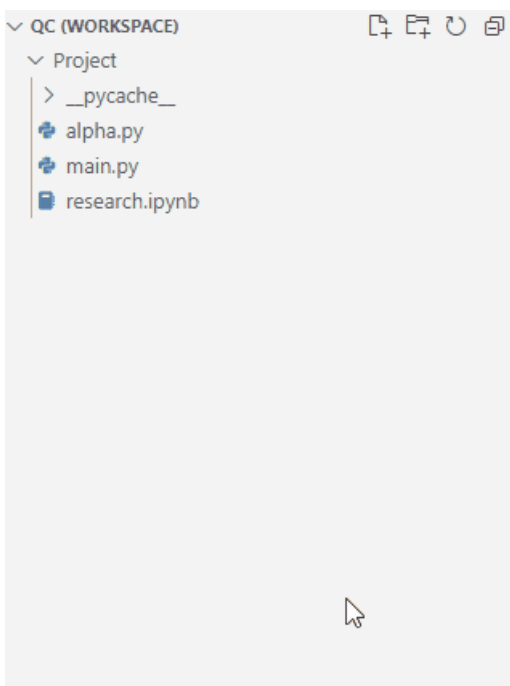
To close a file, at the top of VS Code, click the **x** button on the file tab you want to close.

To close all of the files in a project, at the top of VS Code, right-click one of the file tabs and then click **Close All** .

Rename Files and Directories


Follow these steps to rename a file or directory in a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **Explorer** icon.
3. In the Explorer panel, right-click the file or directory you want to rename and then click **Rename** .
4. Enter the new name and then press **Enter** .



Delete Files and Directories

Follow these steps to delete a file or directory in a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **Explorer** icon.
3. In the Explorer panel, right-click the file or directory you want to delete and then click **Delete Permanently** .
4. Click **Delete** .


4.3 Shared Libraries

Introduction

Project libraries are QuantConnect projects you can merge into your project to avoid duplicating code files. If you have tools that you use across several projects, create a library.

Create Libraries

Follow these steps to create a library:


1. [Open a project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, click **Add Library** .
4. Click **Create New** .
5. In the **Input Library Name** field, enter a name for the library.
6. Click **Create Library** .


The template library files are added to a new project in the **Library** directory in your [organization workspace](#) .

7. In the left navigation menu, click the  **Explorer** icon.
8. In Explorer panel, open the **Library.cs** file and implement your library.

Add Libraries

Follow these steps to add a library to your project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, click **Add Library** .
4. Click the **Choose a library...** field and then click a library from the drop-down menu.
5. Click **Add Library** (e.g. **Calculators**).

The library files are added to your project. To view the files, in the right navigation menu, click the  **Explorer** icon.

6. Import the library into your project to use the library.

```
using Calculators;
namespace QuantConnect.Algorithm.CSharp
{
    public class AddLibraryAlgorithm : QCAAlgorithm
    {
        private TaxesCalculator _taxesCalculator = new();
    }
}
```


C#

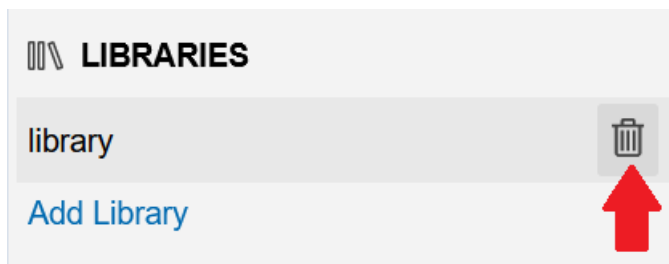
Rename Libraries

To rename a library, [open the library project file](#) and then [rename the project](#) .

Remove Libraries

Follow these steps to remove a library from your project:

1. [Open the project](#) that contains the library you want to remove.
2. In the left navigation menu, click the  **QuantConnect** icon.
3. In the Project panel, hover over the library name and then click the **trash can** icon that appears.



The library files are removed from your project.

Delete Libraries

To delete a library, [delete the library project file](#) .

4.4 Version Control

Introduction

Version control is the practice of tracking and managing changes to code files. By using version control, you can save an extra back up of your project files in the cloud, keep a history of all code changes, and easily revert changes to your projects.

Add Projects to Version Control

Follow these steps to add projects to your version control systems:

1. In your version control system, [create a new repository](#) for the project.
2. Open a terminal in your [organization workspace](#) and then [clone](#) the new repository to a temporary directory.

```
$ git clone <repoUrl> temp
```

3. Move the **.git** directory from the temporary directory to the project directory.

```
$ mv temp/.git <projectDirectory>/.
```

4. Delete the temporary directory.

```
$ rm -r temp
```


5 Data Management

Data Management > Key Concepts

5.1 Key Concepts

Introduction

Download Formats

You can download individual data files or bulk download entire universes of assets. For more information about each of these data formats, see [Downloading Data](#) .

Physical Location

When you download data from the Dataset Market, it's stored in the **data** directory in your [organization workspace](#) .

Data Formats

LEAN strives to use an open, human-readable format, so all data is stored in flat files (formatted as CSV or JSON). The data is compressed on disk using zip.

Live Trading

You need live data feeds to inject data into your algorithm so that you can make real-time trading decisions and so that the values of the securities in your portfolio are updated. The data feeds you have available to you depend on where you deploy the algorithm. When you [request historical data](#) in local algorithms, the historical data comes from your data feed vendor. Familiarize yourself with the quotas and limits of your data feed to avoid errors.

Local Deployments

When you deploy local algorithms, you can use any of the following data feeds:

- IQFeed

To view the asset classes that our IQFeed integration supports, see [Supported Assets](#) .

- Polygon

To view the asset classes that our Polygon integration supports, see [Supported Assets](#) .

- [A brokerage data feed](#)

Cloud Deployments

When you deploy algorithms to QuantConnect Cloud, you can use any of [the data feeds we support in the cloud](#) , including SIP, CTA, CME, and select brokerages. Your live algorithms run on our co-located servers that have 10 GB

transfer speeds and low latency.

5.2 Getting Started

Introduction

5.3 Licensing

Introduction

You can license datasets in the Dataset Market to use in the cloud for live trading and research or to download locally. We have contracts with the data providers in the Dataset Market that define the costs of each license. All of the datasets can be used in QuantConnect Cloud. There are some free licenses, but we can't freely redistribute most of the datasets.

Free

We strive to make as many datasets available for free to use in the cloud and to download locally as possible. We also list proprietary datasets that are available for license using our cloud or download paid licensing. Most price data is free for use in the cloud.

Cloud

If you have a Cloud license for a dataset, you can access the dataset for research, backtests, and live trading by using the [Cloud deployment target](#) . The cost of the license is added to your monthly bill, which you can pay with your organization's credit card or [QuantConnect Credit](#) balance. With one Cloud license for a dataset, all of the members in your organization can access the dataset in the cloud.

Add Cloud Access

You need an organization above the [Free tier](#) to purchase cloud access to datasets.

Follow these steps to add cloud access to datasets:

1. Log in to the Algorithm Lab.
2. Open the [listing page of a dataset](#) for which you want to gain cloud access.
3. On the dataset listing page, click the **Pricing** tab.
4. Under the **Cloud Access** section, click **SUBSCRIBE** .
5. On the Pricing page, click **Proceed to Checkout** .

Remove Cloud Access

Follow these steps to remove cloud access to datasets:

1. Open the [organization homepage](#) .
2. Click **Edit Plan** .
3. On the pricing page, click the **Customize Plan > Build Your Own Pack > Data** tab.
4. In the **Datasets Subscriptions** section, next to the name of the dataset you want to remove, click **Added** .
5. Click **Proceed to Checkout** .

Download

If you have a Download license, you can store datasets on your local machine. This download is for the licensed organization's internal LEAN use only and cannot be redistributed or converted in any format. If you study the data and produce some charts, you may share images of the charts online if the original data can't be reconstructed from the image. The cost of the license depends on the dataset and it's calculated on a per-file or per-day basis. For more information about downloading datasets, see [Downloading Data](#) . If you bulk download datasets, you can download historical data packages or daily updates. In most cases, you need both.

5.4 Downloading Data

To locally run the LEAN engine, you need local data. We recommend you source local data from our [Dataset Market](#) , so you can use the same data that is available to your algorithm when you run it in the cloud. There are two methods of downloading data. You can download smaller discrete datasets at a low cost or download complete collections in bulk to avoid selection bias.

Download By Ticker

Low cost option for individual tickers

Download in Bulk

All tickers to avoid selection bias

See Also

[Datasets](#)

6 Backtesting


Backtesting > Getting Started

6.1 Getting Started

Introduction


Backtesting is the process of simulating a trading algorithm on historical data. By running a backtest, you can measure how the algorithm would have performed in the past. Although past performance doesn't guarantee future results, an algorithm that has a proven track record can provide investors with more confidence when deploying to live trading than an algorithm that hasn't performed favorably in the past. If you run local backtests, you can leverage your local data and hardware.

Run Backtests

Local Platform provides multiple [deployment targets](#) to enable you to run backtests on-premise and in the cloud. To run a backtest, [open a project](#) and then click the  **Backtest** icon. If the project successfully builds, "Received backtest backtestName request" displays. If the backtest successfully launches, the IDE displays the [backtest results page](#) in a new tab. If the backtest fails to launch due to coding errors, the new tab displays the error. As the backtest executes, you can close Local Platform and Docker Desktop without interfering with the backtest. Just don't quit Docker Desktop.

View All Backtests

Follow these steps to view all of the backtests of a project:

1. [Open the project](#) that contains the backtests you want to view.
2. In the top-right corner of the IDE, click the  **Backtest Results** icon.

A table containing all of the backtest results for the project is displayed. If there is a **play** icon to the left of the name, it's a [backtest result](#). If there is a **fast-forward** icon next to the name, it's an [optimization result](#).

Results							Show	All
Name			Platform	PSR ↓	Sharp...	Trades	Requested	
▶ Calculated Brown Bear	✓	Completed	Cloud	11.568	0.292	3	2023-04-24 21:41:47	
▶ Logical Brown Bee	✓	Completed	Local	0.078	0.2212	0	2023-04-24 20:37:15	
▶ Creative Orange Seahorse	✓	Completed	Local	0.078	0.2212	0	2023-04-24 20:39:42	
▶ Logical Orange Monkey	✓	Completed	Local	0.078	0.2212	0	2023-04-24 20:39:50	
▶ Alert Fluorescent Orange Chinchilla	✓	Completed	Local	0.078	0.2212	0	2023-04-24 21:20:58	

1 to 5 of 5

Page 1 of 1

☐ Hide Runtime Errors

3. (Optional) In the top-right corner, select the **Show** field and then select one of the options from the drop-

down menu to filter the table by backtest or optimization results.

4. (Optional) In the bottom-right corner, click the **Hide Error** check box to remove backtest and optimization results from the table that had a runtime error.
5. (Optional) Use the pagination tools at the bottom to change the page.
6. (Optional) Click a column name to sort the table by that column.
7. Click a row in the table to open the results page of that backtest or optimization.

Rename Backtests

We give an arbitrary name (for example, "Smooth Apricot Chicken") to your backtest result files, but you can follow these steps to rename them:

1. Open the [backtest history](#) of the project.
2. Hover over the backtest you want to rename and then click the **pencil** icon that appears.

▷	Swimming Light Brown Salmon				21.489	0.581	1	2022-03-08 22:00:20
---	-----------------------------	---	---	---	--------	-------	---	---------------------

3. Enter the new backtest name and then click **OK**.

6.2 Deployment

Introduction

Deploy a backtest to simulate the historical performance of your trading algorithm. Since the same Lean engine is used to run backtests and live trading algorithms, it's easy to transition from backtesting to live trading once you are satisfied with the historical performance of your algorithm. If you find any issues with Lean or our historical data, we'll resolve the issue.



Nodes

If you deploy a local backtest, the algorithm runs on your hardware.



Concurrent Backtesting

Concurrent backtesting is the process of running multiple backtests at the same time. Concurrent backtesting speeds up your strategy development because you don't have to wait while a single backtest finishes executing. You can run as many concurrent backtests as your CPU and RAM will handle.

Build Projects

If the compiler finds errors during the build process, the IDE highlights the lines of code that caused the errors in red. Your projects will automatically build after each keystroke. To manually build a project, [open the project](#) and then click the  /  **Build** icon.

Run Backtests

Local Platform provides multiple [deployment targets](#) to enable you to run backtests on-premise and in the cloud. To run a backtest, [open a project](#) and then click the  /  **Backtest** icon. If the project successfully builds, "Received backtest backtestName request" displays. If the backtest successfully launches, the IDE displays the [backtest results page](#) in a new tab. If the backtest fails to launch due to coding errors, the new tab displays the error. As the backtest executes, you can close Local Platform and Docker Desktop without interfering with the backtest. Just don't quit Docker Desktop.

Stop Backtests

To stop a running backtest, [stop the backtesting node](#) .

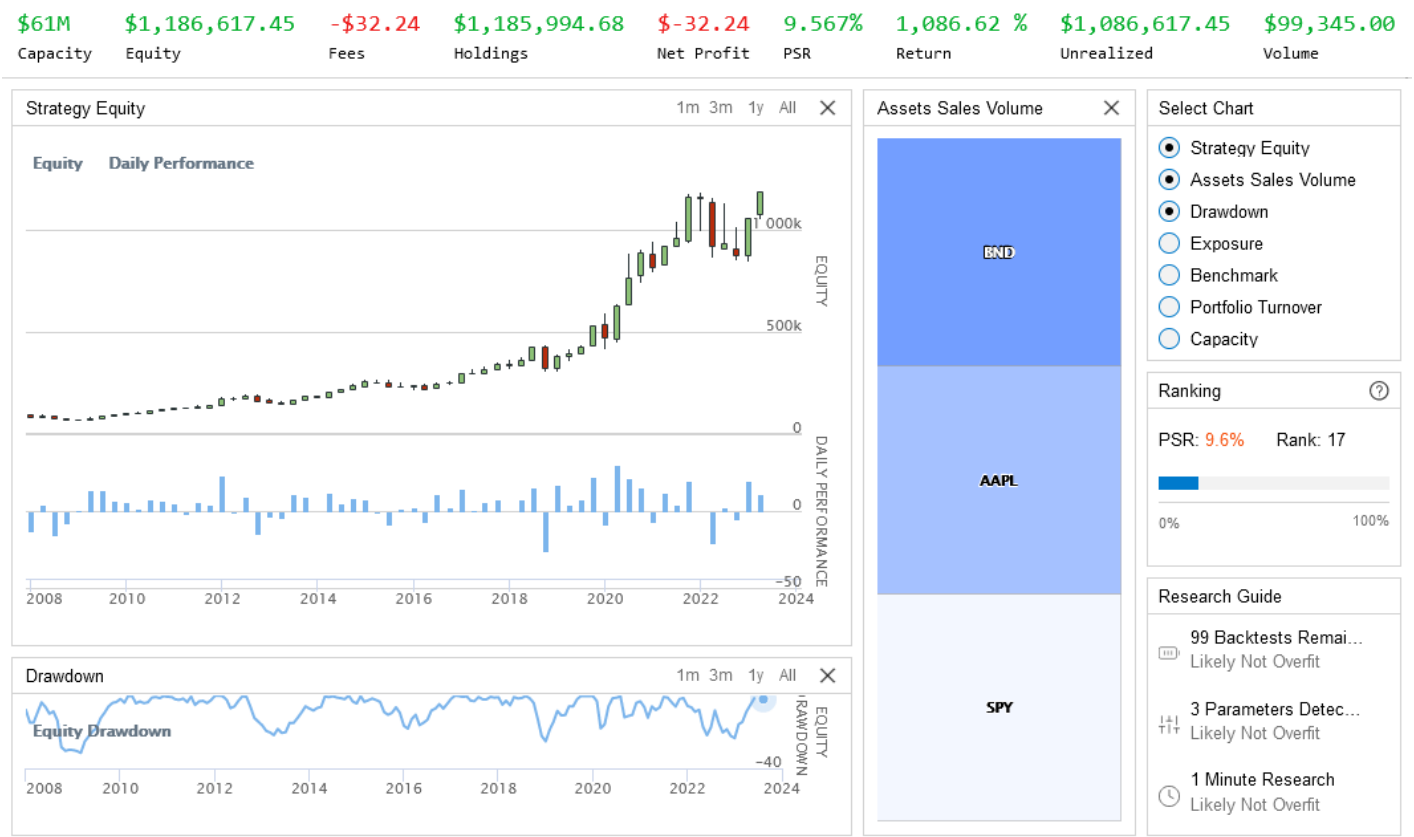
6.3 Results

Introduction

The backtest results page and the **backtests** directory in your project show your algorithm's performance. Review the results to see how your algorithm has performed during the backtest and to investigate how you might improve your algorithm before live trading.

View Backtest Results

The backtest results page automatically displays when you [deploy a backtest](#) . The backtest results page presents the equity curve, trades, logs, performance statistics, and much more information.



The content in the backtest results page updates as your backtest executes. You can close Local Platform without interrupting the backtest as long as you keep Docker running. If you close the page, to open it again, [view all of the project's backtests](#) . Only you can view the results of local backtests. If you run the backtest in QuantConnect Cloud, only you can view its results unless you explicitly make the backtest public. If you delete a backtest result or you are inactive for 12 months, we archive your backtest results.

The information on the backtest results page is also available in its raw form. To access it, see [View Local Result Files](#) or [Download Cloud Result Files](#) .

Runtime Statistics

The banner at the top of the backtest results page displays the runtime statistics of your backtest.

\$61M	\$1,186,617.45	-\$32.24	\$1,185,994.68	\$-32.24	9.567%	1,086.62 %	\$1,086,617.45	\$99,345.00
Capacity	Equity	Fees	Holdings	Net Profit	PSR	Return	Unrealized	Volume

The following table describes the default runtime statistics:

Statistic	Description
Capacity	The maximum amount of money an algorithm can trade before its performance degrades from market impact.
Equity	The total portfolio value if all of the holdings were sold at current market rates.
Fees	The total quantity of fees paid for all the transactions.
Holdings	The absolute sum of the items in the portfolio.
Net Profit	The dollar-value return across the entire trading period.
PSR	The probability that the estimated Sharpe ratio of an algorithm is greater than a benchmark (1).
Return	The rate of return across the entire trading period.
Unrealized	The amount of profit a portfolio would capture if it liquidated all open positions and paid the fees for transacting and crossing the spread.
Volume	The total value of assets traded for all of an algorithm's transactions.

To view the runtime statistics data in JSON format, see [View Local Result Files](#) or [Download Cloud Result Files](#) .

To add a custom runtime statistic, see [Runtime Statistics](#) .

Built-in Charts

The backtest results page displays a set of built-in charts to help you analyze the performance of your algorithm.

The following table describes the charts displayed on the page:

Chart	Description
Strategy Equity	Time series of equity and daily performance
Capacity	Time series of strategy capacity snapshots
Drawdown	Time series of equity peak-to-trough value
Benchmark	Time series of the benchmark closing price (SPY, by default)
Exposure	Time series of long and short exposure ratios
Assets Sales Volume	Chart showing the proportion of total volume for each traded security
Portfolio Turnover	Time series of the portfolio turnover rate

To view the chart data in JSON format, see [View Local Result Files](#) or [Download Cloud Result Files](#) .

Custom Charts

The results page shows the custom charts that you create.

Supported Chart Types

We support the following types of charts:

If you use `SeriesType.Candle` and plot enough values, the plot displays candlesticks. However, the `Plot` method only accepts one numerical value per time step, so you can't plot candles that represent the open, high, low, and close values of each bar in your algorithm. The charting software automatically groups the data points you provide to create the candlesticks, so you can't control the period of time that each candlestick represents.

To create other types of charts, save the plot data in the ObjectStore and then load it into the Research Environment. In the Research Environment, you can [create other types of charts with third-party charting packages](#) .

Supported Markers

When you create scatter plots, you can set a marker symbol. We support the following marker symbols:

Chart Quotas

Custom charts are limited to 4,000 data points. Intensive charting requires hundreds of megabytes of data, which is too much to stream online or display in a web browser. If you exceed the quota, the Cloud Terminal displays the following message:

```
Exceeded maximum points per chart, data skipped
```

You can create up to 10 custom chart series per algorithm. If you exceed the quota, your algorithm stops executing and the Cloud Terminal displays the following message:

Exceeded maximum series count: Each backtest can have up to 10 series in total.

Demonstration

For more information about creating custom charts, see [Charting](#) .

Adjust Charts

You can manipulate the charts displayed on the backtest results page.

Toggle Charts

To display and hide a chart on the backtest results page, in the **Select Chart** section, click the name of a chart.

Toggle Chart Series

To display and hide a series on a chart on the backtest results page, click the name of a series at the top of a chart.



Adjust the Display Period

To zoom in and out of a time series chart on the backtest results page, perform either of the following actions:

- Click the **1m** , **3m** , **1y** , or **All** period in the top-right corner of the chart.
- Click a point on the chart and drag your mouse horizontally to highlight a specific period of time in the chart.



If you adjust the zoom on a chart, it affects all of the charts.

After you zoom in on a chart, slide the horizontal bar at the bottom of the chart to adjust the time frame that displays.



Resize Charts

To resize a chart on the backtest results page, hover over the bottom-right corner of the chart. When the resize cursor appears, hold the left mouse button and then drag to the desired size.

Move Charts

To move a chart on the backtest results page, click, hold, and drag the chart title.

Refresh Charts

Refreshing the charts on the backtest results page resets the zoom level on all the charts. If you refresh the charts while your algorithm is executing, only the data that was seen by the Lean engine after you refreshed the charts is displayed. To refresh the charts, in the **Select Chart** section, click the **reset** icon.

Storage

You can store data in the [ObjectStore](#) during a backtest and then load the data into the Research Environment for further analysis. The [Research Environment](#) is a Jupyter notebook-based environment with access to many [third-party libraries](#), so you can [produce plots](#) and display DataFrames in many more ways than the backtest results page supports.

Key Statistics

The backtest results page displays many key statistics to help you analyze the performance of your algorithm.

Overall Statistics

The **Overview** tab on the backtest results page displays tables for Overall Statistics and Rolling Statistics. The Overall Statistics table displays the following statistics:

- [Probabilistic Sharpe Ratio \(PSR\)](#)
- Total Trades
- [Average Loss](#)
- [Drawdown](#)
- [Net Profit](#)
- [Loss Rate](#)
- [Profit-Loss Ratio](#)
- [Beta](#)
- [Annual Variance](#)
- [Tracking Error](#)
- [Total Fees](#)
- [Lowest Capacity Asset](#)
- [Sharpe Ratio](#)
- [Average Win](#)
- [Compounding Annual Return](#)
- [Expectancy](#)
- [Win Rate](#)
- [Alpha](#)
- [Annual Standard Deviation](#)
- [Information Ratio](#)
- [Treynor Ratio](#)
- [Estimated Strategy Capacity](#)

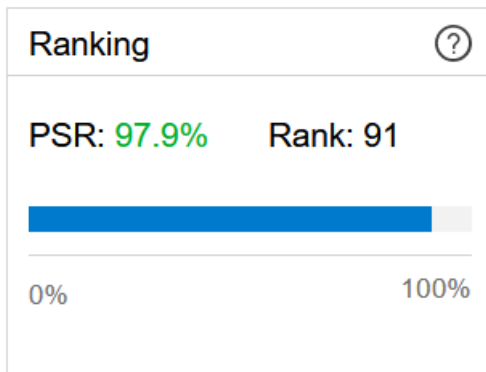
Some of the preceding statistics are sampled throughout the backtest to produce a time series of rolling statistics.

The time series are displayed in the Rolling Statistics table.

To view the data from the Overall Statistics and Rolling Statistics tables in JSON format, see [View Local Result Files](#) or [Download Cloud Result Files](#).

Ranking

If you backtest in QuantConnect Cloud, the backtest results page displays a Ranking section that shows the PSR and rank (percentile) of your algorithm.



The rank of your algorithm is calculated as

$$CDF\left(\frac{PSR_{algo} - \overline{PSR}}{\sigma_{PSR}}\right)$$

where CDF

is the normal cumulative distribution function and $\overline{PSR_{algo}}$

is your algorithm's PSR. \overline{PSR}

and σ_{PSR}

are the mean PSR and the standard deviation of PSR values, respectively, calculated from all of the backtests that have the following attributes:

- Occurred in the last 30 days
- Had more than 90 tradable days
- Had a PSR value in the interval (0, 100)

Research Guide

For information about the Research Guide, see [Research Guide](#).

Reports

The [backtest report](#) provides a summary of your algorithm's performance. Follow these steps to generate one:

1. Open the backtest results page for which you want to generate a report.
2. Click the **Report** tab.
3. If the project doesn't have a description, enter one and then click **Save**.

4. Click **Download Report** .

The report may take a minute to generate.

5. If the IDE says that the report is being generated, repeat step 4.

If you create a report for a local backtest, the report is stored in the **Project / backtests / <unixTimestamp>** directory as **report.html** and **report.pdf** .

Orders

The backtest results page displays the orders of your algorithm and you can view them on your local machine.

View in the GUI

To see the orders that your algorithm created, open the backtest results page and then click the **Orders** tab. If there are more than 10 orders, use the pagination tools at the bottom of the Orders Summary table to see all of the orders. Click on an individual order in the Orders Summary table to reveal additional information regarding the following topics:

- Submissions
- Fills
- Partial fills
- Updates
- Cancellations
- Option contract exercises and expiration

The timestamps in the Order Summary table are based in Eastern Time (ET).

Access the Order Summary CSV

To view the orders data in CSV format, open the backtest results page, click the **Orders** tab, and then click **Download Orders** . The content of the CSV file is the content displayed in the Orders Summary table when the table rows are collapsed. The timestamps in the CSV file are based in Coordinated Universal Time (UTC). If you download the order summary CSV for a local backtest, the file is stored in **Project / backtests / <unixTimestamp> / orders.csv** .

Access the Orders JSON

To view all of the content in the Orders Summary table, see [View Local Result Files](#) or [Download Cloud Result Files](#) .

Access the Order Events JSON

To view all of the [order events](#) for a local backtest, open one of the following files:

- The **Project / backtests / <unixTimestamp> / <algorithmId>-order-events.json** file from your [local result files](#) in Local Platform
- The **<projectName> / backtests / <unixTimestamp> / <algorithmId>-log.txt** file from your

Insights

The backtest results page displays the insights of your algorithm and you can view the raw insight data on your local machine.

View in the GUI

To see the insights your algorithm emit, open the backtest result page and then click the **Insights** tab. If there are more than 10 insights, use the pagination tools at the bottom of the Insights Summary table to see all of the insights. The timestamps in the Insights Summary table are based in Eastern Time (ET).

Open Raw JSON

To view the insights in JSON format, open the backtest result page, click the **Insights** tab, and then click **Download Insights** . The timestamps in the CSV file are based in Coordinated Universal Time (UTC).

If you run a local backtest, the JSON file is also available in the following locations:

- The **Project / backtests / <unixTimestamp> / <algorithmId>-alpha-insights.json** file from your [local result files](#) in Local Platform
- The **<projectName> / backtests / <unixTimestamp> / <algorithmId>-alpha-insights.txt** file from your [organization workspace](#)

Logs

The backtest results page displays the [logs](#) of your backtest and you can view them on your local machine. The timestamps of the statements in the log file are based in your [algorithm time zone](#) .

View in the GUI

To see the log file that was created throughout a backtest, open the backtest result page and then click the **Logs** tab.

Download Log Files

To download the log file that was created throughout a backtest, follow these steps:

1. Open the backtest result page.
2. Click the **Logs** tab.
3. Click **Download Logs** .

If you ran a local backtest, the log file is automatically saved on your local machine when the backtest completes.

Access Local Log Files

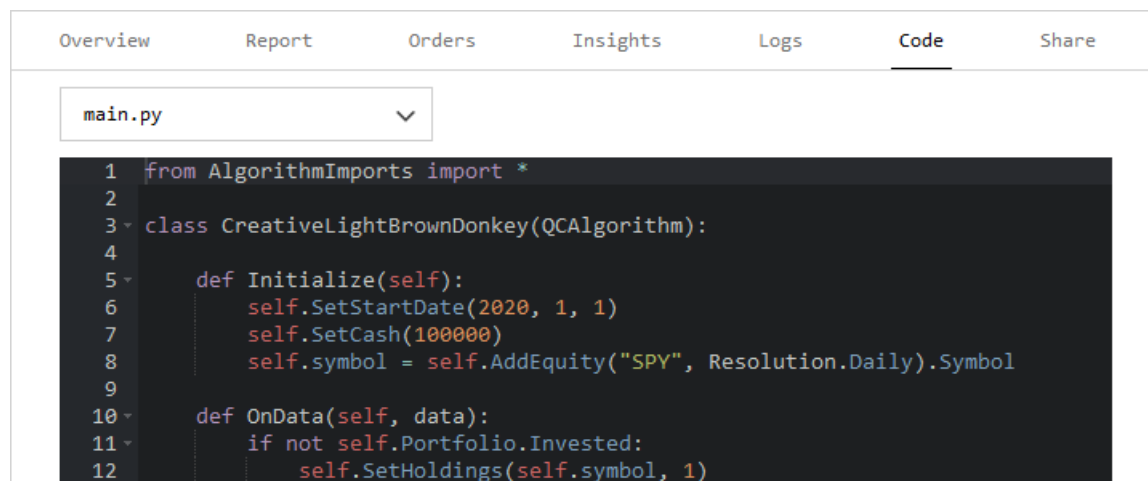
To view the log file of a local backtest, open one of the following files:

- The **Project / backtests / <unixTimestamp> / <algorithmId>-log.txt** file from your [local result files](#) in VS Code.

- The **<projectName> / backtests / <unixTimestamp> / <algorithmId>-log.txt** file from your [organization workspace](#) .

Project Files

The backtest results page displays the project files used to run the backtest. To view the files, click the **Code** tab. By default, the **main.py** or **Main.cs** file displays. To view other files in the project, click the file name and then select a different file from the drop-down menu.



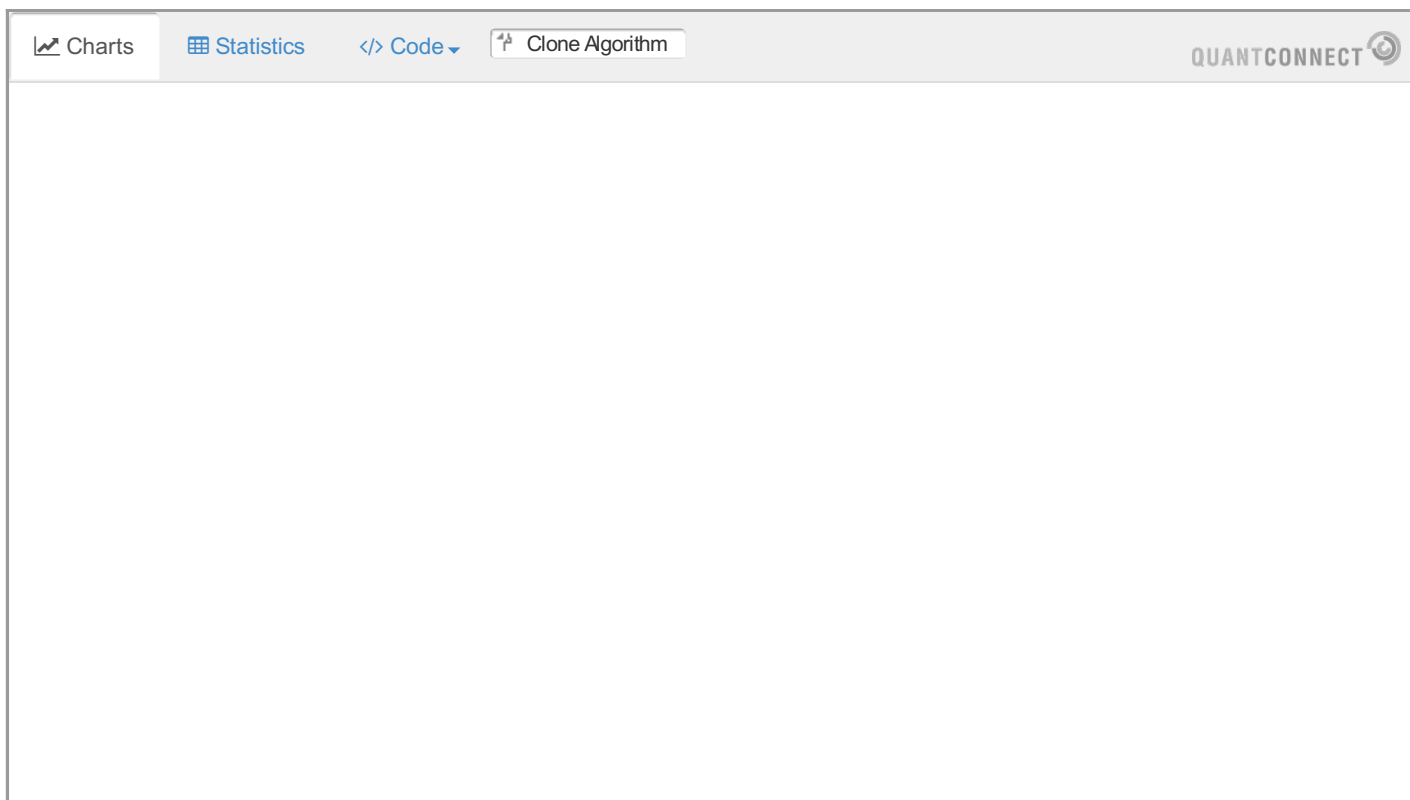
If you ran a local backtest, the project files are also available in the following locations:

- The **Project / backtests / <unixTimestamp> / code** directory from your [local result files](#) in Local Platform
- The **<projectName> / backtests / <unixTimestamp> / code** directory in your [organization workspace](#)

Share Results

The backtest results page enables you to share your cloud backtest results. You need to make a backtest public in order to share it. To make a backtest public, on the backtest results page, click the **Share** tab and then click **Make Public** . Once you make a backtest public, the **Share** tab displays a link to the [backtest report](#) , a link to an embedded backtest result, and a script to embed the embedded backtest result into a website.

The following widget is an example of an embedded backtest result:



To attach the embedded backtest result to a forum discussion, see [Create Discussions](#) or [Post Comments](#) .

After you've made your backtest results public, the results are always stored, anyone with the link can access the results, and the results can't be made private again because someone may have already cloned your project.

View Local Result Files

Follow these steps to view the results files of local backtests:

1. [Run a local backtest](#) .
2. Navigate to [the files in your project](#) .
3. Open one of **Project / backtests / <unixTimestamp>** directories in your project.

For example, **Project / backtests / 168669292409** .

The following table describes the initial contents of the backtest result directories:

File/Directory	Description
code /	A directory containing a copy of the files that were in the project when you ran the backtest.
<algorithmId>-alpha-results.json Ex: 1967791529-alpha-results.json	A file containing all of the backtest insights . This file only exists if you emit insights during the backtest.
<algorithmId>-log.txt Ex: 1967791529-log.txt	A file containing all of the backtest logs .
<algorithmId>-order-events.json Ex: 1967791529-order-events.json	A file containing all of the backtest order events .
<algorithmId>.json Ex: 1967791529.json	A file containing the following data: <ul style="list-style-type: none"> • Runtime statistics • Charts • The data in the Overview tab • The data in the Orders tab • The algorithm configuration settings
config	A file containing some configuration settings, including the backtest Id, Docker container name, and backtest name.
data-monitor-report-<backtestDate> <unixTimestamp>.json Ex: data-monitor-report-20230614155459950.json	A file containing statistics on the algorithm's data requests.
failed-data-requests-<backtestDate> <unixTimestamp>.txt Ex: failed-data-requests-20230614155451004.txt	A file containing all the local data paths that LEAN failed to load during the backtest.
log.txt	A file containing the syslog.
succeeded-data-requests-<backtestDate> <unixTimestamp>.txt Ex: succeeded-data-requests-20230614155451004.txt	A file containing all the local data paths that LEAN successfully loaded during the backtest.

The backtest result directories can contain the following additional files if you request them:

File	Description	Request Procedure
orders.csv	A file containing all of the data from the Orders table when the table rows are collapsed.	See Orders
report.html and report.pdf	A file containing the backtest report	See Reports

Download Cloud Result Files


You can download the following information for cloud backtests from the backtest results page:

- Runtime statistics
- Charts
- The data in the **Overview** tab
- The data in the **Orders** tab

To download the preceding information, open the backtest results page, click the **Overview** tab, and then click **Download Results** . The timestamps in the file are based in Coordinated Universal Time (UTC).

View All Backtests

Follow these steps to view all of the backtests of a project:

1. [Open the project](#) that contains the backtests you want to view.
2. In the top-right corner of the IDE, click the  **Backtest Results** icon.

A table containing all of the backtest results for the project is displayed. If there is a **play** icon to the left of the name, it's a [backtest result](#) . If there is a **fast-forward** icon next to the name, it's an [optimization result](#) .

Results							Show	All
Name			Platform	PSR ↓	Sharp...	Trades	Requested	
▶ Calculated Brown Bear	✓	Completed	Cloud	11.568	0.292	3	2023-04-24 21:41:47	
▶ Logical Brown Bee	✓	Completed	Local	0.078	0.2212	0	2023-04-24 20:37:15	
▶ Creative Orange Seahorse	✓	Completed	Local	0.078	0.2212	0	2023-04-24 20:39:42	
▶ Logical Orange Monkey	✓	Completed	Local	0.078	0.2212	0	2023-04-24 20:39:50	
▶ Alert Fluorescent Orange Chinchilla	✓	Completed	Local	0.078	0.2212	0	2023-04-24 21:20:58	




1 to 5 of 5 < > Page 1 of 1 > > ☐ Hide Runtime Errors

3. (Optional) In the top-right corner, select the **Show** field and then select one of the options from the drop-down menu to filter the table by backtest or optimization results.
4. (Optional) In the bottom-right corner, click the **Hide Error** check box to remove backtest and optimization results from the table that had a runtime error.
5. (Optional) Use the pagination tools at the bottom to change the page.
6. (Optional) Click a column name to sort the table by that column.
7. Click a row in the table to open the results page of that backtest or optimization.

Rename Backtests

We give an arbitrary name (for example, "Smooth Apricot Chicken") to your backtest result files, but you can follow these steps to rename them:

1. Hover over the backtest you want to rename and then click the **pencil** icon that appears.

▶ Swimming Light Brown Salmon				21.489	0.581	1	2022-03-08 22:00:20
-------------------------------	---	---	---	--------	-------	---	---------------------

2. Enter the new backtest name and then click **OK** .

Clone Backtests

Hover over the backtest you want to clone, and then click the **clone** icon that appears to clone the backtest.


▶	Swimming Light Brown Salmon				21.489	0.581	1	2022-03-08 22:00:20
---	-----------------------------	---	---	---	--------	-------	---	---------------------




A new project is created with the backtest code files.

Delete Backtests

Hover over the backtest you want to delete, and then click the **trash can** icon that appears to delete the backtest.

▶	Swimming Light Brown Salmon				21.489	0.581	1	2022-03-08 22:00:20
---	-----------------------------	---	---	---	--------	-------	---	---------------------



Anonymous Backtests

Local Platform doesn't sync anonymous backtests to QuantConnect Cloud.

6.4 Debugging

Introduction

The debugger is a built-in tool to help you debug coding errors while backtesting. The debugger enables you to slow down the code execution, step through the program line-by-line, and inspect the variables to understand the internal state of the program.

Requirements

You need to install [.NET](#) and [Microsoft's C# VS Code extension](#) to run the debugger.

Breakpoints

Breakpoints are lines in your algorithm where execution pauses. You need at least one breakpoint in your code files to start the debugger. [Open a project](#) to start adjusting its breakpoints.

Add Breakpoints

Click to the left of a line number to add a breakpoint on that line.

```
51 | public override void Initialize()  
52 | {  
53 |     SetStartDate(2022, 1, 1);  
54 |     SetCash(100000);  
55 |     AddEquity("SPY", Resolution.Minute);  
56 | }
```

Edit Breakpoint Conditions

Follow these steps to customize what happens when a breakpoint is hit:

1. Right-click the breakpoint and then click **Edit Breakpoint...** .
2. Click one of the options in the following table:



Option	Additional Steps	Description
Expression	Enter an expression and then press Enter .	The breakpoint only pauses the algorithm when the expression is true.
Hit Count	Enter an integer and then press Enter .	The breakpoint doesn't pause the algorithm until its hit the number of times you specify.

Enable and Disable Breakpoints

To enable a breakpoint, right-click it and then click **Enable Breakpoint** .

To disable a breakpoint, right-click it and then click **Disable Breakpoint** .

Follow these steps to enable and disable all breakpoints:

1. In the left navigation menu, click the  **Run and Debug** icon.
2. In the Run and Debug panel, hover over the **Breakpoints** section and then click the  **Toggle Active Breakpoints** icon.

Remove Breakpoints


To remove a breakpoint, right-click it and then click **Remove Breakpoint** .

Follow these steps to remove all breakpoints:

1. In the left navigation menu, click the  **Run and Debug** icon.
2. In the Run and Debug panel, hover over the **Breakpoints** section and then click the  **Remove All Breakpoints** icon.

Launch Debugger






Follow these steps to launch the debugger:

1. [Open the project](#) you want to debug.
2. In your project's code files, add at least one breakpoint.
3. Click the  **Debug** icon.

If the Run and Debug panel is not open, it opens when the first breakpoint is hit.

Control Debugger

After you launch the debugger, you can use the following buttons to control it:

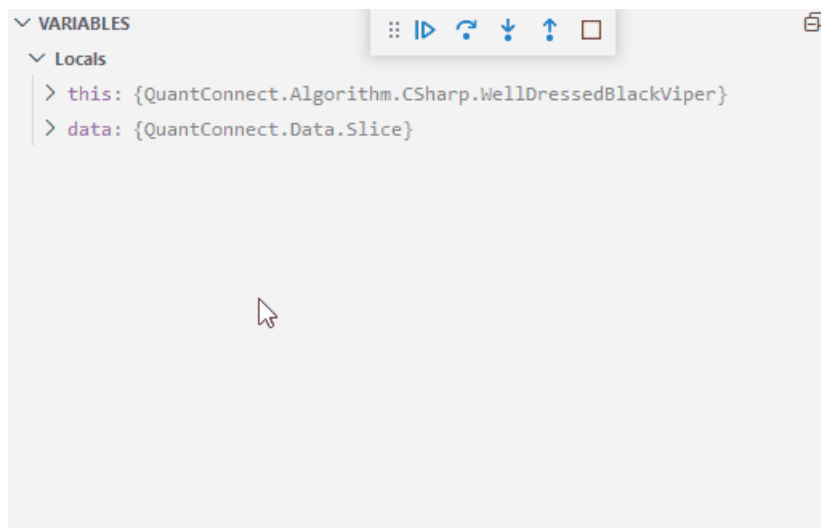
Button	Name	Default Keyboard Shortcut	Description
	Continue		Continue execution until the next breakpoint
	Step Over	Alt+F10	Step to the next line of code in the current or parent scope
	Step Into	Alt+F11	Step into the definition of the function call on the current line
	Restart	Shift+F11	Restart the debugger
	Disconnect	Shift+F5	Exit the debugger

Inspect Variables

After you launch the debugger, you can inspect the state of your algorithm as it executes each line of code. You can inspect local variables or custom expressions.

Local Variables

The **Variables** section of the Run and Debug panel shows the local variables at the current breakpoint. If a variable in the panel is an object, click it to see its members. The panel updates as the algorithm runs.

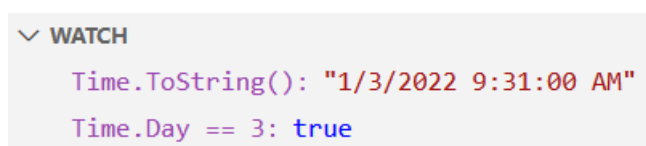


Follow these steps to update the value of a variable:

1. In the Run and Debug panel, right-click a variable and then click **Set Value** .
2. Enter the new value and then press **Enter** .

Custom Expressions

The **Watch** section of the Run and Debug panel shows any custom expressions you add. For example, you can add an expression to show the current date in the backtest.



Follow these steps to add a custom expression:

1. Hover over the **Watch** section and then click the **plus** icon that appears.
2. Enter an expression and then press **Enter** .

6.5 Troubleshooting

Introduction

This page explains some common troubleshooting topics that arise for backtests.

Speed Issues

If you notice that backtests run faster in QuantConnect Cloud than on-premise, it's likely because we host special hardware that's optimized for LEAN. For more information about our hardware, see [Backtesting Nodes](#) .

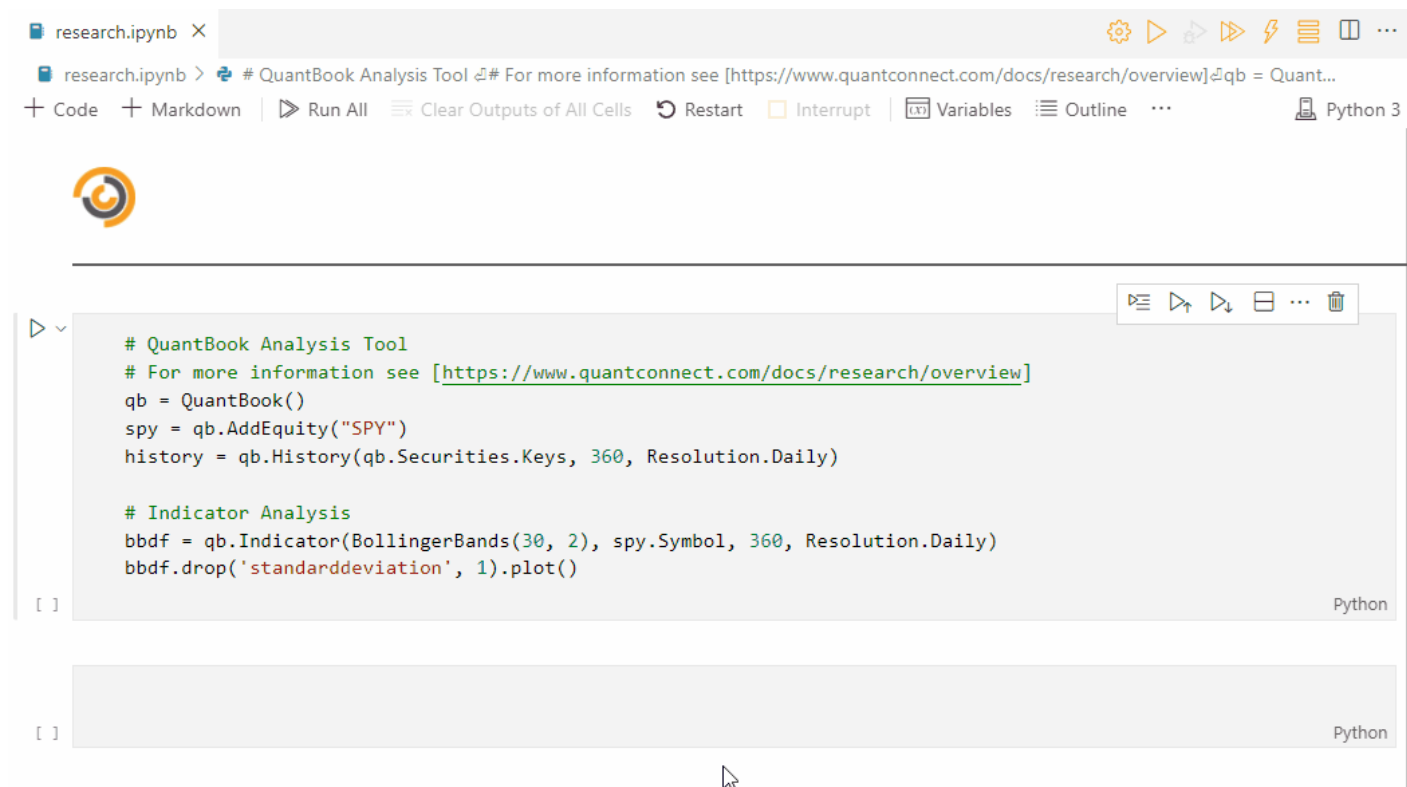
Local and Cloud Result Differences

If your algorithm produces different results when you backtest it in QuantConnect Cloud versus on-premise, it's usually because of differences in data. For example, if you don't have the latest version of the [US Equity Security Master](#) , you will likely be missing some splits and dividends, which impact the historical prices of adjusted data. In this case, to avoid differences in the backtest results, update your local copy of the US Equity Security Master every day. For more information about downloading data from the Dataset Market so you have the same data on-premise as in QuantConnect Cloud, see [Downloading Data](#) .

7 Research

Research > Getting Started

7.1 Getting Started



Introduction

The Research Environment is a [Jupyter notebook](#) -based, interactive commandline environment where you can access your local data or our cloud data through the [QuantBook](#) class. The environment supports both Python and C#. If you use Python, you can import code from the code files in your project into the Research Environment to aid development.

Before you run backtests, we recommend testing your hypothesis in the Research Environment. It's easier to perform data analysis and [produce plots in the Research Environment](#) than in a backtest.

Before backtesting or live trading with machine learning models, you may find it beneficial to train them in the Research Environment, save them in the ObjectStore, and then load them from the ObjectStore into the backtesting

and live trading environment

In the Research Environment, you can also use the QuantConnect API to [import your backtest results](#) for further analysis.

Note: This chapter is an introduction to the Research Environment for the Algorithm Lab. For more comprehensive information on using research notebooks, see our dedicated [Research Environment](#) documentation.

Example

The following snippet demonstrates how to use the Research Environment to print the price of the S&P 500 index ETF, SPY:

```
// Load the required assembly files and data types
#load "../Initialize.csx"
#load "../QuantConnect.csx"
using QuantConnect;
using QuantConnect.Data;
using QuantConnect.Algorithm;
using QuantConnect.Research;

// Create a QuantBook
var qb = new QuantBook();

// Create a security subscription
var symbol = qb.AddEquity("SPY").Symbol;

// Request some historical data
var history = qb.History(symbol, 70, Resolution.Daily);


foreach (var tradeBar in history)
{
    Console.WriteLine($"{tradeBar.EndTime} :: {tradeBar.ToString()}");
}
```

C#

```
4/2/2018 9:31:00 AM :: SPY: O: 244.1315 H: 244.1594 L: 243.7596 C: 243.8712 V: 1125336
4/2/2018 9:32:00 AM :: SPY: O: 243.8712 H: 244.271 L: 243.834 C: 244.178 V: 316362
4/2/2018 9:33:00 AM :: SPY: O: 244.178 H: 244.3361 L: 244.1315 C: 244.2338 V: 340659
4/2/2018 9:34:00 AM :: SPY: O: 244.2059 H: 244.271 L: 243.9642 C: 244.178 V: 248638
4/2/2018 9:35:00 AM :: SPY: O: 244.1873 H: 244.3826 L: 244.1594 C: 244.3361 V: 340971
...
7/13/2018 3:56:00 PM :: SPY: O: 261.128 H: 261.184 L: 261.0813 C: 261.184 V: 662780
7/13/2018 3:57:00 PM :: SPY: O: 261.184 H: 261.2401 L: 261.1654 C: 261.2121 V: 613786
7/13/2018 3:58:00 PM :: SPY: O: 261.2214 H: 261.2774 L: 261.2027 C: 261.2588 V: 371463
7/13/2018 3:59:00 PM :: SPY: O: 261.2588 H: 261.2681 L: 261.1747 C: 261.1747 V: 609839
7/13/2018 4:00:00 PM :: SPY: O: 261.184 H: 261.2027 L: 261.1187 C: 261.1373 V: 2611546
```

Open Notebooks

Local Platform provides multiple [deployment targets](#) to enable you to open notebooks on-premise and in QuantConnect Cloud. Each new project you create contains a notebook file by default. Follow these steps to open it:

1. [Open the project](#) .
2. In the left navigation menu, click the  **Explorer** icon.
3. In the Explorer panel, expand the **QC (Workspace)** section.
4. Click the **Research.ipynb** file.

Run Notebook Cells

Notebooks are a collection of cells where you can execute code snippets or write Markdown.

```
[1] 3+4
    ✓ 3.1s C#
... 7

[2] Console.WriteLine("Hello world!");
    ✓ 0.3s C#
... Hello world!
```

The following describes some helpful keyboard shortcuts to speed up your research:

Keyboard Shortcut	Description
Shift+Enter	Run the selected cell.
a	Insert a cell above the selected cell.
b	Insert a cell below the selected cell.
x	Cut the selected cell.
v	Paste the copied or cut cell.
z	Undo cell actions.

Stop Nodes

Follow these steps to stop a research node:



1. If you opened the research notebook on Local Platform, [close the notebook file](#) .
2. In the [Resources panel](#) , click the **stop** button next to the research node you want to stop.

If you are using the [Cloud Platform deployment target](#) , you need [stop node permissions](#) to stop research nodes.

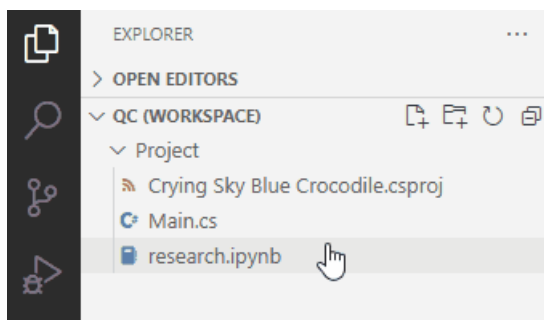
3. In the Visual Studio Code window, click **Yes** .

Add Notebooks

Follow these steps to add notebook files to a project:


1. [Open the project](#) .
2. In the right navigation menu, click the  **Explorer** icon.
3. In the Explorer panel, expand the **QC (Workspace)** section.
4. Click the  **New File** icon.

5. Enter **fileName .ipynb** .
6. Press **Enter** .




Rename Notebooks

Follow these steps to rename a notebook in a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **Explorer** icon.
3. In the Explorer panel, right-click the notebook you want to rename and then click **Rename** .
4. Enter the new name and then press **Enter** .

Delete Notebooks

Follow these steps to delete a notebook in a project:

1. [Open the project](#) .
2. In the left navigation menu, click the  **Explorer** icon.
3. In the Explorer panel, right-click the notebook you want to delete and then click **Delete Permanently** .
4. Click **Delete** .

Learn Jupyter

The following table lists some helpful resources to learn Jupyter:

Type	Name	Producer
Text	Jupyter Tutorial	tutorialspoint
Text	Jupyter Notebook Tutorial: The Definitive Guide	DataCamp
Text	An Introduction to DataFrame	Microsoft Developer Blogs

