Introduction

The Trump administration's [recent announcement that it plans to end or privatize the ENERGY STAR program](#) has created uncertainty around the potential future of the ENERGY STAR Portfolio Manager tool. While the outcomes of this announcement remain elusive, AOBA recommends that members get in the practice of keeping copies of their Portfolio Manager data on their company networks. This is the most practical and impactful thing members can do today to be prepared for potential disruptions to ENERGY STAR Portfolio Manager. This document will show you how to do this and offer a few best practice tips on document management.

Manage Portfolio

[Upload and/or update multiple properties](#) at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.

[Download your entire portfolio to Excel](#) or create a [custom download.](#)

[Set a portfolio baseline and/or target](#) to help measure progress.

[Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

[Delete](#) properties from your account.

Downloading Your Entire Portfolio

Fortunately, ENERGY STAR allows you to download all the data that is in your account (which ENERGY STAR calls your portfolio). There are two options within ENERGY STAR:

- You can download your whole profile's worth of data, or
- You can download individual building data.

How To Download Your Portfolio Data

When you log into ENERGY STAR Portfolio Manager, below the Property County and Portfolio Metrics boxes on the right-hand side of the landing page once you log in, you will see a Manage Portfolio callout box. In this box, select "Download Your Entire Portfolio to Excel." This will open a pop-up that tells you that Portfolio Manager is working on the download. When done, you will receive an Excel file.
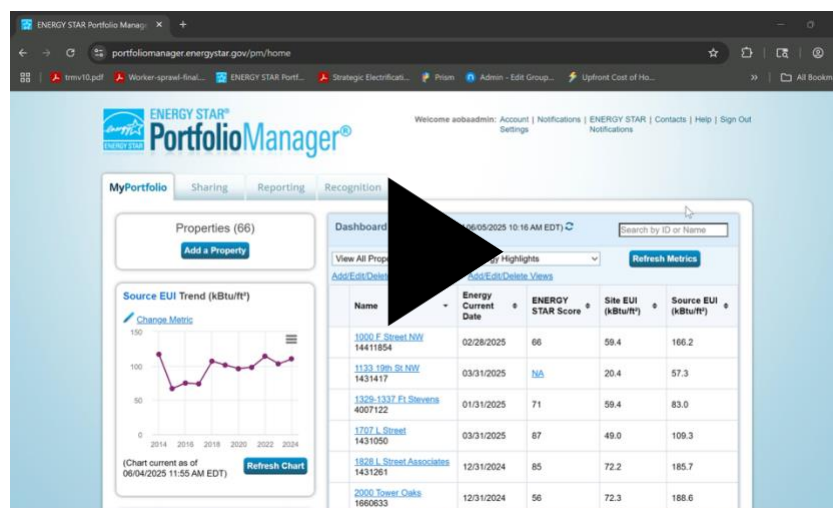
What's in the Downloaded Data?

In the download is an Excel file with a bunch of tabs. Each tab contains information on your entire portfolio, including a property list, Portfolio Manager ID, and any specific jurisdictional identification numbers like SSL (for Washington, D.C.), Montgomery County Building ID (for Montgomery County), and Unique Building ID (for Maryland). Property uses, property use details (including historical uses), energy meters, and energy data are also included. Lastly, if you used ENERGY STAR for any performance tracking or design (including the baseline and target-setting functionalities in Portfolio Manager), this is included.

Downloading Individual Buildings

In some cases, you may want to download individual building data in lieu of portfolio-level data. This can also be done by clicking into the building you wish to download data into, then scrolling below "Sharing this Property" until you find the "Download Property to   Excel" function. Click download.

 Copy Property   Download Property to Excel

Similar to the portfolio level, the file will contain a lot of tabs, all with relevant information. The Excel file is formatted the same as the portfolio level download.
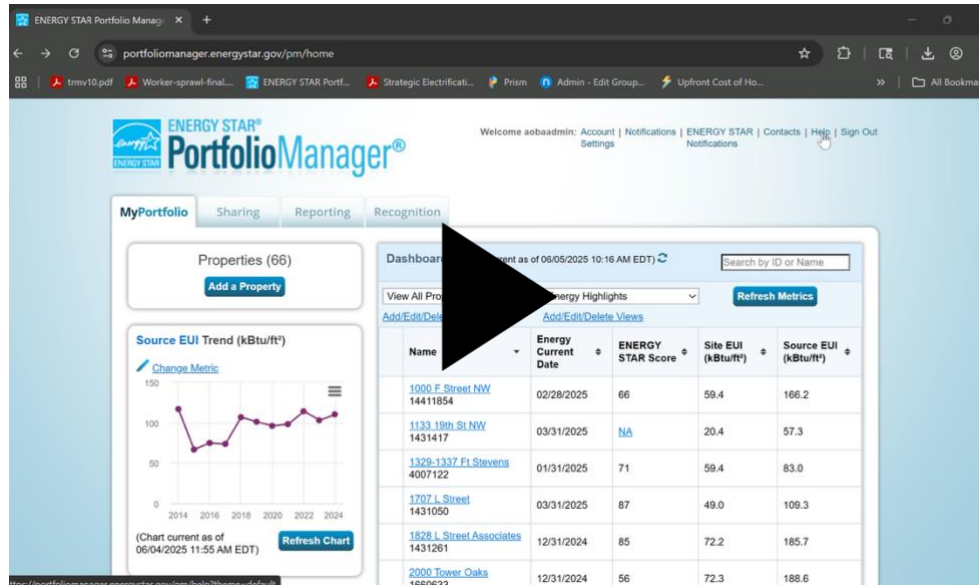
Data Storage Tips

One good best practice with data management is being in the habit of regularly downloading copies of your data and preserving them in your company's file management system. Particulars will need to be governed by any data management structures associated with your company, but some good best practices are as follows:

- If you have a large portfolio, download your data more frequently. This way, if something happens the update process will take you less time.
- If you are downloading individual buildings, name each download as the building's name and/or address or other method of tracking the property.
- Date your downloads. This can be done most easily by appending a date to the file name (which ideally also includes the building name(s) as noted above).

Involvement with Local Regulations

Some local energy benchmarking regulations explicitly mention ENERGY STAR Portfolio Manager as the benchmarking tool. It is unclear at this time how these regulations would be impacted should ENERGY STAR Portfolio Manager not be available for an extended period of time but AOBA will work to provide an update for members should this occur.