



External Data

Filtered export to CSV, Excel, Access or a GeoMate package, and controlled import with insert, update or upsert — every replaced value remaining reversible.

- Group: Integration
- Import reversible through the log
- 4 output formats
- Master HoleID filter

Save As...

Delete

Save your table selection, filters & output paths for quick reuse — configurations can also be referenced from Auto

ENTER

OR filter to derive HoleIDs for all selected tables

HoleID Filter

[Project]='KDI_Project' AND [Status]=1

Build Master Filter... Clear

Formats

- File per table
- Single workbook, one sheet per table
- Single database, all tables
- Geo — proprietary format, re-importable only by GeoMate

Each selected format

Select output folder for CSV files...

OK Cancel

Executive summary

External Data handles both directions of transfer: exporting filtered tables to CSV, Excel, Access or a GeoMate package, and taking a third-party file back in with a chosen conflict mode — insert, update, or both.

01 What it replaces

The manual table-by-table export out of Access, and the blind import that overwrites records without anyone knowing which.

02 How it works

On export: tick the tables, filter by WHERE clause or by hole list, pick the format. On import: map the columns and decide explicitly what happens on conflict.

03 Who it is for

The database owner delivering an extract to a consultant, and the person taking the corrected dataset back in when it returns.

4

export formats

3

import conflict modes

105

exportable project tables

SQL

WHERE filter per table

Contents

01 Two directions of travel

Take a subset out, bring an external delivery in.

02 The master filter

A single WHERE clause deriving the HoleIDs for every selected table.

03 Four output formats

One CSV per table, Excel workbook, Access database, .gmate package.

04 Saved configurations

Selection, filters and paths reusable, and referenceable from automation.

05 Three import modes

Insert only, update only, insert + update upsert.

06 Empty-cell semantics

An empty cell keeps, #NULL erases on purpose.

07 Anonymised data

11 tables exported, 198,335 logged intervals carried.

08 Business value

Deliver a subset without delivering the whole database.



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SECTION I

The module

The problem addressed, the capabilities delivered, the processing chain and the module's place in the platform.

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- 01 Context
 - 02 Key capabilities
 - 03 Processing chain
 - 04 Place in the platform
-

Context

A consultant asks for one prospect's holes. A partner wants collars and assays, not the full log. An audit asks for everything, in a format it can open.

The module handles all three with the same tool: table selection, filter, format, path — and a saved configuration for next time.

One filter, every table

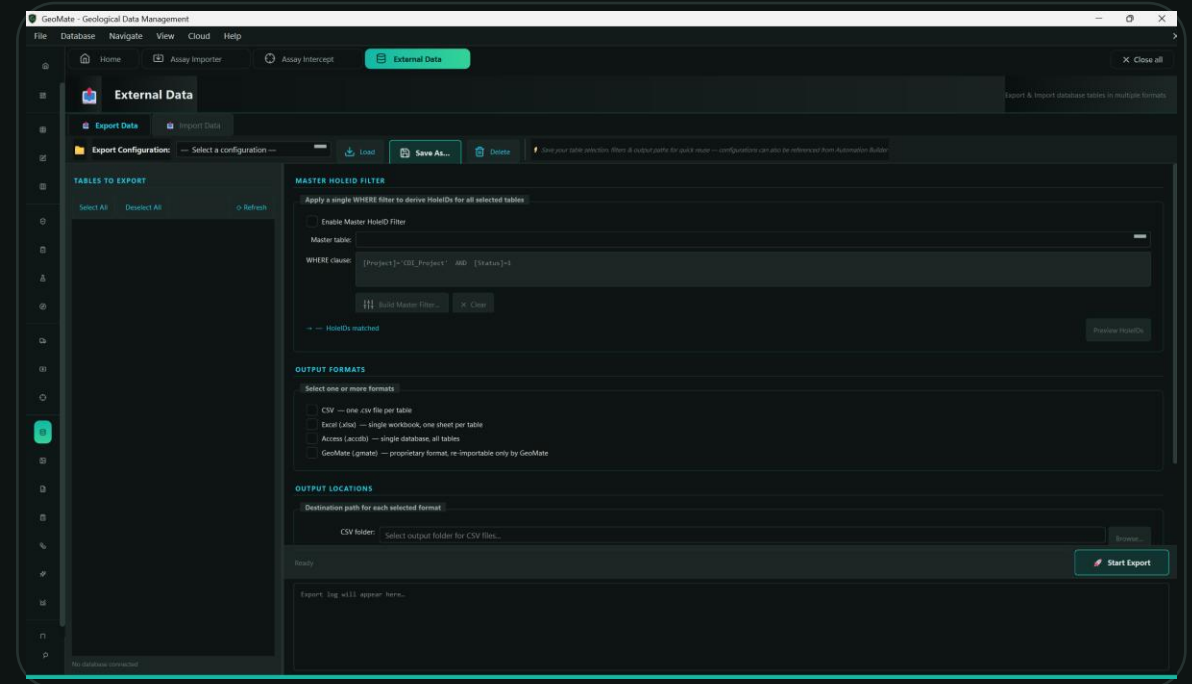
The master filter derives a HoleID list from a pivot table, then applies it to every selected table, including those with no HoleID column, through their link table.

The .gmate package travels whole

A proprietary format re-importable only by GeoMate: structure and types survive the journey.

Update is reversible

Every value an import replaces is written to the correction log; the whole run can be undone from Validation > Correction History.



Warning — the Update and Upsert modes overwrite existing records. An empty cell keeps the stored value; a cell reading #NULL erases it on purpose. Back up before running.

Key capabilities



01

Table selection

Checklist of every table in the project, with optional per-table renaming on export.



02

Master HoleID filter

A WHERE clause on a pivot table derives the hole list applied to every table, including linked tables.



03

Four formats

One CSV per table, an Excel workbook with one sheet per table, a full Access database, or a GeoMate .gmate package.



04

Export configurations

Selection, filters and paths saved under a name, reloadable and referenceable from the Automation Builder.



05

Three import modes

Insert only for a pure addition, update only for a correction, upsert for a mixed delivery.



06

Full rollback

Every replaced value is logged; the import can be undone in full from the correction history (Ctrl+5).

Processing chain

Two directions of travel, each with its own explicit decision point.

A Export

From the database outwards

- Table selection, with optional rename alias
- Filter: SQL WHERE clause per table, or a HoleID list
- Format: CSV, Excel, Access or GeoMate package
- Destination path and a logged run
- A coherent extract, reduced to the intended scope

B Import

From outside into the database

- Loading one or several CSVs, or a package
- Target table and column mapping per source
- Conflict mode: insert only, update only, or upsert
- Line-by-line log, with the errors met
- Database updated according to the explicit decision taken

C Effects

What the transfer enables

- Delivery of an extract to a consultant or a partner
- Taking back the corrected dataset without losing the rest
- Feeding a third-party modelling package
- Archiving a snapshot of the project
- Merging two campaign databases

THE DECISION POINT

The conflict mode is not a technical setting: it decides whether an existing record is kept, replaced or completed. Insert only protects what exists; update only refuses novelties; upsert does both — and is the one that demands the most care.

Place in the platform

FED BY

02 Table Designer

Defines the exportable tables and the columns that will receive the import.

— Third-party deliveries

Topographic surveys, geophysics, datasets inherited from an earlier campaign.

19 Mobile Sync

Field packages follow the same logic of controlled reintegration.



External Data

The project's boundary: everything that deliberately enters or leaves the database goes through here.

FEEDS

05 Data Validation

Any third-party dataset deserves a full pass before use.

— Modelling packages

The CSV or Access export feeds a third-party block or geostatistics package.

14 Report Builder

The filtered extract is often a report's data appendix.



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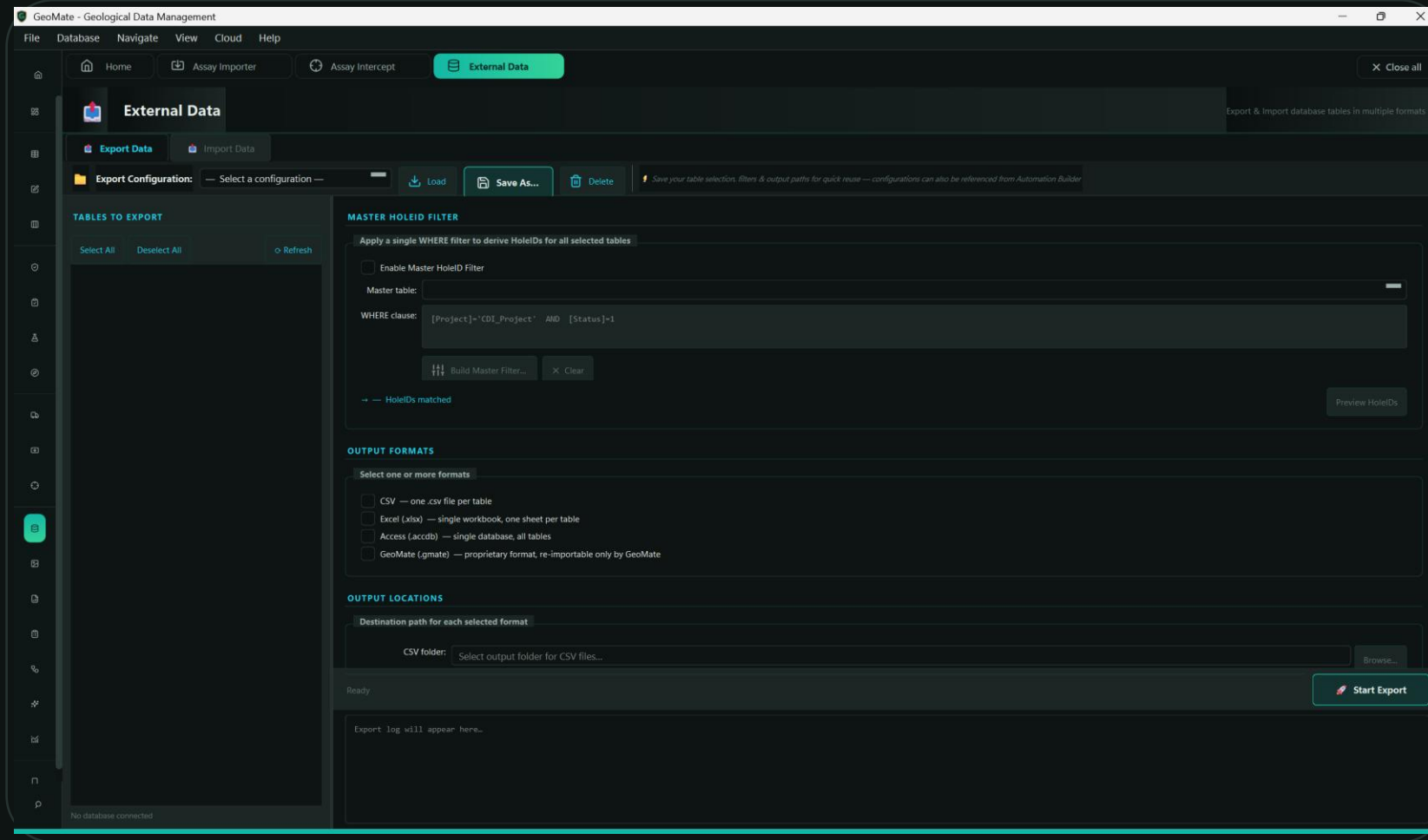
SECTION II

In practice

The real interface, the operating workflow, the reference settings, good practice and the questions that come up.

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- 01 The interface
 - 02 Operating workflow
 - 03 In depth
 - 04 Good practice
 - 05 Frequently asked
-

The interface



1 Export configuration

Load, save as, delete — and reference from the Automation Builder.

2 Tables to export

Select all, deselect all, refresh the list from the database.

3 Master filter

A single WHERE clause —
[Project]='CDI_Project' AND [Status]=1 —
applied to every table.

4 Output formats

CSV, Excel, Access or GeoMate package —
several formats in one run.

5 Export log

Table-by-table progress, with the number
of rows written and any warnings.

Actual GeoMate 2026 v2026.3.1.5 screen capture — Midnight theme.

Operating workflow

Four steps to export, four to import — and a reusable configuration on both sides.

1

Pick the tables

Tick the tables to take out, rename those that must change on delivery.

2

Set the filter

Master WHERE clause, or a pasted HoleID list — applied to every linked table.

3

Choose format and path

CSV, Excel, Access or a .gmate package; several formats can be produced in one run.

4

Export

The log reports progress, row counts and warnings per table.

5

Import back

Load the file, map onto the target table, choose the mode — and back up first.

Export formats and their uses

FORMAT	WHAT IS PRODUCED	TYPICAL USE
CSV	One .csv file per selected table	Loading into modelling software or a GIS
Excel (.xlsx)	A single workbook, one sheet per table	Review by a geologist with no database access
Access (.accdb)	A complete database holding every table	Delivering a standalone subset to a consultant
GeoMate (.gmate)	Proprietary package, re-importable only by GeoMate	Transfer between two GeoMate installations with no loss of structure

Import modes and cell semantics

MODE	EFFECT ON AN EXISTING RECORD	RISK
Insert only	None: duplicates are skipped or reported	No overwrite
Update only	The columns present in the file are rewritten	Overwrite
Upsert	Updates when the record exists, inserts otherwise	Overwrite
Empty cell	Keeps the value already in the database	Intended behaviour
#NULL cell	Deliberately erases the stored value	Explicit action

Every value an import replaces is written to the correction log: the whole run can be undone from [Navigate > Data Validation > Correction History \(Ctrl+5\)](#).

Good practice

The precautions before exporting, and above all before importing.

✓ Back up before any import

An import in update mode changes existing records. The backup is the only way back.

✓ Choose the conflict mode deliberately

Insert only for a new delivery, update only for a correction, upsert only when both cases are understood.

✓ Filter the export to the necessary scope

The WHERE clause and the hole list avoid delivering more data than was asked for.

✓ Check what the extract contains

Partner, laboratory or personal names may sit in the exported columns. To be checked before any external transmission.

✓ Read the log to the end

The log gives line-by-line progress and errors. A partially failed import announces itself no other way.

✓ Validate after reintegration

A dataset from outside has not been through the capture checks: a pass through Validation is the normal counterpart.

Frequently asked

The most frequent transfer questions.

Q Which format for a consultant?

Excel for reading, CSV for automated processing, Access or a GeoMate package to carry the structure along with the data.

Q Can the tables be renamed on export?

Yes: a per-table alias lets you deliver under the names the recipient expects without touching the database.

Q What exactly does upsert do?

It inserts the record if absent and updates it if present. Powerful, and the mode that overwrites most easily.

Q Can I filter by a list of holes?

Yes: pasting a HoleID list is often quicker and safer than writing a WHERE clause.

Q What is a GeoMate package?

A container carrying the tables and their structure together — the format to prefer between two GeoMate instances.

Q Several files in one operation?

Yes: several CSVs can be loaded together, each with its own target table and mapping.



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SECTION III

The data

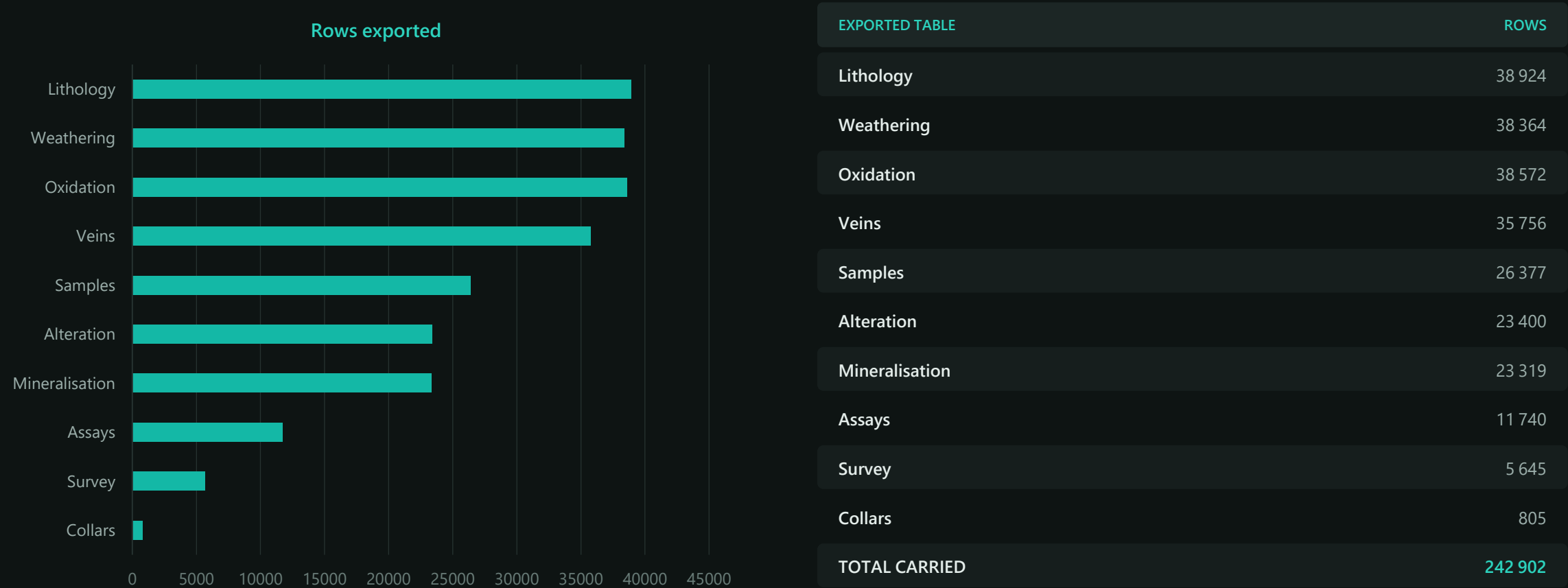
What the module produces on a real dataset, and the vocabulary needed to read those results.

01 Anonymised data

02 Key concepts

Anonymised data

Volume actually carried when exporting the KOUKLOUDAN project to a set of CSV files.



Eleven CSV files produced in a single run, filtered by one master WHERE clause. Source: KOUKLOUDAN project database (Senegal) — figures computed from the real data exported from GeoMate.

Key concepts

The vocabulary of data transfer.

Conflict mode

The rule applied when an imported row already exists: insert only, update only, or upsert.

Table alias

The name a table is exported under, distinct from its database name. Useful to meet a third party's expected format.

Extract

A coherent, filtered and dated subset of the database, intended to leave the project's perimeter.

WHERE clause

The SQL condition restricting the export to the intended rows — the finest way to define a delivery scope.

GeoMate package

A container carrying tables and structure together, intended for exchange between GeoMate instances.

Reintegration

The return into the database of a dataset that had left it, corrected or enriched by a third party. The riskier of the two operations.



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SECTION IV

Value & specifications

What the module changes for the project, and its technical integration profile.

01 Business value

02 Technical profile

Business value

You deliver a scope, not the whole database

The master filter carves out a prospect, a campaign or a hole list with no manual table-by-table extraction.

Single filter

The recipient opens what they can open

CSV for the modeller, Excel for the geologist, Access for the consultant, .gmate for another GeoMate installation.

4 formats

The import destroys nothing silently

The distinction between an empty cell and #NULL makes explicit what is kept and what is erased.

Clear semantics

Every write is reversible

The correction log allows a badly judged import to be undone in full, without restoring a backup.

Full rollback

Delivery becomes automatable

A saved configuration is triggered from the Automation Builder: a weekly export with no intervention.

Schedulable

Technical profile

Export

Formats

CSV · Excel .xlsx · Access .accdb · GeoMate .gmate

Filter

Master WHERE clause or HoleID list

Linked tables

Filtered through their link table

Renaming

Per-table alias on delivery

Import

Sources

One or more CSVs, or a .gmate package

Mapping

Target table and columns, per source file

Modes

Insert · update · upsert

Log

Record-by-record progress

Safety

Reversibility

Correction log, rollback with Ctrl+5

Empty cell

Keeps the stored value

#NULL cell

Erases on purpose

Recommendation

Back up before any writing import



One platform, from field to report

The “External Data” module is one of the 19 modules of GeoMate 2026 — a single, fully offline platform covering the whole chain: database design, data entry, validation, QA/QC, dispatch, analysis and reporting.