



Take Doc-Trak With You: Cloud Migration Without the Document Control Gap

A common question we hear: "Since CloudSuite Industrial includes IDM, do we still need Doc-Trak?"

Yes. IDM is a repository. Doc-Trak provides the logistics and automation layer that sits on top of IDM – and your other repositories. They're complementary, not redundant. Pairing them eliminates the manual work of uploading and tagging files and lets users access documents from any repository in one place.

Automate Storage Anywhere. Access Everything in One Place.

Doc-Trak integrates seamlessly with various document repositories – automatically linking existing files and routing new ones to the right location, all accessible from a single view.

Integration	What it provides
IDM	Direct access to IDM-stored documents with automated filing
SharePoint	Seamless document workflows
Amazon S3	Scalable cloud storage access
Local File Systems	Access to documents on local network drives
Dropbox	Access to externally shared files

Example: Engineering saves drawings to a network drive or SharePoint. Doc-Trak makes them instantly visible inside CloudSuite Industrial – no extra login, no tagging, no change in workflow.



Automated Filing vs. Manual Tagging

Moving files into IDM manually takes time away from high-value work.



Auto-Attach Rules

Link thousands of documents to the right records automatically – based on simple criteria like item, customer, or order number.



Drag & Drop Filing

Route a file to the right repository – IDM or otherwise – based on those same rules. No manual indexing. No duplicate effort.



From "Filing Documents" to "Unlocking Knowledge"

AI Search & Query lets users ask questions and get direct answers – drawn from every document attached to the job, order, or customer in front of them, no matter which repository those files live in. No opening individual files, no switching systems.

Doc-Trak FLEX — Speed Drives Results

Doc-Trak FLEX is built for high-velocity environments. Users can see related documents simultaneously—PO, Invoice, Specs—all in one view. You see the right document, at the right time, every time.

Why it matters: When customers ask about an order, your team answers immediately. Faster answers mean faster decisions, faster closes, and improved customer experience.

Automated Delivery — The "Last Mile"

In minutes, you can bundle drawings, specs, and certifications onto standard ERP reports—invoices, POs—for one-click delivery to customers or vendors.

The result: faster payments, fewer follow-ups, and less administrative overhead.

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The Lake Companies builds execution tools for manufacturers—helping teams manage documents, streamline processes, and keep operations running smoothly across the shop floor and beyond.