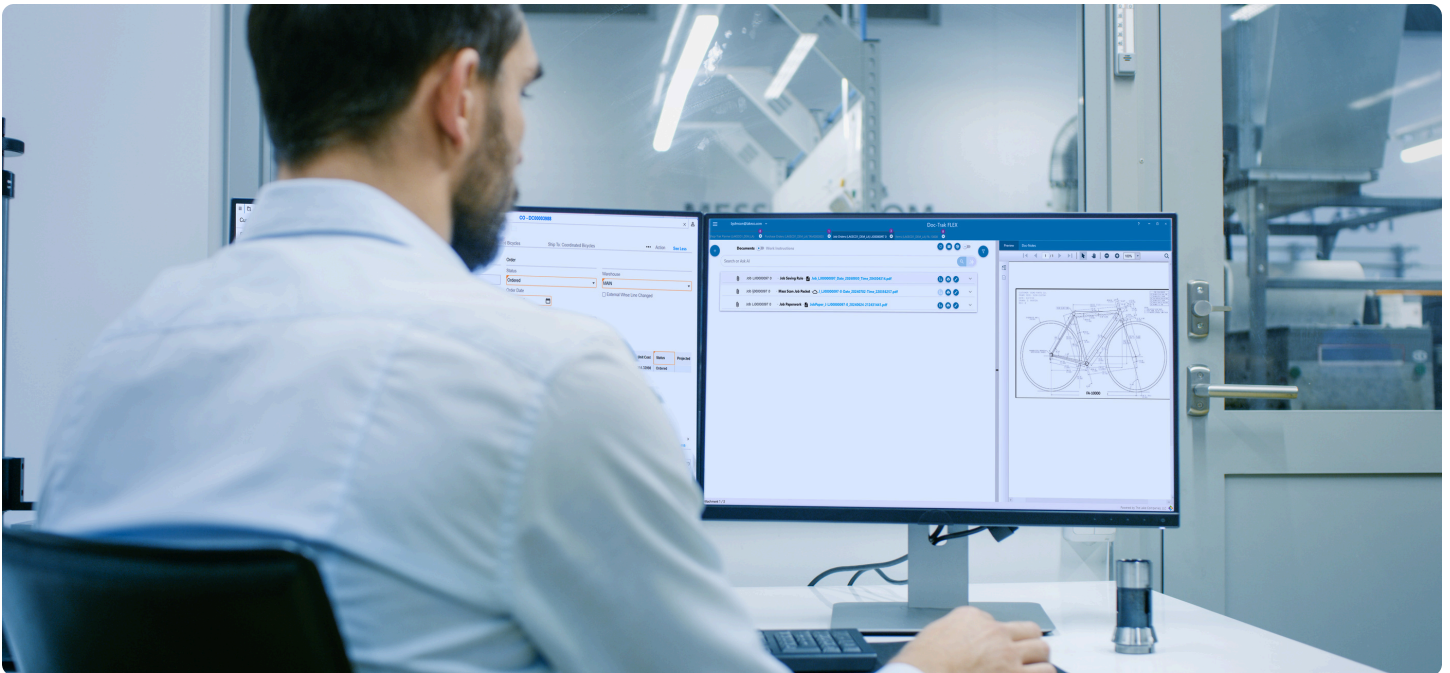


DOCUMENT AUTOMATION AND CONTROL FOR INFOR SYTELINE

The right document finds the work.

Every SyteLine transaction has paper behind it: the customer's PO, the drawing, the cert, the packing slip, the vendor's invoice. Doc-Trak attaches each document to the SyteLine record it belongs to, files what arrives by rule, sends what leaves with the attachments already inside one PDF, and puts the job's drawing in front of the operator through Shop-Trak. Your documents stay in the file shares, SharePoint libraries, cloud storage or Infor Document Management (IDM) you already have. What changes is that SyteLine knows where they are.



SyteLine is your system of record. The Lake MES Platform is your system of execution.

The shop-floor platform for SyteLine manufacturers. Available now, and it grows with every release.

650+

manufacturers run Lake software today

Since 1983

The Lake Companies has served more than 1,000 manufacturers over four decades, through SyteLine implementations, services and its own products, focused on the Midwest.

Built for SyteLine only

A standalone application on the SyteLine database, under SyteLine security, with no middleware. Built and supported by The Lake Companies.

WHAT WE HEAR ABOUT PAPERWORK AND DOCUMENTS

Six versions of the same problem, in almost every plant we walk into. Here is what each one looks like once the document finds the work.

The goal underneath all six is the same: the right document, one click from the SyteLine transaction it belongs to, and at the station where the work is done.

TODAY Fifty small hunts a day Invoices, POs, certs and drawings live in inboxes, shared drives and paper folders. Everyone spends part of the day looking.	WITH DOC-TRAK Every document one click from the record Doc-Trak FLEX follows you through SyteLine and shows the attachments for whatever record you are on, across every open form and site. The Search or Ask AI bar answers a question across the attachments on screen.
The wrong print on the bench The packet on the bench is a revision behind. The part runs until someone notices.	The released revision opens with the job The drawing is attached to the item once and shows on every order line, job operation and Shop-Trak station for that item. The old revision is marked Obsolete and never prints, emails or goes into a packet again.
Invoices wait on paperwork Accounts payable hunts for the PO, the receiver and the packing slip before anyone can approve the voucher.	The PO, the receiver and the invoice sit together Receive with Docs scans the vendor's packing slip onto the PO at receiving. At vouchering the invoice is scanned or dragged from Outlook onto the voucher, and all three sit on the posted transaction.
Paperwork assembled by hand in four departments Shipping staples certs to the packing slip while the truck waits. Purchasing attaches drawings to the PO by hand. Customer service and invoicing hunt for the same documents again.	One PDF out the door Print Doc-Trak sends the packing slip, the purchase order, the order verification and the invoice to the right contact with the certs and drawings inside one PDF, then archives each one and attaches it back to its record. Shipping, purchasing, customer service and invoicing, one button each.
Audits and disputes stall An auditor or a customer asks for the record, and the team starts digging through binders.	The record answers while they wait Certs are scanned to the lot at receiving and follow the material. The Job Document Book collects every document on the job into one PDF, and the audit log shows who added, changed or deleted any attachment.
Knowledge walks out the door Files sit in personal folders and inboxes, under a filing system one person understands, and leave when that person does.	Filing rules, not personal habits Saving rules name and file every document the same way, from the record's own fields, into your repositories. When someone leaves, the record is where the next person will look.

"Where is the drawing for this job? And is it the current one?"

The question asked at every work center, every day. A drawing attached once to the item and shown wherever the item appears is where the answer starts.

"Can we prove these parts were good? Certs live on a whiteboard, audits take two weeks."

The question every quality manager answers under pressure. A cert scanned to the lot at receiving and collected in the Job Document Book is the answer with no searching.

WHAT YOUR TEAM GETS, ROLE BY ROLE

Purchasing and accounts payable The PO leaves with the drawings inside. The packing slip comes back onto the PO, and the invoice joins them on the voucher.	Engineering and document control Attach the drawing once. Approve a work instruction once, with a revision number, and the old version retires itself.	Operator Opens the drawing and work instruction attached to the job at the Shop-Trak station, and drops a photo back onto the job.	Quality Pulls the job's certs and the work instruction view log from the record while the auditor is still in the room.
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WHY DOC-TRAK

Five reasons manufacturers choose it, whichever repository they keep.

Works with the repository you have, IDM included

File shares, SharePoint, Amazon S3, Box, Dropbox, Laserfiche and Infor Document Management. Doc-Trak 2026 saves to IDM, archives to IDM and shows IDM documents beside the record. Nothing to migrate.

The paperwork does the filing

Saving rules build the path, the name and the document type from the record. Mass Scanning matches a stack by barcode to receipts, lots, serials and vouchers. Receive with Docs files the packing slip as part of receiving.

One PDF out the door

The Print button on about 30 SyteLine forms, packing slips, purchase orders, order verifications and invoices among them, becomes Print Doc-Trak. Twelve of them go out as packets with the drawings, specs and certs inside. The Job Packet prints with its drawings. The Job Document Book collects the whole job.

The floor sees it, and proves it saw it

Through Shop-Trak, the operator opens the drawing and work instruction at the station. Required steps gate quantity complete, the view log says who saw what, and Doc-Notes carry replies back to the office.

Every form, every site, every SyteLine you run

More than 100 SyteLine forms plus Infor CRM, Service, RFQ and Quality-Trak forms. On-premises SyteLine 9.00.20 through 10, SyteLine 10 and Infor CloudSuite Industrial (SyteLine) in Infor's multi-tenant cloud.

SIDE BY SIDE WITH INFOR DOCUMENT MANAGEMENT

IDM is a good repository, and in the multi-tenant cloud it is already yours. Doc-Trak is the document workflow that runs on it.

The IDM column is as Infor documents IDM for CloudSuite Industrial, together with the separate Infor products it works with. Where IDM is stronger, the verdict says so.

	IDM AND THE INFOR PRODUCTS IT WORKS WITH	DOC-TRAK ON THE LAKE MES PLATFORM	VERDICT
A repository of record	Versioning, check-out and check-in, retention policies, access control lists, security audit log	Not a repository. Documents stay in your repositories, IDM included; Doc-Trak adds the Obsolete flag, an attachment audit log and revision control on work instructions	IDM
Included and Infor-maintained	The entry tier of Infor OS, which carries IDM, is included with CloudSuite Industrial in Infor's multi-tenant cloud; Infor Cloud sets it up and moves it with each uplift	Part of the Lake MES Platform subscription. Each SyteLine release is tested by Lake, then the platform release follows	IDM
Which forms carry documents	The forms Infor has set up (customers, orders, invoices, vendors, POs, A/P, items); other forms by extending Infor's context model	More than 100 forms, and an item's drawing flows automatically to every order line, job operation and estimate	DOC-TRAK
Filing inbound paper	Upload or drag and drop with the record's attributes; Infor Document Capture, a separate product, scans supplier invoices to the PO and voucher	Saving rules, Mass Scanning with barcode match, Receive with Docs, certs to lot and serial, PO, receiver and invoice together at vouchering	DOC-TRAK
Outbound paperwork and job packets	Invoices and POs are stored in IDM when printed; delivery is SyteLine report email	About 30 reports and 12 packet types with attachments inside; Job Packet with drawings; Job Document Book	DOC-TRAK
The shop floor	Infor Factory Track, a separate product, shows IDM documents in its pane	Shop-Trak shows drawings, Doc-Notes with replies and Visual Work Instructions with required steps and a view log; IDM documents show in Shop-Trak too	DOC-TRAK

Already running IDM? Keep it.

IDM stays the repository, with its versions, retention and access lists. Doc-Trak 2026 saves inbound documents into IDM by rule with the right document type, archives SyteLine reports into IDM, surfaces documents already in IDM beside the record, and shows them in FLEX and in Shop-Trak. Customers run both, and we implement both. IDM is part of Infor OS: in Infor's multi-tenant cloud it is included with CloudSuite Industrial. Doc-Trak works with IDM's standard document types; custom IDM document types are set up by Lake as a modification.

- Saving rules file into IDM with path and document type. AVAILABLE NOW
- Form Output archives reports and packets into IDM. AVAILABLE NOW
- Virtual rules surface existing IDM documents by standard type and metadata. AVAILABLE NOW
- IDM documents in Doc-Trak FLEX and at the Shop-Trak station. AVAILABLE NOW

Doc-Notes and Visual Work Instructions keep their own Doc-Trak storage.

WHY THE PLATFORM

Documents don't live alone. On the platform, the job carries them.

Shop-Trak

Labor, quantities and scrap at the operation. The drawing, notes and work instruction open at the same station, and a photo from the floor lands on the job.

AVAILABLE NOW

Machine-Trak

Any asset reports run, idle and down. OEE and utilization first, then downtime reasons. The job link to Shop-Trak is expected by the end of 2026.

AVAILABLE NOW

Quality-Trak

Nonconformance, corrective action, engineering change, audits and inspections inside SyteLine, on the same records your documents follow.

AVAILABLE NOW

Fact-Trak

Job cost and margin analytics on your SyteLine data, by job and work center, before month-end. Part of the Pro tier.

AVAILABLE NOW

Vantage

Your Command Center: late jobs, holds and machine state on one role-based screen, with the job's documents a click away.

EXPECTED EARLY 2027

Intelligence

AI across the platform, building on Doc-Trak's AI summaries and Search or Ask AI. A person approves every action.

PLANNED 2027

YOUR PLATFORM JOURNEY

STAGE 1

Paper onto the record

Inbound paper files itself by rule. Outbound paperwork leaves with the attachments inside.

AVAILABLE NOW

STAGE 2

Documents at the station

Shop-Trak opens the drawing and work instruction attached to the job, and logs who viewed it.

AVAILABLE NOW

STAGE 3

Machines reporting, quality on the job

Machine-Trak reports OEE and utilization on any asset. Quality-Trak records inspections and nonconformance on the same job.

AVAILABLE NOW

STAGE 4

Run the plant from one screen

Late jobs, holds and machine state on one role-based command center, with the job's documents a click away.

EXPECTED EARLY 2027

ONLY A PLATFORM CAN DO THIS

The drawing opens with the job

The drawing attached to the job is at the station when the operator clocks in: the revision in force, under Doc-Trak's revision rules.

AVAILABLE NOW WITH SHOP-TRAK

The instruction gates the quantity

Required steps must be viewed before the operator reports quantity complete, and the view log says who saw what.

AVAILABLE NOW WITH SHOP-TRAK

A new revision reaches every open job

A released revision walks the bill of material to every job that carries the item.

PLANNED

HOW YOU BUY IT

One subscription, one renewal

Your tier includes a license for each of its products, with starter quantities included, and you install what you need. One agreement covers all of it.

Capacity scales, capability activates

Add users as you grow. New capability is switched on, not reinstalled. Your account team sizes the platform with you and confirms the numbers in a written quote.

Care after go-live, included

Check-ins and activation help are part of the subscription. Current Lake customers receive loyalty pricing on the platform.

Shop-Trak, Doc-Trak and Fact-Trak already work on your SyteLine data today. The first direct product-to-product integration, Shop-Trak and Machine-Trak, is expected by the end of 2026, with more through 2027. Moving to Infor's multi-tenant cloud? Doc-Trak and the platform move with you. Your account team will confirm what your version supports.

START WITH THE PAPERWORK. KEEP CLIMBING.

Paper onto the record › documents at the station › connected machines › one screen

Talk to a Doc-Trak expert: (920) 406-3030 | lakeco.com/doc-trak | We'd rather come solve a real problem on your floor than run you through a demo.

