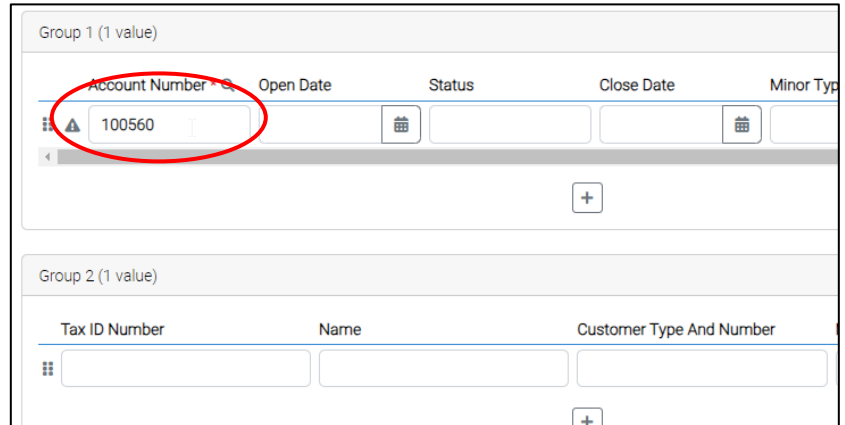# Using the Indexing Required Smart Folder
(Managing Unsynced Documents with Host Data)

When a document that has a lookup attribute (pulling back associated data from Core Data) comes into the archive, it should sync with core data. However, in some situations the lookup may not yield data, in which case the sync will not be successful, indicated by the ⚠ icon.


The "Indexing Required" Smart Folder is designed to capture documents whose lookup is not synced.
The search criteria are comprised of:
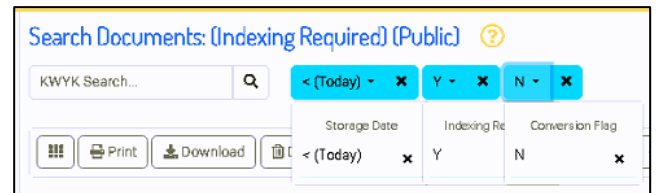
- **<(today)** – Requests documents with a Storage Date prior to today, AND
- **Y** – Indexing is required (a computed formula is set up to indicate whether the document has a successful sync status, AND
- **N** – Conversion documents (documents that are coming in as part of the conversion process) are excluded from the search results.

To remove the documents from the folder, the indexing information must be corrected (synced). Open the document in Identifi and navigate to the **Indexing Panel** within the Document Detail Viewer. Check to ensure the Account Number (or Tax ID) is correct (i.e., are there dashes or leading zeroes?)

Click the **"Edit"** button and enter the correct lookup data, then force the lookup to sync by clicking the magnifying glass. A successful sync will reflect a check mark next to the attribute.
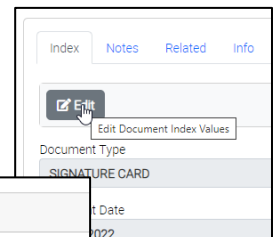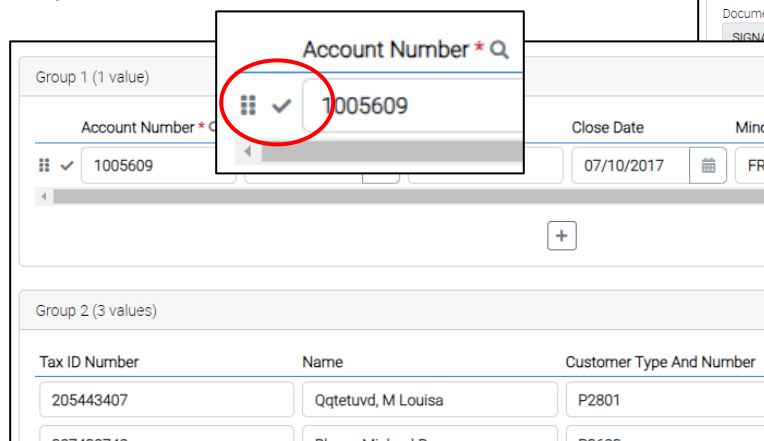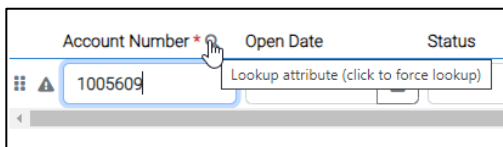
Click Save to save the information.

Index	Notes	Related	Info

✕ Cancel   💾 Save

Save Index Value Changes
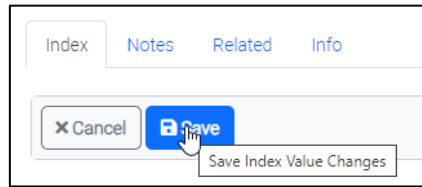
Go back to the Smart Folder and refresh the screen. The document will no longer meet the folder criteria and will no longer show in the folder.