# Quick Concepts Check Answer Key Excel, Chapter 5

**Quick Concepts Check 1**

1. Why must a dataset be sorted by a category before using the Subtotal feature? Within the Subtotal dialog box, which option do you set to match the column you used to sort the data?  
     
   If the data are not sorted by a major category, the subtotaled results will not be correct. The *At a change in* option must be set to match the column that you used to sort the data. The data must be sorted by categorical data.
2. Explain the SUBTOTAL function as it is used by the Subtotal feature.  
     
   Excel uses the SUBTOTAL function to calculate the subtotals using the function you select. For example, the first argument in the function (9) sums the values in the range specified in the second argument.
3. How can you expand or collapse outlined groups of columns?  
     
   Click the + icons to expand a group; click the – icon to collapse a group.

**Quick Concepts Check 2**

1. What are the advantages of using a PivotTable instead of a subtotal?  
     
   You can group data into one or more categories and perform a variety of calculations without altering the original dataset, whereas the Subtotal feature inserts subtotal rows within the original dataset. An important benefit of a PivotTable is that it is dynamic: You can easily and quickly *pivot*, or rearrange, the data to see them from different angles, such as expanding or collapsing details, organizing and grouping data differently, and switching row and column categories.
2. What is the main benefit of creating a PivotTable using the Quick Analysis gallery or from the Recommended PivotTables dialog box over creating a blank PivotTable?  
     
   Excel displays recommended PivotTables based on the data. If you create a blank PivotTable, you must manually add fields to create the PivotTable.
3. List the four areas of a PivotTable.  
     
   Filters, Columns, Rows, and Values.

**Quick Concepts Check 3**

1. What is the purpose of applying a filter to a PivotTable? How do you apply a main filter and additional filters?  
     
   The PivotTable might contain too much detail. You can apply a filter to include only the values that meet a particular condition. You can set a main filter by dragging a field to the FILTERS area of the task pane and then click the filter arrow in cell B1 to specify the condition(s) you want. For additional filtering, click the arrow above the row labels in cell A4 or the column labels filter arrow in cell B3.
2. What is a slicer? What do the three different colors indicate in a slicer?   
     
   A slicer is a window listing all items in a field and enables efficient filtering of data in a PivotTable. The main color indicates the filters you set. The lighter color indicates values you have not set. Values that not applicable due to other filters set are grayed out.
3. When would you create a calculated field in a PivotTable?  
     
   You create a calculated field when the values in the PivotTable do not provide the calculations you need. For example, the original dataset may not provide a percentage increase, so you can create a calculated field to calculate a percentage increase based on the aggregated values.

**Quick Concepts Check 4**

1. What types of specific elements can you select to be controlled by PivotTable styles?  
     
   Bold formatting, font colors, shading colors, and border lines.
2. What must be done to create a PivotTable from more than one table?  
     
   The tables must be in the same workbook. The user must then relate the tables together based on a common field, such as ID.
3. What replaces the ROWS and COLUMNS areas in the task pane when you create a PivotChart?  
     
   The ROWS area changes to AXIS FIELDS (CATEGORY), and the COLUMNS area changes to LEGEND (SERIES) when you select the PivotChart.