Here is a report with aggregate by Fiscal Year



If I filter for Fiscal Year… Looks Great. Exactly What I want.



BUT if I then drill down, the MONTHS are sorted by calendar year it looks like calendar Year and there is no option to choose “Data Order” as the sort. 

Drill down to the actual Date/Time of the visit shows that the years of the month correspond to the Fiscal Years(here I just removed the aggregation and added the date timestamp of the visit.)



….



If I Add just the “YEAR” field, it doesn’t give me the sum total of the Fiscal Year but the aggregate by Calendar Year



Even if I swap it:



Although when drilling down, it does, give the correct month order, I really want the (above) SUM total by Fiscal Year…. (as shown in the original screen shots).



Example of the Base report is FY by Agency with Drill downs:

Agency > Division > Program > Service

Fiscal Year > Month> Day (or could be Fiscal Year > Quarter > Month

| Agency | Fiscal Year | 2020 | 2021 |
| --- | --- | --- | --- |
| Agency | # Unique Clients | ### | ### |

Our Fiscal (Financial) Year 2020 is 01 Jul 2019 through 30 Jun 2020, but without the year, it just looks like a calendar year (Blue are months in 2020, Highlighted in Yellow are months in 2019.

After Drill down, below is a version sorted by “Data Order”

| Agency | DOS (Month) | Jan  | Feb | Mar | Apr | May | Jun | Sep  | Oct  | Nov  | Dec  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Agency | # Unique Clients | ### | ### | ### | ### | ### | ### | ### | ### | ### | ### |

Without the data sort, it comes out alphabetical

| Agency | DOS (Month) | Apr  | Dec | Feb | Jan | Jun | Mar | May | Nov | Oct | Sep |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Adult | # Unique Clients | ### | ### | ### | ### | ### | ### | ### | ### | ### | ### |

If you add the YEAR as a separate field and sort by data order

|  | Fiscal Year | 2019 | 2020 |
| --- | --- | --- | --- |
| Divisions | DOS (Month) | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
| Adult | # Unique Clients | ### | ### | ### | ### | ### | ### | ### | ### | ### | ### |

I had to concatenate the YEAR to the numeric month in order for it to work:



The view has a virtual table:

*select clientvisit\_id*

*, convert(date, rev\_timein) as DtRevTimein*

*, DatePart(Year, rev\_timein) as DOS\_Year*

*, DatePart(Month, rev\_timein) as DOS\_Month*

*, DatePart(Day, rev\_timein) as DOS\_Day*

*, YEAR(DATEADD(month, 6, clientvisit.rev\_timein)) as DOS\_FiscalYear*

*, convert(varchar, right(DatePart(Year, rev\_timein),2)) + ' '*

*+ Case when len(DatePart(Month, rev\_timein)) < 2 THEN convert(varchar, '0')+ convert(varchar, DatePart(Month, rev\_timein)) Else convert(varchar, DatePart(Month, rev\_timein)) END*

*+ '('*

*+ convert(varchar, left(DATENAME(MONTH, rev\_timein), 3))+')' AS DOS\_MM\_YYYY*

*from ClientVisit*

In the below, DOS\_MM\_YY Format Display Name is DOS\_CY\_Month

