



LUND
UNIVERSITY

HR Division

Primula Salary review module - Guide for managers

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Contents

Instructions Primula salary review	3
1. Log in to Primula Salary revision	4
2. Bid.....	4
2.1 Overview.....	4
2.1.2 Follow-up bid.....	5
2.1.3 Follow-up salary agreement.....	5
2.1.4 Follow-up status	5
2.2 Section Bid.....	5
2.2.1 Filter bids	6
2.2.2 Salary Scope.....	6
2.2.3 About the Bid table	6
2.2.4 Register bids	8
2.2.6 Salary agreement.....	10
2.7.7 Mark as done	11

Instructions Primula salary review

This guide is aimed at those who will work as a manager or as a trade union representative in a salary review in Primula's salary review module.

In the Primula salary review module, there are three authorisation roles: Manager, Trade union and Administrator:

- Users with the authorisation role Manager can enter the system and register new salaries for their staff.
- Users with the Trade union authorisation role can enter the system to register counteroffers (claims). The trade union representatives only have access to the individuals in the salary revision round who are affiliated to their trade union organisation.
- Users with the Administrator authorisation role can configure and administer different parts of the salary revision, assign permissions and, if necessary, can change information about the loaded employments.

All roles can export bids to Excel.

1. Log in to Primula Salary revision

Log in to Primula via **Staff Pages** → **SSC Primula**.

To open Salary revision, select the menu option **"Salary revision"**, which will open the application. Select **"Bid"**.



Choose the salary revision in the pop-up window **"Select review round"** and click on **"Select"**. *If you only have one role, such as manager (chef) or trade union (fackförening), or if you only have access to one review round, this option will not be shown to you. You will then be directed to the Overview directly.*



There is an overall salary revision concerning all staff members, excluding phd students, key management positions etc. and it is this salary revision You are going to work with:

- Lönerevision 2023

2. Bid

2.1 The Overview tab

The first tab of the Bid menu option is 'Overview', which provides a overview of the selected review round.

Bids

Change role

Chef

Selected review round: Lönerrevision 2023

CHANGE REVIEW ROUND

OVERVIEW

BIDS

Overview +

Checklist +

Follow-up bid +

Follow-up salary agreement +

EXPORT

Follow-up status +

2.1.2 Follow-up bid

In the "Follow-up bid" section a quick overview is provided of the bids that you have access to in the review round.

Follow-up bid					
Organization ↑	Employees	Bids (incl. zerobid)	Avg. salary	New Avg. salary	Avg. increase
809930 HR	7	0	55 057.14	55 057.14	0
809930-2 HR, Arbetsgivars...	15	0	50 980	50 980	0
809930-3 HR, Verksamhet...	15	0	42 006.67	42 006.67	0
809930-4 HR, HR Systems...	15	0	45 286.67	45 286.67	0
Total	52	0			

2.1.3 Follow-up salary agreement

New in this year's review round, is that the salary agreement can be generated directly in Primula salary review (which means that this is no longer done with a paper form). See more information on how this is done under 2.2.5 below.

Under the overview tab, you as a manager can also see a table that shows how many salary agreements have been generated and what status they have.

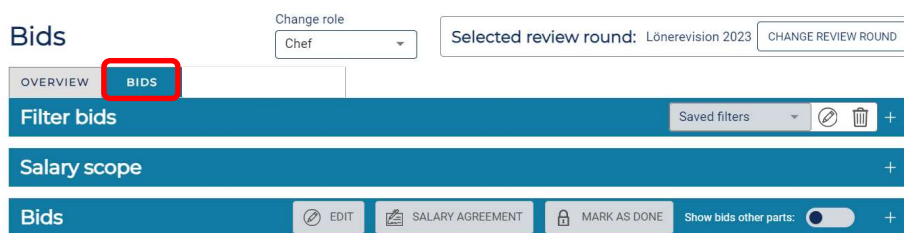
Follow-up salary agreement					
Organization ↑	Sent	Without action	Pending	Declined	Accepted
No Rows To Show					

2.1.4 Follow-up status

In the Bids table, it is possible to enter the status of an employment in a column to indicate different phases of the salary setting process. It is optional to use this column at LU. If it is used, you can follow the status in the review round.

2.2 The Bids tab

Under the Bids tab, all employments are shown that you (as a manager or trade union representative) are authorised for.



2.2.1 Filter bids

To work with a selection of the employments in the review round, that you as a user have access to, the following filtering options are available:

- Organisational belonging
- Job title
- Person (name and/or personal number)
- Function (not used at LU)
- Bids with warnings (e.g. because there is a future salary event that affects a bid)
- Revision type
- Status

If necessary, the selection can be saved as a ready-made filter that you can reuse later. It is also possible to filter directly under the heading in the Bids table (here you can also filter on, for example, trade union organisation), see below.

2.2.2 Salary Scope

This functionality is not used at LU.

2.2.3 About the Bids table

The "Bids" table shows all negotiable posts included in the selection. It is in this part of the review round that bids for new salary are registered. The information for each person/employment presented is based on basic employment information such as personal number, employment number, position, organisational affiliation, etc.

For each employment, a detail view can also be opened and salary history can be presented.

The menu bar/columns in the Bids table are in the following order:

- Trade union= Saco, OFR, Seko or unaffiliated
- Revision type – Appraisal, negotiation, unaffiliated appraisal
- Personal number
- Employment number
- Name
- Job
- Organisation
- Salary – the salary before the salary review
- New salary – the manager's proposed salary is written here
- Increase in SEK
- Increase in %
- Salary agreement – must only be sent to Saco-S members and unaffiliated (revision type Appraisal and unaffiliated appraisal)
- Salary history

ⓧ

ATO:

Negotiation type:

Personal number: ██████████

E.no: **3**

Name: ██████████

Job: **HR-partner**

Organization: ██

Salary: ██████

New salary:

Increase SEK:


Increase %:

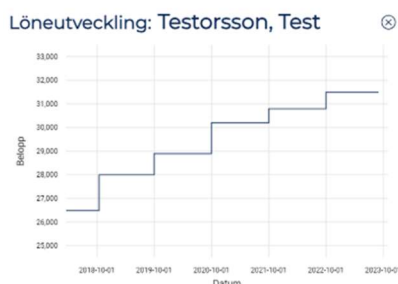
Done: **N**

Extent: **100**

Allocation: **100**

2.2.3.2 Salary history

The salary history of an employment can be opened in a separate dialogue. This is done by clicking on the Salary history icon  which is located on each employment line. The dialogue displays a chart showing the salary up to 5 years back in the current employment (i.e employment number) from the revision date.



2.2.3.3 Filter the bid table

As mentioned in section 2.2.1, the bid table can be filtered by typing in the text field under the headings in the bid list.

2.2.3.4 Sorting the bid table

The bid table can be sorted by clicking on the respective headings.

2.2.4 Register bids

The Bids table shows all negotiable posts included in the sample.

In the column "**New salary**", the new salary for the employee is registered. Primula calculates the correct value for the columns "**Increase in SEK**" and "**Increase in %**". Save reported salaries by clicking on the "**Save bids**" button (located on the right, at the bottom of the page). Please note that all bids should be entered in even hundreds.

NOTE!

If you leave the salary review module without clicking on "Save bids", the salary reported will disappear.

If several people with the same access rights work with the same organisational unit at the same time, everything reported will be saved when one of the users presses the "Save bids" button.

Here can you see the revision type (**Appraisal, negotiation**) for each employee. Do not make any changes in this column. The membership in the trade union decides what revision type it should be.

Register the new salary in even hundreds in the column "**New Salary**". The system calculates the increase in SEK and in %. It's also possible to register the increase in SEK or %, but the new salary must be in even hundreds.

Do not forget to **SAVE BIDS**.

There is a *summary* at the bottom of the page that summarises and calculates the outcome of registered bids for the current selection or applied filter.

2.2.5 Process Bid - Counter-bid (claims) - Negotiation

When the managers have entered their bids/offers, the employer sends these in the Primula salary revision module to the trade unions (OFR/S and Seko) (see timetable for when this happens). The trade unions will now see "New salary Manager" in its respective bid table. The trade union now enters its counteroffers (claims) under "New salary". When these counteroffers (claims) are collectively received by the employer, the manager will see the trade union counterbid/claims in the column "New Salary Fackförening". The manager sees the trade union counter offers (claims) by clicking on the button "Show bids other parts".

Salary	New salary	New salary Administr...	New salary Fackfö...	Increase SEK	Increase SEK Admini...	Increase SEK Fackfö...	Increase %
		This is not used at LU	The trade unions counterbids/ claims are shown here. New salary		This is not used at LU	The trade unions counterbids/ claims are shown here. Increase in	
40 300							
56 300							
42 700							
35 900							
53 200							


The role Administrator never registers salary bids as an administrator; therefore nothing will be visible in this column. If the need arises, the administrator can make changes to the existing bid, but this is always done in the role of "manager" and will also be visible in the system logs.

2.2.6 Salary agreement

NOTE - Below, regarding sending a salary agreement, applies only to employees who are affiliated to Saco-S, or are not affiliated to any organisation. NOTE - The manager should NOT send a salary agreement to employees who are affiliated to OFR or Seko.

If there is a new salary registered, the manager can generate a salary agreement for one or more employments. How to do this:

Send a salary agreement to an individual employee:

1. To generate a salary agreement, click on the symbol in the bid table . A question will appear that looks like this:

Salary agreement for XXXXXXXXXX

There are no previous salary agreements

2. To send the salary agreement to the employee, press the button "Send salary agreement."

Send a salary agreement to several employees at the same time:

1. Select the employees/who the salary agreement should be sent to, either by ticking the correct individuals on the far left, or by e.g. sorting by revision type Apraisal/Unaff. Apraisal. Salary agreement should only be sent to those with revision type "Apraisal" and "Unaff. Apraisal" (not Negotiation). In the checkbox, select either all of the selected employments via the tick box at the top of the menu bar (far left) or individuals in the selection.
2. Check that you have the right employees ticked.
3. Click on the button "Send salary agreement". The salary agreement will be sent immediately.

The screenshot shows a web interface for managing bids. At the top, there's a 'Salary scope' section. Below it, a table lists various bid entries. A 'Salary agreement' button is located above the table. Red boxes highlight the 'Salary agreement' button and the 'Approve'/'Disagree' dropdown menus in the table rows.

When a salary agreement has been generated (i.e. sent to the employee), it becomes visible to the employee under the menu item "Salary agreement" under "My page" in Primula. The page contains information about the new salary and when it applies from. If a response is required (Saco members only), the employee has two choices, Approve or Disagree. If the employee chooses Disagree, an explanation must be provided. In the message table for the manager (see the Overview tab), the icon under the salary agreement column shows the status of the sent salary agreement. The manager can open the salary agreement dialogue for more information.

Follow-up salary agreement						EXPORT
Organization	Sent	Without action	Pending	Declined	Accepted	
809930-4 HR, HR Systemstöd- och kompetensutve...	1	0	1	0	0	

If the salary agreement was generated incorrectly, the manager can cancel the sent agreement or generate a new one. If a new one is generated, the previous one will be automatically cancelled.

If the new salary has been changed after the salary agreement has been sent, a warning will be displayed in the message table in the new salary column. Neither the employee nor the manager can respond to a salary agreement after the offer is marked as done or transferred to Primula for payment.

2.7.7 Mark (bid) as done

- May only be done after notification from the faculty's RALS representative.

Information for managers: After negotiations/completed salary appraisals and before final checks and upcoming payment, all employment posts must be marked as done.

This can be done by clicking on the padlock symbol, or by selecting one or more employments and then clicking on the "Mark as done" button. **PLEASE NOTE, however, that this may only be done after notification from the faculty/other RALS representative.** Once marked as done, the offer is locked to the manager and the trade union organisation.