



Harbourside Group

People & Culture · Standard operating procedures



Harbourside Group

Add a new starter in Kestrel HR

26 September 2026 · 13 steps

Yellow box = click here. The magnified panel shows the same spot up close.

Before you start

- You need the **HR Advisor** role in Kestrel HR.
- Have the signed offer letter to hand: the name, department and contract type must match it.
- Practise with test data only, never a real person's details.

Policy: [Onboarding and induction procedure, v3.2](#)

Step 2 — Complete the following steps

Kestrel HR

**Everything for your people,
in one place.**

Onboarding, training records and approvals for Harbourside Group.

Sign in
Use your Harbourside Group work account.

1 Work email
sam.taylor@harbourside.example

2 Password
.....

3 Sign in

Trouble signing in? Contact the IT service desk.

1. Enter **sam.taylor@harbourside.example** in **Work email**
2. Enter your **Password**
3. Click the **Sign in** button

Sign in · Kestrel HR · <http://hr.harbourside.example:8800/> · textbox · 26 Sept 2026, 10:49

Step 3 — In the menu, click Onboarding

Kestrel HR

Home

People

3

+ Onboarding

Training

Reports

Harbourside Group

Good morning, Sam

Sam Taylor · HR Advisor

ST

4

Starters in the next 30 days

12

Training records due for renewal

98%

Mandatory training compliance

Tasks for you

Approve leave request — Priya Nair

Due today

Review probation — Tom Okafor

Next week

Fire safety refresher — Warehouse team

In progress

Step 3 · Result

Kestrel HR

Home

People

+ Onboarding

Training

Reports

People

Onboarding

Add new starter

Name	Department	Start date	NI number	Salary	Status
Jordan Blake	Operations	6 Oct 2026			Ready
Mei Chen	Customer Care	13 Oct 2026			Right to work check
Oliver Grant	IT	20 Oct 2026			Contract sent
Aisha Rahman	Legal	27 Oct 2026			Contract sent

Step 4 — Click the Add new starter button

The screenshot shows the Kestrel HR interface. On the left is a dark blue sidebar with navigation links: Home, People, Onboarding (highlighted with a plus icon), Training, and Reports. The main content area is titled 'Onboarding' and contains a table of new starters. A yellow callout box with the number '4' points to a blue 'Add new starter' button in the top right corner. Another yellow callout box with the text 'Add new starter' is shown in the bottom left, with a line pointing to the button in the top right.

Name	Department	Start date	NI number	Salary	Status
Jordan Blake	Operations	6 Oct 2026			Ready
Mei Chen	Customer Care	13 Oct 2026			Right to work check
Oliver Grant	IT	20 Oct 2026			Contract sent
Aisha Rahman	Legal	27 Oct 2026			Contract sent

Onboarding · Kestrel HR · <http://hr.harbourside.example:8800/#onboarding> · button · 26 Sept 2026, 10:49

Step 5 — Complete the following steps

Kestrel HR

Onboarding

Add new starter

1 First name Alex

2 Last name Morgan

3 Work email

Department Choose a department

Start date 3 Nov 2026

Line manager Priya Nair

Contract type

☐ Permanent ☐ Fixed term ☐ Contractor

☐ Assign mandatory compliance training

- Data protection and privacy (GDPR)
- Fire safety and evacuation
- Code of conduct and anti-bribery

Cancel Create starter record

1. Enter **Alex** in **First name**
2. Enter **Morgan** in **Last name**
3. Enter **alex.morgan@harbourside.example** in **Work email**

Add new starter · Kestrel HR · <http://hr.harbourside.example:8800/#onboarding/new> · textbox · 26 Sept 2026, 10:49

Step 6 — Choose Finance from Department

Kestrel HR

Onboarding

Add new starter

First name	Last name	Work email
Alex	Morgan	alex.morgan@harbourside.example
Department	Start date	Line manager
Finance	3 Nov 2026	Priya Nair

Contract type

☐ Permanent ☐ Fixed term ☐ Contractor

☐ Assign mandatory compliance training

- Data protection and privacy (GDPR)
- Fire safety and evacuation
- Code of conduct and anti-bribery

Cancel Create starter record

Step 6 · Result

Kestrel HR

Onboarding

Add new starter

First name	Last name	Work email
Alex	Morgan	alex.morgan@harbourside.example
Department	Start date	Line manager
Finance	3 Nov 2026	Priya Nair

Contract type

☐ Permanent ☐ Fixed term ☐ Contractor

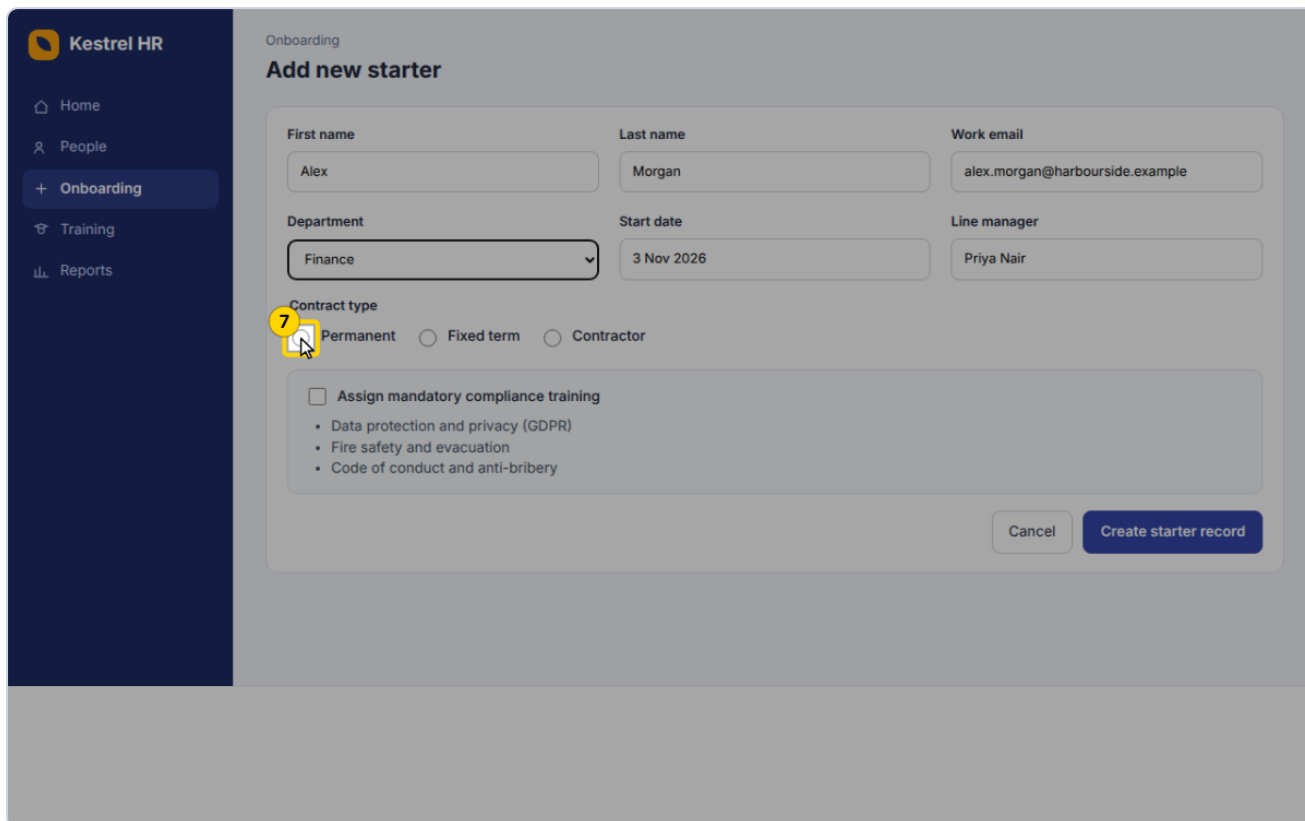
☐ Assign mandatory compliance training

- Data protection and privacy (GDPR)
- Fire safety and evacuation
- Code of conduct and anti-bribery

Cancel Create starter record

Add new starter · Kestrel HR · <http://hr.harbourside.example:8800/#onboarding/new> · combobox · 26 Sept 2026, 10:49

Step 7 — Under Contract type, select Permanent



Kestrel HR

Onboarding

Add new starter

First name	Last name	Work email
Alex	Morgan	alex.morgan@harbourside.example

Department	Start date	Line manager
Finance	3 Nov 2026	Priya Nair

Contract type

☒ Permanent ☐ Fixed term ☐ Contractor

☐ Assign mandatory compliance training

- Data protection and privacy (GDPR)
- Fire safety and evacuation
- Code of conduct and anti-bribery

Cancel Create starter record

Add new starter · Kestrel HR · <http://hr.harbourside.example:8800/#onboarding/new> · radio · 26 Sept 2026, 10:50

Step 8 — Tick Assign mandatory compliance training

The screenshot shows the 'Add new starter' form in the Kestrel HR system. The form includes fields for First name (Alex), Last name (Morgan), Work email (alex.morgan@harbourside.example), Department (Finance), Start date (3 Nov 2026), and Line manager (Priya Nair). Under 'Contract type', 'Permanent' is selected. A yellow callout box with the number '8' points to a checkbox labeled 'Assign mandatory compliance training'. Below this checkbox is a list of training topics: 'Data protection and privacy (GDPR)', 'Fire safety and evacuation', and 'Code of conduct and anti-bribery'. At the bottom right of the form are 'Cancel' and 'Create starter record' buttons.

Kestrel HR

Onboarding

Add new starter

First name: Alex, Last name: Morgan, Work email: alex.morgan@harbourside.example

Department: Finance, Start date: 3 Nov 2026, Line manager: Priya Nair

Contract type: ☒ Permanent, ☐ Fixed term, ☐ Contractor

8 ☐ Assign mandatory compliance training

- Data protection and privacy (GDPR)
- Fire safety and evacuation
- Code of conduct and anti-bribery

Cancel Create starter record

Add new starter · Kestrel HR · <http://hr.harbourside.example:8800/#onboarding/new> · checkbox · 26 Sept 2026, 10:50

Step 9 — Click the Create starter record button

Kestrel HR

Onboarding

Add new starter

First name	Last name	Work email
Alex	Morgan	alex.morgan@harbourside.example

Department	Start date	Line manager
Finance	3 Nov 2026	Priya Nair

Contract type

☒ Permanent ☐ Fixed term ☐ Contractor

☒ Assign mandatory compliance training

- Data protection and privacy (GDPR)
- Fire safety and evacuation
- Code of conduct and anti-bribery

Cancel **Create starter record**

Add new starter · Kestrel HR · <http://hr.harbourside.example:8800/#onboarding/new> · button · 26 Sept 2026, 10:50

Step 10 — In the Confirm new starter dialog, click Confirm and send welcome pack

The screenshot shows the 'Add new starter' form in the Kestrel HR system. The form is titled 'Onboarding' and 'Add new starter'. It contains several input fields: 'First name' (Alex), 'Last name' (Morgan), 'Work email' (alex.morgan@harbourside.example), 'Department' (Finance), 'Start date' (3 Nov 2026), and 'Line manager' (Priya Nair). The 'Contract type' is set to 'Permanent'. There is a checkbox for 'Assign mandatory training' which is checked, with a list of training items: 'Data protection', 'Fire safety and evacuation', and 'Code of conduct'. A confirmation dialog is open in the center of the screen, titled 'Confirm new starter'. It contains the text: 'Alex Morgan will get a welcome email with their first-day details, and their line manager will be notified.' The dialog has two buttons: 'Go back' and 'Confirm and send welcome pack'. A yellow circle with the number '10' is placed over the 'Confirm and send welcome pack' button. At the bottom right of the form, there are 'Cancel' and 'Create starter record' buttons.

Kestrel HR

Onboarding

Add new starter

First name: Alex

Last name: Morgan

Work email: alex.morgan@harbourside.example

Department: Finance

Start date: 3 Nov 2026

Line manager: Priya Nair

Contract type: Permanent

☒ Assign mandatory training

- Data protection
- Fire safety and evacuation
- Code of conduct

Confirm new starter

Alex Morgan will get a welcome email with their first-day details, and their line manager will be notified.

Go back

10 Confirm and send welcome pack

Cancel

Create starter record

Add new starter · Kestrel HR · <http://hr.harbourside.example:8800/#onboarding/new> · button · 26 Sept 2026, 10:50

Step 11 — Check the green banner: the record number (KH-20417) confirms the starter record was created and the training was assigned

Kestrel HR

Onboarding

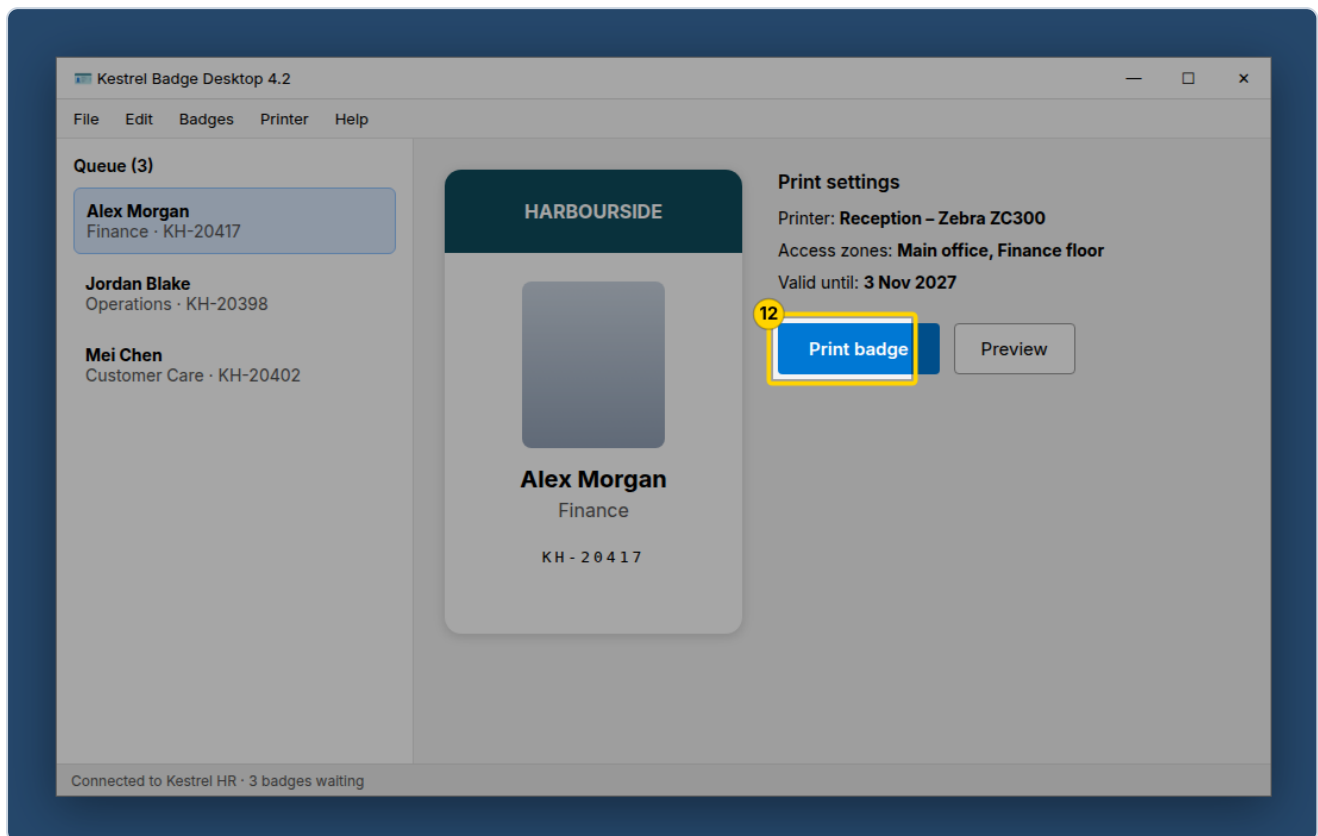
Alex Morgan [View record](#)

11 ✓ **Starter record created (KH-20417).** The welcome pack has been emailed and three training courses are assigned.

Department	Finance
Contract	Permanent
Start date	3 Nov 2026
Training assigned	Data protection · Fire safety · Code of conduct Due before 17 Nov 2026

Alex Morgan · Kestrel HR · <http://hr.harbourside.example:8800/#onboarding/KH-20417> · manual · 26 Sept 2026, 10:50

Step 12 — In Kestrel Badge Desktop, select the new starter and click Print badge



manual · 26 Sept 2026, 10:50

What happens next

- Alex gets the welcome pack by email today.
- The three compliance courses are due before **17 Nov 2026**; Kestrel HR sends reminders.
- Questions: people@harbourside.example