|  |  |  |
| --- | --- | --- |
| **Trial Date** | **Product Name** | **Brand or Customer** |
|  |  |  |
| **Production Site / Department** | **Product Target Weight** | **Product Development Code** |
|  |  |  |
| **Trial Outcome At A Glance** | Trial Successful – No further trials are needed and the product can proceed to launch | Trial Successful – But some further refinement is desirable as the product proceeds to launch |
| Trial Unsuccessful – Further trials are needed before the product can proceed to launch | Trial Unsuccessful – Product should be abandoned and not proceed to launch |

|  |
| --- |
| **Trial Objectives & Information Requirements** |
|  |

**Factory Trial Information Capture (Document Template)**

**1. RAW MATERIAL INFORMATION**

*Ensure all raw materials are logged and that you can confidently trace their origin and key information about them so you can determine if this has affected the trial outcomes.**Add rows to table as required.*

***Take photographs*** *of labels / traceability paperwork, and attach them to the report.*

|  |  |
| --- | --- |
| **List the Raw Materials** used for the trial | For each raw material record information such as :  **Supplier name, Traceability Information** (Including, but not limited to: Use By / Best Before Date; Good Received Code). |
| **1.** |  |
| **2.** |  |
| **3.** |  |
| **4.** |  |
| **5.** |  |
| **6.** |  |

**2. PROCESSING DETAILS**

*Plot each step of the product’s progress through any manufacturing processes and note when these began and ended. This should also include any WIP (work in progress) holding times, and where products take several days to be processed, dates should also be recorded.* *Add rows to the table below as applicable.*

*Take photographs at each processing step to provide a helpful record of what the product looked like as it entered and exited that step, what machinery settings were used, staff interaction with the product and any food safety or health and safety issues.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Process Step** | **Maximum permitted WIP time** | **Start Date & Time** | **Finish Date & Time** | Include information such as  **Processing Methods**  **Equipment Used and Machinery Settings** (e.g. machine speeds, operating temperatures, time in operation, dwell times, pressure applied)  **Batch Sizes**  **Packs per Minute vs Targets**  **Number of Staff / Labour Implications**  **Food Safety or HACCP issues raised**  **CCP Parameters Met**  **Health & Safety issues raised**  **Any Other Important Details** |
| 1. |  |  |  |  |
| 2. |  |  |  |  |
| 3. |  |  |  |  |
| 4. |  |  |  |  |
| 5. |  |  |  |  |
| 6. |  |  |  |  |
| 7. |  |  |  |  |
| 8. |  |  |  |  |

**Processing Line Diagram / Schematic**

|  |
| --- |
| *Add a sketch or process flow diagram to show the line set up as the product progresses through manufacturing. Include positioning of equipment & staff as appropriate and include any work in progress holding phases.* |

**3. WEIGHT MONITORING DURING PROCESSING**

*Tracking how the weights of raw materials, sub-components and finished products increase or decrease during the manufacturing process is a key aim of production trials, as understanding weight performance at each stage supports obtaining consistent products, cost controls and effective management of inputs and outputs. Add rows to the table below as applicable.*

*Cross reference the process steps you have identified above and use these to identify where weights may change. Decide if you will be monitoring these at an item level, or batch level and the number of weight checks needed to give you statistically significant data.*

*It may be both such as when weighing in components and then weighing out a production batch.*

*Yield losses will vary by type of product but might include those which occur when removing raw materials from their packaging, residues that remain when emptying production machinery, drip loss and evaporation, wastage from breakages when handling.*

*Weight gains may occur when products are hydrated, coated, enrobed, stuffed, or marinated for example.*

|  |  |  |
| --- | --- | --- |
| **Raw Material or Process Step** | **Weights In** | **Weights Out** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**4. SIZE MONITORING DURING PROCESSING**

*The physical dimensions of your products may be another important area to monitor and will affect the consistency of appearance and behaviour of your product, for example to ensure they cook or freeze evenly. Size may be a critical factor when fitting through processing or packing machinery and in the designated packaging. Again, you should decide how many items to measure to give you a representative picture.*

*Add rows to the table below as applicable.*

|  |  |  |
| --- | --- | --- |
| **Raw Material or Process Step** | **Size In** | **Size Out** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**5. PRODUCT PACKING**

*The final pack has several functions, it has to be robust and hold your product safely and securely through transportation, storage, display and into the customers hands. It must fulfil your legal obligations in terms of containing the stated weight/volume and conveying the necessary legally required information, including date coding where applicable. Your packaging may also be a key selling tool, attracting customers and enticing them to purchase your product.*

*Monitoring the pack integrity, appearance, weight or volume is therefore an important part of your trial.*

**5.1 Packing Line Details**

|  |  |
| --- | --- |
| **Proposed Production Line Name or Number** |  |
| **Actual Line used for Trial** |  |
| **Packaging Format/ Materials Trialled** |  |
| **Packs per Cycle Achieved** |  |
| **Packs per Minute/ Hour** |  |
| **Sealing or packing Information (e.g. machinery settings)** |  |
| **Other Key Information** |  |

**5.2 Metal Detection -** *note the machinery and settings used. Confirm no metal detected*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Metal Detector Used** | | **Non-Ferrous** | | **Ferrous** | **Stainless Steel** |
|  | |  | |  |  |
| **Metal Detected** | **No** | | **Yes** | **If yes – note cause of issue & corrective actions needed** | | |
|  |  | |  |  | | |

**5.3 Check Weighing** – *record details from weighing equipment display or report.* *Agree prior to the trial the number of packs that will be assessed and if minimum weight or average weight protocols are to be applied and tick as appropriate.*

|  |  |
| --- | --- |
| **Packing to Minimum Weight** | **Packing to Average Weight** |
|  |  |

*Record individual packs on a separate sheet and summarise below.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Total No. of Packs Checked** | **No. of Reject Packs Observed** | **No. of Underweight Packs Recorded** | **No. of Overweight Packs Recorded** | **Product Confirmed as Packing to Defined Weights or Corrective Action Needed** |
|  |  |  |  |  |

**5.4 Packaging Fit** *– Record data collected through pack tests conducted or visual inspections undertaken.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Packaging Format and Dimensions** | **No. of Packs with Product Fitting Packaging as Required** | **No. Packs with Product Failing to Fit Packaging as Required** | **% Reject Rate** | **Product Fit to Packaging Confirmed or Corrective Actions Needed** |
|  |  |  |  |  |

**5.5 Seal Integrity** *– Record data collected through pack tests conducted or visual inspections undertaken. If the product is food safe/ suitable to be repacked note your observations.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **No. of Packs with Good Seals** | **No. Packs Rejected Due to Poor Seals** | **% Reject Rate** | **Product Seal Integrity Confirmed or Corrective Actions Needed** |
| **After First Pass in Packing Machinery** |  |  |  |  |
| **After Any Repacking Conducted** |  |  |  |  |

**5.5 Outer Packaging** *– Record data collected through pack tests conducted or visual inspections undertaken. If the product is food safe/ suitable to be repacked note your observations.*

|  |  |  |
| --- | --- | --- |
| **Outer Packaging Format/ Dimensions** | **No. of Packs Per Outer Unit Achieved** | **Product Fit to Outer Packaging Confirmed or Corrective Actions Needed** |
|  |  |  |

**6. Summary of Trial Observations and Further Actions Required**

|  |  |
| --- | --- |
| **Trial Observations & Key Learnings** | |
| **Raw Materials –**  *Suitability, Handling etc* |  |
| **Processing Steps –** *Appropriate, Effective etc.* |  |
| **Processing Equipment –**  *Appropriate, Effective etc.* |  |
| **Productivity –**  *Desired throughputs achieved, any labour issues* |  |
| **Packing –**  *Weight control, Pack fit, Seal integrity etc* |  |
| **Food Safety & HACCP -**  *Food safety confirmed, any issues arising* |  |
| **Health & Safety**  *Safety Confirmed, any issues arising* |  |
|  |  |
|  |  |

|  |  |  |
| --- | --- | --- |
| **Actions Required** | **Person Responsible for Actions** | **Timeline For Actions** |
|  |  |  |

|  |  |
| --- | --- |
| **Staff Who Attended the Trial** |  |

**7. Product Approval to Progress to Launch**

*Formally note if the product is approved to progress to launch, requires actions and re-trialling or should be abandoned.*

|  |  |  |
| --- | --- | --- |
| **Trial Outcome At A Glance** | **Trial Successful – No further trials are needed and the product can proceed to launch** | **Trial Successful – But some further refinement is desirable as the product proceeds to launch** |
| **Trial Unsuccessful – Further trials are needed before the product can proceed to launch** | **Trial Unsuccessful – Product should be abandoned and not proceed to launch** |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Approved By** | **Production Representative** | **Commercial Representative** | **Technical Representative** | **Development/ Process Representative** |
| **Name** |  |  |  |  |
| **Signature** |  |  |  |  |
| **Date** |  |  |  |  |

**8. Retain and Add/ Attach Supporting Documents as appropriate**

*These may vary depending on the nature of the trial conducted.*

*All documents and other evidence of the trial should be securely stored in case they are needed after the product has launched to prove due diligence and that adequate trials were conducted.*

*For example :*

* Traceability information for Raw Materials, Components and Packaging
* Photographs of components, processes, machinery and settings and finished product packaging.
* Photographs which may assist in drafting of factory specifications and standard operating procedures, quality attribute standards or for staff training purposes
* Records from any logging equipment used
* Weights record sheets recording yields and any wastage which occurred
* Records of seal integrity and packaging fit tests conducted
* Notes and photographs of any food safety or health and safety issues noted