Specimen Label Template Implementation
Requirements, Installation, and Use

The specimen label template is a Microsoft Word document that allows the user to print labels on-site for primary specimens. Each template is protocol-specific and may be used for all participants in a given protocol. Participant identifier, visit number, collection date, and protocol can be printed on the labels.

These templates are created and maintained by the SCHARP lab programmer group. They include code to verify that the participant identifier and visit number is valid, and the collection date is a valid date. These macros are password-protected to prevent alteration of the code.

The template is provided as a service to the site, but their usage is not required. The site should inform the SCHARP project manager if they prefer to use another method of printing primary specimen labels.

Label stock requirements for implementing specimen label template:

1) International sites -   Avery 5267 address labels (or equivalent) OR Avery L7656 A4 address labels (or equivalent)

Software requirements for implementing specimen label template:

1) Microsoft Operating System: Windows 7

2) Microsoft Word: Word 2003, Word 2007, Word 2010

Hardware requirements for implementing specimen label template:

1) Personal computer

2) A laser printer capable of printing standard labels

Installation of the Specimen Label Template

The template will be provided in a zipped file via email or can be obtained from the website.

Installation from email:

1) The label template is contained within a zipped file attached to the email. Double-click on the file and a default application should open the zip file.

   The user must have Winzip or equivalent software installed to open the zip file.

2) Extract the zipped label template by double-clicking on the label template Word file (e.g. HPTN052LBL-LG.doc). The software will prompt the user for a location to extract the file. Choose the preferred location on your computer or network (e.g. 'Local Disk (C:)').

Installation from the web site:

1) If downloading the label template from the web site, follow the instructions on the web site.

For regular use of the label template, the user may want to create an icon on the computer desktop:

1) On the desktop, click the right button on the mouse.

2) Select "New" and then "Shortcut".

3) Click on the "Browse" button to locate and select the label template (e.g HVTN060LBL.doc).

4) Click the "Ok" button.

5) Click the "Next" button.

6) You can either accept the default name for the shortcut or enter a new one. Click the "Finish" button.

Note: double-click on the icon whenever you want to use the label template. If multiple users at a site will be printing labels using the same computer, and each has a separate login, each user may need to create a shortcut to the template.
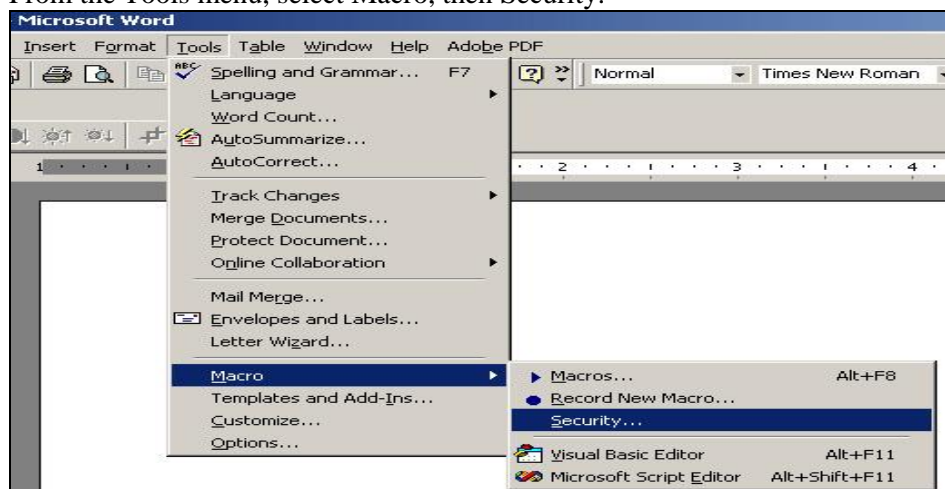
Using the Specimen Label Template Document

The specimen label template uses code to verify that any participant identifier, visit, and collection date information that is entered is valid. The code is also used to add the entered information to the labels. Macros must be enabled within MS-Word for this code to run.

Configuring Macro Security (*instructions are for users of MS-Word 2003 and earlier Word versions*)

For users running MS-Word 2003 or earlier Word versions, follow these instructions to configure the Macro security on your PC. This configuration only needs to be done once per login, however each PC user who prints labels and has a separate login must configure the Macro Security separately.

1) Open MS-Word (do not open Word with the label template).

2) From the Tools menu, select Macro, then Security.

3) Select a Security Level of Medium or Low. *Medium is recommended* so that you are able to choose which files to allow Macros to run. Click OK.

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Enabling Macros in the Specimen Label Template (*instructions are for all users, regardless of Word version*)

Open the label template Word file and enable macros in the document.
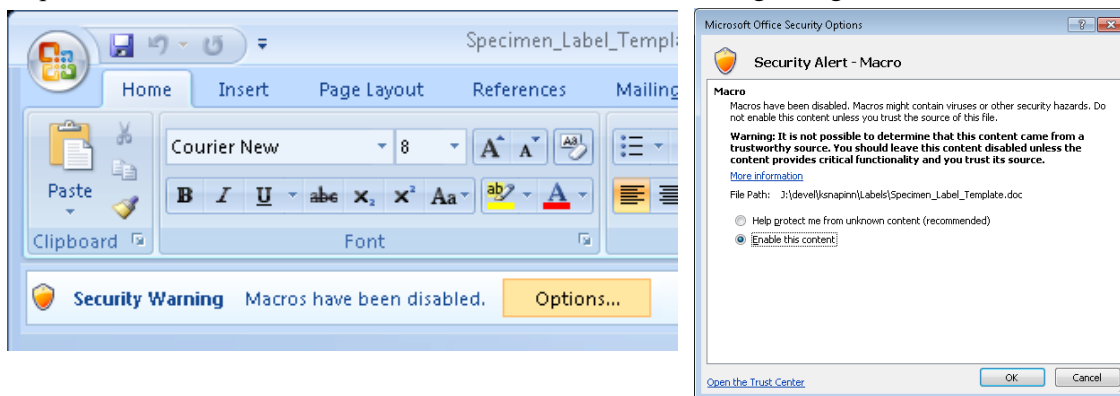
If using MS-Word 2003 or earlier versions of Word:

    When the file opens, a dialog similar to the following may be displayed. Click on the "Enable Macros" button to continue.


If using MS-Word 2007:

    When the file opens, a Security Warning ribbon similar to the following may be displayed. Click on the "Options…" button and select "Enable this content" in the resulting dialog box to continue.


If using MS-Word 2010:

    When the file opens, a Security Warning ribbon similar to the following may be displayed. Click on the "Enable Content" button to continue.
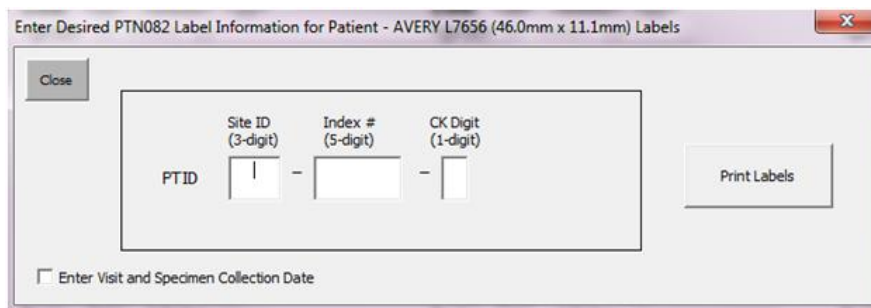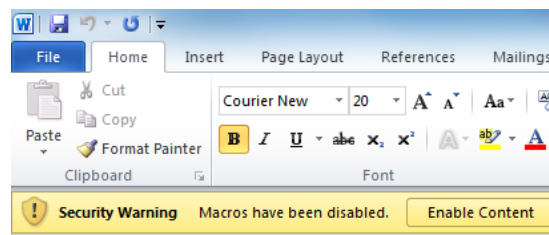

If Macros were not enabled properly, a screen similar to the following will display. If this screen displays, close the document and return to the beginning of the section "Using the Specimen Label Template Document" to make sure the macro settings are correct.
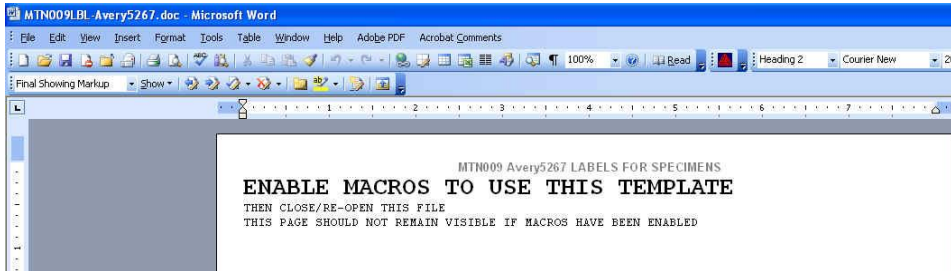
Using the Label Program

If Macros have been properly enabled on your computer, you should see a label information form similar to the following:


1) Complete the PTID. The PTID must be valid for this protocol.

2) Entering visit and collection date:

    a. If you wish to hand write the visit codes and dates, leave the box labeled "Enter Visit and Specimen Collection Date" unchecked.

    b. To pre-print visit codes and dates, check the box labeled "Enter Visit and Specimen Collection Date". Visit and Date fields will appear. Complete the Visit and Date fields.

3) When finished, click the "Print Labels" button. The following dialog box will appear.

    a. Make sure that the labels specified have been inserted correctly. Some printers require sheets to be inserted right side up and some require right side down.

    b. Then select the "Yes" button.
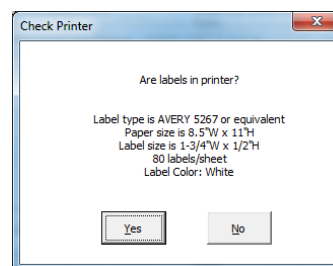
4) The print dialog for your printer should now pop up.

    a. Ensure the paper size in printer properties is correct:

        i. For Avery 5267 labels, printer properties should be set to "Letter", 8 ½" x 11" paper

      ii.   For Avery L7656 labels, printer properties should be set to "A4" paper

    b.   If the correct printer is selected and the properties are correct, press the "print" button.

5) One set of labels should now be generated. You can print multiple sets, if needed, by specifying the number of copies in the print dialog box.

6) Check the sheet(s) to make sure that the labels have been printed within the label boundaries.

7) Repeat from Step 1 to print labels for another PTID, or click Close to end.

If you require additional assistance please contact sc.lp@scharp.org