

**TAFE INSTITUTE  
MONITORING SYSTEM  
2008**

**TRAINING PACK**

amrinteractive 

**TAFE INSTITUTE PRINT COPYING SURVEY  
THE TAFE SECTOR COPYRIGHT AGREEMENT**

A general background to the TAFE Institute Monitoring System. This can form the basis of a letter for issue to staff by a College Director or Campus Manager.

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Dear .....

Copyright Agency Limited (CAL), appointed by the Commonwealth Attorney-General, is legally authorised to administer statutory licenses for the copying and communication of print copyright materials by educational institutions. This license allows TAFE Institutes to copy and communicate print works without having to obtain direct permission in each instance.

TAFE Institutes Australia wide have an agreement with CAL to only keep records when selected to take part in a sample survey. This is undertaken in only a minimum number of TAFE's each year.

The purpose of the survey is to collect on copyright material copied or communicated by TAFE Institutes. This information is then used as a basis upon which to estimate the amount and type of copying and communication of copyright works undertaken by TAFE Institutes overall.

The survey is the practical alternative to the keeping of records all the time. This TAFE Institute has been selected as one of the TAFE Institutes to participate in the sample during 2008. As a result, this TAFE Institute must fully cooperate with the survey.

AMR Interactive an independent research organisation, has been appointed to administer the TAFE Institute Monitoring System.

A Copyright Monitoring Coordinator has been selected to represent each of the departments/areas in the survey. Any questions regarding the survey can be directed to that person.

An AMR Interactive representative will regularly visit to ensure that the survey procedures are being correctly followed and to collect the completed Record Forms. Photocopying machine meter readings will also be taken to ensure that photocopying records are complete.

The completed Record Forms will be edited and checked by the Copyright Monitoring Coordinators, AMR Interactive field officers, and CAL.

The information collected does not represent a check on individual TAFE Institutes or staff, but provides a basis upon which to estimate overall levels of copying and communication and to make payments to authors and publishers (the "owners") of copyright works. It is important, therefore, that the records be completed accurately and legibly.

**Signed by College Director/Campus Manager**

# **TAFE INSTITUTE MONITORING SYSTEM GUIDELINES FOR STAFF**

## **What is the monitoring system about?**

This TAFE institute copies and communicates copyright material under the educational copying license in the Copyright ACT. Under the educational license TAFE institutes are required to provide information about the copying they do so that owners of copyright can be fairly remunerated.

The *monitoring system* is the method by which copying information is collected. The objective of the monitoring system is to minimise the amount of record keeping necessary while ensuring fair payment to copyright owners. The monitoring system allows institutes to take it in turns to keep copyright records.

## **Who does it apply to?**

- All staff of the campuses selected for the monitoring system.
- All persons using photocopiers in these selected areas.
- Certain staff who undertake electronic copying and communications (these staff will receive specific notification of their involvement).

## **How does it work?**

For all staff of the selected campuses (whether teaching or administrative), the monitoring system comprises monitoring of photocopying as well as monitoring of electronic copying such as scanning and printing.

Monitoring of electronic copying and communication such as emailing and posting published works onto an internet or intranet site will also be included in specialised sections of the institute, referred to as "digital service area" (e.g. libraries, web coordinators etc). If you are in a digital service area, you may be required to take part. This will apply to relatively few staff. If you are one of these people, you will receive separate information about this.

## **What do I have to do?**

In the monitoring system we need to capture all photocopying as well as some printing and scanning done during the monitoring period.

There are three forms that are used. The first two are used at monitored copiers in the selected areas and the third is used when staff from the selected areas are copying published material away from a monitored copier, or when printing or scanning published material.

The forms used are described overleaf.

- **At monitored copiers staff must complete either the *Published Material Record Form* or the *Unpublished Material Record Form*.**
- **Copying of published material done away from a monitored copier must be recorded on a *Copying Declaration Form*.**



## **Everyone who uses this machine must fill in the record form**

See either the “Unpublished Record Folder” or the “Published Record Folder”

### **Don't Forget:**

A **Copying Declaration Form** must be completed for all Published Material copied off-campus or when scanning or printing published material.

Remember, if the records are inaccurate or incomplete this TAFE Institute may be required to repeat the survey.

If you have any queries see your ***Copyright Monitoring Co-ordinator***, who is

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**IF YOU SCAN  
PUBLISHED MATERIAL  
ON THIS SCANNER YOU  
MUST COMPLETE A  
*COPYING DECLARATION*  
*FORM***

Remember, if the records are inaccurate or incomplete this TAFE Institute may be required to repeat the survey.

If you have any queries, see your  
***Copyright Monitoring Co-ordinator***, who is

.....

**IF YOU PRINT  
PUBLISHED MATERIAL  
FROM A DIGITAL  
SOURCE  
(E.G. *Internet or CD-Rom*)  
ON THIS PRINTER  
YOU MUST COMPLETE A  
COPYING DECLARATION  
FORM**

Remember, if the records are inaccurate or incomplete this  
TAFE Institute may be required to repeat the survey

If you have any queries, see your  
***Copyright Monitoring Co-ordinator***, who is

.....

## **Examples of Published and Unpublished Works**

### **Published**

**Books**

**Journals**

**Magazines**

**Newspapers**

**Print Music**

**Artworks**

(eg. Maps, Illustrations, Diagrams, Photos, Pictures, Paintings, Cartoons, etc)

**Internet web pages**

**CD-ROMs**

**TAFE publications**

**Licensed materials**

(except DEST/ANTA/AESharenet products)

### **Unpublished**

**Memos**

**Letters**

**Student Records**

**Circulars**

**Admin documents**

**DEST/ANTA licensed products** (e.g. training packages)

**Materials marked with AEShareNet logo**

**Teachers' own original notes**

**Departmental / TAFE written media releases**

**Discarded copies** (e.g. mistakes)

**Personal copying** (e.g. not job-related)

**Copying for exams/tests**

# **UNPUBLISHED MATERIAL**

## **Record Folder**

All copying of unpublished material

must

be recorded on these forms



TAFE INSTITUTE MONITORING SYSTEM

# **PUBLISHED MATERIAL**

## **Record Folder**

All copying of published material

must

be recorded on these forms

## Published Material Record Form

- Use this form when copying published material at a monitored photocopier
- When completed place the form in the folder provided

PLEASE ANSWER EVERY QUESTION

1. TAFE Institute:
2. College/Campus ID:   
(assigned by AMR Interactive)
3. Photocopier number:
4. Your name:
5. Date:

6. Number of published pages copied (a):
7. Number of copies of each page (b):
- 8a. Total copies made (a x b):
- 8b. Tick this box if you have copied two published pages to one side of an A4 page:

9. Are the copies to form part of a collection of readings or course pack or a similar collection to be issued as a set to students or staff? (NB: these packs do not include collections of media clippings made for staff.)

- Yes
- No

10. Does the material to be copied contain artworks or drawings? (e.g. photographs, cartoons, graphs, illustrations, maps etc)

- Yes Attach a full copy of the material being copied AND attach a list of illustrations / diagrams if it exists.
- No

11. Please tick **ONE** of the four boxes and follow the instructions to identify the **SOURCE** of your copy:

- A single **published** work (e.g. a BOOK, a JOURNAL article, an ARTWORK etc)

You need to attach enough information to identify the copyright owner in the work you have copied.

1) For **ALL** single published works:

**With an ISBN/ISSN or ISMN** → Photocopy the ISBN on the back of a book, ISSN on the front of a magazine or journal, or ISMN on a piece of music and staple it to this form.

**Without an ISBN/ISSN or ISMN** → Photocopy the page with publication details (eg. Reverse of the title page or the cover) and staple it to this form.

AND

2) If copying an item, article or chapter from a collection (e.g. a journal, a magazine or an anthology):

- Copy the first page of the item, article or chapter (if not done already) and staple the copy to this form.

NOTE: If you are copying PRINT MUSIC or ARTWORKS make sure the composer or visual artist is identified.

Newspaper

- Make an additional copy of the article and staple it to this form (if not done already).
- Fill out the details below.

Newspaper name:

Publication date:  /  /  Page no(s):

Title of article:

Multiple published works

- Make an additional photocopy of the material you are copying (if not done already), along with any identifying information, eg. ISBN barcodes etc.
- Staple the copy to this form.

SOURCE UNKNOWN

- Insufficient publication details? Please attach a copy

12. How many pages have you attached?

**TAFE INSTITUTE MONITORING SYSTEM**

**COPYING  
DECLARATION  
FORM**

**Record Folder**

**Place all completed Copying Declaration Forms  
in this folder**

**TAFE INSTITUTE MONITORING SYSTEM 2008**  
**Copying Declaration Form**

Use this form if you are:

- Sending published material to a central print facility (attach this form to the front of the material to be copied); or
- Copying outside the TAFE institute or at an unmonitored copier; or
- Scanning or printing published material.

When completed, either:

- Send it with your order to Central Print; or
- Give it directly to your Copyright Monitoring Co-ordinator (CMC); or
- Place this form in the folder at a monitored copier, scanner or printer

**PLEASE ANSWER EVERY QUESTION**

**1. TAFE Institute:**

**2. College/Campus ID:**   
 (assigned by AMR Interactive)

**3. Your name:**

**4. Date:**

**5. Number of published pages copied (a):**

**6. Number of copies of each page (b):**

**7. Total copies made (a x b):**

**8. Are the copies to form part of a collection of readings or course pack or a similar collection to be issued as a set to students and staff?**

Yes

No

**9. How have you copied the material?**

Photocopied – COMPLETE Q.11 & Q.12

Scanned – COMPLETE Q.11 & Q.12

Printed from digital source (eg. From the Internet, CD-ROM etc) – COMPLETE Q.10 & Q.12

**10. What have you printed from a digital source?**

Internet/Intranet sites

Attach a copy of all material you have printed, ensuring the internet address is clearly marked.

CD-ROM or other digital sources – Attach a copy of what you have printed together with a photocopy of the CD cover and/or any identifying information on sections copied (e.g. title of chapters etc).

**GO TO Q.12**

**11. What have you photocopied or scanned?** (Tick one of the four boxes below and follow the instructions provided).

**Multiple published works**

- Make an additional photocopy of the material you are copying (if not done already), along with any identifying information, eg. ISBN barcodes etc.
- Staple the copy to this form.

A single published work (e.g. a BOOK, a JOURNAL article, an ARTWORK etc)

**You need to attach enough information to identify the copyright owner in the work you have copied.**

1) For ALL single published works:

**With an ISBN/ISSN or ISMN** → Photocopy the ISBN on the back of a book, ISSN on the front of a magazine or journal, or ISMN on a piece of music and staple it to this form.

**Without an ISBN/ISSN or ISMN** → Photocopy the page with publication details (eg. Reverse of the title page or the cover) and staple it to this form.

**AND**

2) If copying an item, article or chapter from a collection (e.g. a journal, a magazine or an anthology):

- Copy the first page of the item, article or chapter (if not done already) and staple the copy to this form.

**NOTE: If you are copying PRINT MUSIC or ARTWORKS make sure the composer or visual artist is identified.**

**Newspaper**

- Make an additional copy of the article and staple it to this form (if not done already).
- Fill out the details below.

Newspaper name:

Publication date:  /  /  Page no(s):

Title of article:

**SOURCE UNKNOWN**

- Insufficient publication details? Please attach a copy

**12. How many pages have you attached?**

# Photocopier Summary Sheet

Name of TAFE Institute: \_\_\_\_\_

TAFE Institute ID: \_\_\_\_\_

Location of Copier: \_\_\_\_\_  
(eg: staff room)

Copier No: \_\_\_\_\_

CMC Name: \_\_\_\_\_

Period Ending: \_\_\_\_\_

## FORMS FOR COLLECTION.

Number of forms for the period:

- Unpublished Material Record Forms \_\_\_\_\_
- Published Material Record Forms \_\_\_\_\_
- Copying Declaration Record Forms \_\_\_\_\_

## 1. METER READINGS

Meter Reading at Period END (A) \_\_\_\_\_

Meter Reading at Period START (B) \_\_\_\_\_

A minus B = \_\_\_\_\_  
VOLUME through this copier

## 2. TOTALS

**Unpublished Pages Copied**  
(add all the totals of the Unpublished forms) (x) \_\_\_\_\_

**Published Pages Copied**  
(add all the totals of the Published Record forms) (y) \_\_\_\_\_

**Extra Pages Copied for Survey**  
(add the extra pages copied that are attached to the Published Records forms) (z) \_\_\_\_\_  
X + Y + Z = \_\_\_\_\_  
VOLUME accounted for on forms

*The information provided on this form is, as far as possible, an accurate reflection of copying volumes for the period specified. I have checked the attached forms for completeness and legibility.*

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**TAFE INSTITUTE MONITORING SYSTEM**  
**AMR Interactive FIELD OFFICER RECORD OF SET UP VISIT**

State/Term:	CMC Name:	Phone Number:
TAFE:	Monitoring Period Commences Date: (Monday)	Set-up Date:
TAFE ID		

No. of Copiers being monitored:	If meter reading not available on all copiers, specify which ones won't have readings. Copier numbers:
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No. of Copiers shared with non-survey users	Indicate copiers which are shared by both in-scope staff and other users. Copier numbers:
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Copier access  *Codes to use: <b>G-</b> General/ open access <b>RP-</b> Restricted physically (i.e. in locked room or behind counter) <b>RK-</b> Key card Restricted <b>DK-</b> Don't know	For each photocopier, indicate the copier no. assigned, level of access (using the codes* provided) & estimated % student use.																																																															
	<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Copier No.</th> <th style="width: 10%;">Access</th> <th style="width: 10%;">Student Use</th> <th style="width: 10%;">Copier No.</th> <th style="width: 10%;">Access</th> <th style="width: 10%;">Student Use</th> <th style="width: 10%;">Copier No.</th> <th style="width: 10%;">Access</th> <th style="width: 10%;">Student Use</th> </tr> </thead> <tbody> <tr> <td></td><td></td><td style="text-align: center;">-</td><td></td><td></td><td style="text-align: center;">-</td><td></td><td></td><td style="text-align: center;">-</td> </tr> <tr> <td></td><td></td><td style="text-align: center;">%</td><td></td><td></td><td style="text-align: center;">%</td><td></td><td></td><td style="text-align: center;">%</td> </tr> <tr> <td></td><td></td><td style="text-align: center;">-</td><td></td><td></td><td style="text-align: center;">-</td><td></td><td></td><td style="text-align: center;">-</td> </tr> <tr> <td></td><td></td><td style="text-align: center;">%</td><td></td><td></td><td style="text-align: center;">%</td><td></td><td></td><td style="text-align: center;">%</td> </tr> <tr> <td></td><td></td><td style="text-align: center;">-</td><td></td><td></td><td style="text-align: center;">-</td><td></td><td></td><td style="text-align: center;">-</td> </tr> <tr> <td></td><td></td><td style="text-align: center;">%</td><td></td><td></td><td style="text-align: center;">%</td><td></td><td></td><td style="text-align: center;">%</td> </tr> </tbody> </table>	Copier No.	Access	Student Use	Copier No.	Access	Student Use	Copier No.	Access	Student Use			-			-			-			%			%			%			-			-			-			%			%			%			-			-			-			%			%			%
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<ol style="list-style-type: none"> <li>1. The CMC has a good understanding of their role? <i>(If no, comment below on problem/action)</i></li> <li>2. Has the CMC briefed staff members on the survey?            How were they briefed?      Letter/ memo/ email                      notice posted                      meeting held</li> <li>3. All signs, folders, forms in place?</li> <li>4. Reasonable overall preparation for survey? <i>(If no, comment below)</i></li> <li>5. Expect good cooperation from CMC and staff? <i>(If not, notify your state field supervisor ASAP)</i></li> <li>6. Have you noted the location of any central copying/slide copying and/or library facilities?</li> <li>7. Have you organised a time for the 1<sup>st</sup> collection visit next week?</li> </ol>
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Comments/ action to be followed up?

I certify that, to the best of my knowledge, the information provided is true and accurate.

Name of Field Officer: \_\_\_\_\_

Signature of Field Officer: \_\_\_\_\_ Date: \_\_\_\_\_

Checked by Field Manager: \_\_\_\_\_ Date: \_\_\_\_\_

## TAFE INSTITUTE MONITORING SYSTEM

### AMR Interactive FIELD OFFICER CONTACT SHEET

<b>TAFE Name:</b>	<b>CMC Name:</b>	<b>Phone Number:</b>
<b>Dept/Area Name:</b>	<b>Collection Period Ending Date:</b>	<b>Visit Date:</b>
<b>Campus ID:</b>		

**No. of Copiers:** *Complete a row on the following Summary Sheet for each copier*

**FIELD OFFICERS LOCATION CHECK:**

1. Are the signs, folders and forms in place?	Y/N
2. Does each folder have enough forms for the next period and a new Cover Sheet?	Y/N
3. Have Meter Readings been taken on all copiers?	Y/N
4. Have you checked to see if any Copying Declaration Forms are available for collection?	Y/N

**FIELD OFFICERS QUALITY CHECK:**

**Check at all forms are of a sufficient standard for collection (as opposed to leaving for resolution):**

1. TAFE ID, copier number and date are indicated on all Record Forms	Y/N
2. All questions on the Record Forms fully completed or indicate "Don't know" (i.e. Q1 –12 are complete on the Published Record Form: Q1 – 9 and 12 for the CDF)	Y/N
3. All material has been attached where requested, with copies attached if ticked 'Multiple published	Y/N
4. If a journal article copied: title, journal number/date, article, page and author provided	Y/N
5. Barcode of ISBN/ISSN is correct (and not the price/or dept. code)	Y/N
6. Total Pages on each Record form summed and accurate (incl. Halving 2 sheets/page copies)	Y/N
7. All copying volumes within acceptable range of meter readings	Y/N

**If 'No' to any of 1 – 7 in this box:** Request CMC checks and clarified and/or completes correctly. Note "held back" column on next page, complete the Held Back Log and comment below on any action taken/needed.

Overall standard of records.	Overall standard of cooperation.	Comments:
1. Very Good	1. Very Good	
2. Good	2. Good	
3. Satisfactory	3. Satisfactory	
4. Poor	4. Poor	
5. Very Poor	5. Very Poor	

*If poor or very poor, notify your supervisor as soon as possible.*

I certify that, to the best of my knowledge, the information provided on this form and the attached summary form(s) is true and accurate and I have completed the 7 Quality Checks above.

Name of Field Officer:.....

Signature of Field Officer: ..... Date: .....

Checked by Field Manager: ..... Date:.....







**TAFE INSTITUTE MONITORING SYSTEM**  
**Guidelines for Copyright Monitoring Co-Ordinators**

**Tasks of Copyright Monitoring Co-ordinators**

1. Review training materials to consolidate understanding of procedures.
2. Inform staff about the recording procedures to be used during the survey (including the Part time/ Casual Teachers).
3. Ensure that information, signs, labelled folders, forms and collection trays are located at each photocopier, printer and scanner and that sufficient recording sheets are available.
4. Check record forms regularly to ensure that entries are legible and complete.
5. For each Unpublished Material Record Form calculate the sum of the **Total pages copied** and place in the box at the bottom of the column.
6. Transfer the sum of the Total boxes from each Record Form into the Photocopying Summary Sheet. Attach the Summary Sheet to the top of the weekly batch of record forms, both published and unpublished. The total on the Summary Sheet should closely match the difference between start and end meter readings. If not, you will be requested to assist the Field Officer understand the discrepancy.
7. If you need advice on copyright issues contact CAL for print and literary works.
8. Have all materials ready for review/collection visits by the Field Officer, who will visit on a regular basis according to the timetable given. Incomplete forms will be returned for resolution.

**If you need more information about set-up procedures**  
**Please call AMR Interactive Copyright Field Manager**  
**on (02) 9020 6700**

## **TAFE Institute Monitoring System Common Survey Questions & Answers**

### **1. Do we have to provide/print the forms for the survey?**

No, AMR Interactive provides all the forms during the survey. The Field Officer will bring the forms at set up and collection visits.

### **2. What areas of the TAFE Institute are in-scope?**

All areas of the selected campuses/colleges of the TAFE Institute are in-scope. It does not matter if courses are commercially funded, under special purpose grants or if it is the corporate area of the TAFE Institute – these are all still included in the survey.

### **3. What if I'm not sure if the material is published or not?**

When in doubt you can either contact CAL on 02 9374 7600 and follow their advice, or write down all the details on the Published Material Record Form anyway. If it turns out not to be a published work, then the record will be removed at the processing stage.

### **4. What if it's a TAFE publication – what do I do?**

In the case where it's *your own Institute's* publication and you are certain that there is not any material within the publication owned by other copyright owners (such as a cartoon, photograph, other artworks or written passages etc) then you may just fill in the Unpublished Material Record Form. If it is another Institute's work, or if there is **any** doubt regarding the presence of other copyright material embedded within the work, then include it on the Published Material Record Form.

### **5. What if the TAFE Institute has already got an agreement with the copyright holder?**

In the cases where you know that an agreement exists for you to copy, or free permissions exist, then during the survey any of these published works may be recorded as *unpublished* material. You must be certain that an agreement exists and that it applies to the copying you are doing. If you are not sure, then you should record it as published material, which is declaring it as CAL licensed copying. TAFE's advise CAL of known pre-licensed material and if the work is pre-licensed then the record will be treated as *unpublished* at a later stage.

### **6. What if it's a page from the Internet. Do I need to declare it as published material?**

The simple answer for most cases is 'yes'. There may be some web pages that give permission for work to be copied for free. You must locate the copyright notice/statement and be sure that your copying is within the terms to record it as *unpublished*. However always remember that if you are unsure about whether a work is published or unpublished it is always safest to record it as published. The research team at CAL will investigate the copyright holders of each piece of work. If it is a copyright free work or is subject to some other exemption, then the record will be treated as unpublished at a later stage.

### **7. What is the procedure with copying that goes to Central Print?**

For administrative efficiency and to obtain the most complete information the staff member who is requesting the printing fills in the Copying Declaration Form. They hand the form in with the print request. The Print Room staff member will then stockpile the forms for the Field Officer to collect.

## Common Survey Questions & Answers – cont.

### **8. What happens with copiers that both staff and students use?**

First check to see if the copier is coin operated for students, or that student copying can be separately identified. In this case the copier can still be monitored as normal. When doing the meter reconciliation at the end of the period, you will need to determine how much was student copying (e.g. by counting the coins). This number of pages then needs to be noted on the Unpublished Material Record Form and indicated as student copying.

If student copying cannot be separately identified, then advise AMR Interactive and special arrangements can be made for these copies.

### **9. Do we have to monitor Fax machines too?**

If the fax machine in question is often used for copying published material then we may include this machine within the survey. If so, we will ask that you complete a Copying Declaration Form when copying published material. In most cases, these machines will only be used for faxing and therefore will not need to be monitored, as this will only add complexity and burden to the survey.

### **10. What if I'm using a combined printer/fax/copier machine? How do I reconcile my copying with the meter reading?**

The first thing to check is whether or not there are separate meters for each of the functions. If there are separate meters then you will need to make sure that you look at the meter reading for the photocopier when filling in the *Photocopier Summary Sheet*. The Field Officer can assist you with this at the time of set up. If there only appears to be one meter then all printing and faxing of unpublished pages will need to be recorded on the unpublished form.

### **11. What if my area does copying for other TAFE Institutes? How do I record that?**

It is important that only works copied for the educational purposes of campuses in scope for the survey are reported as published material. The survey is measuring the copying done for certain campuses of your TAFE Institute. If you are copying for another campus that is not included in the survey, or another Institute or other outside body, then this must be recorded as unpublished material.

### **12. What if my area receives published material (e.g. coursepacks) copied by other Institutes for the teaching purposes of this TAFE Institute?**

This must be declared by filling in a Copying Declaration Form.

### **13. What do I fill in for making copies from different sources to set an exam/test?**

Fill in the Unpublished Material Record Form.

Exam: *Copying of a work for the purpose of including it in a test or exam paper. It does not include revisions not intended to test students, e.g. practice exam papers intended to give students practice answering exams or questions posed as of the teaching and learning process.*