

# Zoom Usage Guide

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**Applies To:** All Employees

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## Overview

Zoom is NovaTech's video conferencing platform for external meetings and webinars. For internal meetings, use Google Meet. This guide covers Zoom setup, features, and best practices.

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## When to Use Zoom vs Google Meet

### Use Zoom For

- External meetings (customers, partners, vendors)
- Webinars and large events
- Meetings requiring breakout rooms
- Interviews with external candidates

### Use Google Meet For

- Internal team meetings
  - Quick sync calls
  - 1:1s with colleagues
  - Meetings where all participants have NovaTech accounts
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## Account Setup

### Accessing Your Account

1. Go to [zoom.novatech.com](https://zoom.novatech.com)
2. Click **Sign In**
3. Select **Sign in with SSO**
4. Enter your NovaTech email
5. Complete Okta authentication

## First-Time Setup

1. Download Zoom desktop app: [zoom.us/download](http://zoom.us/download)
  2. Sign in using SSO (company domain: novatech)
  3. Complete profile:
    - Add professional photo
    - Set display name: First Last - NovaTech
    - Set timezone
  4. Test audio/video in Settings
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## Scheduling Meetings

### From Zoom App

1. Click **Schedule**
2. Enter meeting details:
  - Topic (clear, descriptive)
  - Date and time
  - Duration
3. Configure settings:
  - Video: On for host and participants
  - Audio: Computer audio
  - Meeting options (see below)
4. Click **Save**

### From Google Calendar

1. Create calendar event
2. Click **Add conferencing → Zoom Meeting**
3. Save event
4. Zoom details automatically added

## Recommended Meeting Settings

Setting	Recommendation
Require passcode	Yes (security)
Waiting room	Yes for external meetings

Setting	Recommendation
Join before host	No for external meetings
Mute participants on entry	Yes for large meetings
Record meeting	Only if necessary and disclosed

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## Hosting Meetings

### Before the Meeting

- Test audio and video
- Close unnecessary applications
- Ensure stable internet connection
- Have meeting materials ready
- Join 5 minutes early

### Starting the Meeting

1. Click meeting link or **Start** in Zoom app
2. Admit participants from waiting room
3. Welcome attendees
4. Review meeting agenda
5. Set ground rules for participation

### During the Meeting

**Managing Participants:** - Mute/unmute participants - Spotlight video for presenters - Use chat for questions - Use reactions for quick feedback

**Sharing Content:** - Click **Share Screen** - Select window or full screen - Use annotation tools if needed - Stop sharing when done

### After the Meeting

- End meeting for all
  - Send follow-up if needed
  - Share recording (if recorded)
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## Joining Meetings

### From Calendar Invite

1. Click Zoom link in calendar event
2. Select **Open Zoom** if prompted
3. Join with video on/off as appropriate
4. Test audio when prompted

### Manual Join

1. Open Zoom app
2. Click **Join**
3. Enter Meeting ID
4. Enter passcode if required
5. Join meeting

### Audio/Video Tips

- Use headphones to prevent echo
  - Mute when not speaking
  - Turn off video if bandwidth issues
  - Use virtual background in distracting environments
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## Zoom Features

### Virtual Backgrounds

**Setting a Background:** 1. Click ^ next to Video 2. Select **Choose Virtual Background** 3. Select from options or upload custom 4. For best results, use green screen or solid wall behind you

**NovaTech Branded Backgrounds:** - Available at: [files.novatech.local/brand/zoom-backgrounds](http://files.novatech.local/brand/zoom-backgrounds)  
- Use for customer meetings - Professional, consistent appearance

### Breakout Rooms

**Creating Rooms:** 1. Click **Breakout Rooms** 2. Choose number of rooms 3. Assign participants (automatic or manual) 4. Click **Create Rooms** 5. Click **Open All Rooms**

**Managing Rooms:** - Broadcast message to all rooms - Join rooms to check in  
- Close rooms when done

## Recording

**Recording Requirements:** - Inform all participants before recording - Get consent (verbal or written) - Comply with privacy laws

**Local Recording:** - Saved to your computer - Not recommended (storage, security)

**Cloud Recording:** - Saved to Zoom cloud - Automatically transcribed - Share link with participants - Retained for 90 days

## Polls

1. Schedule polls before meeting or create live
2. Click **Polls** during meeting
3. Launch poll
4. Share results

## Waiting Room

Enable for external meetings: - Prevents unauthorized entry - Admit participants individually - Customize waiting room message

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## Security Best Practices

### Meeting Security

Practice	Why
Use passcodes	Prevents unauthorized access
Enable waiting room	Screen participants
Lock meeting when started	Prevents late unauthorized joins
Don't share meeting links publicly	Prevents zoom bombing
Use unique meeting IDs	Not personal meeting ID

### During Meetings

- Remove disruptive participants
- Disable participant screen sharing (by default)
- Use “Suspend participant activities” if needed
- Report incidents to security@novatech.com

## **Data Protection**

- Don't record without consent
  - Don't share recordings publicly
  - Be careful with sensitive content
  - Use password-protected recordings
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## **Troubleshooting**

### **Audio Issues**

**No Sound:** 1. Check Zoom audio settings 2. Select correct speaker/microphone 3. Test in Settings → Audio 4. Check system sound settings 5. Restart Zoom

**Echo:** - Use headphones - Mute when not speaking - Only one device in room should be unmuted

**Poor Audio Quality:** - Check internet connection - Close other bandwidth-heavy apps - Move closer to router

### **Video Issues**

**Camera Not Working:** 1. Check camera privacy settings 2. Ensure no other app using camera 3. Select correct camera in Zoom settings 4. Restart Zoom

**Poor Video Quality:** - Check internet bandwidth - Close other applications - Turn off HD video if bandwidth limited - Use wired connection if possible

### **Connection Issues**

**Can't Join Meeting:** 1. Check internet connection 2. Verify meeting ID and passcode 3. Try web browser instead of app 4. Contact host to verify meeting is active

**Frequent Disconnects:** - Check internet stability - Switch to wired connection - Close bandwidth-heavy apps - Move closer to router

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## **Mobile Usage**

### **Installing Mobile App**

1. Download from App Store / Play Store
2. Sign in with SSO
3. Enable notifications

### **Mobile Features**

- Join meetings on the go
- View shared content
- Chat with participants
- Limited hosting features

### **Mobile Best Practices**

- Use WiFi when possible
  - Use headphones for audio
  - Find quiet location
  - Mute when in noisy environments
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## **Webinars**

### **NovaTech Webinar License**

Limited webinar licenses available: - Request via Marketing - For customer/prospect events - Up to 500 attendees

### **Webinar Features**

- Panelist and attendee roles
  - Q&A functionality
  - Registration tracking
  - Practice sessions
  - Polling and surveys
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## **Support**

### **IT Service Desk**

- **Slack:** #it-help
- **Email:** it@novatech.com
- **Portal:** it.novatech.com

### **Zoom Resources**

- Zoom Learning Center: learning.zoom.us
  - Zoom Support: support.zoom.us
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*Related Documents: Google Meet Guide (IT-SUP-016), Meeting Best Practices (ENG-COM-001)*