How to Use SharePoint

The purpose of this guide is to provide easy step by step instructions on how to navigate the Pivot Point Security SharePoint website. For any questions/clarifications please contact: operations@pivotpointsecurity.com.

Table of Contents

Introduction

If you are reading this document that means you are a key player in a project that you are working with Pivot Point Security.

Welcome!

This document provides:

- An overview of SharePoint
- Quick troubleshooting guide providing a basic overview of common problems and solutions
- A variety of screenshots including sample invitations, the Portal itself, and common errors
- Detailed instructions on how to accept invitations and log in to SharePoint for the first time
- In depth troubleshooting instructions on common SharePoint issues and how to solve them

Section I: SharePoint Basics

1. Overview – Purpose of SharePoint

Pivot Point Security uses SharePoint to:

- Provide a shared repository to all key players of the project (PPS team and client team)
- Easily allow clients to upload key documents related to their projects
- Main directory provides "one stop shop" for accessing all reports related to project(s)
- Enable client project lead to dictate who should get access to reports
- Offer an extra layer of security that email is not able to provide
    - We password protect all documents using a unique client password

2. Quick Troubleshooting Guide – FAQ

If you are familiar with SharePoint and having slight issues, or you are new and would rather have some quick tips rather than reading through all the details, you have come to the right section! Here are all the basics/troubleshooting tips of SharePoint in a nutshell:

- You need a Microsoft account to accept an invitation
  - If you do not have one – create a new one. You must use the user name in the email invitation.
- Only you can accept the invitation
  - Do not forward to others – it will not work for them
- If you do not see the invitation
  - Check your Spam box
  - Make sure you are looking for an email from Microsoft not Pivot Point Security
- Invitations expire in 90 days
- You need to accept an invitation before you can login to the portal
- After accepting the invitation, use the direct link given to you by the PPS project team to access reports
  - Do not reuse the invitation link
- If you are getting a "That didn't work" error after accepting an invitation
  - Try going to the direct SharePoint link using a private browsing window (in your browser settings choose New Private Window)
- If you do not have the password to open the documents
  - Contact the PPS project team with your cell number – we will text you the password
  - For security purposes we do not provide the password over email
- If you cannot open the documents directly from the portal, try downloading them first
- Final reports are in the Deliverables folder
- If the Microsoft login pages are blocked by your company, we can provide an alternative way of delivering the reports. Contact your PPS Project Team

More detailed information with screenshots are provided below. If you are still having issues, please contact our project team. We would be happy to help!

Section II: SharePoint Invitations

1. Sample Invitation

After the project kickoff/intro call, invitations are sent out to all main contacts on your team that were on the call or received a kickoff call invitation. If any additional invitations are needed, the main client point of contact for the project can request them at any time.
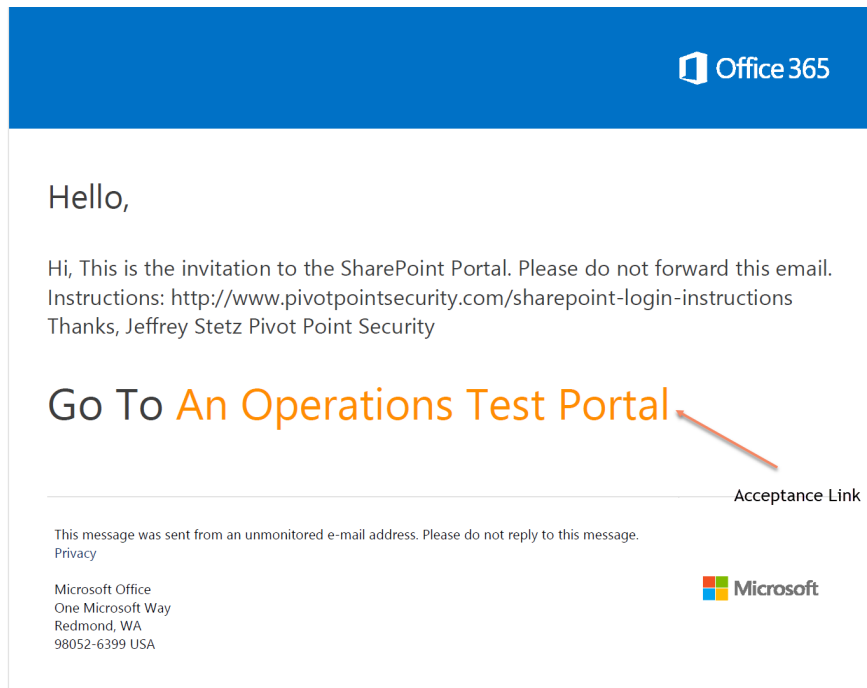
2. Accepting Invitations – Office 365 and Other Microsoft Domain Based Accounts

In this section, the details of accepting your invitation and logging into SharePoint for the first time are examined.

Use this section if:

- The email you provide our team is affiliated with an Office 365 Account login
- The email you provide our team is a Hotmail, Live, or Outlook account

If your email does not fit either of the above criteria, skip this section and move onto the next session (**Accepting Invitations – Non-Microsoft Account Type**)

1. To begin, login to your email account and go to your SharePoint invitation. Click on the big orange link to accept the invitation.

From: no-reply@sharepointonline.com <no-reply@sharepointonline.com>
Sent: Monday, November 26, 2018 12:52 PM
To: ppstest2@hotmail.com
Cc: jeffrey.stetz@pivotpointsecurity.com
Subject: Jeffrey Stetz wants to share An Operations Test Portal

Hello,

Hi, This is the invitation to the SharePoint Portal. Please do not forward this email.
Instructions: http://www.pivotpointsecurity.com/sharepoint-login-instructions
Thanks, Pivot Point Security

Go To An Operations Test Portal

This message was sent from an unmonitored e-mail address. Please do not reply to this message.
Privacy

Microsoft Office
One Microsoft Way
Redmond, WA
98052-6399 USA

Microsoft

2. You will now see a Welcome to SharePoint Online screen. Select the first option (Microsoft Account) if you are accepting the invitation using a Hotmail, Live, or Outlook account. Select the second option (Organizational Account) if you are accepting the invitation using your Office 365 account.

Welcome to SharePoint Online

To accept your invitation, sign in with a Microsoft account or an account assigned to you by your organization. By signing in you allow Pivot Point Security to use your basic profile (name and email address) in accordance with their privacy statement. Pivot Point Security has not provided links to their terms for you to review. You can remove these permissions at myapps.microsoft.com.

Microsoft account
Sign in with the account you use for OneDrive, Xbox LIVE, Outlook.com, or other Microsoft services.

Organizational account
Sign in with the account provided by your work or school to use with Office 365 or other Microsoft services.

Don't have either account? Create a Microsoft account, it's quick and easy!

Legal | Privacy

3. After selecting the option, you should either directly enter the portal or be asked to login. If you are asked to login, sign in with the same credentials you use to access your Microsoft account.

3. Accepting Invitations – Non-Microsoft Account Type
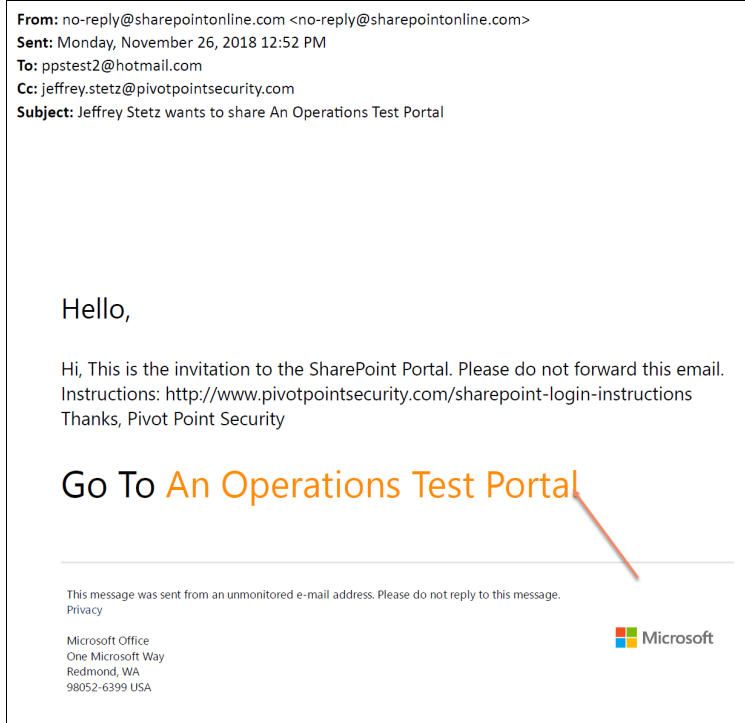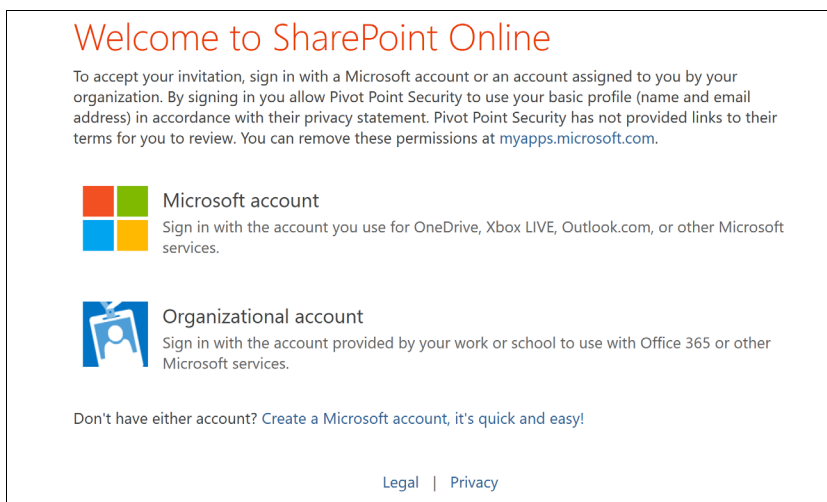
In this section, the details of accepting your invitation and logging into SharePoint for the first time are examined.

Use this section if:
- Your organization does not have Office 365
- You have not provided a Microsoft based account (Hotmail, Live, or Outlook) to the PPS Team

If you have an Office 365 account or provided the PPS team with a Microsoft based account, you can ignore this section. Please see the section entitled **Accepting Invitations – Office 365 and Other Microsoft Domain Based Accounts** above for instructions on how to login.
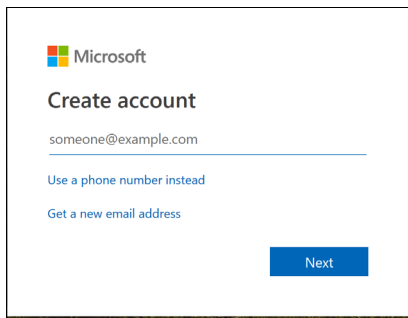
1. To begin, login to your email account and go to the SharePoint invitation email. Click on the big orange link.
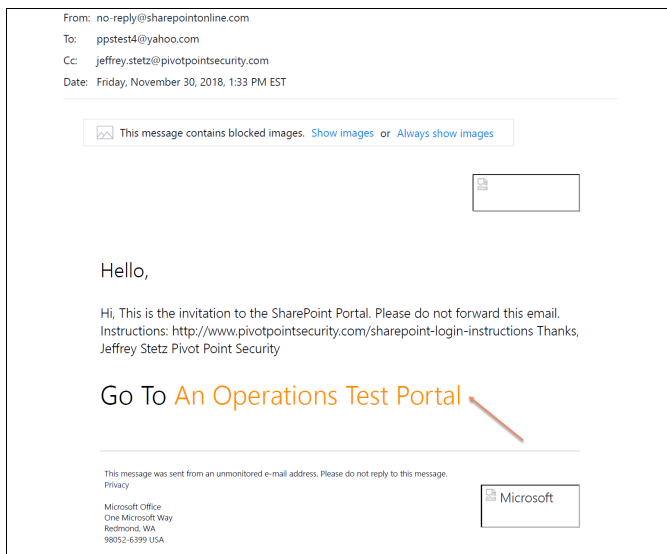
2. You will see a Welcome to SharePoint Online page along with two login options. Ignore those and select the Create a Microsoft account link on the bottom of the page.
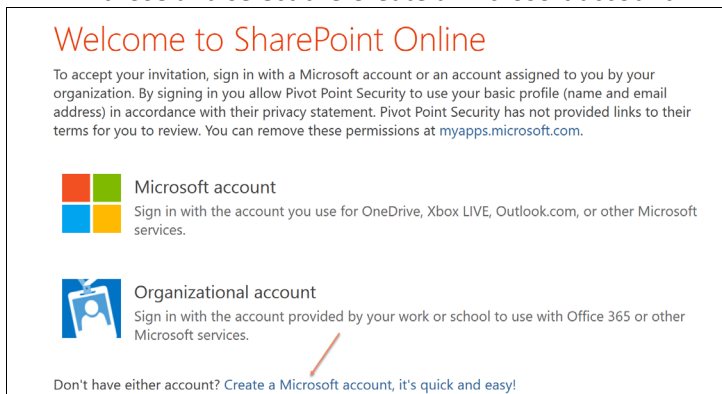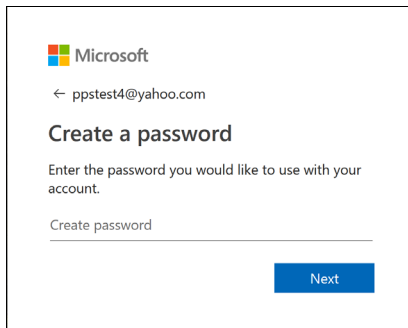
3. The first screen entitled Create Account will ask you for an email address. Type in the email address that your SharePoint invitation went to.
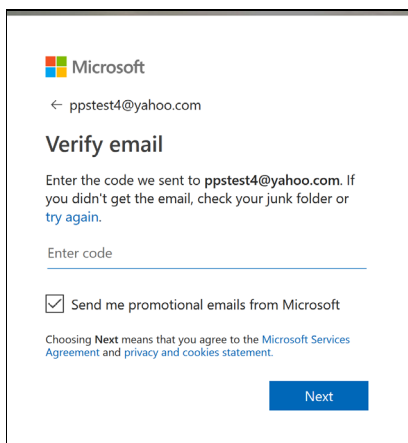

4. Now create a new password for the account. It **should not** be the same as your regular email account (**we strongly recommend creating a complex password**).

5. Microsoft will now ask for the verification code sent to the email you provided.

6. Check your email Inbox for the code. The email will be from the Microsoft account team (if you do not see it in your Inbox check the Spam folder). Type in the code you receive and hit the next button (make sure you unselect the checkbox if you do not want to get promotional emails from Microsoft).

Microsoft account team <account-security-noreply@accountprotection.microsoft.com>   Dec 4 at 10:40 AM
To: ppstest4@yahoo.com

Microsoft account

Verify your email address

To finish setting up your Microsoft account, we just need to make sure this email address is yours.

To verify your email address use this security code: **3813**

If you didn't request this code, you can safely ignore this email. Someone else might have typed your email address by mistake.

Thanks,
The Microsoft account team

Microsoft

← ppstest4@yahoo.com

Verify email

Enter the code we sent to **ppstest4@yahoo.com**. If you didn't get the email, check your junk folder or try again.

3813

☐ Send me promotional emails from Microsoft

Choosing **Next** means that you agree to the Microsoft Services Agreement and privacy and cookies statement.

Next

7. The next screen will ask you to enter in a specific random letter/number combination. Enter the combination as you see it on your screen (case sensitive) and then click on Next.

Microsoft

← ppstest4@yahoo.com

Create account

Before proceeding, we need to make sure a real person is creating this account.

New
Audio

Enter the characters you see
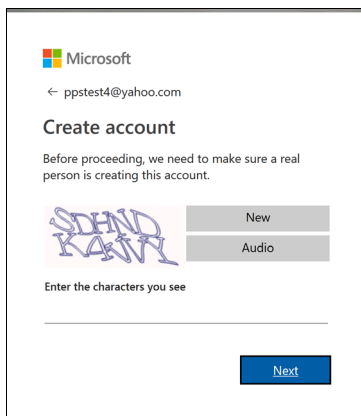
Next

8. The next screen will ask you to confirm your email address. If it is correct select Looks Good.

Microsoft

ppstest4@yahoo.com

Is your security info still accurate?

We just want to make sure this security info is up-to-date, so we can use it to verify your identity or alert you if there's ever a problem with your account.

• ppstest4@yahoo.com

Remind me later

Update now   Looks good!
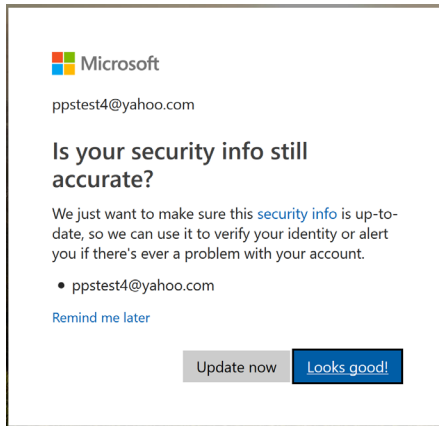
9. You should now be able to access the portal.

An Operations Test Portal   Files and Documents

An Operations Test Portal ⓘ

Home

Files and Documents

   Deliverables

   Client Upload

   Project Docs

Tasks

Calendar

Project Summary

Get organized. Edit the task list.

Today

December 2018

Add tasks with dates to t
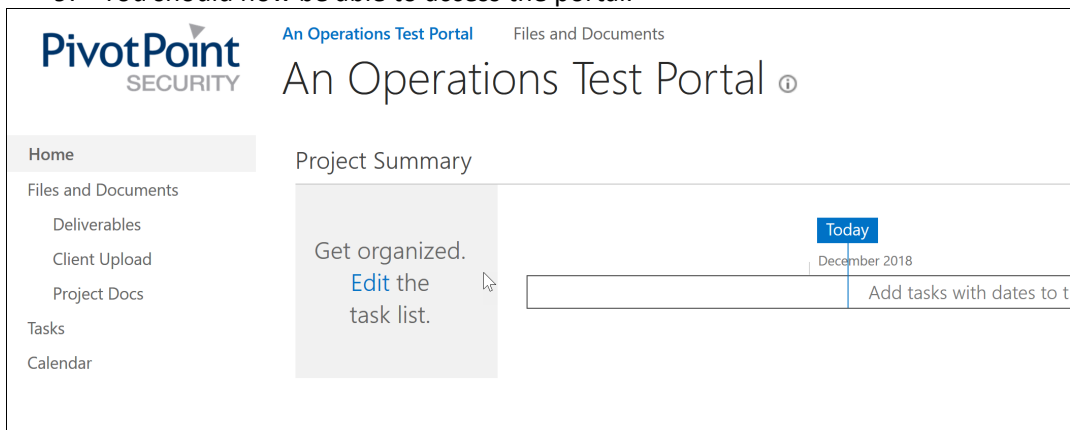
Section III: SharePoint Common Issues and How to Solve Them – Detailed Instructions with Screenshots

1. Invitations – Not Forwarding to Others

SharePoint will only allow you to accept invitations from the email address that you originally provided the PPS team. If you receive an email from any of your co-workers, you will not be allowed to accept the invitation and be given an error message. The error message will be:

Welcome to SharePoint Online

You're trying to accept your invitation with jeffrey.stetz@pivotpointsecurity.com.

This item was shared with ppstest2@hotmail.com. This organization's policy requires you to accept the invitation using the account that it was shared with.

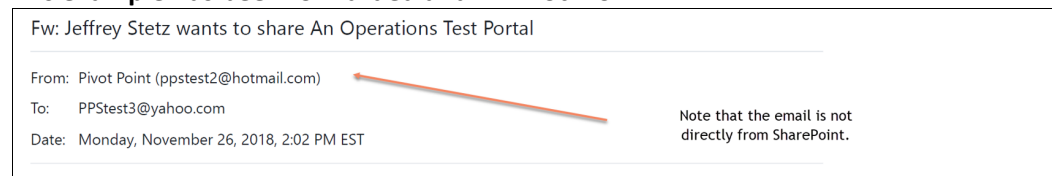Please try accepting the invitation again with ppstest2@hotmail.com. By signing in you allow Pivot Point Security to use your basic profile (name and email address) in accordance with their privacy statement. Pivot Point Security has not provided links to their terms for you to review. You can remove these permissions at myapps.microsoft.com.

Don't have either account? Create a Microsoft account, it's quick and easy!

Legal | Privacy

If you are unsure if the invitation is an original or forwarded, check the header line in the email you receive.

This example has been forwarded and will not work

Fw: Jeffrey Stetz wants to share An Operations Test Portal

From: Pivot Point (ppstest2@hotmail.com)

To: PPStest3@yahoo.com

Date: Monday, November 26, 2018, 2:02 PM EST

Note that the email is not directly from SharePoint.

This is an original email and will work

Jeffrey Stetz wants to share An Operations Test Portal

From: no-reply@sharepointonline.com

To: PPStest3@yahoo.com

Cc: jeffrey.stetz@pivotpointsecurity.com

Date: Monday, November 26, 2018, 12:52 PM EST

Sent directly from SharePoint so this will work.
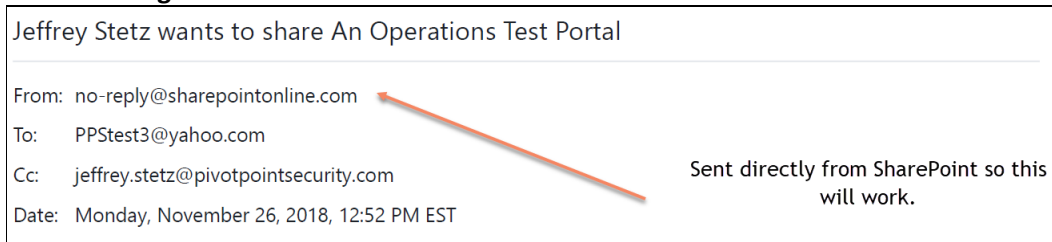
2. Expired Invitations

Because invitations expire after 90 days, it is advised that you set up your access shortly after receiving the invitation. As a rule, the PPS team tends to send out invitations within 24 hours of the original kickoff call. If your project continues past 90 days, there is a good chance that you will be accessing the SharePoint portal after that time to review reports. Do not use the invitation link to access the portal, as it will give you an error message.

That didn't work

We're sorry, but this invitation has expired. Please ask for a new invitation to this site.

If that doesn't help, contact the person who invited you and include these technical details:

This error occurs because you are trying to access the portal by re-clicking on your original invitation. Instead, you should copy and paste the direct link to the portal in your browser and log in from there.

Unsure of the direct link?

The direct link can usually be found in any delivery emails the PPS team provides. If you still cannot find it, feel free to contact any of our team members and we would be happy to assist you.

3. Cannot Access SharePoint Due to Permission Errors

In rare instances, after you have accepted a SharePoint invitation, it is possible to receive the below error message when attempting to access the portal.

I'd like access, please.

Accept or Decline this request

Requested resource: https://pivotpointsecurity.sharepoint.com/

To resolve this issue, follow these steps:

1. Verify that the SharePoint site you are trying to access is the correct one
   a. The correct link will always be provided by the PPS team and will always be included in report notification emails
2. If you have verified that you have the correct link, wait a few minutes and try again
   a. Sometimes Microsoft has issues with their server and this message inaccurately appears

When in doubt, feel free to contact a PPS team member for assistance.

4. Cannot Login to the SharePoint Site with a Direct Link – Not Accepting an Invitation

Even if you have a direct link to the SharePoint portal, you may still sometimes experience login issues like this:
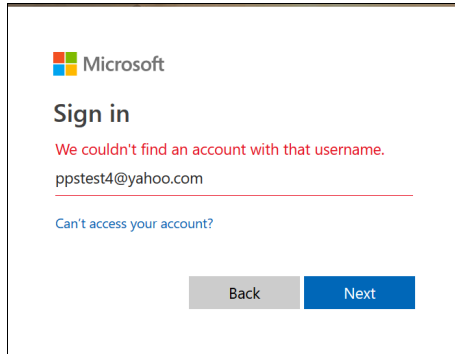
Review your original invitation and click on the link to login to the portal at least one time with your account for future access to the portal.
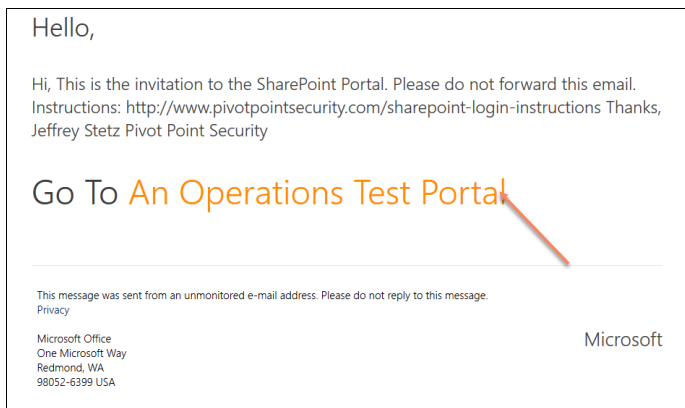
*If you have a Hotmail, MSN, or Live account you should automatically be given access even if you forget to click on the invitation invite (provided you are accessing the portal within 90 days of the original invitation).

5. User in Multiple SharePoint Instances

Have you accepted our invitation, logged in at least once, and are receiving the below error message?

That didn't work

We're sorry, but ppstest511@outlook.com can't be found in the pivotpointsecurity.sharepoint.com directory. Please try again later, while we try to automatically fix this for you.

Here are a few ideas:

➔ Click here to sign in with a different account to this site.
   This will sign you out of all other Office 365 services that you're signed into at this time.

➔ If you're using this account on another site and don't want to sign out, start your browser in Private Browsing mode for this site (show me how).

If that doesn't help, contact your support team and include these technical details:

Correlation ID: 293aa69e-d040-7000-6e56-76c4f3d2ed0f
Date and Time: 11/26/2018 11:18:49 AM
URL: https://pivotpointsecurity.sharepoint.com/
User: ppstest511@outlook.com
Issue Type: User not in directory.

It is very possible that you previously accepted the invitation with your personal/professional account, but you and are logged in with the other one. Microsoft will not allow you to have two separate instances open at the same time.

Private Browsing Window Workaround:

1. Depending on what browser you are using, open a private browsing window.
   a. It could be New Private Window (Firefox), New InPrivate Window (Edge), or New Incognito Window (Chrome)
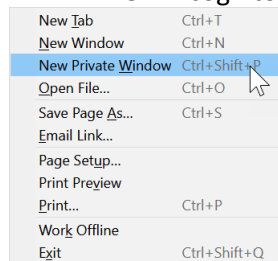
2. Copy the SharePoint Link Directly into the new Private Window.
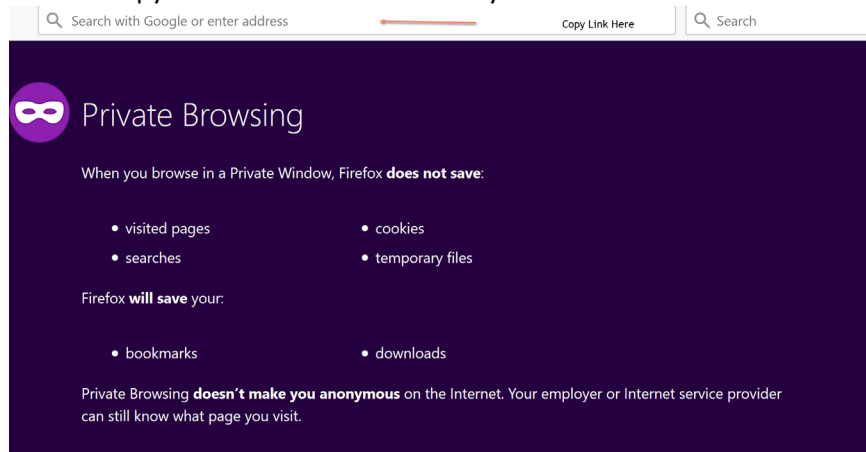
3. If you get the screenshot listed below, select the top option (Microsoft account).

Welcome to SharePoint Online

To accept your invitation, sign in with a Microsoft account or an account assigned to you by your organization. By signing in you allow Pivot Point Security t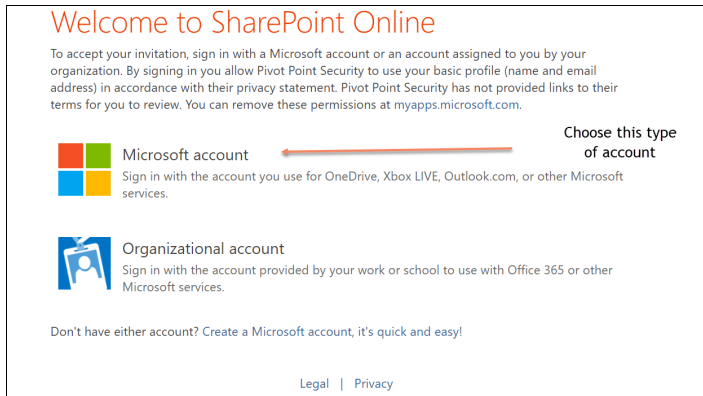o use your basic profile (name and email address) in accordance with their privacy statement. Pivot Point Security has not provided links to their terms for you to review. You can remove these permissions at myapps.microsoft.com.

Choose this type of account ←

Microsoft account
Sign in with the account you use for OneDrive, Xbox LIVE, Outlook.com, or other Microsoft services.

Organizational account
Sign in with the account provided by your work or school to use with Office 365 or other Microsoft services.

Don't have either account? Create a Microsoft account, it's quick and easy!

Legal | Privacy

4. You should now be granted a login screen and be able to login as usual.

* If you are still having issues logging in, it is possible that you originally accepted an invitation with a different Microsoft account. Try repeating the same process using a different email account you may have access to or contact the PPS project team to verify the email account used to accept the invitation.

6. SharePoint Invitation Does Not Arrive/Never Received an Invitation

As a rule, Pivot Point Security sends out a SharePoint invitation to everyone listed on the Intro/Kickoff Call Agenda within 24 hours after the meeting has concluded.

If that time has passed and you still have not received an invitation:

1. Take a look at the meeting agenda. Does your name and email address appear properly? Does it appear at all?
    a. If you are missing from the agenda or your information is incorrect, this is more than likely the reason why you have not received an invitation
    b. If you are a new team member to the project, then we do not have your contact information on file
        i. Have your Project Lead reach out to us to get an invitation sent to you

2. If your information is correct, did you check your Spam folder?
    a. Depending on your system and filters, sometimes our invitations do not land in the Inbox right away.
        i. You may need to go into your Spam or Junk folder. Mark that the email is not spam and move it into your Inbox. From there you will be able to accept the invitation.

3. The invitation comes directly from the email address: **no-reply@sharepointonline.com** as opposed to one of our team members.
    a. Please look at your Inbox and search for this email address as the sender.
    b. A sample invitation is below:
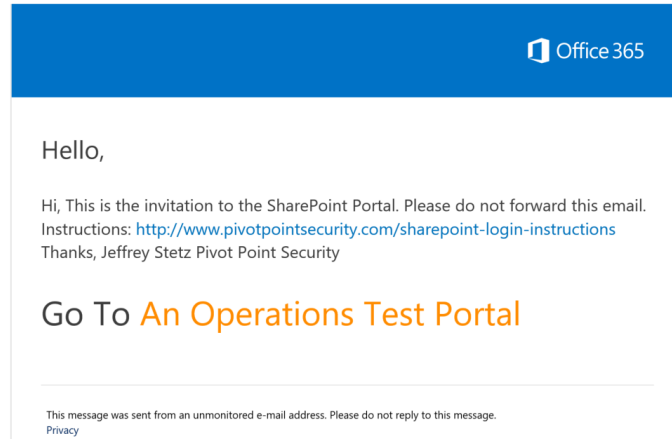
4. If none of the above works, please contact the PPS team associated with your project. They can verify if Microsoft is having an issue on their end or if for some reason an invitation was not properly sent out.

7. Unsure of which Email/Password to Use to Login to Portal

PPS sends invitations to the primary email addresses in the kickoff call agendas. These email addresses are derived from an email provided to the PPS team by the client project lead as well as from the email addresses that accepted the kickoff call meeting invitation.

As of December 2018, Microsoft will only allow you to accept an invitation from the email address it was sent to, and only allow you to create a Microsoft account (if needed) using that email address as the user name.

If you have accepted an invitation previously, please follow the instructions as referenced under the **User in Multiple SharePoint Instances** section if you are having trouble or contact the PPS team to confirm which email address we have on file for you.
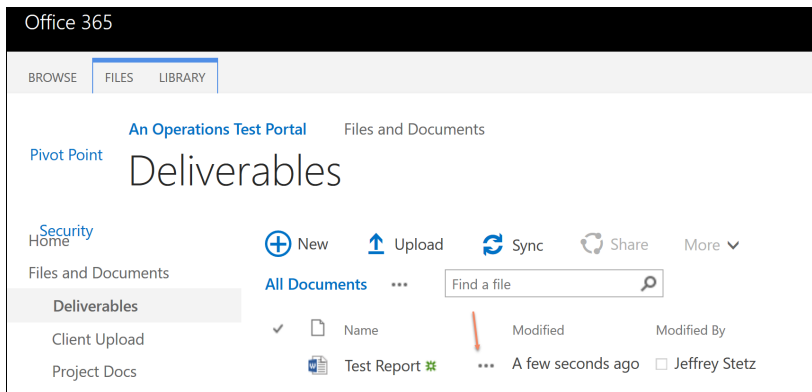
8. Difficulty Opening SharePoint Documents

Once reports are ready for delivery, they are uploaded to the SharePoint portal. To make opening them easier we recommend **downloading the reports**. To do this perform the following steps.
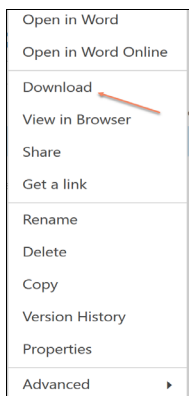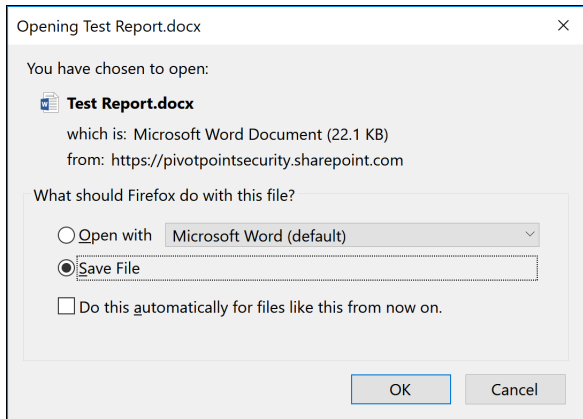
1. Locate the file that you want to open.
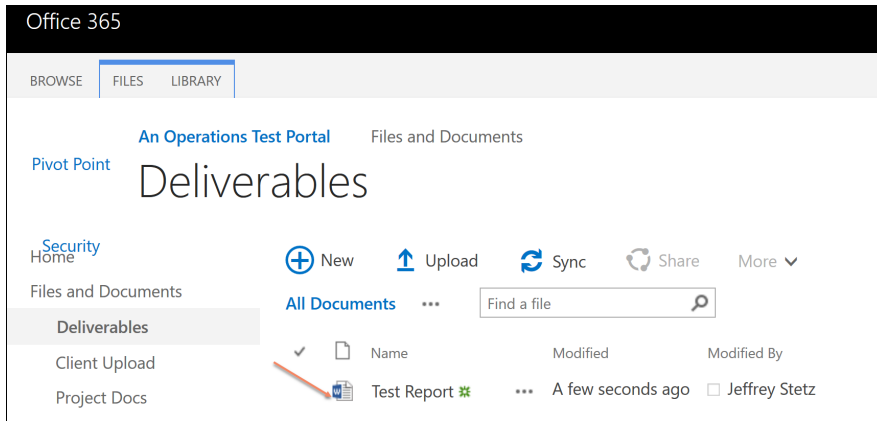
2. Right click on the three dots next to the file name.

3. From the drop-down menu select the option for Download.

4. Depending on what browser you are using, you will be given an option to Open or Save the file. Select Save.

Opening Test Report.docx

You have chosen to open:

📄 **Test Report.docx**

    which is: Microsoft Word Document (22.1 KB)
    from: https://pivotpointsecurity.sharepoint.com

What should Firefox do with this file?

○ Open with   Microsoft Word (default)
◉ Save File

☐ Do this automatically for files like this from now on.

           OK   Cancel

5. Save the document onto the appropriate place on your computer/network.
6. Go into your directory where you saved the file and open it. For most documents you will be asked to enter in the password.

Password   ?   ✕

Enter password to open file
C:\Users\Jeffrey\Downloads\Test Report.docx
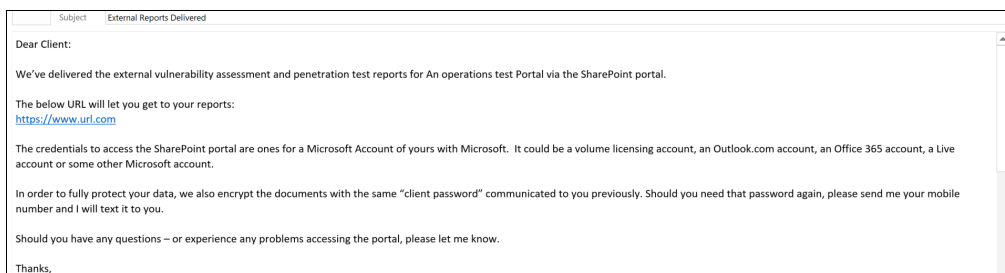
           OK   Cancel
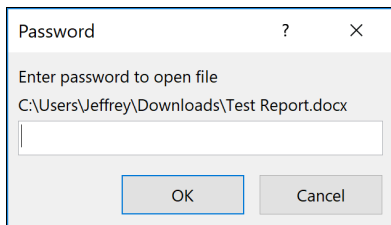
7. Enter the password you received on the kickoff call and you will be able to access the reports. (Contact your PPS team and provide your cell phone number if you do not have it. We will text the password to you. For security purposes we do **NOT** provide passwords via email.)

9. User Does Not Know Where Reports are on Portal

Your testing is completed, and you are ready to read your reports. Where can you find them?

1. First make sure you received a notice from PPS that your reports have been delivered. A sample delivery screenshot is shown below.

Subject   External Reports Delivered

Dear Client:

We've delivered the external vulnerability assessment and penetration test reports for An operations test Portal via the SharePoint portal.

The below URL will let you get to your reports:
https://www.url.com

The credentials to access the SharePoint portal are ones for a Microsoft Account of yours with Microsoft. It could be a volume licensing account, an Outlook.com account, an Office 365 account, a Live account or some other Microsoft account.

In order to fully protect your data, we also encrypt the documents with the same "client password" communicated to you previously. Should you need that password again, please send me your mobile number and I will text it to you.

Should you have any questions – or experience any problems accessing the portal, please let me know.

Thanks,

If you are on the email chain for the project, and you do not receive a similar message to the above, most likely the reports are not ready yet.

2. After you receive the above message (or similar), login to the SharePoint portal.

3. In the portal, locate the Deliverables link on the left-hand side of the page.
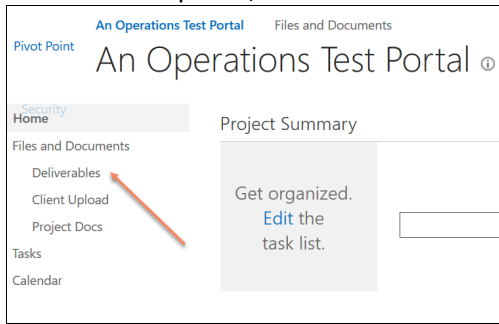
4. After clicking on the Deliverables tab, you should see all the reports for the project.

5. You will now be able to access all the reports. If you are having difficulty opening the files, see the section entitled **Difficulty Opening SharePoint Documents** above.

10.   Microsoft Login Pages are Blocked

If for some reason your company blocks Microsoft login pages there will be no way for you to access our portal. You have two options.

1. Contact your IT Department and explain the situation. See if they can add an exception and allow you to be unblocked from the Microsoft login site.
2. If the page cannot or will not be allowed to be unblocked, please contact the PPS team and we can exchange information through another secure channel such as Box.

11.   Client Migrating to Office 365

If during your time using the PPS portal your company moves over to Office 365, there is some housekeeping that our team will need to perform. Failure to do so may lead to trouble in accessing the portal. Please do the following:

1. Notify the PPS team that you company will be migrating – provide the date when your Office 365 instance will go live
2. Provide the email address associated with the Office 365 account(s) if different from your current login to SharePoint

With this information we will begin the migration process on our end. You will be temporarily unable to login to SharePoint while this process is going on (up to 24 hours). You will also receive a new invitation to access the portal once everything is complete.

Once this has been accepted you should be able to access the reports in a normal fashion.