

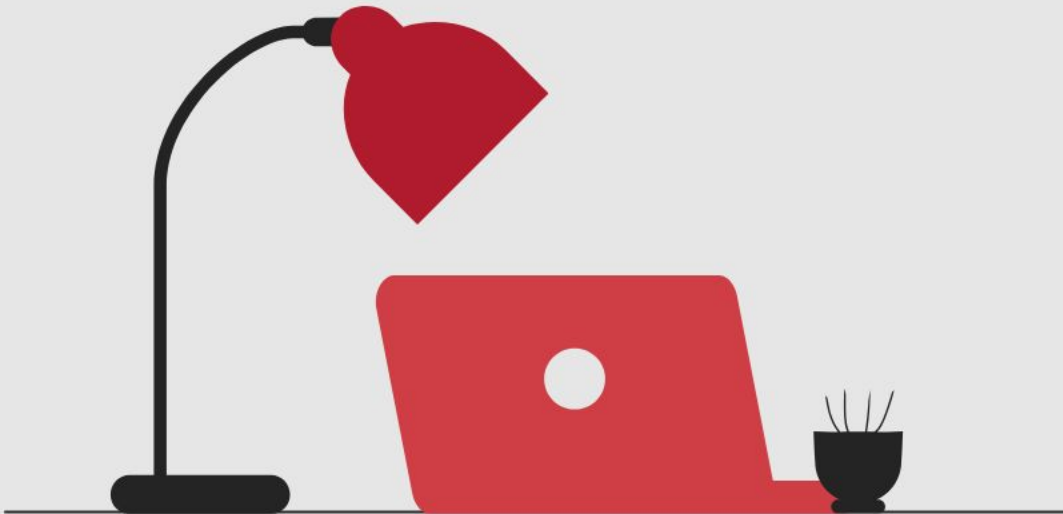
Using Office 365 to Simplify Compliance

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Payment Acceptance and Compliance Manager



What we will cover today....



Walkthrough of the University of Bristol's compliance Journey



Exploring Common Barriers for Universities and Organisations



What we did to solve Payment Security process issues

Payments Acceptance & Compliance Team



We are in Finance Services which is part of a wider Income and Credit Control department



The team is responsible for dealing with all commercial income related tasks and oversee university payment streams



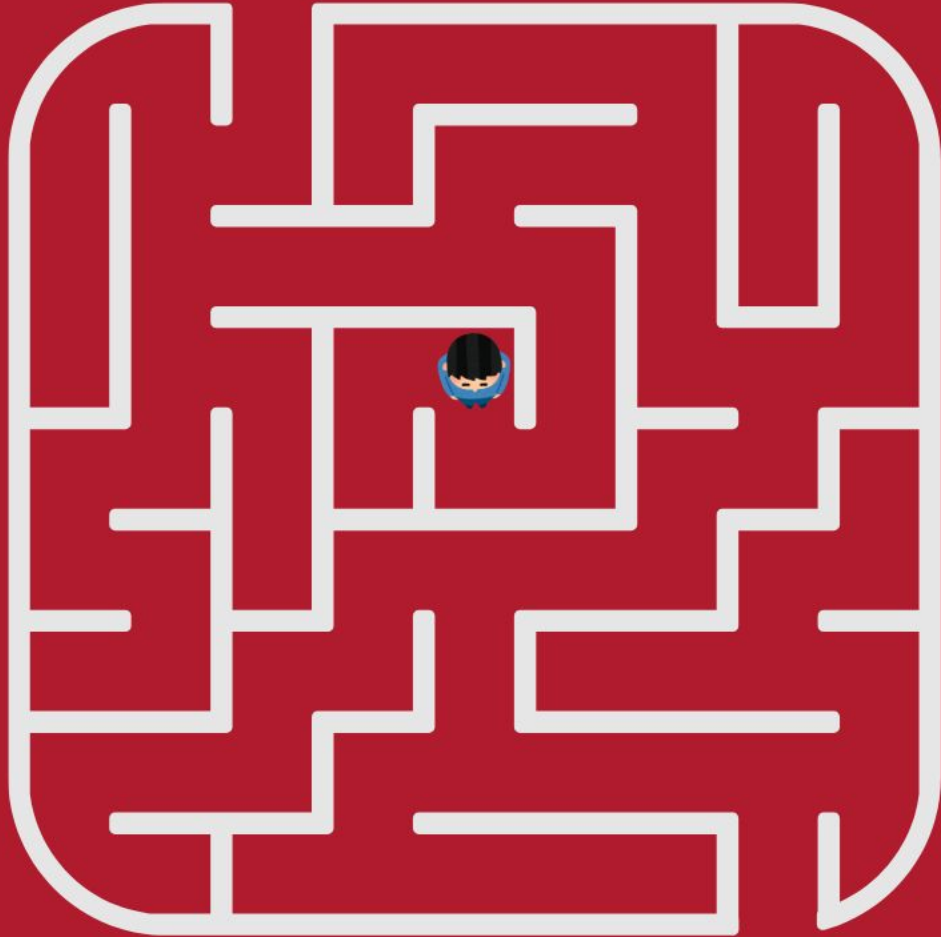
Team consists of 5 staff, 3 Income Officers, 1 Senior Income Officer & PAC Manager



Allocate all commercial income and reconcile various related bank statements.



Our involvement with Payment Security is to ensure activates involving card payments is compliant



**“Managing
Payment
Security can be
challenging”**

Retaining compliance is
reliant on everyone
playing their part



Decentralised Departments

Departments were seemingly operating independently not necessarily following best practice. Some departments procured PDQ machines without consulting the right finance channels



Time Pressures

Being compliant was seen as “additional work” for staff and felt this was time consuming which resulted in lack of engagement



Unclear Roles

Managers in departments didn't know what their roles and responsibilities were in relation to payment security



Compliance Complexity

Compliance was difficult to understand within Finance and the wider University stakeholders and identified better education was required

It was time to level up!



We partnered with Flywire

Implementing the Payment Security Management System (PSMS)



Accountability and Support

Consisted of fortnightly catch ups with **Mike Vale** and **Philippa Watson**



Improved understanding of PCI DSS

On hand to help with any queries and solutions related to compliance

The Flywire logo, featuring the word "flywire" in a blue, lowercase, sans-serif font. The "f" is stylized with a horizontal line through it.

How the PSMS implementation started

Project Initiation,
Training & Scoping

Sept 22 - Jan 23

Audit & Implementation

Nov 23 - Jan 24

• Kicked off PSMS
project with Flywire

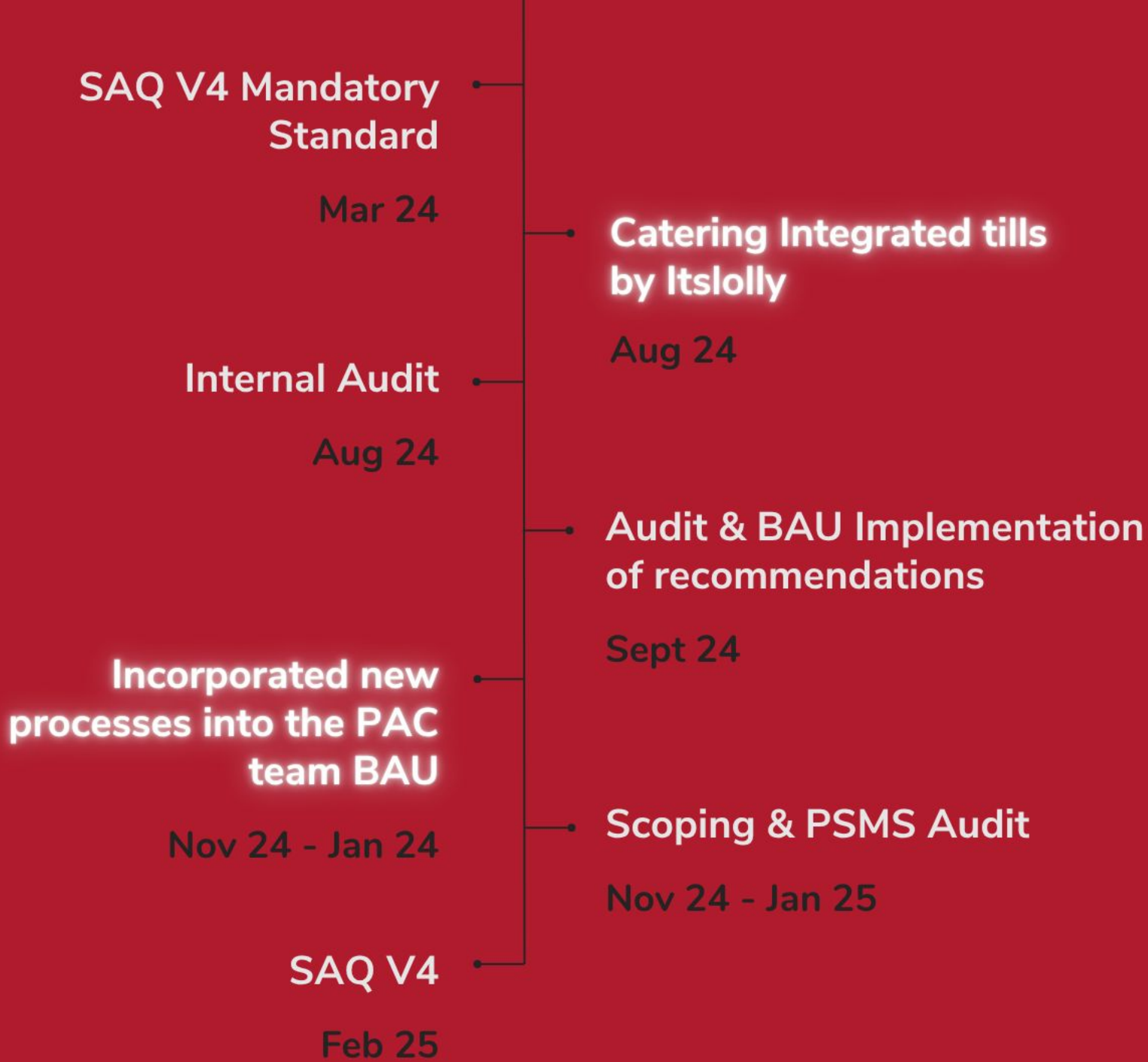
Sept 22

• I Joined the project

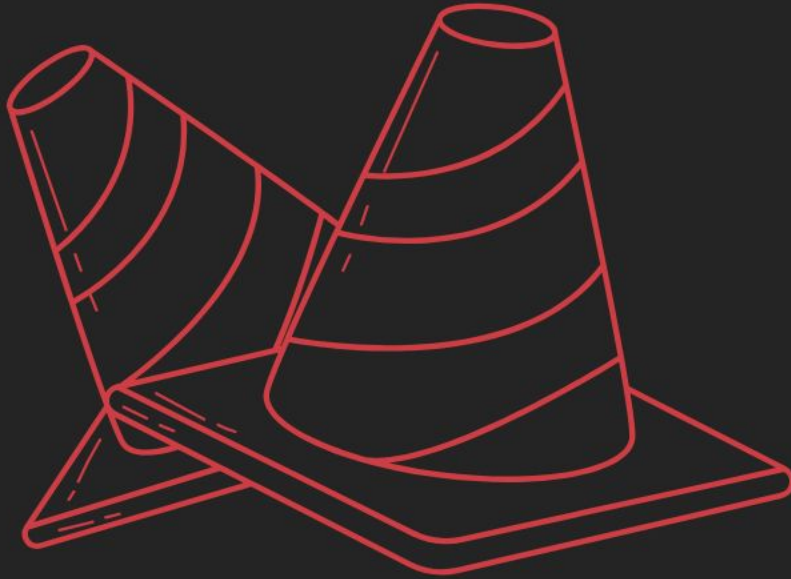
July 23

• SAQ ~~V4~~ V3.2.1

Feb 24



**How the PSMS
implementation
is going.....**



Let's talk about some Common Barriers

for universities and other
organisations

What is your university's #1 compliance blocker



Scan the QR code

or

log in to slido.com

use the code #Flywire2025, then track 2

Unclear Ownership

Departments operate independently
Inconsistent procedures for handling payments
Lack of central oversight or standards

Lack of Training and Awareness

Staff are unsure of what is required
Minimal onboarding or refresher training
Reliance on outdated documents or hearsay

Tech Fatigue or Tool Resistance

New systems not adopted if perceived as “more work”
Staff ignore tools they don’t trust or understand
If it’s not intuitive, it won’t be used

Payment Security Not Seen as a Priority

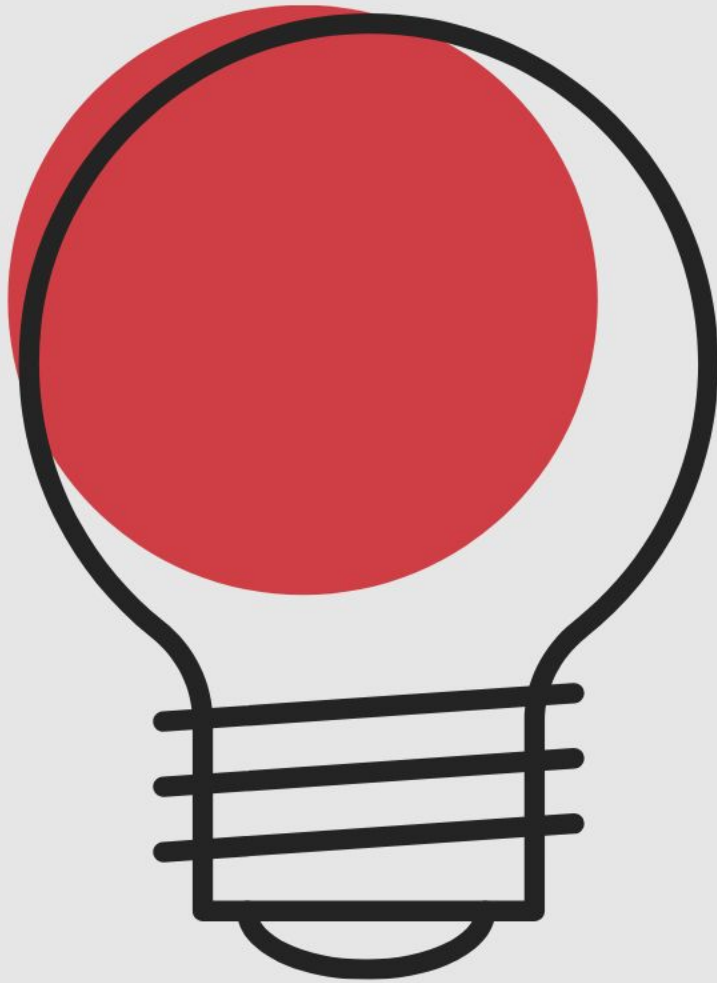
Departments prioritise revenue or academic goals
Compliance viewed as "IT or Finance's job"
Security concerns seen as hypothetical or overly technical

Email Overload and Information Loss

Important updates lost in inbox noise
No structured version control
Key decisions buried in threads

Manual or Duplicated Processes

Paper-based or ad-hoc systems
Same data entered multiple times across systems
Human error introduces risk



What
worked for
us at



University of
BRISTOL



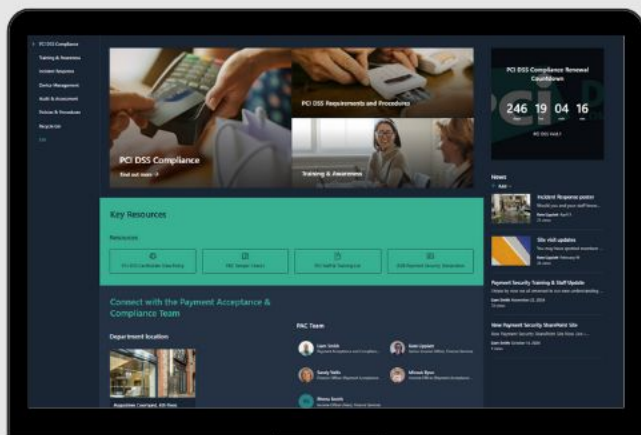


***“Start with the tools we already use
- see if it saves time”***

- ✓ Payment Security Site for Users
- ✓ Payment Security Teams site for Users and Staff
- ✓ Payment Security Hub for the PAC team

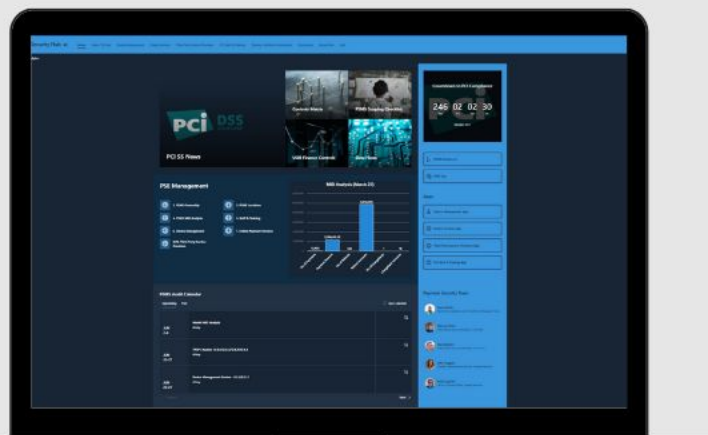


SharePoint



Staff SharePoint Site

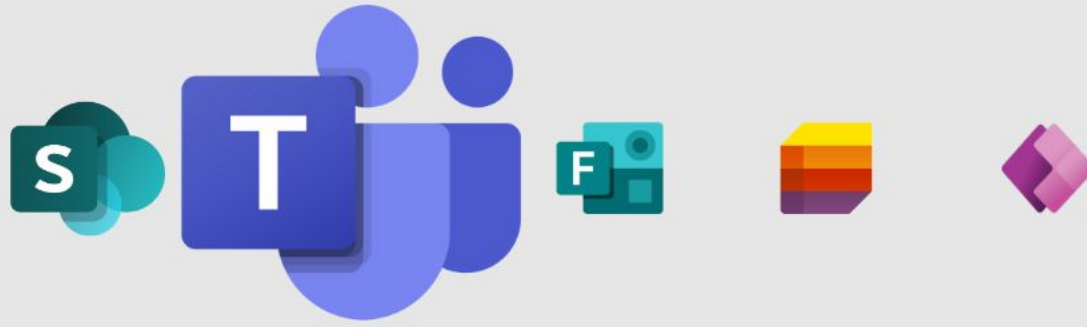
- Central source of the Truth!
- Information on PCI DSS, roles and responsibilities
- Training resources
- Device management, PIM information and devices instructions
- Incident reporting
- Policy and Procedure links
- Other resources like posters, ped tamper check



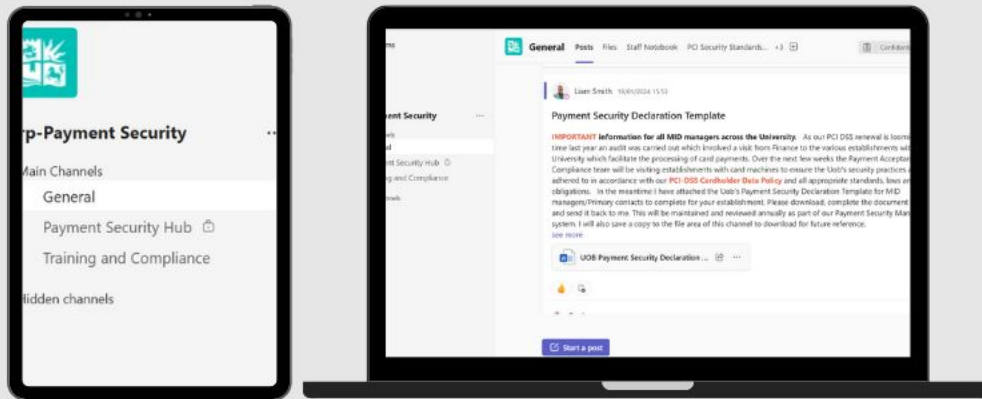
Payment Security Hub

- Private working Group for the PAC/Infosec Teams
- Document Management and access of the PSE
- Annual audit tasks calendar
- Storage for required audit evidence, AOC's, 3rd party agreements
- Site visit events schedule



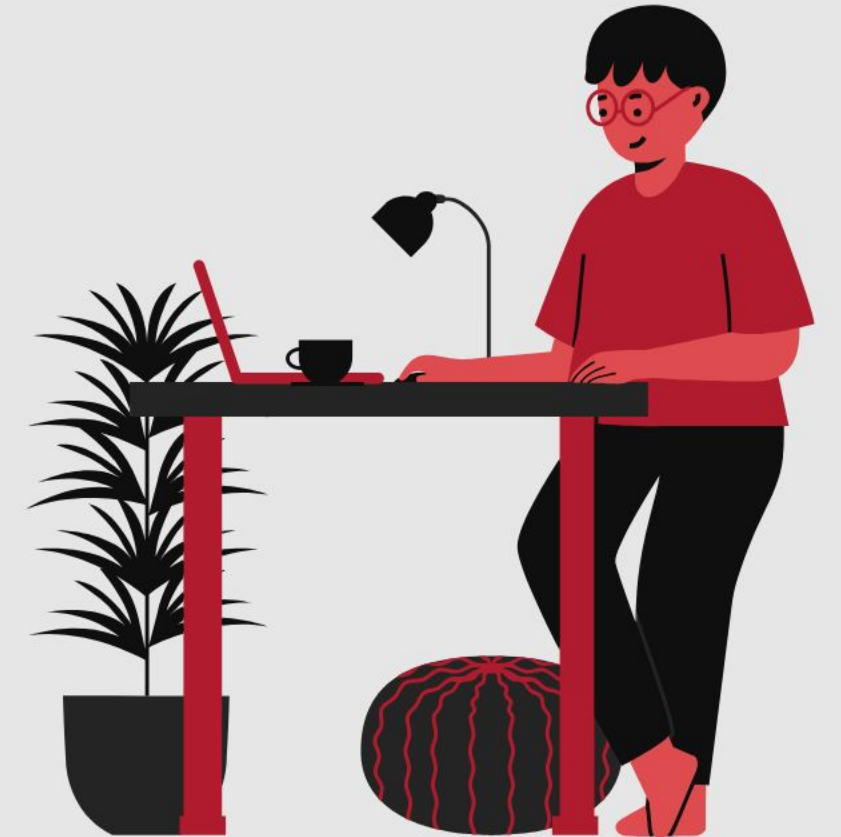


Teams



Payment Security Teams Channel

- Stakeholder Collaboration
- Linked to the PS SharePoint site
- Users can communicate and ask questions through this channel
- PAC team can provide important updates to group members
- Private communication channel to communicate inhouse teams



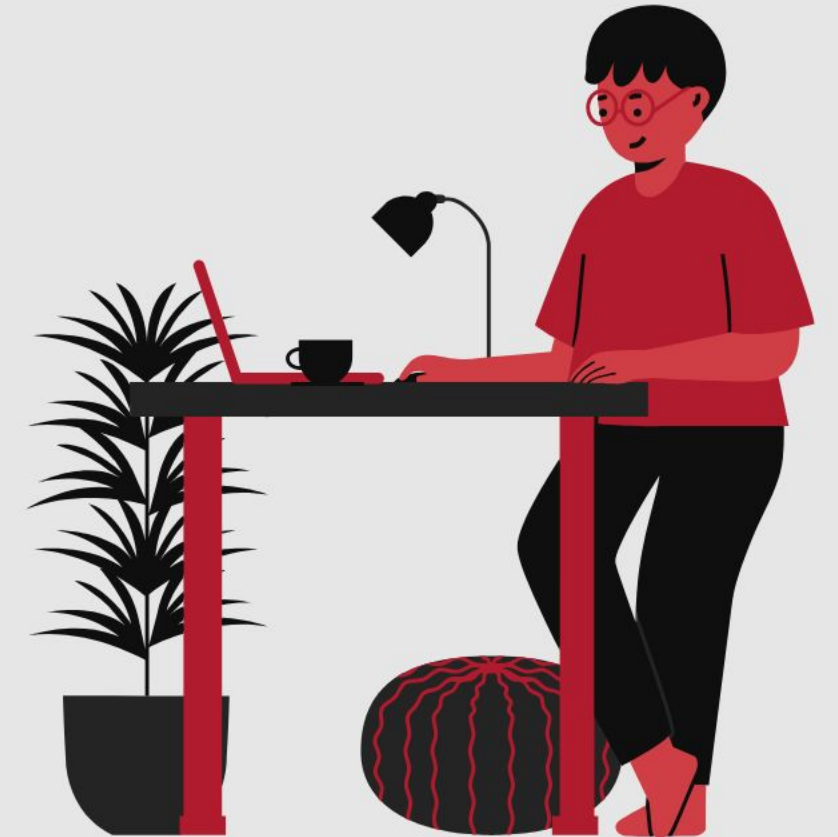


Forms



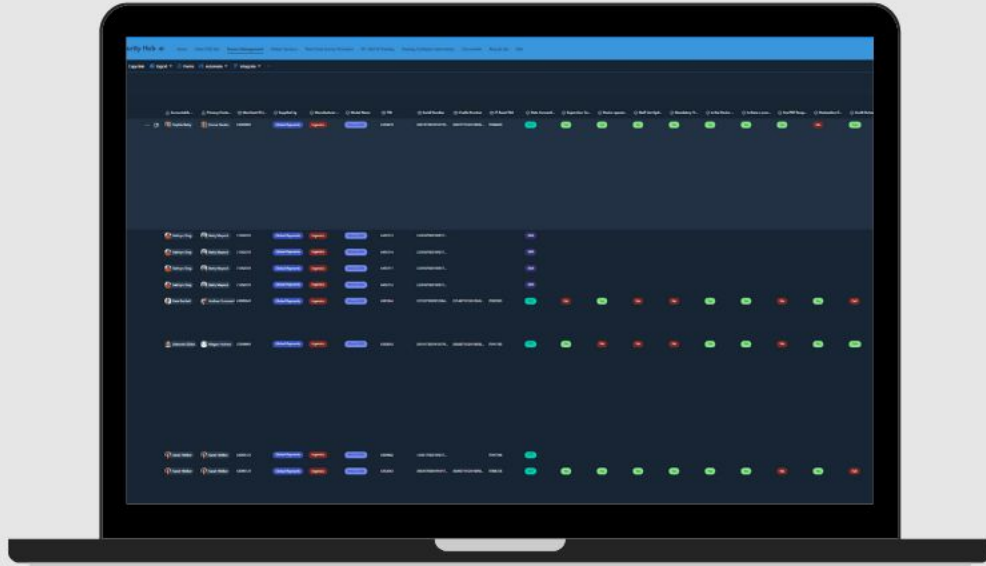
Payment Security Forms

- Easy submission of requests
- Can be accessed from the SharePoint site
- Users can complete forms to request new MIDS, TIDS etc
- Automatically sends to our mailbox for action
- No missing information required for processing



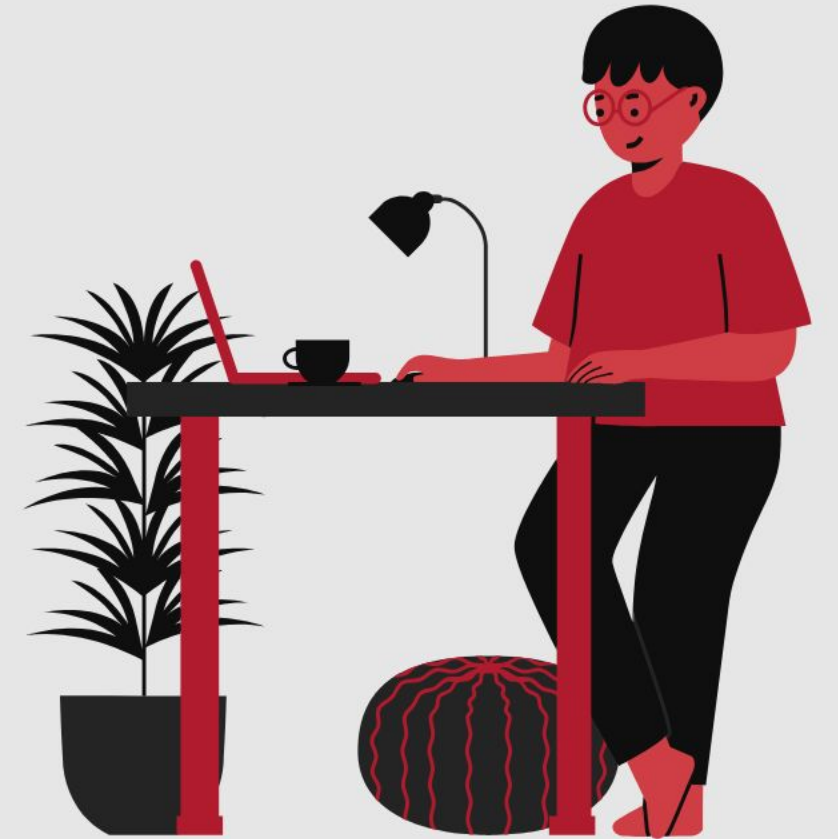


Lists



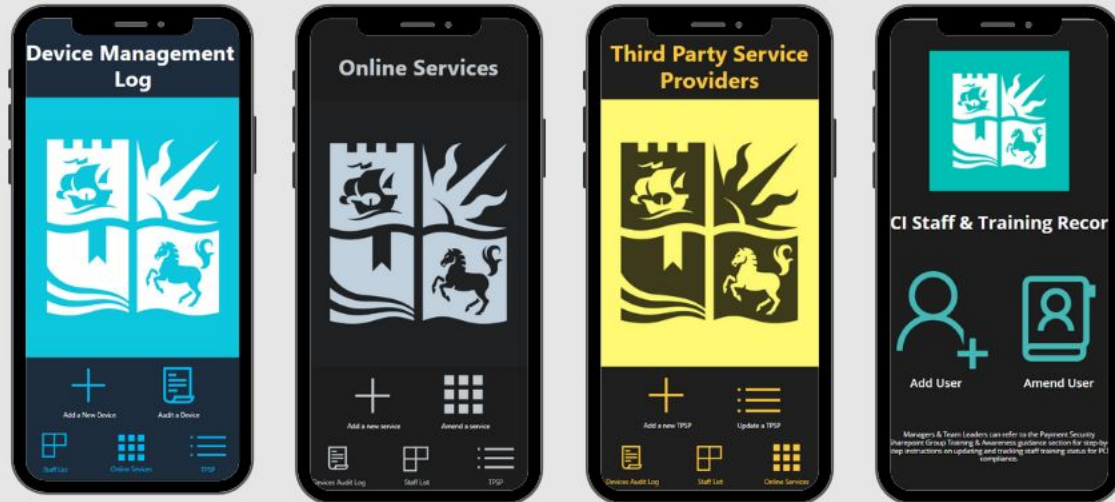
PSE and other databases

- Cleaner and easier to manager than Excel sheets
- Provides an audit history
- Easy to maintain
- Can integrate with SharePoint, Teams and other applications!
- Can be share and accessed from a variety of devices





PowerApps



Interface Apps for PAC and Users

- Unlimited choice in interface for updating information
- Information links directly to existing lists and updates them!
- Accessible on any device, anywhere
- Great to use for infield work i.e Site visit audits
- PSE data has been converted into these apps all linking together



It made a real difference.....



One source of “Truth” for users



Easy access to resources and information for staff



Less time spent on drawn out tasks and procedures



Fewer emails & questions and efficient processes



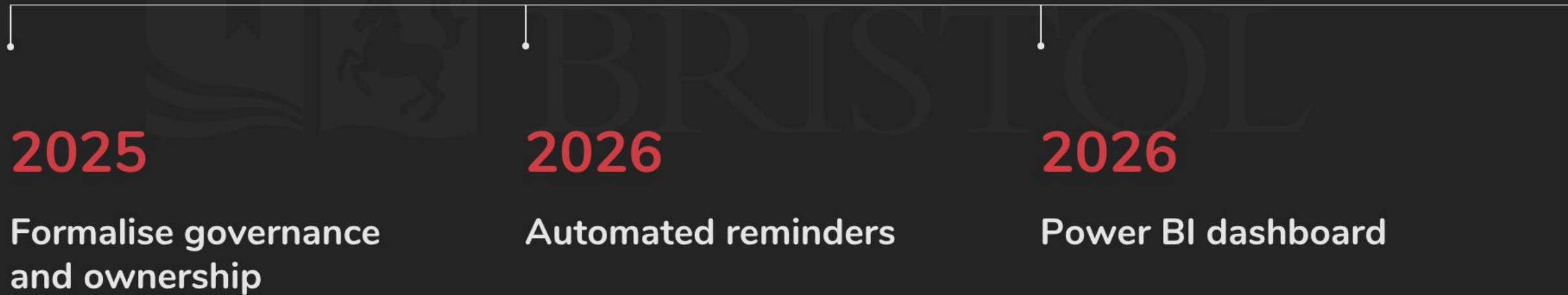
Audit confidence



Improved understanding of PCI DSS and compliance

What's next

It's all about continuous improvement.....



Get in touch



Post session coffee



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