

Microsoft Copilot for Oil & Gas Finance Governance Training Course

OGI-1164 · 5 days · 15 CPD hours · English

Overview

Microsoft Copilot for Oil & Gas Finance Governance Training Course from [Institute For Oil & Gas Training](#) develops practical capability in Using Microsoft Copilot for Oil & Gas Finance while establishing the governance, confidentiality, verification and control disciplines required for responsible AI assisted finance operations. The course addresses the growing skills gap between the availability of AI enabled finance tools and the governance capabilities required to use them safely across oil and gas organisations.

Oil and gas finance functions operate within complex environments involving joint ventures, capital projects, procurement expenditure, production costs, asset portfolios, treasury activities, management reporting and commercially sensitive financial information. Microsoft Copilot introduces powerful capabilities for drafting, analysing, summarising, organising and interpreting information within supported Microsoft environments. Effective use therefore requires more than familiarity with AI functionality. Finance professionals need a structured understanding of AI governance policy, data confidentiality and tenant boundaries, sensitivity labels, permission inheritance, output accuracy verification and human review requirement.

This course from Institute For Oil & Gas Training focuses on the governance layer surrounding Microsoft Copilot use in finance. It helps organisations establish disciplined practices for AI assisted financial work while maintaining appropriate controls over information access, data handling, review responsibilities and documentation. Participants examine how Copilot interacts with organisational data permissions and how existing access rights influence the information available to users.

The course also addresses the practical implications of using generative AI in financial reporting, analysis, budgeting, forecasting support, reconciliation activities, management information and finance administration. Participants learn to distinguish between AI generated assistance and approved financial information, ensuring that human judgement remains central to significant finance decisions and control activities.

A core focus is output accuracy verification. AI generated content requires appropriate validation before it becomes part of a financial workflow, management report, analysis or business communication. Participants develop methods for checking calculations, source information, assumptions, summaries and generated narratives against authoritative organisational records.

The course also examines the human review requirement for AI assisted work. Finance teams establish clear points at which outputs require review, validation, approval or escalation. This creates a more consistent approach to responsible Copilot adoption across finance departments and helps organisations avoid treating AI generated information as automatically authoritative.

Governance extends beyond individual users. Participants explore the development and application of an acceptable use policy covering appropriate Copilot activity within finance. They examine AI risk assessment principles,

accountability, access control, documentation and audit trail for AI assisted work. These practices support stronger governance structures and provide management with a clearer basis for monitoring AI enabled finance processes.

The course is designed specifically around the operational realities of oil and gas organisations. Examples address financial governance across upstream, midstream and downstream environments, including project finance, cost management, procurement, commercial reporting, asset accounting, treasury and management reporting. The emphasis remains practical, business focused and directly applicable to corporate finance functions.

Institute For Oil & Gas Training positions Microsoft Copilot as an enabler within a controlled finance environment rather than a replacement for established financial governance. Participants learn how to use AI assistance while preserving defined responsibilities for financial accuracy, confidentiality, review and approval.

The programme also supports finance leaders responsible for AI adoption. Managers gain a framework for establishing governance expectations, defining user responsibilities and identifying risks before Copilot becomes embedded in everyday finance processes. This creates a stronger foundation for controlled digital finance transformation.

Objectives

- Understand the principles of Using Microsoft Copilot for Oil & Gas Finance within controlled corporate finance environments
- Establish practical foundations for an effective AI governance policy
- Assess data confidentiality and tenant boundaries when using Copilot with organisational information
- Understand the role of sensitivity labels in protecting finance information
- Recognise how permission inheritance influences access to organisational data
- Apply structured methods for output accuracy verification
- Establish an appropriate human review requirement for AI assisted financial work
- Develop controls supporting an audit trail for AI assisted work
- Apply an acceptable use policy to finance related Copilot activity
- Conduct practical AI risk assessment for finance workflows
- Identify governance risks associated with AI assisted financial analysis and reporting
- Improve consistency in AI assisted finance processes across departments

- Strengthen accountability for reviewing and approving AI generated outputs
- Integrate Copilot usage with existing finance control environments
- Develop practical governance approaches for budgeting, reporting, analysis and finance administration
- Support responsible AI adoption across oil and gas finance functions

Training methodology

Institute For Oil & Gas Training delivers the programme through an applied corporate training methodology designed around realistic oil and gas finance scenarios. The delivery combines expert-led discussion with practical exercises, case studies, simulations, governance workshops and scenario-based analysis.

Participants examine realistic situations involving financial information, management reporting, cost analysis, budgeting documentation, procurement information and commercially sensitive data. These scenarios demonstrate where Copilot assistance creates value and where additional governance controls are required.

Case studies focus on common finance governance challenges. Participants analyse situations involving inappropriate data access, unclear user permissions, insufficient output verification, missing review records and inconsistent AI usage practices. Each case study leads to a structured discussion of appropriate controls and management responsibilities.

Simulation exercises allow participants to assess AI assisted finance workflows from initiation through review and approval. Participants consider the information supplied to Copilot, the permissions governing access, the generated output, the verification process and the documentation retained after completion.

Group exercises focus on developing practical AI governance controls. Participants work through the structure of an AI governance policy, acceptable use policy and AI risk assessment approach relevant to finance operations. The exercises encourage cross-functional consideration of finance, IT, information security, compliance, internal audit and management requirements.

Real-world scenarios address data confidentiality and tenant boundaries. Participants explore how organisational information environments, permissions and sensitivity labels influence responsible Copilot usage. The methodology reinforces the importance of understanding existing information governance before introducing AI assisted workflows.

Output review exercises develop practical verification skills. Participants assess generated financial summaries and narratives against source information, identify unsupported statements and determine when human review is mandatory. This approach reinforces the principle that AI assistance requires appropriate professional validation.

The course also uses workflow mapping exercises to identify where an audit trail for AI assisted work is appropriate. Participants examine how organisations can document significant AI assisted activities, review actions and approval points without creating unnecessary administrative burdens.

Organisational impact

Organisations gain a more structured approach to deploying Microsoft Copilot across finance operations. The course helps management establish governance expectations before AI assisted processes become embedded in routine financial activity.

A clearly defined AI governance policy creates consistent organisational expectations. Finance teams understand what constitutes appropriate Copilot usage, which activities require additional review and which information requires enhanced protection.

Improved data governance supports stronger protection of commercially sensitive finance information. Understanding data confidentiality and tenant boundaries helps organisations assess where information resides, how access is governed and how existing permissions affect AI assisted workflows.

Sensitivity labels provide an important part of the information protection environment. Participants understand how classification and labelling practices contribute to responsible handling of finance information and how these controls interact with AI enabled workflows.

Permission inheritance receives specific attention because AI tools operate within broader organisational information environments. Finance managers and technology stakeholders gain greater awareness of how inherited permissions influence information availability and why access governance must be considered before expanding Copilot usage.

The course strengthens financial control through output accuracy verification. Organisations gain a repeatable approach for checking AI generated summaries, analyses and narratives against authoritative financial information before those outputs enter business processes.

The human review requirement strengthens accountability. Finance professionals remain responsible for evaluating AI assisted outputs, identifying errors and confirming that information is suitable for its intended purpose. This supports stronger control over management reporting and other financially significant activities.

An audit trail for AI assisted work improves traceability where documentation is required. Organisations gain a clearer understanding of what should be recorded, who performed the review and where approval or escalation applies.

The course also supports more consistent AI risk assessment. Management can identify risks relating to information security, inaccurate outputs, inappropriate use, insufficient review and unclear accountability before expanding AI usage.

For oil and gas organisations, these practices contribute to more controlled digital finance transformation. Finance, IT, compliance, information security and internal audit teams gain a shared vocabulary for discussing AI related risks and controls.

Personal impact

Participants develop practical competence in managing Microsoft Copilot within professional finance environments. They gain a stronger understanding of how AI assistance fits within established financial governance rather than operating as an independent source of financial authority.

Finance professionals strengthen their ability to evaluate AI generated information. They learn how to check outputs against source records, identify unsupported conclusions and apply appropriate professional judgement before using generated content.

Participants also develop stronger data governance awareness. They understand the importance of confidentiality, tenant boundaries, sensitivity labels and permission inheritance when working with organisational finance information.

Managers gain practical capability to define responsibilities for AI assisted work. They can establish review points, approval expectations and escalation procedures that support controlled adoption.

Participants responsible for finance transformation gain a framework for assessing AI risks and documenting appropriate controls. This supports more structured engagement with IT, information security, compliance and internal audit functions.

The programme also strengthens professional confidence when introducing Copilot into finance workflows. Participants learn to distinguish productive AI assistance from activities that require additional validation, approval or restriction.

Career capability improves through stronger understanding of AI governance, finance controls and digital transformation. These capabilities support finance professionals involved in modernisation programmes, governance initiatives, reporting transformation and technology-enabled process improvement.

Who should attend

- Finance Directors and CFO Office professionals who require governance oversight of AI assisted finance activities
- Finance Managers responsible for financial controls, reporting and operational finance processes
- Financial Controllers who need stronger verification and accountability practices for AI assisted outputs
- Management Accountants who use digital tools for analysis, reporting and management information
- Financial Analysts who require structured methods for validating AI assisted analysis
- Treasury Professionals who handle sensitive financial information and require controlled AI usage practices
- Procurement Finance Professionals who work with commercially sensitive expenditure and supplier information
- Internal Audit Professionals who assess controls, documentation and accountability surrounding AI assisted work
- Compliance Professionals who support organisational governance and acceptable use requirements
- Risk Managers responsible for AI risk assessment and operational control frameworks

- Information Security Professionals supporting data protection and access governance for finance environments
- IT Managers responsible for Microsoft environments and controlled Copilot adoption
- Digital Transformation Leaders managing AI enabled finance initiatives
- Finance Transformation Teams developing new technology-enabled processes
- Senior Finance Executives responsible for organisational adoption of AI within corporate finance

Course outline

AI Governance for Oil and Gas Finance

This module establishes the governance foundations for Using Microsoft Copilot for Oil & Gas Finance. Participants examine how AI governance applies to finance functions and how organisations establish clear responsibilities for approved use, review, accountability and risk management.

Data Confidentiality and Access Controls

This module focuses on data confidentiality and tenant boundaries when using Copilot within oil and gas finance environments. Participants examine how organisational information is protected through access controls, classification practices and existing permission structures.

Output Verification and Financial Control

This module develops practical capability in output accuracy verification. Participants learn how to assess AI generated information before incorporating it into finance processes, reports or management communications.

Auditability and AI Assisted Finance Work

This module focuses on documentation, traceability and the audit trail for AI assisted work. Participants examine how organisations can maintain appropriate evidence of AI assisted activities while preserving efficient finance workflows.

Acceptable Use and AI Risk Assessment

This module brings governance, information protection, verification and accountability together within an operational framework for responsible Copilot adoption. Participants develop practical approaches for applying an acceptable use policy and AI risk assessment across finance activities.

Scheduled dates

Dates	Venue	Format	Fee
12 - 16 Oct 2026	Abu Dhabi, United Arab Emirates	In person	£4,200

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12 - 16 Oct 2026	Abuja, Nigeria	In person	£4,200
12 - 16 Oct 2026	Accra, Ghana	In person	£4,200
12 - 16 Oct 2026	Addis Ababa, Ethiopia	In person	£4,200
12 - 16 Oct 2026	Al Ain, United Arab Emirates	In person	£4,200
12 - 16 Oct 2026	Al Khobar, Saudi Arabia	In person	£4,200
12 - 16 Oct 2026	Alberta, Canada	In person	£4,200
12 - 16 Oct 2026	AlUla, Saudi Arabia	In person	£4,200
12 - 16 Oct 2026	Amman, Jordan	In person	£4,200
12 - 16 Oct 2026	Amsterdam, Netherlands	In person	£4,200
12 - 16 Oct 2026	Athens, Greece	In person	£4,200
12 - 16 Oct 2026	Baku, Azerbaijan	In person	£4,200
12 - 16 Oct 2026	Barcelona, Spain	In person	£4,200
12 - 16 Oct 2026	Berlin, Germany	In person	£4,200
12 - 16 Oct 2026	Boston, United States	In person	£4,200
12 - 16 Oct 2026	Brussels, Belgium	In person	£4,200
12 - 16 Oct 2026	Budapest, Hungary	In person	£4,200
12 - 16 Oct 2026	Cairo, Egypt	In person	£4,200
12 - 16 Oct 2026	Cape Town, South Africa	In person	£4,200
12 - 16 Oct 2026	Casablanca, Morocco	In person	£4,200
12 - 16 Oct 2026	Dammam, Saudi Arabia	In person	£4,200
12 - 16 Oct 2026	Dhahran, Saudi Arabia	In person	£4,200
12 - 16 Oct 2026	Doha, Qatar	In person	£4,200
12 - 16 Oct 2026	Dubai, United Arab Emirates	In person	£4,200
12 - 16 Oct 2026	Edinburgh, United Kingdom	In person	£4,200
12 - 16 Oct 2026	Edmonton, Canada	In person	£4,200
12 - 16 Oct 2026	Frankfurt, Germany	In person	£4,200

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12 - 16 Oct 2026	Geneva, Switzerland	In person	£4,200
12 - 16 Oct 2026	Houston, United States	In person	£4,200
12 - 16 Oct 2026	Istanbul, Turkey	In person	£4,200
12 - 16 Oct 2026	Jakarta, Indonesia	In person	£4,200
12 - 16 Oct 2026	Jeddah, Saudi Arabia	In person	£4,200
12 - 16 Oct 2026	Jubail, Saudi Arabia	In person	£4,200
12 - 16 Oct 2026	Khamis Mushait, Saudi Arabia	In person	£4,200
12 - 16 Oct 2026	Kigali, Rwanda	In person	£4,200
12 - 16 Oct 2026	Kuala Lumpur, Malaysia	In person	£4,200
12 - 16 Oct 2026	Lisbon, Portugal	In person	£4,200
12 - 16 Oct 2026	Liverpool, United Kingdom	In person	£4,200
12 - 16 Oct 2026	London, United Kingdom	In person	£4,200
12 - 16 Oct 2026	Los Angeles, United States	In person	£4,200
12 - 16 Oct 2026	Luanda, Angola	In person	£4,200
12 - 16 Oct 2026	Madrid, Spain	In person	£4,200
12 - 16 Oct 2026	Manama, Bahrain	In person	£4,200
12 - 16 Oct 2026	Marbella, Spain	In person	£4,200
12 - 16 Oct 2026	Marrakech, Morocco	In person	£4,200
12 - 16 Oct 2026	Miami, United States	In person	£4,200
12 - 16 Oct 2026	Milan, Italy	In person	£4,200
12 - 16 Oct 2026	Munich, Germany	In person	£4,200
12 - 16 Oct 2026	Muscat, Oman	In person	£4,200
12 - 16 Oct 2026	Nairobi, Kenya	In person	£4,200
12 - 16 Oct 2026	New York, United States	In person	£4,200
12 - 16 Oct 2026	Nice, France	In person	£4,200
12 - 16 Oct 2026	Nouakchott, Mauritania	In person	£4,200

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12 - 16 Oct 2026	Oslo, Norway	In person	£4,200
12 - 16 Oct 2026	Paris, France	In person	£4,200
12 - 16 Oct 2026	Port Louis, Mauritius	In person	£4,200
12 - 16 Oct 2026	Prague, Czech Republic	In person	£4,200
12 - 16 Oct 2026	Pretoria, South Africa	In person	£4,200
12 - 16 Oct 2026	Riyadh, Saudi Arabia	In person	£4,200
12 - 16 Oct 2026	Rome, Italy	In person	£4,200
12 - 16 Oct 2026	Sarajevo, Bosnia and Herzegovina	In person	£4,200
12 - 16 Oct 2026	Sharm El Sheikh, Egypt	In person	£4,200
12 - 16 Oct 2026	Singapore	In person	£4,200
12 - 16 Oct 2026	Stockholm, Sweden	In person	£4,200
12 - 16 Oct 2026	Tokyo, Japan	In person	£4,200
12 - 16 Oct 2026	Toronto, Canada	In person	£4,200
12 - 16 Oct 2026	Tromso, Norway	In person	£4,200
12 - 16 Oct 2026	Vienna, Austria	In person	£4,200
12 - 16 Oct 2026	Zagreb, Croatia	In person	£4,200
12 - 16 Oct 2026	Zurich, Switzerland	In person	£4,200
12 - 16 Oct 2026	Online, Virtual	Online	£4,200
08 - 12 Feb 2027	Abu Dhabi, United Arab Emirates	In person	£4,200
08 - 12 Feb 2027	Abuja, Nigeria	In person	£4,200
08 - 12 Feb 2027	Accra, Ghana	In person	£4,200
08 - 12 Feb 2027	Addis Ababa, Ethiopia	In person	£4,200
08 - 12 Feb 2027	Al Ain, United Arab Emirates	In person	£4,200
08 - 12 Feb 2027	Al Khobar, Saudi Arabia	In person	£4,200
08 - 12 Feb 2027	Alberta, Canada	In person	£4,200
08 - 12 Feb 2027	AlUla, Saudi Arabia	In person	£4,200

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08 - 12 Feb 2027	Amman, Jordan	In person	£4,200
08 - 12 Feb 2027	Amsterdam, Netherlands	In person	£4,200
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08 - 12 Feb 2027	Dhahran, Saudi Arabia	In person	£4,200
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08 - 12 Feb 2027	Kuala Lumpur, Malaysia	In person	£4,200
08 - 12 Feb 2027	Lisbon, Portugal	In person	£4,200
08 - 12 Feb 2027	Liverpool, United Kingdom	In person	£4,200
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08 - 12 Feb 2027	Sharm El Sheikh, Egypt	In person	£4,200
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11 - 15 Oct 2027	Abu Dhabi, United Arab Emirates	In person	£4,200
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11 - 15 Oct 2027	Al Ain, United Arab Emirates	In person	£4,200
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11 - 15 Oct 2027	Dhahran, Saudi Arabia	In person	£4,200

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11 - 15 Oct 2027	Doha, Qatar	In person	£4,200
11 - 15 Oct 2027	Dubai, United Arab Emirates	In person	£4,200
11 - 15 Oct 2027	Edinburgh, United Kingdom	In person	£4,200
11 - 15 Oct 2027	Edmonton, Canada	In person	£4,200
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11 - 15 Oct 2027	Kigali, Rwanda	In person	£4,200
11 - 15 Oct 2027	Kuala Lumpur, Malaysia	In person	£4,200
11 - 15 Oct 2027	Lisbon, Portugal	In person	£4,200
11 - 15 Oct 2027	Liverpool, United Kingdom	In person	£4,200
11 - 15 Oct 2027	London, United Kingdom	In person	£4,200
11 - 15 Oct 2027	Los Angeles, United States	In person	£4,200
11 - 15 Oct 2027	Luanda, Angola	In person	£4,200
11 - 15 Oct 2027	Madrid, Spain	In person	£4,200
11 - 15 Oct 2027	Manama, Bahrain	In person	£4,200
11 - 15 Oct 2027	Marbella, Spain	In person	£4,200
11 - 15 Oct 2027	Marrakech, Morocco	In person	£4,200
11 - 15 Oct 2027	Miami, United States	In person	£4,200
11 - 15 Oct 2027	Milan, Italy	In person	£4,200
11 - 15 Oct 2027	Munich, Germany	In person	£4,200

Dates	Venue	Format	Fee
11 - 15 Oct 2027	Muscat, Oman	In person	£4,200
11 - 15 Oct 2027	Nairobi, Kenya	In person	£4,200
11 - 15 Oct 2027	New York, United States	In person	£4,200
11 - 15 Oct 2027	Nice, France	In person	£4,200
11 - 15 Oct 2027	Nouakchott, Mauritania	In person	£4,200
11 - 15 Oct 2027	Oslo, Norway	In person	£4,200
11 - 15 Oct 2027	Paris, France	In person	£4,200
11 - 15 Oct 2027	Port Louis, Mauritius	In person	£4,200
11 - 15 Oct 2027	Prague, Czech Republic	In person	£4,200
11 - 15 Oct 2027	Pretoria, South Africa	In person	£4,200
11 - 15 Oct 2027	Riyadh, Saudi Arabia	In person	£4,200
11 - 15 Oct 2027	Rome, Italy	In person	£4,200
11 - 15 Oct 2027	Sarajevo, Bosnia and Herzegovina	In person	£4,200
11 - 15 Oct 2027	Sharm El Sheikh, Egypt	In person	£4,200
11 - 15 Oct 2027	Singapore	In person	£4,200
11 - 15 Oct 2027	Stockholm, Sweden	In person	£4,200
11 - 15 Oct 2027	Tokyo, Japan	In person	£4,200
11 - 15 Oct 2027	Toronto, Canada	In person	£4,200
11 - 15 Oct 2027	Tromso, Norway	In person	£4,200
11 - 15 Oct 2027	Vienna, Austria	In person	£4,200
11 - 15 Oct 2027	Zagreb, Croatia	In person	£4,200
11 - 15 Oct 2027	Zurich, Switzerland	In person	£4,200
11 - 15 Oct 2027	Online, Virtual	Online	£4,200

Certificate

Attendees receive a Certificate of Completion from Institute For Oil & Gas Training upon successfully finishing the course. The certificate confirms completion of the programme and is issued to participants who meet the course attendance requirement.