

Ask the Expert: AI Q&A Session

Regan Knepp, Community Events & User Groups Lead, Boomi



Upcoming Community Events

Higher Education User Group Meetup

- **Date:** September 9
- **Time:** 2:00pm EDT

Join us as we meet for our monthly virtual Higher Education User Group!

Ask the Expert: Architecture

- **Date:** September 16
- **Time:** 11:00 AM IST | 3:30 PM AEST

Join us for Boomi Office Hours – your go-to Q&A session led by Boomi experts!

Introducing Boomi Orchestrate: Getting Started & What's Ahead

- **Date:** September 29
- **Time:** 1:00 PM EDT

Learn what Boomi Orchestrate is, core capabilities of it, how to get started, and the roadmap



Mark Dawson

Agentstudio and Integration -
Technical Training Lead

Boomi

- Joined Boomi in 2025
- Located in Vancouver, Canada
- 5+ years IT Trainer and Instructor
 - Healthcare specific application training for physicians, and other healthcare specialists
 - Retail (POS, Inventory Management, Promotions, Cash Office applications)
 - AI Agent Development for Scenario Based learning paths
- Experienced with Integration and Automation
- AI Content Lead and Trainer

Questions



Question: Among Boomi staff, what's the favorite Boomi AI feature that's currently available?

Question: Usage of Boomi Companion and Boomi AI Features





Boomi Companion



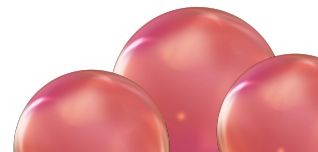
```
→ intro_to_boomi_companion git:(main) x claude
Claude Code v2.1.126
Opus 4.7 (1M context) with xhigh effort · API Usage Billing
~/Documents/boomicompanion_projects/intro_to_boomi_companion

> |

Opus 4.7 (1M context) | [ ] 0.0% | intro_to_boomi_companion ● xhigh · /effort
▶▶ accept edits on (shift+tab to cycle)
```

Boomi Companion is a portfolio of open-source Agent Skills and plugins designed to give AI agents the expertise to do real Boomi work.

The skills are being expanded rapidly as well with the new addition of an agentstudio skill



Boomi Companion

Available Plugins

Plugin	Description
bc-integration	Skills, commands, and agents for building Boomi integrations
bc-marketplace	Skill for searching and installing Boomi Marketplace recipes
bc-datahub	Skills to operate Boomi Data Hub
bc-bdi	Skills to operate Boomi Data Integration (formerly Rivery)
bc-agentstudio	Skills to operate Boomi Agentstudio

Boomi Companion

Can it create new integrations - yes

Can it write groovy script - yes

Can it review existing integration processes and provide recommendations? - yes, but be explicit in what you are asking

It can also write and provide documentation - in multiple languages

<https://github.com/OfficialBoomi/boomi-companion>

<https://usergroups.boomi.com/events/details/boomi-enablement-events-presentations-unlocking-boomi-companion-skills/>

Question: How to use Boomi Companion across teams

<https://developer.boomi.com/docs/BoomiCompanion/InstallingPlugins/ClaudeCode/setting-up-template-workspace>

<https://developer.boomi.com/docs/BoomiCompanion/InstallingPlugins/ClaudeCode/setting-up-project-workflow>

Question: Best practices for implementing AI within your Boomi environment



Best Practices for Implementing AI

- Learn! train.boomi.com
- Start small and/or engage with our PSO team.
- Have security and governance conversations early and often.
- Build integration processes *as tools **specific** for your agent*
- **ONLY** attach the tools your Agent *absolutely* needs access to. Nothing more.
- Give your Agent a clear goal, *goals set the scope* and are what the agent is weighing the 'asks' and results on. Tasks and Instructions *serve* the goal.
- Create a testing and eval protocol, test and document.
- Watch out for *not enough* context and *too much* context.



OWASP GenAI Security Project Identified the Top Ten Threats for 2026

As of Aug 4 2026

1. Prompt Injection
2. Sensitive Information Disclosure
3. Excessive Agency
4. Agentic 'Supply Chain' Vulnerabilities
5. Data and Model Poisoning
6. Unbounded Consumption
7. Misinformation
8. Hidden Content Exposure
9. Vector and Embedding Weaknesses
10. Improper Output Handling

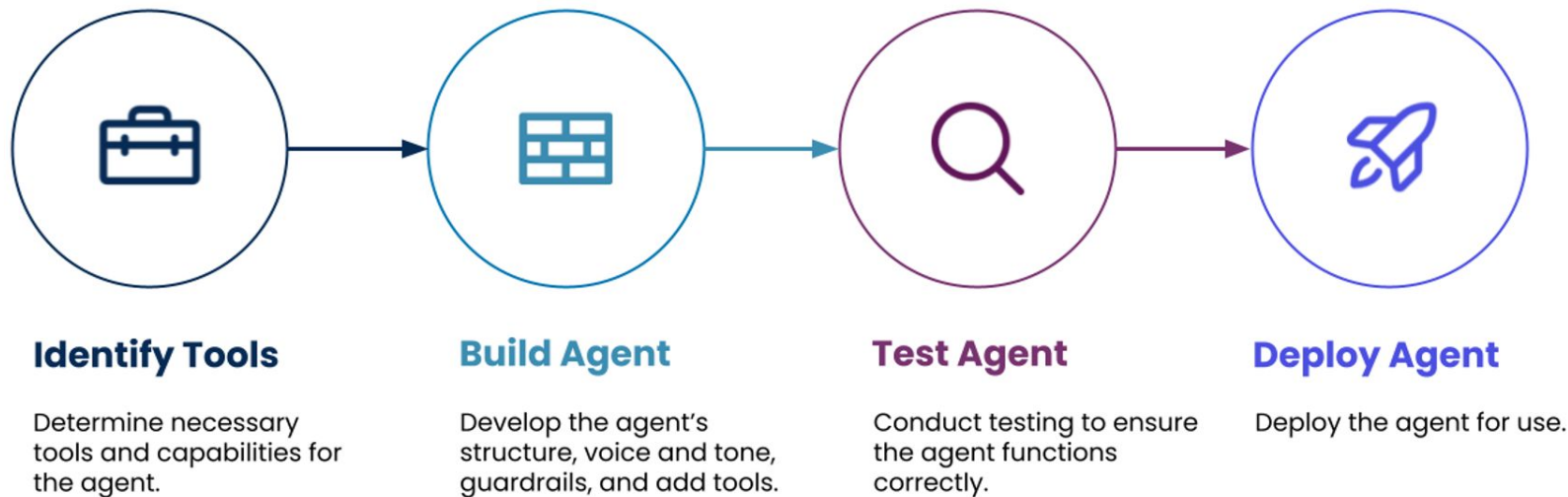
<https://genai.owasp.org/resource/owasp-genai-llm-top-10-2026/>

Question: Want to understand AI token use and agent build process

A: Token use is handled differently in Boomi than other AI solutions so that billing is easier to see and agentic usage costs are easier to predict. If you are using Agentstudio agents, messages are what is used and recorded at 100 x each invocation. Check with your account manager or CSM for pricing details

Question: Capabilities and Best Practices of Agentstudio Agents

Tool first approach





Time for a Shameless Plug!

Building and Managing AI Agents

Instructor Led Training

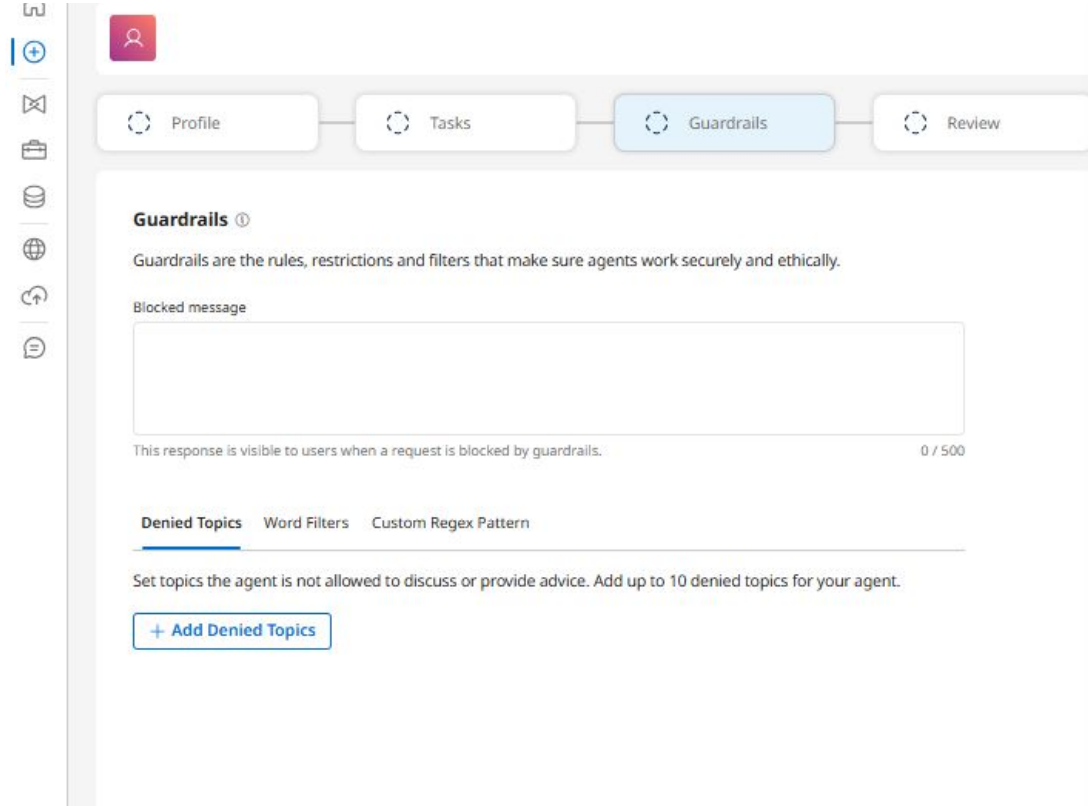
Sept 15th, 16th, and 17th, 8AM to 11AM Pacific

50% off for attending this Ask the Expert session!

ask-expert50

AI Direction and Governance

- The Harness goal, tasks, tools, guardrails



The screenshot displays the 'Guardrails' configuration page in the Harness AI platform. A vertical sidebar on the left contains icons for various system components. The top navigation bar includes tabs for 'Profile', 'Tasks', 'Guardrails' (which is the active tab), and 'Review'. Below the navigation bar, the 'Guardrails' section is titled with a help icon. A descriptive text states: 'Guardrails are the rules, restrictions and filters that make sure agents work securely and ethically.' Below this, there is a text area labeled 'Blocked message' for defining the response shown to users when a request is blocked. A character count '0 / 500' is visible at the bottom right of this text area. Further down, there are three tabs: 'Denied Topics' (the active tab), 'Word Filters', and 'Custom Regex Pattern'. A descriptive text for the 'Denied Topics' tab reads: 'Set topics the agent is not allowed to discuss or provide advice. Add up to 10 denied topics for your agent.' At the bottom of this section is a button labeled '+ Add Denied Topics'.

AI Direction and Governance

- Agent Control Tower

Monitoring and Compliance

Monitor and assess your Agents impacting your business.

If you don't see an account or agent info populating below, refer to [For Monitoring and Compliance](#) ¹

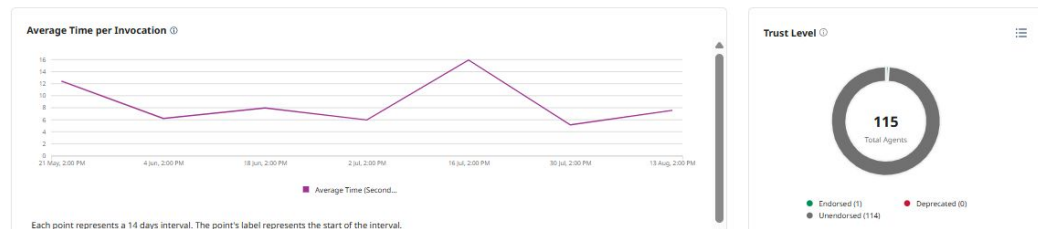
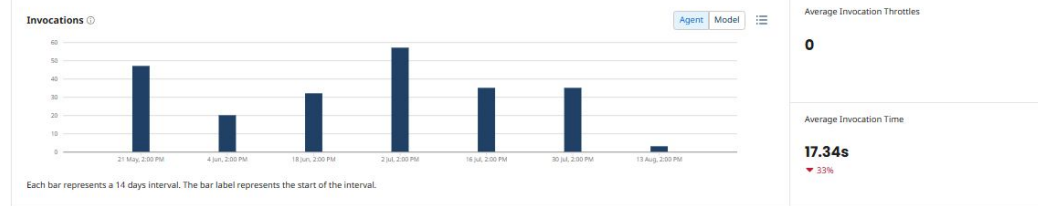
All Providers

19-08-2026 14:00 PDT

¹ AWS Bedrock Beta can only display some items.

Agents

Agents	Total Tokens	Average Model Latency	Total Errors	Total Agent Invocations	Total Model Invocations
33 ▲ 32%	2.8M ▼ 31%	7.27s ▼ 1%	31 ▼ 3%	229 ▲ 15%	336 ▼ 22%



AI Tools

Connect Instantly. Govern Confidently.

Enterprise Systems

 Claude

Discover

 ChatGPT

Prompt

 Gemini

Invoke

 Any MCP Client

Request



Connect

1,000+ Enterprise Tools

Secure Access | Tool Scoping | Observability

Governance Layer

 salesforce

Retrieve

 SAP

Respond

 servicenow.

Execute

 ORACLE

Activate

1,000+ MORE

Retrieve

https://help.boomi.com/docs/Atomsphere/Connect/Connect_overview
<https://boomi.com/boomi-demo-hub/>

Security Architecture



OAuth 2.0 / OIDC

Zero Credential Exposure

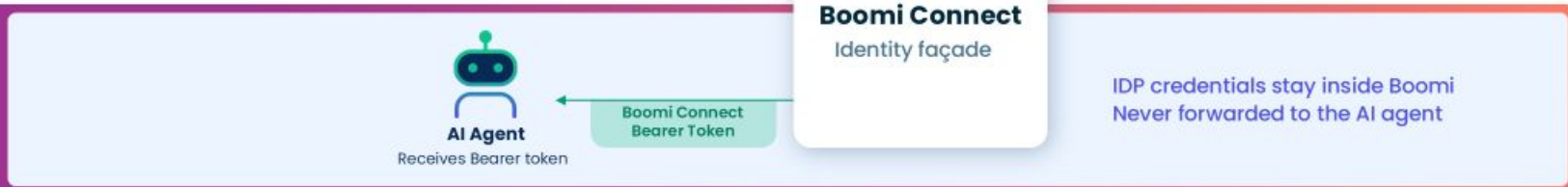
Role-Based Access

Boomi Connect

01 Token Issuance



02 Token Exchange



03 Token Usage



Zero credential exposure

App credentials stay inside Boomi — never sent to the AI agent.



Uses your existing IDP

Authenticated via Okta, Entra ID, or any OIDC provider.



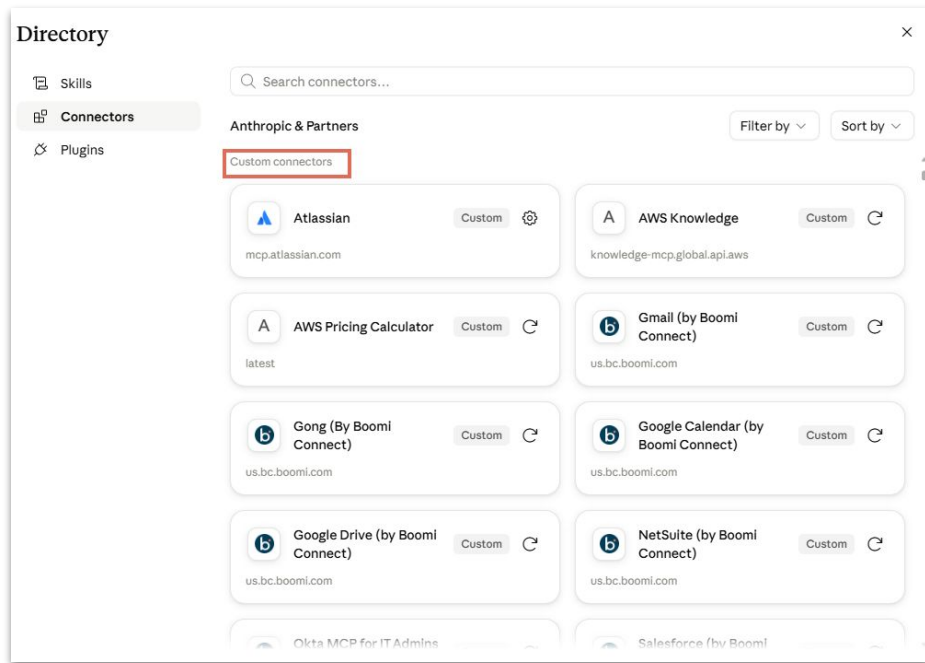
Role-based access

AI can only act within the authenticated user's IDP permissions.



Governance

“AI agents make our employees superhuman,” he explains. “We’re really drinking our own champagne in terms of making ourselves more productive. It’s changing the way we think about the world.” – *Ed Macosky*
Chief Product and Technology Officer
at Boomi



<https://boomi.com/blog/ai-agent-governance-framework/>

Question: Where can I find more details on the AI Training Policies and Compliance details?

[Agent management FAQ | Boomi Documentation](#)

<https://boomi.com/compliance/>

https://files.help.boomi.com/Boomi_AI_Acceptable_Use_Policy.pdf

Does AgentStudio support MCP integration to bring in other models?

A: yes... in that you can expose Boomi processes as APIs and MCP servers, and you could reach out to those other agents using MCP. A more integrated option is coming for 'Bring Your Own Model' in September, stay tuned!

What is the cost consumption model for using AgentStudio?

A: make sure to talk to your Account Manager or CSM for pricing details. Agentstudio agents are priced on a message model, they will have more details

Question: Healthcare use cases



Sample Healthcare Use Cases

1. Prior Authorization

Agent: gathers evidence, drafts submission, chases missing info.
Boomi Integration: EHR pull (FHIR), X12 278 to payer, status writeback.

2. Patient Intake and Scheduling

Agent: chats with patient, collects intake, books appointment.
Boomi Integration: 270/271 eligibility, EHR create, scheduling sync.

3. Referral Triage

Agent: triages urgency, matches specialist, chases missing docs.
Boomi Integration: CCDA routing between EHRs, status back to referring provider.

4. Claims Denial Appeals

Agent: reads denial reason, drafts payer-specific appeal.
Boomi Integration: 835 ingest, chart-note pull, 837 resubmission.

5. Medication Reconciliation

Agent: compares lists, flags interactions for pharmacist review.
Boomi Integration: aggregates Surescripts, EHR, PBM, and pharmacy data.

6. Care Gap Outreach

Agent: personalizes outreach, schedules the closing visit.
Boomi: aggregates claims, labs, EHR (DataHub golden record); pushes campaigns.

7. Provider Credentialing

Agent: monitors expirations, drafts renewals, chases signatures.
Boomi Integration: syncs NPPES, DEA, state boards, CAQH, HRIS.

8. Lab Result Triage

Agent: flags critical values, drafts patient-friendly explanation.
Boomi Integration: routes HL7/FHIR results into EHR and triggers the agent.

9. Discharge Coordination

Agent: orchestrates home health, DME, pharmacy, PCP follow-up.
Boomi Integration: dispatches orders to each downstream system, confirms receipt.

10. Public Health Reporting

Agent: identifies reportable conditions, confirms with clinician.
Boomi Integration: submits ELR / eCR to state and CDC, tracks acknowledgments.

11. Clinical Trial Matching

Agent: evaluates eligibility, explains the trial, coordinates screening.
Boomi Integration: pulls EHR data and trial criteria, syncs enrollment status.

12. Billing and Payment Assistant

Agent: answers billing questions, negotiates payment plans.
Boomi Integration: reads AR balances, runs eligibility, posts payments.



Health Insight Advisor Accelerator

Turn complex clinical data into
plain-language patient insights....



Contact Us

Type	Accelerator
Last updated on	11 Jul 2026
Built By	Boomi
Difficulty level	ADVANCED
Published on	20 Feb 2026



AI Agent: Bast AI Medical Query Agent

The Bast AI Medical Query Agent
enables Boomi Agents to access a
Bast AI Ontology for accurate,
transparent and explainable
medical queries, supporting critical
applications such as paramedic
use.



Get Started

Type	Designer Agent Recipe
Last updated on	11 Jul 2026
Built By	Boomi
Difficulty level	BEGINNER
Published on	13 Jan 2026

Question: Where do you see the most benefits in financial services?



Financial Services AI benefits possibilities

Lending and credit decisioning: AI agents pull applicant data from core banking, credit bureaus, and KYC systems, verify identity, and accelerate the approval.

Customer onboarding and KYC. Identity verification, document extraction, sanctions screening, and regulatory filing sync.

Fraud detection and dispute resolution. Agents watch transaction streams in real time, triage disputes, and orchestrate the response across card networks, ledger systems, and customer comms. Citi has publicly called this out as one of their top agentic AI plays.

Insurance claims triage (for the bancassurance and insurer crowd). Agents ingest the claim, cross-check policy, price the settlement, and route only the exceptions to humans. Manual workloads down 30 to 50%.

<https://boomi.com/solutions/industries/financial-services/>

Question:

- How can we leverage AI tools within Boomi to help us update all legacy Database Connectors to Database V2 Connector?

A: First I just want to mention that The Database (Legacy) connector isn't going away anytime soon. Legacy connectors stay supported, and there is no announced retirement date. New features though will only be added to the new/current Database connector (formerly Database V2), so "migrating" is only about future-proofing and unlocking features, not chasing a deadline. And there are some functional gaps between the two, so make sure that migrating won't cause issues. AI *within* Boomi to help...? not sure on this. Orchestrate may help at some point, but Boomi Companion can help if you are looking for help now. NOTE: make sure to get Boomi Companion to *look at your process FIRST* to make sure that using the new connector isn't going to break anything.

https://community.boomi.com/boomi_community/en/getting-started-with-the-database-v2-connector-part-1-2?id=kb_article&sys_id=ff5f8abc25f3fe10ba0e94c6835b30ab

- Can AI tools help identify inefficient / poorly coded Boomi processes?

A: Yes the next slide shows what Boomi GPT has to offer as far as pointing you towards some of those solutions

- Using AI tools to better organise existing API processes, naming convention, log analysis, error handling?

A: Yes, enter this question as a prompt in Boomi GPT like this: 'Are there any Boomi AI tools that can help better organise existing API processes, use naming conventions, help with log analysis, error handling?' NOTE: it might be better to enter these each separately for more information on each one Boomi GPT output is limited in each query.



AI

Boomi GPT >

🔍

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MD

Can AI tools help identify inefficient / poorly coded Boomi processes?

AI

Yes, AI tools can help identify inefficient and poorly coded Boomi processes through automated analysis and review capabilities.

Code Review Tool

Boomi offers a **Code Review** tool that evaluates processes against best practices and naming conventions. This tool:

- Validates Process Structure** - Analyzes the process XML to identify all components including connectors, maps, scripts, decision shapes, and flow controls
- Measures Complexity** - Evaluates processes using specific thresholds:
 - Total Shapes:** Low (<20), Medium (<50), High (<100), Extreme (>100)
 - Connector Shapes:** Low (<5), Medium (<10), High (<15), Extreme (>15)
 - Tracks total number of mappings across all map shapes
- Analyzes Code Quality** - Extracts and counts lines of code from Groovy and JavaScript in Map and Process shapes, excluding comments and blank lines
- Identifies Dependencies** - Maps sub-processes, execution tree depth, and referenced components like custom libraries, cross-reference tables, and process properties

Process Log Analyzer

The **Process Log Analyzer** tool helps identify runtime inefficiencies by examining execution logs and performance patterns.

Pending Process Identifier Agent

This AI agent monitors process execution efficiency by:

- Tracking processes running longer than expected
- Comparing current execution times against historical averages
- Identifying processes pending for more than normal duration
- Alerting when execution time differences exceed thresholds (e.g., more than 1 hour)

How to Use

To analyze a process, provide the **Process ID** (a 36-character UUID format like 851b2a64-f585-4fa0-b121-b5359e8c7d04). The tool fetches the component XML via the Boomi AtomSphere API and performs comprehensive analysis, and deviations from best practices.

Documentation

[🔗 Building AI Agents](#)

Community

[🔗 AI Agent Boomi Nexus](#)

[🔗 How to create summaries and documentation of processes in Boomi AI](#)

← Explore Agent Templates Gallery

Choose from ready-made or configurable templates

🔍 pending

Templates (1)

Marketplace (3)

b

Boomi

AI Agent Recipe

AI Agent: Pending Processes Identifier

Install

Learn More 🔗

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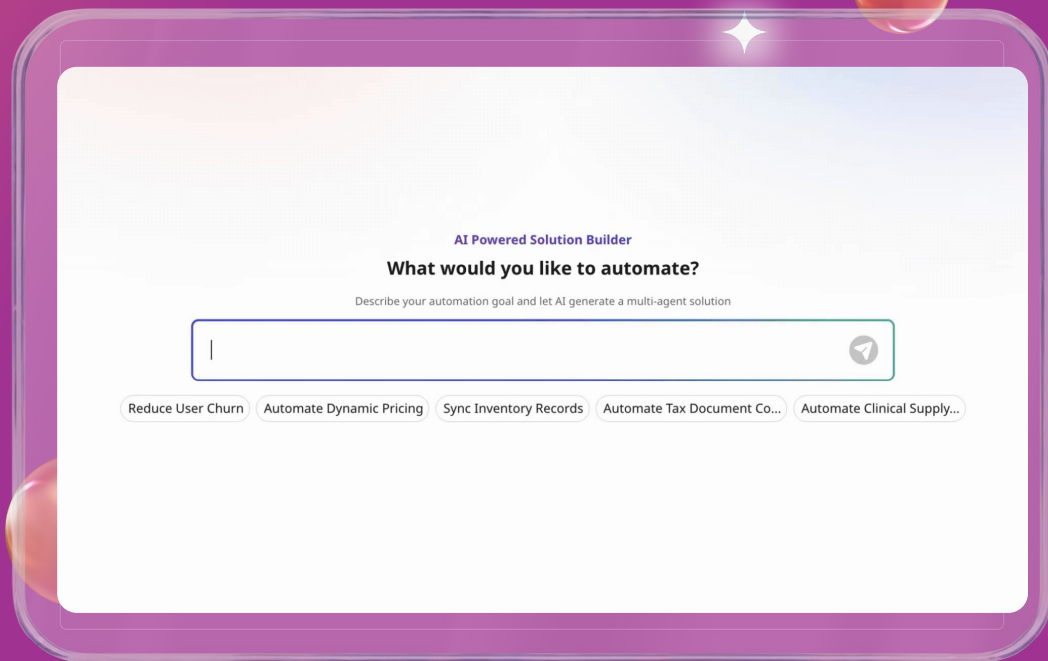
Question: How would I go about implementing this? I have a prompt that calls the implementation with an Action and a NetSuite ID. How would I get AI to assist me in developing an implementation without "writing" the whole process in Boomi? Process Instructions: Given an action and a netsuite ID. Check if record is in the xx boomi action file. if not, insert it. Check the boomi_approval_process value in NetSuite. If the boomi_approval_process = 'Not Started', update it to 'Pending Approval'

A: It sounds like you are using Boomi Companion or similar. Ask the AI to plan not build, and walk you through options. So you could re-phrase your prompt like this: I am looking for help designing an integration process, please give me options so we can plan this but do not build anything. Process instructions - given an action... (etc.)

Boomi Orchestrate

Bring IT, Business, and agents
together to solve problems

- ✦ Align business goals and IT execution from the start
- ✦ Enable more teams to build using built-in Boomi expertise
- ✦ Turn ideas into context-aware solutions faster



A Whole New Way to Build Agentic Workflows

Question: I'm struggling to get an agent to read text from documents pulled in by an integration connecting to SharePoint. What is the best way to connect the agent to that integration to read the text already supplied by the integration?

It's little difficult to diagnose without more details but here are some things to check/try:

- If using a tool, make sure it is an API tool and not an Integration tool.
- Double check the output (in process) from Sharepoint using a 'test' example. Is the text decipherable? Or does it need to be processed (with a data process step) before reaching the agent?
- If the agent is a Structured Agent in an agent step inline with the integration and using JSON as an input and output, wrap the text in a JSON string using a data process step before the agent and make sure the input JSON schema is correct (AI can help with both of these), it must be Schema 4 JSON and indicated using <http://json-schema.org/draft-04/schema#>

Questions





Thank you