

Oracle Health Insurance Back Office

Agent Installation & Configuration Manual

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Purpose statement

This document provides an overview of the architecture used for the Oracle Health Insurance Back Office AI Agents and installation and configuration instructions to integrate the AI Agents in your Oracle Health Insurance Back Office environments.

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Change History

Release	Version	Changes
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Purpose

This document provides an overview of the architecture used for the Oracle Health Insurance Back Office AI Agents and it contains installation and configuration instructions to integrate the AI Agents in your Oracle Health Insurance Back Office environments.

Currently, Oracle Health Insurance Back Office has only one AI Agent: the OHI Online Help AI Assistant.

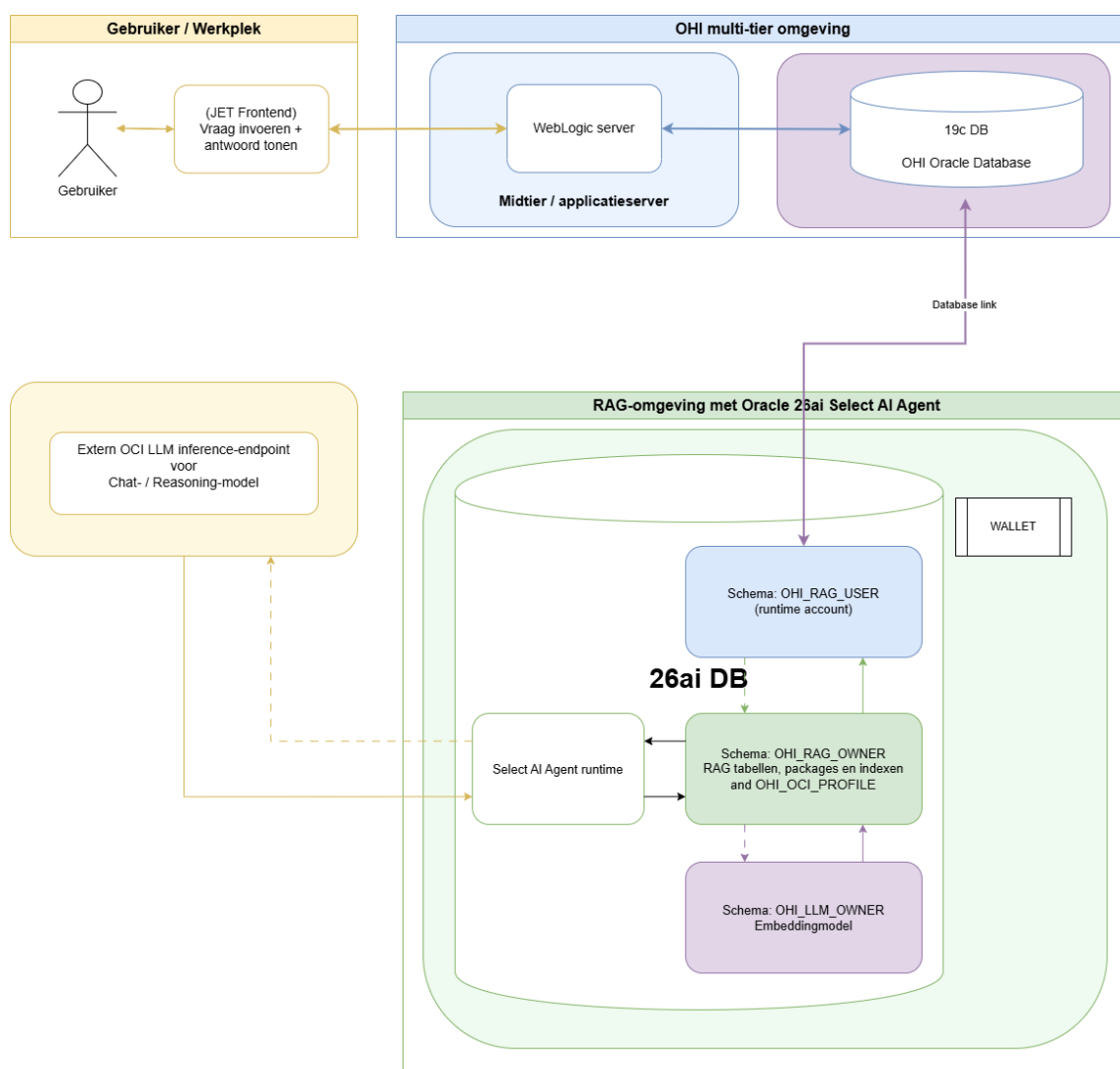
When new AI agents become available, instructions for those agents will be added in this document.

Installing the Oracle database 26ai PDB for the OHI Online Help AI Assistant

This chapter describes the database preparation and installation procedure for the OHI Online Help AI Assistant in a dedicated Oracle Database 26ai Pluggable Database (PDB).

Overview

The database stores and indexes OHI Back Office Online Help content using Oracle Text and Oracle Vector Search. This enables a Retrieval-Augmented Generation (RAG) solution, where a Large Language Model (LLM) combines its reasoning capabilities with information retrieved from the OHI knowledge base enabling accurate and context-aware responses.



The installation is performed using SQL*Plus or SQLcl and a set of SQL scripts delivered in a ZIP archive. The ZIP archive is located in the \$OZG_BASE/conf/generic directory of the OHI Back Office environment.

The OHI Online Help AI Assistant leverages the Oracle Database 26ai "Select AI Agent" and Vector Search capabilities. The procedures in this chapter are intended for database administrators responsible for:

- Preparing the target PDB.
- Creating and configuring the required database schemas.
- Configuring access to Oracle Cloud Infrastructure (OCI) Generative AI services.
- Executing the database installation scripts and validating the installation.

Scope and assumptions

This installation procedure assumes that an Oracle Database 26ai container database (CDB) and target PDB already exist and that the target PDB is open in 'read write' mode. Creation of the CDB or PDB itself is outside the scope of this chapter. See below for storage requirements.

For the OHI Online Help AI Assistant, the target PDB should have a minimum SGA size of 5 GB available, including at least 1 GB allocated to the shared pool and 1 GB allocated to the database buffer cache. A minimum of 4 OCPUs is recommended. These values are based on the expected workload for the delivered OHI Online Help AI assistant.

The installation creates and configures three database accounts, installs the OHI RAG owner objects, configures access to Oracle AI functionality, loads the RAG documents and terms, and builds the hybrid vector index.

- OHI_RAG_OWNER owns the RAG tables, packages, views, Oracle Text configuration, scheduler job, and hybrid vector index.
- OHI_RAG_USER is the runtime user that calls the RAG and agent packages.
- OHI_LLM_OWNER owns or exposes the embedding model used by the vector index.

The installation is executed with wallet aliases for the three accounts.

Release scope

The OHI RAG installation is tied to a specific OHI release level. Each Database 26ai PDB may contain the RAG installation for one OHI release only. The installer validates the release level of the existing installation and prevents incompatible deployments.

Multiple OHI Back Office environments may share the same Oracle Database 26ai CDB and even the same RAG PDB, provided that all environments use the same OHI major release and therefore the same Online Help content and RAG metadata.

If support for multiple OHI major releases is required (for example, a production environment running one release and a test environment running a newer release), a separate Database 26ai PDB must be created for each release. This allows each release to maintain its own release-specific (meta)data.

DBA actions before running the installer

Carry out the following actions in the target PDB as SYS or from a SYSDBA session, unless explicitly stated otherwise. Determine the passwords, default tablespace, quotas, directory object, and host path before starting the installation.

- Password for OHI_RAG_OWNER.
- Password for OHI_RAG_USER.

- Password for OHI_LLM_OWNER.
- Default tablespace, for example USERS. Make sure this can grow with 15Gb.
- Tablespace quota for OHI_RAG_OWNER, 10G will be sufficient.
- Tablespace quota for OHI_LLM_OWNER, 5G will be sufficient.
- Database host path for the ONNX model being used (the vector embedding model) and NDJSON files (these contain the Online Help textual information).

The installation requires a database directory object named OHI_RAG_DIR. This directory object must point to the operating system path containing the ONNX model file and the NDJSON data files, e.g.:

```
create or replace directory OHI_RAG_DIR as '/share01/ai_dir';
```

The operating system path may be chosen according to local standards and must satisfy the following requirements:

- The path must be accessible to the Oracle Database software owner.
- The database must have read access to all files through the OHI_RAG_DIR directory object.
- The ONNX model file and NDJSON files must be present in the directory before the installation is started.
- In Oracle RAC, Exadata, and other clustered environments, the path must be available on all database nodes. Use shared storage, for example ACFS, to ensure consistent access from all instances.

DBMS_CLOUD and Oracle AI packages

The OHI Online Help AI Assistant relies on Oracle Database components that provide access to Oracle Cloud Infrastructure (OCI) services and AI functionality:

- DBMS_CLOUD provides database access to OCI resources and credentials management.
- DBMS_CLOUD_AI provides integration with Oracle AI services, including the Select AI Agent functionality used by the OHI Online Help AI Assistant solution.

If DBMS_CLOUD, DBMS_CLOUD_AI and DBMS_CLOUD_AI_AGENT are not installed, execute the Oracle-supplied installation scripts shown below. The installation consists of two steps:

- `catclouduser.sql`: Creates and configures the Oracle-maintained schema and supporting objects required by the DBMS_CLOUD package.
- `dbms_cloud_install.sql`: Installs the DBMS_CLOUD and DBMS_CLOUD_AI packages and their supporting database objects.

Use `catcon.pl` so that the scripts are executed in the CDB and all PDBs where the functionality is needed, you can add `-c 'my_pdb_1 my_pdb_2'` to install this for a specific PDB's `my_pdb_1` and `my_pdb_2`.

```
$ORACLE_HOME/perl/bin/perl $ORACLE_HOME/rdbms/admin/catcon.pl \
-u sys/<SYS_PASSWORD> \
-force_pdb_mode 'READ WRITE' \
-b dbms_cloud_install \
-d $ORACLE_HOME/rdbms/admin/ \
-l /tmp \
catclouduser.sql
```

```
$ORACLE_HOME/perl/bin/perl $ORACLE_HOME/rdbms/admin/catcon.pl \
-u sys/<SYS_PASSWORD> \
-force_pdb_mode 'READ WRITE' \
-b dbms_cloud_install \
-d $ORACLE_HOME/rdbms/admin/ \
-l /tmp \
dbms_cloud_install.sql
```

Network access to OCI endpoints

As SYS in the root container (CDB\$ROOT), grant network access to the OCI Generative AI endpoints used by DBMS_CLOUD and DBMS_CLOUD_AI.

The value supplied for the host parameter should correspond to the OCI Generative AI endpoint hostname for the region configured in the AI profile.

The OCI Generative AI endpoint can be obtained from the OCI Console by navigating to Analytics & AI → Generative AI and selecting the region in which the service is deployed.

The hostname can be derived from the Generative AI endpoint URL by removing the protocol prefix (https://) and any trailing path information.

For example, when the AI profile uses the OCI region eu-frankfurt-1, the Generative AI endpoint URL may be:

```
https://inference.generativeai.eu-frankfurt-1.oci.oraclecloud.com
```

In that case, the hostname to be used in the ACL is:

```
inference.generativeai.eu-frankfurt-1.oci.oraclecloud.com
```

Alternatively, the ACL can be configured with a broader hostname pattern such as *.oraclecloud.com, although using the specific Generative AI endpoint hostname is recommended from a security perspective.

```
begin
  DBMS_NETWORK_ACL_ADMIN.APPEND_HOST_ACE(
    host      => '*.oraclecloud.com',
    lower_port => 443,
    upper_port => 443,
    ace       => xs$ace_type(
      privilege_list => xs$name_list('http', 'http_proxy'),
      principal_name => upper('C##CLOUD$SERVICE'),
      principal_type => xs_acl.ptype_db
    )
  );
end;
/
```

Vector memory

Oracle Vector Search uses a Hierarchical Navigable Small World (HNSW) index to efficiently perform approximate nearest-neighbour searches on vector embeddings. Creating and maintaining HNSW indexes requires vector memory, therefore VECTOR_MEMORY_SIZE must be configured before running the installation.

For HNSW index creation, VECTOR_MEMORY_SIZE in CDB\$ROOT must be at least 1 GB. This is a CDB-level setting and must be configured with SCOPE=SPFILE, followed by a database restart.

Check the current setting:

```
SHOW PARAMETER vector_memory_size;
```

If the value is less than 1 GB, update it as follows:

```
ALTER SYSTEM SET vector_memory_size = 1G SCOPE=SPFILE;
```

Restart the database and verify that the new value is active before continuing with the installation.

Database accounts and grants

The following actions must be performed in the target pluggable database (PDB).

Temporary tablespace

The OHI RAG accounts use the database default temporary tablespace. In most environments it is not necessary to explicitly specify a temporary tablespace during user creation, because Oracle automatically assigns the database default.

The current default temporary tablespace can be verified as follows:

```
select property_value as default_temp_tablespace
from   database_properties
where  property_name = 'DEFAULT_TEMP_TABLESPACE';
```

User tablespace

Specify a suitable permanent tablespace for the OHI RAG schemas.

Replace <DATA_TABLESPACE> with the tablespace name appropriate for the target environment. This may be the USERS tablespace or a dedicated application tablespace, depending on local database administration standards and storage policies.

Database accounts

Create the three accounts in the target PDB. Replace the password placeholders and tablespace name with values appropriate for the local environment.

```
create user OHI_RAG_OWNER identified by "<OHI_RAG_OWNER_PASSWORD>"
  default tablespace <DATA_TABLESPACE>
  account unlock;
create user OHI_RAG_USER identified by "<OHI_RAG_USER_PASSWORD>"
  default tablespace <DATA_TABLESPACE>
  account unlock;
create user OHI_LLM_OWNER identified by "<OHI_LLM_OWNER_PASSWORD>"
  default tablespace <DATA_TABLESPACE>
  account unlock;
```

Make sure the passwords do not expire or add an action to your calendar to change them before the expiration date. Do not forget to update the wallet entries too (see below).

Quota

Assign quota to the owner schemas. The values shown below are the recommended minimum quotas for the current implementation and may be increased if additional content is expected in the future.

```
alter user OHI_RAG_OWNER quota 10G on <DATA_TABLESPACE>;
alter user OHI_LLM_OWNER quota 5G on <DATA_TABLESPACE>;
```

System privileges for OHI_RAG_OWNER

Grant the privileges required to create the RAG schema objects, text index, scheduler job, public synonym, and Oracle AI integration objects.

```
grant create session to OHI_RAG_OWNER;
grant alter session to OHI_RAG_OWNER;
grant create table to OHI_RAG_OWNER;
grant create view to OHI_RAG_OWNER;
grant create procedure to OHI_RAG_OWNER;
grant create public synonym to OHI_RAG_OWNER;
grant create job to OHI_RAG_OWNER;
grant select any dictionary to OHI_RAG_OWNER;
grant ctxapp to OHI_RAG_OWNER;
grant execute on ctxsys.ctx_ddl to OHI_RAG_OWNER;
grant execute on ctxsys.dbms_vector_chain to OHI_RAG_OWNER;
grant execute on dbms_cloud to OHI_RAG_OWNER;
grant execute on dbms_cloud_ai to OHI_RAG_OWNER;
grant execute on dbms_cloud_ai_agent to OHI_RAG_OWNER;
grant create credential to OHI_RAG_OWNER;
grant create any context to OHI_RAG_OWNER;
```

Runtime and model-owner privileges

Grant the required system privileges to OHI_RAG_USER.

```
grant create session to OHI_RAG_USER;
grant alter session to OHI_RAG_USER;
```

Grant the required system privileges to OHI_LLM_OWNER.

```
grant create session to OHI_LLM_OWNER;
grant alter session to OHI_LLM_OWNER;
grant create mining model to OHI_LLM_OWNER;
```

OCI credential and AI profile

Create the OCI credential while connected as OHI_RAG_OWNER. Replace the anonymized example values with the values for the target tenancy, user, key, and fingerprint.

For instructions on obtaining the required OCI values (user OCID, tenancy OCID, API key fingerprint, and private key), refer to the [Oracle Cloud Infrastructure API signing key documentation](#)

Information on locating tenancy and user OCIDs is available in the [OCI documentation](#).

```

begin
  DBMS_CLOUD.CREATE_CREDENTIAL(
    credential_name => 'OHI_OCI_CRED',
    user_ocid       => 'ocid1.user.oc1..example_anonymized_user_ocid',
    tenancy_ocid    => 'ocid1.tenancy.oc1..example_anonymized_tenancy_ocid',
    private_key     => 'EXAMPLE_ANONYMIZED_PRIVATE_KEY_LINE_1
EXAMPLE_ANONYMIZED_PRIVATE_KEY_LINE_2
EXAMPLE_ANONYMIZED_PRIVATE_KEY_LINE_3',
    fingerprint     => '00:00:00:00:00:00:00:00:00:00:00:00:00:00:00:00',
    comments        => 'OHI OCI Cloud credentials'
  );
end;
/

```

Create the AI profile after the credential is available. The compartment OCID, region, and large language model (LLM) are environment specific.

```

begin
  DBMS_CLOUD_AI.CREATE_PROFILE(
    profile_name => 'OHI_OCI_PROFILE',
    attributes   => JSON_OBJECT(
      'provider'          value 'oci',
      'credential_name'   value 'OHI_OCI_CRED',
      'region'            value 'eu-frankfurt-1',
      'oci_compartment_id' value
'ocid1.compartment.oc1..example_anonymized_compartment_ocid',
      'model'             value 'google.gemini-2.5-flash',
      'max_tokens'        value 65536,
      'object_list'       value JSON_ARRAY(
        JSON_OBJECT('owner' value 'OHI_RAG_OWNER')
      ) format json
    )
  );
end;
/

```

Test the profile before running the RAG installation:

```

select DBMS_CLOUD_AI.GENERATE(
  prompt      => 'tell me something interesting about the city of paris?',
  profile_name => 'OHI_OCI_PROFILE',
  action      => 'chat'
) as response
from dual;

```

Database directory and input files

Create a shared database directory for the input files. These are the OHI Online help RAG files and the embedding model for the vector search.

The path must exist on the database host and must be readable by the database server process.

```

create or replace directory OHI_RAG_DIR as '<DATABASE_HOST_PATH>';
grant read on directory OHI_RAG_DIR to OHI_LLM_OWNER;
grant write on directory OHI_RAG_DIR to OHI_LLM_OWNER;
grant read on directory OHI_RAG_DIR to OHI_RAG_OWNER;

```

Place the following files in the database host path:

- documents.ndjson
- terms.ndjson
- all_MiniLM_L12_v2.onnx

Copy the files documents.ndjson and terms.ndjson from the directory
\$OZG_BASE/help/n1_n1/Output/OHIHelp/RAG.

[Download](#) the file all_MiniLM_L12_v2.onnx.

Wallet aliases

Create Oracle wallet aliases for the three OHI RAG database accounts, OHI_RAG_OWNER, OHI_RAG_USER, OHI_LLM_OWNER.

The installer prompts for these aliases and validates that each alias connects to the expected database account.

The following naming convention is recommended:

```
/@<environment>_ohi_rag_owner
/@<environment>_ohi_rag_user
/@<environment>_ohi_llm_owner
```

For example: /@prod01_ohi_rag_owner

Including the environment name in the alias helps distinguish credentials across environments and reduces the risk of accidentally connecting to the wrong database.

For information on creating wallet aliases, refer to section 6.1.3.2 Wallet for OS Account BATCH. The same procedure can be used for these three accounts.

Preparing the SQL scripts

Copy and unzip the contents of OHI_OLH_AI_ASSISTANT.zip from the directory \$OZG_BASE/conf/generic to a location where SQL*Plus or SQLcl can read the scripts. Start the full installation from that directory so that relative @@ includes work correctly.

Running the installation

Run the installer with SQL*Plus or SQLcl:

```
sqlplus -L /nolog @OHI_RAG_DB_INSTALL.sql
```

The script prompts for the following values:

- Wallet alias for OHI_RAG_OWNER including /@.
- Wallet alias for OHI_RAG_USER including /@.
- Wallet alias for OHI_LLM_OWNER including /@.
- Optional ONNX file name (e.g., all_MiniLM_L12_v2.onnx).

The ONNX file name can be omitted when the embedding model is already present in the database and only the RAG data and agent specification need to be updated.

To verify whether the embedding model is already installed, execute the following query:

```
SELECT m.owner,
       m.model_name
FROM   dba_mining_models m
WHERE  m.model_name = 'ALL_MINILM_L12_V2';
```

If the query returns a row for owner OHI_LLM_OWNER and model ALL_MINILM_L12_V2, the embedding model is already available in the database and the ONNX file name can be omitted. If no rows are returned, the installer requires the ONNX file to load the embedding model.

Installer activities

OHI_RAG_DB_INSTALL.sql performs the following steps:

1. Validate the wallet aliases for OHI_RAG_OWNER, OHI_RAG_USER, and OHI_LLM_OWNER.
2. Install tables, Oracle Text settings, views, and packages in OHI_RAG_OWNER.
3. Create or update the scheduler job OHI_RAG_TRACE_PURGE_JOB.
4. Compile the Select AI Agent package from separate .pks and .pkb scripts.
5. Register the Select AI Agent definition through OHI_RAG_AGENT_DEFINITION.sql.
6. Optionally load the ONNX model in OHI_LLM_OWNER, depending on the optional file name.
7. Align model access from OHI_LLM_OWNER to OHI_RAG_OWNER.
8. Load documents.ndjson through install/OHI_RAG_LOAD_DOCUMENTS_FROM_NDJSON.sql.
9. Load terms.ndjson through install/OHI_RAG_LOAD_TERMS_FROM_NDJSON.sql.
10. Build the HNSW index.

Post-installation validation

Before executing the validation queries below, review the installation spool file generated by the installer and verify that:

- No 'ORA-', 'SP2-', 'PLS-' or 'ERROR' messages are present.
- All expected verification messages reporting successful execution are present.
- The spool file confirms successful completion of:
 - RAG data loading.
 - Embedding model access verification or embedding model loading.
 - Hybrid vector index creation.
 - Agent deployment.

Proceed with the validation steps only after the installation has completed successfully and the spool file confirms that all installation phases have been completed.

Connect as OHI_RAG_OWNER before executing the validation queries. The validation is performed using the same schema that is used by the OHI RAG application and therefore verifies the installed functionality from an application perspective.

1. Verify that the embedding model can generate vectors and returns the expected vector dimensions:

```
SELECT vector_dimension_count(
    vector_embedding(OHI_LLM_OWNER.ALL_MINILM_L12_V2 USING 'smoke test' AS data)
) AS embedding_dimensions
FROM dual;
```

The query should return a single row with a positive dimension count. For the 'ALL_MINILM_L12_V2' model, the expected value is typically "384".

2. Verify that the hybrid vector index can be used to retrieve documents from the OHI knowledge base:

```
SELECT count(*) AS result_count
FROM json_table(
    dbms_hybrid_vector.search(
        json('{
            "hybrid_index_name": "OHI_DOC_HV_IND01",
            "vector": {
                "search_text": "Virtual Private Database",
                "search_mode": "DOCUMENT",
                "result_max": 5
            },
            "return": {
                "topN": 5,
                "values": ["rowid", "score"]
            }
        }')
    ),
    '$[*]'
    COLUMNS (score NUMBER PATH '$.score')
);
```

The query should return a value greater than zero, indicating that the vector index and indexed documentation content are available for retrieval.

3. Verify that the OCI credential, AI profile, network ACL configuration, and OCI Generative AI connectivity are functioning correctly:

```
SELECT DBMS_CLOUD_AI.GENERATE(
    prompt      => 'Reply with the word OK only.',
    profile_name => 'OHI_OCI_PROFILE',
    action      => 'chat'
) AS response
FROM dual;
```

The query should return a response containing the word: "OK".

Trace retention

Tracing for the AI assistant can be configured through the OHI Back Office parameter "Tracelevel" in the Agent parameter group. Valid values are NONE, ERROR, and INFO. When set to NONE, no records are written to table OHI_RAG_TRACE in the 26ai PDB.

The installer creates or updates the scheduler job OHI_RAG_TRACE_PURGE_JOB in the 26ai PDB. The job runs daily at 02:00 and purges records from OHI_RAG_TRACE for which TRACE_MOMENT is more than 30 days old.

OHI Back Office integration

After the OHI RAG schemas have been created and the installation scripts have completed successfully, a database link must be created from the OHI Back Office schema to the OHI_RAG_USER account in the Oracle Database 26ai PDB hosting the OHI Online Help AI Assistant.

The OHI Back Office application uses this database link to access the functionality exposed through the OHI_RAG_USER schema. Create the database link in the OHI Back Office schema using the naming conventions and connectivity settings applicable to the target environment.

After the database link has been created, configure the OHI Back Office parameter Agent Database Link in the Agent parameter group with the name of the database link.

This parameter is used by the OHI Online Help AI Assistant integration to locate and access the remote OHI_RAG_USER schema.

After creating or modifying the database link and configuring the Agent Database Link parameter, execute the following command while connected as the OHI Back Office schema owner, or through a DBA account with sufficient privileges:

```
BEGIN
    sys_install_agent_pck.run;
END;
/
```

This step completes the integration between OHI Back Office and the OHI Online Help AI Assistant.

Installing a higher major release of the Online Help data

After an initial installation of the OHI Online Help AI Assistant, the Online Help data needs to be refreshed for each major Release of OHI Back Office.

This is done by executing the following steps:

- Copy the new versions of the files documents.ndjson and terms.ndjson from the directory "\$OZG_BASE/help/nl_nl/Output/OHIHelp/RAG to the directory used by OHI_RAG_DIR.
- PREPARING THE SQL SCRIPTS (see above)
- RUNNING THE INSTALLATION (see above)
- POST-INSTALLATION VALIDATION (see above)

Cloning an OHI Back Office environment

When an OHI Back Office environment is cloned, the database link configuration should be reviewed. Depending on the cloning procedure and target environment, the database link may need to be:

- updated to point to the correct target PDB.
- recreated with the correct credentials.
- removed if the cloned environment should not have access to the OHI Online Help AI Assistant.

Failure to review the database link after cloning may result in the OHI Back Office environment connecting to an unintended AI Assistant environment.

Patching an OHI Back Office environment

If you patch an OHI Back Office environment to a higher major release, you should determine:

- if you need to update the Online Help data in the linked database 26ai PDB (see above), or
- if you need to point the database link to another database 26ai PDB with Online Help data of the same OHI major release, or
- if you want to disable the OHI Online Help AI Assistant by removing the database link

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