Agentic AI Integration with Procore

A Technical White Paper for Deploying Third-Party Autonomous AI Agents Across Procore-Enabled Multi-Billion-Dollar Capital Construction Programs

Damion Thomas Brown PgMP, PMP, MBA (Mr_Computer)
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Abstract. This white paper proposes a practical operating model for integrating third-party agentic AI agents with Procore construction management software on major capital programs. It explains how an external AI agent can sense, reason, orchestrate, and execute bounded Procore workflows while preserving Procore as the project system of record and preserving human accountability for cost, schedule, safety, quality, contractual, and executive decisions. The paper translates Procore capabilities into an agent-control architecture, defines agent authorities, describes API and webhook integration patterns, and provides use cases, governance processes, implementation waves, and KPIs for owner, EPCM, GC, specialty contractor, and PMO organizations.

Source basis: Procore public product and developer materials reviewed May 20, 2026, and Damion Brown's prior Agentic AI for Mega-Project Delivery white paper uploaded for continuity of terminology and governance framing.

Table of Contents

1. Executive Summary

Procore is more than a digital filing cabinet for construction documents. It is a connected construction management platform that can unify project execution, cost management, workforce and resource management, project lifecycle management, field-to-office collaboration, analytics, integrations, and AI-supported workflows. For a multi-billion-dollar capital program, that makes Procore a prime operating surface for agentic AI: the platform contains the workflows, records, approvals, issue trails, financial controls, field evidence, and stakeholder communications that determine whether a project stays on budget, on schedule, and under control.

The strategic opportunity is to connect a governed third-party agentic AI layer to Procore so that the agent can continuously monitor project data, detect exceptions, prepare decision packages, route workflow actions, draft communications, request missing evidence, and execute low-risk authorized tasks. The agent should not replace the project manager, construction manager, cost manager, scheduler, contract lead, safety lead, quality lead, or executive sponsor. It should compress the control cycle between signal, analysis, decision preparation, escalation, and action.

The recommended operating model is: Procore remains the system of record; the third-party agent becomes a governed execution and intelligence layer; humans retain accountability for material commitments; and every agent action is permissioned, logged, reviewable, and reversible where practical.

- Use Procore's APIs, OAuth-secured integration model, app ecosystem, reports, and event-driven patterns to connect agents without bypassing Procore permissions.
- Start with supervised intelligence: retrieval, summaries, aging analysis, trend detection, and decision-package drafting.
- Move into supervised orchestration: task creation, workflow routing, missing-evidence requests, RFI/submittal triage, and cost/schedule exception alerts.
- Reserve bounded autonomous execution for low-risk, reversible actions such as reminders, metadata enrichment, draft updates, internal assignments, report generation, and evidence collection.
- Keep contractual commitments, safety dispositions, financial approvals, claims positions, change-order approvals, and public communications under explicit human approval.

2. Procore Platform Context

Procore publicly describes its platform as an end-to-end construction management solution that connects the field and office, supports owners, general contractors, and specialty contractors, and provides capabilities across Project Execution, Cost Management, Resource Management, and Project Lifecycle Management. Its public materials also emphasize AI-powered capabilities, unified intelligence, routine-task automation, foresight for faster decisions, real-time project financial visibility, optimization of crews, hours, and equipment, and unification of budgets, contracts, and field progress into a single source of truth.

For agentic AI design, the most important Procore characteristic is not simply that it stores data. The most important characteristic is that Procore contains many of the live construction control workflows that generate project truth: RFIs, submittals, drawings, daily logs, observations,

inspections, incidents, forms, correspondence, commitments, change events, budgets, invoices, resource tracking, reports, and closeout artifacts. When an AI agent can safely read, reason over, and interact with these objects, the agent can become a project-controls accelerator rather than a generic chatbot.

Procore capability area	Why it matters for agentic AI	Example agentic opportunity
Project Execution	Centralizes coordination between field and office and includes workflows where delays become visible.	Monitor RFIs, submittals, drawings, meetings, punch lists, daily logs, and correspondence for aging, blockers, missing ownership, and repeated causes.
Cost / Financial Management	Maintains project financial visibility, budget movement, commitments, change events, and payment workflows.	Detect cost exposure early, reconcile potential change events with RFI/submittal history, and draft cost-impact briefs for review.
Resource / Workforce Management	Captures labor, crews, equipment, productivity, and onsite execution signals.	Compare actual production against planned curves and recommend recovery options before monthly reporting reveals drift.
Project Lifecycle Management	Connects budgets, contracts, and field progress across the lifecycle.	Create a single project-control narrative from preconstruction through closeout and commissioning.
Marketplace / Integrations / Developer Platform	Allows secure connection of external applications, APIs, and integration workflows.	Connect a third-party agent through approved OAuth, app, middleware, and event-notification patterns.
Procore AI / Copilot / Agents / Insights	Signals Procore's own direction toward AI-guided workflows, retrieval, predictive risk, and automation.	Position third-party agents as complementary specialized digital workers that follow governance, customer-specific policies, and capital-project playbooks.

3. Why Procore Is a Strategic Agentic-AI Surface

A mega-project fails slowly before it fails visibly. The early signals are usually scattered: an RFI that sounds minor, a submittal response that arrives late, a daily log note about access constraints, a

change event that is not yet priced, a safety observation trend, a late procurement milestone, a drawing revision, and a crew productivity deviation. Procore is valuable because many of those signals live inside a shared construction-management environment. Agentic AI is valuable because it can continuously correlate those signals and push structured decision packages to the right human leaders.

Traditional construction management software depends on humans to log in, search, notice, interpret, compare, escalate, and follow up. A third-party agentic AI layer changes the cadence. It can watch defined Procore objects, maintain memory of control thresholds, compare current conditions to plan, draft next actions, and create a documented trail of why an item was elevated. This does not remove human judgment; it protects human judgment from being buried under administrative volume.

4. Definition of a Third-Party Agentic AI Layer

For this white paper, a third-party agentic AI layer is an external software capability that can pursue construction-management objectives by reading authorized Procore data, reasoning across project context, planning multi-step actions, calling approved tools, preparing recommendations, routing workflows, and executing bounded tasks under customer-defined permissions and governance. It is different from a one-shot prompt assistant because it has persistent objectives, system memory, role-based permissions, action policies, and escalation logic.

The agent should be treated as a controlled delivery actor. It can draft, route, remind, classify, reconcile, package, and escalate. It should not silently change commercial positions, override project records, approve cost commitments, make safety determinations, or issue binding contractual communications unless the project governance board has explicitly authorized that narrow action class.

Agent type	Primary role inside a Procore-enabled program	Typical Procore interaction
Sensing Agent	Detects new or changed project signals.	Reads RFIs, submittals, daily logs, correspondence, observations, cost events, and report changes.
Analytical Agent	Classifies, forecasts, and identifies anomalies.	Compares aging, status, owner, discipline, criticality, cost code, package, and schedule impact.
Orchestration Agent	Moves low-risk workflows forward.	Creates draft tasks, reminders, evidence requests, report packages, and routing actions.
Decision Package Agent	Prepares human-reviewable recommendations.	Assembles issue history, source links, options, risk range, and recommended next step.
Bounded Execution Agent	Executes pre-approved	Updates allowed metadata,

	reversible actions.	triggers notifications, requests missing data, or generates reports within policy.

5. Target-State Architecture

The target architecture is not one uncontrolled AI system operating inside Procore. It is a controlled agent mesh connected through a governance plane. Procore remains the project system of record. The AI layer reads and writes only through approved interfaces, service accounts, user-delegated permissions, or installed app credentials. The governance plane defines what the agent can see, what it can do, what requires approval, what must be logged, and when the agent must stop.

1. System-of-record layer: Procore project tools, company tools, permissions, reports, documents, cost records, field records, and workflow status remain authoritative.
2. Integration layer: secure API calls, OAuth credentials, approved app marketplace integrations, middleware, data warehouse connections, and event/webhook listeners move data between Procore and the agent environment.
3. Data trust layer: validates source, timestamp, version, permission context, object lineage, duplicate records, and confidence score before the agent reasons or acts.
4. Agent reasoning layer: specialized agents interpret project context, build issue narratives, compare conditions to thresholds, and prepare actions.
5. Control plane: policy engine, authority matrix, approval rules, prompt and tool guardrails, audit logs, rollback controls, and kill-switch authority.
6. Human governance layer: project manager, PMO, construction manager, commercial lead, cost manager, scheduler, safety/quality leads, legal/contract review, and executive board.

A practical architecture for a capital project should also include an immutable action ledger. Every agent-generated decision package, workflow route, draft communication, metadata update, and exception escalation should be stored with source references, prompt/policy version, tool used, timestamp, acting identity, confidence level, and human disposition.

6. Integration Patterns: API, Webhooks, App Marketplace, and Secure Middleware

A third-party agent should integrate with Procore through approved technical pathways rather than scraping screens or sharing user passwords. A secure implementation typically uses OAuth-secured API access, least-privilege app permissions, sandbox testing, approved marketplace or custom app deployment, middleware, and event notifications where available. Webhooks and event-driven integration patterns are important because they allow the agent to react when project objects change rather than relying only on scheduled polling.

Pattern	Best use	Controls required
Read-only API integration	Retrieval, summaries, aging reports, analytics, dashboard	Least privilege, project scoping, token management,

	preparation, evidence linking.	rate-limit discipline, source logging.
Write-limited API integration	Creating draft tasks, draft correspondence, evidence requests, metadata updates, and report artifacts.	Action whitelist, approval gates, rollback rules, object-level logging, human reviewer assignment.
Webhook/event listener	Near-real-time detection of changed RFIs, submittals, logs, observations, cost events, and status changes.	Signature verification where supported, idempotency, queue retry, event replay, duplicate handling.
Middleware/iPaaS connector	Bridge Procore with ERP, schedule, procurement, document control, Power BI, data lake, or AI orchestration platform.	Data mapping, field-level controls, lineage, reconciliation, exception handling.
RAG over approved Procore documents	Question answering over specs, drawings, contracts, meeting minutes, and closeout documents.	Access filtering, citation-only outputs, stale-document detection, no unsupported legal or technical conclusions.
Human-in-the-loop workflow	Material recommendations, commercial responses, safety/quality decisions, schedule recovery options.	Named approver, decision record, versioned recommendation, explicit acceptance/rejection.

The agent should be designed as a tenant-controlled integration. That means the construction organization, not the AI vendor alone, owns the policy matrix, authority bands, security review, data retention standard, model-risk requirements, and production release decision. A Procore integration should also respect project-level permission differences. An agent that can read one project's cost records should not automatically see another project's cost records unless portfolio governance and Procore permissions allow it.

7. Procore Workflow Use Cases for Capital Projects

7.1 RFI Intelligence and Escalation

The RFI workflow is a strong early use case because it is high-volume, time-sensitive, document-linked, and usually non-financial until a delay or change event forms. The agent can classify RFIs by discipline, package, cost code, critical path proximity, overdue status, response quality, drawing/spec references, and potential change exposure. It can draft an RFI aging report, prepare escalation notes, and request missing context from the responsible party.

7.2 Submittal Surveillance

Submittals are ideal for agentic monitoring because they connect design intent, procurement readiness, fabrication, quality, and schedule. The agent can detect overdue reviews, repeated rejection causes, missing samples, long-lead item risk, and approval bottlenecks. It can cross-reference procurement dates and flag when submittal aging threatens fabrication or field installation.

7.3 Daily Logs and Field Production

Daily logs contain the field narrative that often explains later claims, productivity losses, access issues, manpower gaps, weather impacts, and safety signals. An agent can extract structured signals from daily reports, compare them to planned work windows, classify obstruction causes, and assemble a weekly production-risk narrative for the construction manager.

7.4 Cost Management and Change Events

For financial control, the agent can watch potential change events, commitments, budget movements, invoices, and cost-code trends. It can build a decision package that links the cost issue to RFI history, correspondence, daily logs, inspection records, photos, and schedule impact. The agent should never approve a change order by default. It should prepare the evidence trail and route the matter for commercial review.

7.5 Quality and Safety Signals

Quality and safety workflows require careful governance. The agent can monitor observations, inspections, incidents, forms, deficiency lists, recurring defects, incomplete corrective actions, and leading indicators. However, safety dispositions and formal quality acceptance should remain under qualified human leadership. The agent's role should be early warning, evidence organization, trend detection, and follow-up tracking.

7.6 Workforce, Equipment, and Resource Management

Resource and workforce data can help identify whether a project has enough people and equipment in the right areas at the right time. The agent can compare planned versus actual crews, equipment utilization, labor-hour burn, installed quantities, and production rates. On mega-projects, this can help identify workface constraints before they become major schedule impacts.

7.7 Closeout, Turnover, and Commissioning

Closeout and commissioning workflows often suffer because required evidence is spread across inspections, test records, punch lists, turnover packages, O&M documents, and warranties. The agent can maintain a system-by-system readiness matrix, identify missing turnover artifacts, chase responsible parties, and prepare executive readiness dashboards. This is particularly valuable for data centers, hospitals, advanced manufacturing, and other technically intense programs.

8. Agentic AI Process Framework for Procore

The following processes adapt the prior PMBOK-aligned agentic AI framework into a Procore-specific operating system. They are not Procore standards and are not PMI standards. They are proposed governance and delivery processes that an owner, EPCM, GC, specialty contractor, or PMO can tailor for a Procore-enabled capital program.

Process	Purpose	Primary output
PAIP-01 Procore Agent Charter	Defines the agent mission, Procore tools in scope, business value hypothesis, prohibited actions, and accountable human owner.	Approved agent charter and risk class.
PAIP-02 Permission and Data Scope Review	Maps Procore company/project permissions, source systems, object classes, and privacy restrictions.	Data-access register and permission matrix.
PAIP-03 Authority and Decision Rights	Separates advisory, supervised orchestration, and bounded execution authority.	Delegation matrix tied to workflow thresholds.
PAIP-04 Integration Design Review	Approves API, webhook, app, middleware, token, and environment design.	Secure integration design and sandbox test plan.
PAIP-05 Data Trust Qualification	Validates authoritative sources, timestamp rules, stale-document logic, and conflict resolution.	Source-of-truth and confidence-scoring rules.
PAIP-06 Prompt/Policy/Tool Guardrails	Controls instructions, retrieval boundaries, tool permissions, and prohibited outputs.	Versioned prompt and tool policy set.
PAIP-07 Agent Readiness Test	Tests scenarios, edge cases, hallucination risk, permission leakage, and workflow failures.	Go/no-go report and issue log.
PAIP-08 Procore Signal Surveillance	Runs recurring or event-driven monitoring for threshold breaches and weak signals.	Exception queue with source links.
PAIP-09 Decision Package Synthesis	Prepares structured recommendations with facts, options, impact, confidence, and source references.	Human-reviewable decision brief.

PAIP-10 Bounded Workflow Execution	Executes approved low-risk actions within Procore or connected tools.	Logged action record and post-action validation.
PAIP-11 Evidence Preservation	Preserves source references, prompts, outputs, approvals, and action logs for audit/dispute use.	Immutable evidence package.
PAIP-12 Assurance, Drift, and Recertification	Measures agent performance and determines retraining, suspension, expansion, or retirement.	Assurance dashboard and lifecycle decision.

9. Decision Rights, Risk Classes, and Human Approval Thresholds

A Procore-connected agent must operate under a clear authority model. The safest model is not “AI can do everything” or “AI can only summarize.” The safest model is tiered authority. Low-risk reversible actions can be automated after testing. Medium-risk workflow actions should require supervised approval. High-risk project decisions must remain human-approved.

Risk class	Examples	Agent authority	Required human control
Class 0 - Read only	Search project documents, summarize meeting notes, list overdue submittals.	Allowed after access approval.	Periodic QA and citation review.
Class 1 - Draft only	Draft RFI response package, draft change-event narrative, draft executive brief.	May create draft artifacts but not issue externally.	Named reviewer approves or rejects.
Class 2 - Low-risk workflow	Create internal task, send reminder, request missing data, update allowed metadata.	May execute if pre-authorized and reversible.	Post-action log review and exception thresholds.
Class 3 - Controlled operational impact	Route workflow to external party, change status, assign due date, open potential issue.	Requires human approval or strict policy gate.	Approval record with rationale.
Class 4 - Material commitment	Approve change order, certify payment,	Not autonomous by	Qualified human

	accept safety/quality disposition, issue contractual notice.	default.	approval mandatory.
Class 5 - Strategic/legal/public	Claims position, termination notice, public statement, regulatory disclosure, executive commitment.	Agent may prepare only.	Legal/executive approval mandatory.

10. Implementation Roadmap

A disciplined rollout should begin with value cases that are measurable, bounded, and evidence-rich. The objective is to build trust, not to perform a dramatic AI launch. A strong first implementation is usually RFI/submittal aging plus executive decision-package synthesis because it creates visible value without immediately granting the agent commercial authority.

Wave	Horizon	Capabilities	Success criteria
Wave 1 - Read and summarize	0-90 days	Read-only retrieval, document summaries, RFI/submittal aging, meeting action extraction, executive dashboard drafts.	Accurate citations, high reviewer confidence, measurable time saved, no permission leakage.
Wave 2 - Supervised orchestration	90-180 days	Draft tasks, draft correspondence, route internal reviews, prepare change-event packages, generate weekly risk briefs.	Reduced aging, faster escalation, clean audit trail, consistent human approvals.
Wave 3 - Bounded execution	6-12 months	Autonomous reminders, evidence requests, low-risk metadata updates, report generation, workflow assignment within policy.	Low false positives, reversible actions, stable control metrics, no material unauthorized actions.
Wave 4 - Multi-agent control mesh	12-24 months	Specialized agents for RFIs, submittals, cost, schedule, procurement, quality, safety, resources,	Portfolio-level consistency, benefits realization, recertified authority bands, governance board

		turnover, and executive synthesis.	maturity.

11. Controls, Cybersecurity, and Evidence Preservation

Construction project records are commercially sensitive. A Procore-connected agent may touch budgets, contracts, invoices, subcontractor pricing, labor information, safety records, design documents, claims narratives, and regulated project information. Therefore, the integration must be treated as an enterprise system, not a casual productivity plugin.

- Identity and access: use approved OAuth, service-account, or delegated access patterns; never share personal passwords with an agent.
- Least privilege: grant only the Procore tools, projects, fields, and actions required for the agent's mission.
- Environment separation: test in sandbox or non-production environments before production deployment.
- Prompt-injection defense: treat uploaded documents, correspondence, and external text as untrusted input that cannot override system policies.
- Data retention: define how Procore data, prompts, outputs, logs, embeddings, and decision packages are stored and deleted.
- Auditability: preserve source links, object IDs, timestamps, prompt/policy version, model/version, tool calls, and human approval outcomes.
- Kill switch: define who can suspend the agent immediately and how active workflows are paused, rolled back, or reassigned.
- Legal/commercial review: require human review for contractual notices, claims positions, payment approvals, change orders, safety decisions, and quality acceptance.

12. KPIs and Benefits Realization

The strongest business case for agentic AI in Procore is not headcount reduction. The stronger case is control-cycle compression: earlier issue detection, faster escalation, better evidence packaging, reduced aging, fewer missed commitments, improved forecast quality, and better executive decision velocity.

Benefit area	Sample KPI	How the agent helps
RFI/Submittal control	Average age, overdue count, aging by discipline, critical-path proximity.	Classifies, prioritizes, escalates, and prepares missing-context requests.
Change management	Cycle time from signal to change-event package; evidence completeness.	Links RFI, submittal, daily log, correspondence, photos, and cost data into a review package.
Financial control	Potential exposure identified	Flags emerging cost risk and

	before month-end; budget variance narrative quality.	prepares reviewer-ready explanations.
Field productivity	Deviation between planned and actual crew/productivity trends.	Extracts daily-log signals and compares against plan and quantities.
Quality and safety	Open observation aging; recurring cause trends; closure latency.	Identifies patterns and chases missing corrective-action evidence.
Executive reporting	Decision latency; number of unresolved high-priority issues.	Produces concise, source-linked executive briefs with options and risk ranges.
Closeout readiness	Turnover package completeness; punch-list aging; documentation gaps.	Maintains system-level readiness matrix and missing-item queue.

13. Example Operating Scenario: $5B Data Center Program

Consider a $5B hyperscale data center program using Procore for project execution, cost workflows, field documentation, quality/safety records, and closeout tracking. The program includes multiple buildings, long-lead electrical and mechanical equipment, phased energization, hundreds of subcontractor packages, intense commissioning requirements, and executive visibility at the portfolio level.

In this scenario, the Procore agent mesh includes:

- RFI/Submittal Agent: monitors aging, late technical responses, resubmittals, specification conflicts, and critical package dependencies.
- Procurement Risk Agent: connects approved submittals to equipment release dates, fabrication milestones, delivery risk, and installation windows.
- Commercial Change Agent: assembles potential change-event narratives from Procore histories and routes them to commercial leadership.
- Field Production Agent: reads daily logs, labor/resource data, installed quantities, weather/access notes, and look-ahead commitments.
- Quality/Safety Signal Agent: identifies recurring observations, incomplete corrective actions, and workface readiness concerns.
- Turnover/Commissioning Agent: tracks asset/system readiness, test documentation, punch status, and closeout evidence.
- Executive Synthesis Agent: produces weekly board-ready briefs that state what changed, why it matters, decision required, exposure range, and source evidence.

The agent does not approve a payment application, certify a change order, accept a safety condition, or issue a contractual notice. Instead, it shortens the time required for accountable leaders to see the right facts, evaluate the right options, and act with a defensible record.

14. Conclusion

Procore is an ideal surface for agentic AI because it sits near the operational heart of construction delivery: field records, project execution workflows, cost control, resource signals, lifecycle reporting, and connected project stakeholders. A third-party agentic AI system can extend that surface into a governed digital workforce that monitors, reasons, packages, routes, and executes bounded actions at machine speed.

The future-state model is not machine-led construction. It is human-accountable, Procore-centered, agent-accelerated construction management. Project leaders keep decision rights. Procore remains the project record. The agent compresses administrative latency, detects weak signals, prepares evidence, and pushes the right issue to the right person faster. On a multi-billion-dollar capital project, that speed and discipline can convert hidden risk into controlled action.

Appendix A. Example Procore Agent Portfolio

Agent	Mission	Primary Procore targets
RFI Intelligence Agent	Aging, classification, criticality, missing context, escalation packages.	RFIs, drawings, specs, correspondence, meetings.
Submittal Surveillance Agent	Review-cycle tracking, resubmittal patterns, long-lead procurement risk.	Submittals, specs, procurement records, schedule references.
Daily Log Signal Agent	Extracts field constraints, manpower issues, weather impacts, and obstruction narratives.	Daily Logs, photos, manpower/resource records.
Commercial Evidence Agent	Builds change-event and claim-support evidence packages.	Change Events, commitments, budget, RFIs, correspondence, daily logs.
Quality Trend Agent	Finds recurring defects, inspection delays, and deficiency closure issues.	Inspections, observations, deficiency lists, forms.
Safety Precursor Agent	Identifies leading indicators and unresolved corrective-action trends.	Incidents, observations, permits/forms, daily logs.
Turnover Readiness Agent	Tracks system completeness and missing closeout evidence.	Punch lists, closeout documents, inspections, test packages.
Executive Synthesis Agent	Converts project signals into concise leadership decisions.	Reports, dashboards, cross-tool data extracts.

Appendix B. Sample Governance Language

All AI-generated outputs are advisory unless an approved delegation matrix grants specific bounded execution authority. The agent may not approve financial commitments, execute contractual notices, accept safety or quality dispositions, modify baseline schedules, certify payments, or issue external positions without documented human approval. Every agent action must be logged with source references, acting identity, tool call, timestamp, policy version, and disposition. The project manager, program manager, and executive governance board retain accountability for project outcomes.

Appendix C. References

7. Procore, Construction Management Software public platform page, reviewed May 20, 2026. Notes: Procore describes AI-powered capabilities, Project Execution, Cost Management, Resource Management, Project Lifecycle Management, integrations, and support resources.
8. Procore, AI Construction Software public page, reviewed May 20, 2026.
9. Procore press release, “Procore Launches Procore AI with New Agents to Boost Construction Management Efficiency,” November 20, 2024. Notes: Procore announced Procore AI, Agents, Insights, Copilot, Agent Studio, and workflows around RFIs, scheduling, and submittals.
10. Procore Developer Platform documentation, reviewed May 20, 2026. Notes: Procore supports secure RESTful API integrations and OAuth-based application patterns.
11. Procore Support, “What are Procore’s Product Categories?” reviewed May 20, 2026. Notes: product categories include Project Management, Financial Management, and Workforce Management; Quality and Safety tools are organized under Project Management.
12. Damion Thomas Brown, Agentic AI for Mega-Project Delivery, April 10, 2026. Used for continuity of the human-accountable, policy-bounded, agent-enabled project delivery framework.