

Platform Setup & Plan Requirements

Audience: IT Admin • Last verified October 21, 2026

IT Admin (Section 2.5 is also for individual users on Pro and Max plans)

CONTENTS

1. Before you begin
2. Claude (Anthropic)
3. ChatGPT, Gemini and Microsoft 365 Copilot
4. Keeping this guide current
5. Platform documentation

AI platforms change their plans, settings and menu names frequently. Each platform section shows the date Pentaria last verified it. If what you see in your admin console differs from this guide, your platform's own documentation takes precedence — and please let us know at support@pentaria.com.

1. Before you begin

1.1 What you'll need

- An AI platform account on a plan that supports Pentaria (Section 2.1 for Claude).
- Owner or administrator access to your organization's AI platform settings.
- A **Pentaria portal account** for every user, at agentexplorer.pentaria.com. Users need one to download agents and to use the version-check link.
- The Pentaria agents, downloaded from the portal in the format that suits you (Section 1.2).
- A decision on where your official deliverables will live (your **system of record** — see Guide 5). You don't need this to install agents, but you'll need it before you roll out widely.

1.2 Download formats

Pentaria agents are available from the Pentaria portal in three formats:

FORMAT	WHERE TO FIND IT	CONTAINS	BEST FOR
Individual agent (.zip)	Each agent's page on the portal	One agent, as a skill ready to upload	Individual users; adding or updating a single agent

FORMAT	WHERE TO FIND IT	CONTAINS	BEST FOR
Workflow package (plugin .zip)	Each workflow's page on the portal	Every agent in that workflow (e.g. Product Vision Crafting), as one plugin	Teams adopting one workflow at a time
Full library (plugin .zip)	Provided to IT Admins on request	Every Pentaria agent, as one plugin	Company-wide deployment by IT

Avoid installing the same agent twice. If you install a workflow package or the full library, don't also install the same agents individually. Duplicate copies with the same name make it unclear which version users are running. Guide 3 explains how to install and update each format.

How each format installs on Claude

- **Individual agents** are skills. Upload the ZIP file as it is, without unzipping or repackaging it. Individual users upload under **Customize → Skills**; admins upload for the organization under **Organization settings → Plugins & skills → Add → Upload a skill**.
- **Workflow packages and the full library** are plugins. An admin uploads each one as a single item under **Organization settings → Plugins & skills → Add → Upload a plugin**. Availability is then set once for the whole package, and the package has one version history and one rollback point. On Enterprise, a plugin can be limited to specific user groups.

Step-by-step instructions are in Guide 3.

1.3 Decisions to make first

DECISION	OPTIONS	PENTARIA RECOMMENDATION	COVERED IN
Which plan?	Individual plans vs. Team vs. Enterprise	Team minimum for any company deployment; Enterprise for larger organizations or regulated industries	2.1
Who can install agents?	Admin-only vs. users too	Admin-installed for the whole organization; allow users to add their own only if you plan to let them build agents (Guide 7)	2.3, Guide 3
Pilot first?	Whole organization vs. pilot group	Pilot with 5–15 users from your AI vanguard before company-wide rollout	2.4, Guide 9
Who approves new or shared agents?	Open vs. reviewed	Require review	2.3

2. Claude (Anthropic)

Status: Available now · **Last verified:** October 21, 2026

2.1 Choose a plan

CLAUDE PLAN	PENTARIA SUPPORT LEVEL	WHY
Free	Not supported	Usage limits are too low for research-intensive agents (several take 45–60 minutes of research), there are no admin controls, and consumer terms apply.
Pro / Max	Limited — individual use	Agents work, but each person installs and updates their own copy. There is no central deployment, version control or shared company knowledge. Consumer terms apply (see 2.5). Suitable for consultants, solo practitioners and evaluation.
Team	Supported — minimum for company deployment	Central installation and availability control, required agents, version history and rollback, single sign-on (SSO), admin controls for connectors, and no model training on your data by default.
Enterprise	Supported — recommended	Everything in Team, plus SCIM user and group provisioning, audit logs, custom data retention, domain capture, and the ability to give different user groups different agents.

When to choose Enterprise over Team

Choose Enterprise if any of these apply:

- You need **audit logs** for compliance or security review.
- You manage users through your identity provider and want **automatic provisioning (SCIM)**.
- Different teams need **different agents or different company knowledge** — for example, separate product lines with separate ICPs. On Team, every agent and every published knowledge item is available to the entire organization.
- You need **custom data retention** periods.
- You have more than 150 users. (*Anthropic positions Team for teams of 2 to 150.*)

2.2 Data use by plan

	FREE / PRO / MAX	TEAM / ENTERPRISE
Terms	Anthropic Consumer Terms	Anthropic Commercial Terms
Model training on your data	Each user chooses in their privacy settings	Not used for training by default
Who controls the setting	The individual user	Your organization

Pentaria agents are designed for company work: market strategy, product plans, competitive analysis and win/loss data. **We strongly recommend a Team or Enterprise plan for any use involving non-public company information.** Guide 2 covers data handling in detail.

2.3 Configure your organization (Team and Enterprise)

IT Admin

Who can do this: **Owners and Primary Owners.** On Enterprise, members whose custom role includes managing the organization's libraries (the **Libraries** permission) can also manage these settings.

Common stumbling block: the role labeled **Admin** in your members list does *not* include access to **Plugins & skills**. If you can't see the page, ask an Owner or Primary Owner.

All of the settings below are under **Organization settings → Plugins & skills → Policy**.

SETTING	REQUIRED FOR PENTARIA?	PENTARIA RECOMMENDATION	NOTES
Code execution and file creation	Yes	On	Skills cannot run without it. On by default for Team; Enterprise Owners must turn it on.
Skills	Yes	On	Turning this off disables all skills and plugins, including Pentaria agents, for everyone.
Skills and plugins scanning	No	On	Runs a security scan on skills and plugins and shows the result in your inventory.
Publishing (members publishing to the organization)	No	Requires review	Stops unreviewed look-alike agents and duplicate versions from reaching everyone. Team plans default to Open, so change it. Enterprise plans default to Requires review.
User-created skills	No	Your choice — see below	Controls whether members can create or upload their own skills and plugins.
Skill sharing (and Share with groups on Enterprise)	No	On, with Publishing set to Requires review	Lets members share agents they build with colleagues without publishing them company-wide.

Should users be able to create their own skills?

- **Turn it on** if you want teams to build **Customer-Developed Tools** — their own agents — alongside Pentaria's (Guide 7), or to pilot agents before company-wide release (2.4). Pair it with **Publishing: Requires review**.
- **Turn it off** for the tightest control. Users then can't add skills or plugins themselves, and the plugin options disappear from their **Add** menu. Agents you provision centrally remain available.

Other capabilities Pentaria agents use

CAPABILITY	USED BY	REQUIRED?
Web search	Market and Product Definition, Market Landscape and Trends, and the deep-research options in the competitive agents	Required for those agents. Confirm web search is enabled for your organization and members.
Claude in Chrome (browser extension)	Market and Product Definition, URL route only	Optional. The agent's guided-questions route works without it. Follow your browser-extension policy.
File upload	All agents (each agent asks for the earlier deliverables as uploaded files)	Required.
Connectors (Google Drive, SharePoint, etc.)	Not currently used by Pentaria agents	Not required. Guide 6 covers integrations.

Identity (recommended)

- **Team and Enterprise:** set up **single sign-on (SSO)** so access follows your identity provider.
- **Enterprise:** set up **SCIM** so users and groups sync automatically. Groups are how you pilot agents with a subset of users and give different teams different agents.

For setup steps, see Anthropic's documentation (Section 5).

2.4 Plan the rollout

IT Admin

Claude gives each plugin or skill an **availability** setting:

AVAILABILITY	WHAT MEMBERS EXPERIENCE	PENTARIA USE
Not available	Hidden; can't be installed	Withdraw an agent quickly, e.g. while investigating an issue
Available to install	Members can choose to install it	Optional agents for specific roles
Installed by default	Already installed; members can turn it off	Standard Pentaria agents for most organizations
Required	Installed and always on; members can't remove it	Pentaria Knowledge (your approved-deliverables bundle), so every user's agents work from the same approved inputs; core agents if you want consistent use

Recommended rollout path

1. **Pilot (Enterprise):** create a pilot group (SCIM or **Organization settings → Groups**) and set the Pentaria agents to *Installed by default* for that group only.
Pilot (Team): Team plans have no group setting. With **User-created skills** on, upload the agents to your own account and share them with specific pilot users.
2. **Run the pilot** for two to four weeks. Have pilot users run a full workflow — at minimum Market and Product Definition → Market Landscape and Trends → Ideal Customer Profile — on a real product.
3. **Roll out company-wide:** set the agents to *Installed by default* for the organization.
4. **Make the Pentaria Knowledge Builder available only to your Content Owners and their named delegates.** On Enterprise, set it to *Available to install* for a Content Owner group and keep it *Not available* for everyone else. On Team, share it with those named people only. Everyday users don't need the Builder (Guide 4).
5. **Publish your first Pentaria Knowledge bundle as Required** once your Content Owners have approved your first deliverables (Guide 4). For each later update, use **Upload new version** on the existing Pentaria Knowledge item rather than adding a new skill. This keeps one item with full version history and rollback.

Deploy company-wide only what everyone should have. Set to *Installed by default* or *Required* only the

agents and workflows you want every user to have. Give agents or workflows meant for a smaller group to just those users: on Enterprise through user groups, on Team by sharing with named people (Guide 3, Section 3). For help planning a restricted deployment, contact support@pentaria.com.

Installation steps are in Guide 3.

2.5 Individual setup (Pro and Max)

Everyone — for individual users only

1. Go to **Settings → Capabilities** and turn on **Code execution and file creation**.
2. Review your privacy settings and decide whether your conversations may be used to improve Claude. **If you'll use Pentaria agents with non-public company information, we recommend turning this off** — and check your employer's AI policy first.
3. Install the agents as described in Guide 3 (individual installation).

Remember: on individual plans you are responsible for keeping your own agents up to date. Use the version-check link in each agent's introduction (Guide 0, Section 8).

2.6 Model selection

Use the same model across your team so everyone's deliverables are comparable. Pentaria tests each release on the most recent **Claude Opus**, **Claude Sonnet** and **Claude Fable** models. For research-heavy agents (Market and Product Definition, Market Landscape and Trends, and the competitive research agents), we recommend using the most capable of these models your plan makes available to you. Always follow your organization's policy for AI usage.

2.7 Setup checklist

ITEM
Plan is Team or Enterprise (or Pro/Max for individual, Limited-support use)
Code execution and file creation is on
Skills is on
Skills and plugins scanning is on
Publishing is set to Requires review
User-created skills decision made and set
Web search is available to members
SSO configured (Team/Enterprise); SCIM and groups configured (Enterprise)
Pilot group identified
System of record chosen for official deliverables (Guide 5)

ITEM
Content Owners and their named delegates identified; Pentaria Knowledge Builder made available to them only
Pentaria portal accounts set up for every user

Next: install the agents (Guide 3).

3. ChatGPT, Gemini and Microsoft 365 Copilot

Status: Coming soon · **Last verified:** October 21, 2026

Pentaria agents for ChatGPT, Google Gemini and Microsoft 365 Copilot are in development. Plan requirements, setup steps and support levels for each platform will be published in this guide when that version is released.

All three platforms are adopting skills — the same format Pentaria agents use on Claude — so the deployment approach in these guides will carry across, though each platform's admin controls differ.

Evaluating now? Contact your Pentaria account manager or sales@pentaria.com to discuss timing and requirements for your platform.

4. Keeping this guide current

Pentaria reviews this guide at least monthly, and more often when AI platforms release model or admin changes that affect Pentaria agents. Each platform section shows its last-verified date.

5. Platform documentation

Claude (Anthropic):

- [Manage plugins for your organization](#)
- [Provision and manage skills for your organization](#)
- [Using skills in Claude](#)
- [What are skills?](#)
- [Claude plans and pricing](#)
- [Updates to Anthropic's Consumer Terms](#)