A New Framework for Review Research from a Panoramic Perspective: Concept, Process, and Example Postprint

Authors: Chen Hua

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Abstract

[Purpose / Significance] Panoramic backtracking integrates the thinking mode of panoramic analysis with traditional text analysis methods, bibliometric methods, and visualization technologies, thereby achieving expansion and innovation in the design of review research frameworks. [Method / Process] Based on the analysis of the concept and basic attributes of panoramic backtracking, a new framework comprising five processes is constructed: data collection and stratification, time-slice diagnosis, dimensional model architecture analysis, hierarchical recursive visual scenario presentation, and mosaic-style holistic conclusion acquisition. An exploratory verification is conducted using research on the performance evaluation of China' s fiscal expenditure as an example. [Result / Conclusion] The study demonstrates that panoramic backtracking possesses comparative advantages in terms of diversified data collection, refined analysis processes, standardized process design, and more comprehensive conclusions.

Full Text

A New Framework for Review Research from a Panoramic Perspective: Concepts, Processes and Demonstrations

Chen Hua1,2

2 School of Management, Wuzhou University, Wuzhou 543001

Abstract:
[Purpose/Significance] Panoramic backtracking integrates the thinking mode of panoramic analysis with traditional text analysis, bibliometrics, and visualization technologies to achieve expansion and innovation in the design of review research frameworks. [Method/Process] Based on an analysis of the concept and basic attributes of panoramic backtracking, this paper constructs a new

framework comprising five processes: data collection and stratification, time slice diagnosis, dimensional model architecture analysis, hierarchical recursive visual situation presentation, and combined overall conclusion acquisition. The research on China' s fiscal expenditure performance evaluation is used as an example for exploratory verification. [Result/Conclusion] The study demonstrates that panoramic backtracking offers comparative advantages in diversifying data collection, refining analysis processes, standardizing process design, and generating more comprehensive conclusions.

Keywords: panoramic backtracking; visualization; review; fiscal expenditure; performance evaluation

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Tracing the history and development of a research field is fundamental training that every researcher must master. Through review research, scholars can understand historical developments and patterns, grasp research dynamics, judge future trends, identify progress at the current research time point and problems requiring solutions, and thereby locate research directions and entry points. Traditional review research typically employs literature 梳理 to explore developmental trajectories and research dynamics, but it is often constrained by the inherent characteristics of qualitative research, making it unavoidably subjective and arbitrary. Bibliometrics emerged in China in the late 1970s, using mathematical and statistical methods to analyze the structure, characteristics, and patterns of research outcomes, demonstrating strong practicality, though its development in the humanities and social sciences has been limited.

The concept of describing knowledge structures graphically can be traced back to "Knowledge Map" proposed by Brookes in 1980 (later translated as "知识地图") [3]. Chen Yue and Liu Zeyuan used "知识图谱" to visualize the structure, relationships, and evolution of scientific knowledge [4]. The use of computer software such as TDA, SPSS, and CiteSpace to explore knowledge structures, patterns, and distributions through information visualization technology has developed rapidly in many fields [5]. Through scientific measurement of word frequency and citations in databases, researchers can obtain results on the evolution of central terms, distribution of research forces, and clustering of research themes, making findings more objective. However, these approaches suffer from limitations such as single data sources, primarily descriptive analysis, neglect of effective integration with other traditional methods, homogenized research conclusions and information, and a disconnect between theory and reality.

The application of panoramic perspective to review research is a new approach that has gradually emerged in recent years, with various formulations including panoramic dialysis, panoramic perspective, panoramic analysis, panoramic scanning, and panoramic mapping. Li Tao and Song Yubo conducted longitudinal tracking and horizontal segmentation analysis on the historical images and regional practices of comprehensive urban-rural education reform [6]. Li Yuxing used panoramic dialysis to explore the background, motivations, processes, and

strategies of Japan' s administrative regulation reform [7]. These studies emphasize the use of historical and comparative analysis methods but suffer from insufficient focus on practical aspects and reliance on textual description. Yan Ling et al. used bibliometric methods to conduct cluster and multidimensional scaling analysis of construction project governance research, but their work was limited to the theoretical level without involving the time dimension [8]. Some scholars have combined visualization technology with panoramic analysis, such as in analyses of information literacy research [9], summaries of knowledge structures and characteristics within specific journals [10], reviews of China' s new urbanization process [11], and syntheses of thematic model applications in public policy text analysis [12]. These studies leverage the advantages of visual analysis technology and employ multidimensional analysis and temporal segmentation to judge thematic evolution, hot issues, and development trends.

Overall, although existing research provides heuristic ideas for panoramic analysis from different perspectives, there is currently no clear definition of the panoramic concept in review research or explanation of its characteristics, and the operational process has not yet formed a standardized procedure. Review research often faces complex and multifaceted information. To balance theory and practice and fully leverage the advantages of different methods, researchers must consider how to reasonably construct a research framework and analyze the research object in a rational and effective manner to achieve the most complete and objective presentation possible.

Concept and Attributes of Panoramic Backtracking

Panoramic backtracking refers to the use of multiple methods combining qualitative and quantitative analysis to comprehensively and three-dimensionally display the development process of a specific research theme. Following specific procedures, textual and graphical materials are processed according to hierarchical logic to reproduce historical evolution scenarios with multidimensional perspectives. The concept comprises several components: (1) The research object points to a specific thematic field, which may be a discipline or a subfield within it, including both theoretical and practical levels; (2) The research purpose aims to achieve scientific judgment and multidimensional visual reproduction of development stages, ultimately deriving overall development status and patterns through three-dimensional analysis from different perspectives; (3) The research process emphasizes holism and internal logical correlation, which must be realized through comprehensive application of multiple research methods in information acquisition, data processing, research procedures, and result presentation; (4) In terms of conclusion presentation, multiple approaches including textual description and image interpretation are used for multidimensional analysis to discover the interaction between theory and practice and the dynamic progression from points to lines to surfaces in research trajectories.

Panoramic backtracking describes research objects through multiple dimensions while combining visualization technology with traditional literature review anal-

ysis methods to bridge the gap between technology and rational thinking. It possesses unique attributes, enabling macro-micro complementary effects through holistic and partial zoom switching, forming a hierarchical analytical model with orderly point-line-surface connections, arranging rich materials from various sources along a temporal coordinate to form dynamic interactive mirrors, and thereby fully leveraging its distinctive advantages.

Multidimensionality Previous reviews of specific themes often employed single-factor descriptive models, whereas the complexity of phenomena requires examination through multiple perspectives. For instance, in public policy formulation, panoramic analysis should reflect four dimensions including satisfaction, different rationality categories, time, and space [15]. Dimensions must be personalized for different research objects. Common construction forms include: (1) Temporal dimension—integrating and classifying materials according to their time vectors; (2) Thematic direction—clustering and combining according to core branches of the research theme; (3) Source attribute—distinguishing between theoretical research achievements and important policies or events from practice; (4) Spatial dimension—depicting local characteristics in combination with regional distribution of research objects, such as reflecting Anhui' s poverty alleviation status through realistic scenarios at the prefecture level [16]. Panoramic backtracking can achieve switching functions across time and themes through multiple dimensions, better restoring the realistic three-dimensional scenarios of thematic development through shuttling between theory and reality.

Visualization In panoramic image processing, new technologies present three-dimensional or even multidimensional views, clearly distinguishing them from traditional two-dimensional images. This attribute is equally applicable when introduced into review research. By using text, charts, and graphs to construct narrative scenes of research themes in different historical periods, panoramic backtracking forms graphic views of past developments. It integrates textual analysis and qualitative research methods from traditional literature reviews with bibliometrics and visualization software, employing diverse, time-divided, and dynamic approaches to display the development status of research themes. Panoramic backtracking enriches the visual content of previous review research, combining qualitative and quantitative methods to present more comprehensive graphic collections aimed at explaining research objects.

Mosaic-Style The multidimensional attribute of panoramic backtracking necessitates reliance on various materials from multiple sources. Through the collection of effective information from literature, cases, and images, and processing and storing it according to certain logic, the development status of thematic research can be meticulously displayed. Since supporting materials often have fragmented characteristics, they must be pieced together to observe patterns. By classifying and splicing information according to its source attributes, internal correlations can be obtained. Different research focuses have different

centers in the mosaic process. For example, in industry research, observation and trend judgment can be based on industrial chains [17] or competitive landscapes [18]. In the analysis process, through decomposition and integration of individuals and the whole, segmentation and playback of time slices, contextual association between theory and reality, and cropping and classification of thematic branches, panoramic backtracking is achieved through close-up detailed perspective and scanning of development conditions at various stages, which represents both necessary technical support and an important manifestation of advantage.

Hierarchy Panoramic backtracking is highly systematic. In tracking cutting-edge theories and practices, the entire process from information input to analysis to output is a progressive pulse scanning that must form an analytical framework structure through vertical hierarchical progression and horizontal structural layering. Hierarchy is reflected in information collection, temporal segmentation, thematic focus, and result interpretation. In information collection, the collection scope and information usage gradient must be divided according to research purposes. Thematic focus requires hierarchical delineation of keyword frequency, and results must also proceed according to established hierarchies, explaining both local and overall aspects. Therefore, based on material collection and analysis, hierarchical processing should be conducted. According to temporal bearings and thematic classification, multiple dimensions should be used to construct vertical and horizontal structures for classification and analysis, thereby deriving comprehensive research conclusions with strong multi-level internal correlations.

Dynamic Interactivity By using temporal coordinates to position events, panoramic backtracking presents scroll-like dynamic scenes of typical nodes from theory and practice in different time zones according to historical processes. It describes both thematic changes in theoretical development, highlighting theoretical contributions, and reflecting problem focuses in realistic contexts, forming an interpretation method where theory and reality illuminate and combine with each other. After organizing seemingly scattered materials through a temporal axis, a dynamically continuous vector graph emerges, forming evidentiary explanations that combine qualitative description with quantitative analysis, and understanding practice' s guidance for theoretical questions and theory' s contributions to practice within a context combining theory and reality. Therefore, panoramic backtracking presents history through dynamic interaction, 俯视 from a macro perspective and forming understanding of development in different periods through multiple interwoven main lines.

Process Design for Panoramic Backtracking Research

In recent years, the application of "panorama" to review research has shown a clear increasing trend across multiple disciplines, including archival science [19], history [20], and law [21]. However, existing research has not yet formed a

standardized operational procedure. After explaining the connotation and characteristics, the author combines existing experience to explore and propose the methods and specific implementation steps required for panoramic backtracking. The actual operational process comprises the following components:

Data Collection and Stratification Rich and authentic data materials are the basic conditions for panoramic backtracking. The key in the data collection and stratification stage is to clarify the purpose of data use and sequentially determine the scope of the data collection set. With limited researcher time and capacity, the most critical information must be captured from massive data as the analysis object. For example, when using knowledge graphs in information retrieval, exploration is needed [22]. In panoramic backtracking, the main uses of data are: (1) for subsequent time slice analysis; (2) as materials for demonstrating dimensions according to the scenes to be presented; (3) as the basis for deriving overall observational conclusions. In the research process, different categories of information should be hierarchically constructed according to research purposes and analysis dimensions.

Time Slice Analysis Among the multiple dimensions constructed in panoramic backtracking, the temporal dimension is primary. Unlike previous approaches to processing development history, stage segmentation will combine multiple criteria. In specific operations, the first step is to conduct statistical descriptive analysis on the first type of data source, including the total number of publications each year and the proportion of CSSCI publications, to find inflection points and peaks in the time curve as important bases for time division. Second, visualization software is used to draw knowledge maps from literature samples collected through the above retrieval methods, extracting hot words from key nodes according to keyword burstiness analysis time zone maps, with their change trajectories becoming the second basis for judging time progress. Finally, the list of important practical events and key policy texts is used to judge realistic development trends, confirming and revising the division of research stages.

Demonstration Dimension Model Construction Narrative analysis and situations within each time period are often complex. Logical thinking is needed to form organized main lines across time for framework construction. The dimension construction 思路 will differ according to research objects, but some main elements can be shared. For example, under the practical dimension, segmentation can be conducted through spatial distribution; under the theoretical research dimension, publication trends, hot keywords, intermediary centrality words, clustered theoretical branches, highly cited literature, and research force distribution can be obtained through bibliometric methods. These scattered elements can be selected and built into dimensions according to research purposes. According to the logic of process dynamic analysis, research objects can be divided, such as analyzing the whole-process performance management of

UK government service procurement according to preparation, purchase, and implementation [23].

Hierarchical Visual Situation Presentation Hierarchical recursion refers to the process of deriving conclusions. After designing logical dimensions for each historical layer, materials need to be analyzed. Redundant data cannot immediately produce overall conclusions and requires further hierarchical analysis. The first step is to find key nodes, the second is to depict narrative lines of main threads, and the third is to present local overall depictions at the time level, explaining historical processes, theoretical contributions, and potential problems. Visual situations are the specific forms of presentation. In panoramic backtracking, visualization is a broader concept. The presented views include not only maps drawn through bibliometrics but also narrative descriptions and chart explanations, forming a graphic-text combined narrative research approach.

Obtaining Combined Overall Conclusions After analyzing the entire historical process section by section, it is only a fragmented magnification. Subsequently, playback and splicing are needed to form an overall overview—a long-focus panoramic view focusing on the sudden discoveries and continuous themes of each stage, their differentiation, the role of theory, the evolution of research forces, and other developmental patterns. The reason for designing the combined overall conclusion acquisition in the process is that some patterns can only be discovered through overall examination. Additionally, some research elements do not require time-interval research and only need overall judgment for problem discovery and trend prediction. Therefore, this stage will vary according to the researcher' s theme and purpose.

Panoramic Backtracking of Chinese Fiscal Expenditure Performance Evaluation

Following the above process, this paper designs an analytical framework for panoramic backtracking of fiscal expenditure performance evaluation research, as shown in Figure 1 [Figure 1: see original paper].

Data Sources and Stratification According to the research plan, data collection for the theme of Chinese fiscal expenditure performance evaluation includes three categories, with further stratification forming the following data sets: (1) Annual publication numbers and growth rates obtained through precise subject retrieval from the CNKI database, stratified by publication level, with judgment and screening according to research purposes, focusing on analyzing academic paper records included in CSSCI; (2) Policy texts from the Ministry of Finance website, stratified by the administrative level of information publishers into central departments and local governments, with emphasis on provincial-level policies; (3) Case collection of practical progress, the most dispersed part of the data, mainly from secondary sources in literature research

and online tracking collection. Additionally, operations such as redundancy removal, deduplication, and information storage and entry are required for the original data sets.

Development Trajectory Diagnosis Through textual 梳理 of existing Chinese fiscal expenditure performance evaluation research results and policy systems, bibliometric analysis, and knowledge mapping, historical development stages are judged and analyzed. During time zone division, it is necessary to observe inflection points in theoretical research, the realistic basis for important policy introductions, and the distribution of typical cases. By examining the CNKI publication line chart, inflection points appear in 2003, 2007, 2013, and 2019. By 梳理 policy texts, the introduction of important national-level systems related to fiscal expenditure performance evaluation in these periods is verified. Combined with thematic mutation words and high-frequency words in knowledge maps, the time zone distribution of Chinese fiscal expenditure policy performance evaluation is formed.

Demonstration Latitude Design The demonstration dimension for Chinese fiscal expenditure performance evaluation uses the time coordinate as the basic dimension, with important regulations, real cases, and main theories as core nodes in each time zone for map drawing and interpretation. Shuttle analysis of policy texts and typical cases at the practical level restores theory within specific historical contexts, forming a 串联 main line of practical progress from both institutional and realistic aspects. Visualization technology is used for comparative analysis and interpretation of highly central key terms. The H-index is used to select foundational research for theoretical 梳理 and key demonstration. Through 归纳总结 and systematic 串联, three main lines are formed to describe the realistic background in different time cross-sections, the main progress of central and local governments in institutional construction and pilot experiments, scholars' hot spots and main theoretical contributions, and the degree of differentiation, understanding the problems faced and achievements made in historical contexts. Through point-to-line-to-surface layered multi-angle analysis in the time dimension, the development status of this field is explored and explained to form panoramic layers.

Thematic Development Scenario Description According to the above time zone diagnosis and demonstration latitude design, central-level systems in each period are 梳理 ed, theoretical research themes are summarized, and typical cases are discovered. Comprehensive use of literature analysis, knowledge maps, and other methods is employed to describe specific scenarios of thematic research. (1) **Incubation Stage (1994-2002):** China began implementing the tax-sharing system reform in 1994. Before 2003, understanding of fiscal expenditure evaluation was not systematic, remaining in the research incubation stage. The average annual growth rate of publications on this theme in the CNKI database was 34.65%. The key role of theoretical research on fiscal expenditure

evaluation at this stage was to propose preliminary suggestions for evaluation principles, methods, and indicator systems, with practical fields mainly focusing on scattered evaluations of regional fiscal expenditure comprehensive performance, primarily theoretical analysis. (2) **Exploration Stage (2003-2007):** With the proposal of establishing a budget performance evaluation system in 2003, some departments of the Ministry of Finance began organizing pilot performance evaluations of major projects in certain central departments that year. Research on fiscal expenditure evaluation developed rapidly, with the first peak appearing in 2003, CNKI publication growth rate reaching 168.97%, and an average annual growth rate of 62.04% from 2003 to 2007. The research focus at this stage was on fiscal expenditure performance evaluation indicator systems, with empirical research mainly comprehensive evaluations, few empirical studies on local government fiscal expenditure project evaluations, and limited evaluation roles in enabling continuous improvement of fiscal expenditure performance through evaluation feedback. (3) **Growth Stage (2008-2012):** With the introduction of central overall systems, local practices showed rapid development momentum with distinctive features. Since 2007, more than half of provinces launched exploration work on fiscal special fund project performance evaluation [24]. In 2008, research on fiscal expenditure evaluation entered another peak. Although the growth rate slowed compared with the previous stage, both total CNKI publications and CSSCI publications maintained stable and continuous growth. A large number of case studies combining local theories and practices emerged, with obvious interdisciplinary research characteristics. Performance evaluation research on project expenditures in science and technology, education, agriculture support, and social security fields grew vigorously, and attention began to be paid to ecological, poverty alleviation, and health expenditure performance, with a shift from internal evaluation to external evaluation in evaluation models. (4) **Development Stage (2013-2017):** The Third Plenary Session of the 18th CPC Central Committee in 2013 proposed that "finance is the foundation and important pillar of national governance" [25], leading to renewed understanding of the nature of finance. By observing the publication quantity chart, 2013 and 2015 were the third and fourth peaks in academic paper publication volume on fiscal expenditure evaluation themes included in CNKI. Words with intermediary centrality higher than 0.5 evolved into "fiscal revenue," "fiscal decentralization," "economic growth," and "public expenditure," with rising attention to budget expenditure policy functions such as public services and social security. Practice and theoretical research on fiscal expenditure performance evaluation were conducted at multiple levels, deepening from departmental and special expenditure performance evaluation research to overall fiscal expenditure performance evaluation and fiscal expenditure policy performance evaluation. (5) **Prosperity Stage (2018-Present):** The 19th CPC National Congress report in 2018 explicitly proposed "establishing a comprehensive, standardized, transparent, scientifically standardized, and strongly constrained budget system, and comprehensively implementing performance management," representing an important strategic deployment in the process of modernizing fiscal governance. Policy budget performance management is an important com-

ponent, and 打通 the channel between fiscal expenditure performance evaluation and public decision-making and fiscal resource allocation is a key and difficult issue in fiscal governance reform. Fiscal expenditure performance evaluation is gradually aligning with comprehensive budget performance management.

Overall Conclusion Analysis From an overall perspective exploring the research experience and shortcomings of Chinese fiscal expenditure performance evaluation, comprehensive conclusions are drawn on the evolution 规律 of thematic fields, distribution of research forces, and the relationship between theory and practice. The study finds that research on this theme shows sustained and rapid growth; themes are continuously deepening and refining, but attention to various branches is uneven; researchers have diverse professional backgrounds but weak cooperative relationships; research has gradually shifted from the theoretical level to being increasingly closely related to practice, with theory showing significant characteristics of responding to reality.

Advantages and Prospects of Panoramic Backtracking

Panoramic backtracking is an integration based on critical inheritance of previous review research. It inherits the significant characteristics of panoramic thinking—three-dimensional multidimensionality, historical narrative, and segmentation analysis—while also accommodating the technical features of bibliometrics and visualization analysis tools, and embedding traditional qualitative text analysis methods to play a complementary role through organic combination of the three. This architecture has the following advantages:

Rich Data Integration: Through the collection of diverse data sets and nested processing methods, an effective analysis foundation is laid for research. Taking the selection of research samples on Chinese fiscal expenditure performance evaluation as an example, it is necessary to classify and form data sets from literature quantity, case materials, and policy texts, 弥补 the relatively concentrated single data sources of previous review research that focused mainly on academic research results or practical cases. Considering that analysis of publication quantity and quality serves two different research purposes, it is necessary to first analyze the overall publication situation from the database, then select papers representing high academic levels as data samples for further research, leveraging the advantages of hierarchical nested processing.

Refined Analysis Process: Panoramic backtracking uses multiple standards for mutual verification to carefully divide development stages, breaking through previous methods of historical stage division according to single standards and achieving division through mutual verification and gradual revision of multiple standards. The research trajectory transforms through zooming from whole to part to whole—first using the whole to obtain development trend trajectories and stage judgments, then refining each part, and finally conducting overall pattern observation and revision after partial testing. Through multidimensional depiction, multiple switching modes are built for multi-dimensional interpretation,

and by constructing temporal, institutional, factual, and theoretical dimensions, the change trajectories of different aspects of research themes are depicted more meticulously.

Standardized Process Design: The feasibility and effectiveness of panoramic backtracking are ensured through standardized analysis processes, with the difficulty and focus being how to complete more detailed and comprehensive research picture drawing and interpretation of thematic research through new process design. On one hand, the standardization of processes ensures the feasibility and consistency of the framework in operation; on the other hand, it greatly improves the reliability and objectivity of conclusions.

Comprehensive Conclusions: To grasp the overall context and development trajectory of research themes, panoramic backtracking is mainly achieved through three aspects. First, in content, it pays attention to both theoretical trends and practical progress, always emphasizing the close relationship between theory and practice in basic data collection, analysis dimension construction, and conclusion analysis. Second, in methods, it emphasizes the combination of qualitative and quantitative methods to alleviate the current problem of insufficiently close connection between the two, leveraging their respective strengths in data diagnosis and understanding analysis through comprehensive use of multiple methods. Finally, in process, it includes both zooming of specific time zone situations and description of overall pictures, providing richer and more comprehensive analytical conclusions.

Panoramic backtracking inevitably has limitations due to the limitations of research technology and the complexity of research content and needs further improvement. First, as the foundation of research, data sources need to be expanded. The study only demonstrates domestic academic journal research results; in fact, foreign language journals, books, and doctoral dissertations are also important components of research results and need further expansion. Data mining technology and open-source statistical software should be used for dynamic collection and analysis of typical cases and institutional texts related to fiscal expenditure evaluation in online information resources. Second, the division of development stages is based on changes in academic research results and the introduction of key policies in practice, though more scientific division standards cannot be excluded and require discussion. Finally, the specific example analysis selects the currently widely used CiteSpace visualization tool, but the software' s current technical level for CNKI database analysis is not as effective as for WOS and other foreign language databases, which inevitably limits the scope of detailed conclusions and requires assistance from other statistical software. In summary, although the panoramic backtracking analytical framework has advantages over previous review research, it still needs improvement and standardization in specific application stages to complete more detailed and comprehensive research picture drawing and interpretation of thematic research.

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Note: Figure translations are in progress. See original paper for figures.